



Deltek

Deltek Ajera 9

9.90 Release Notes

April 4, 2024

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Version 9.90.11: Improvements	1
Version 9.90.10: State Tax Changes	2
Version 9.90.09: State Tax Changes	3
Version 9.90.08: Improvement	5
Version 9.90.07: Federal Form Changes and Improvements	6
Version 9.90.06: Federal Tax Changes, State Tax Changes, and Improvements	7
Version 9.90.05: Improvements	10
Version 9.90.04: Improvements	11
Version 9.90.03: Improvement	12
Version 9.90.02: Improvements	13
Version 9.90.01: Improvement	14
Version 9.90.00: Introducing Integration with Deltek Payments	15
Introducing Ajera's Integration with Deltek Payments	15
New Bubble Chart Type Now Available	15

Version 9.90.11: Improvements

April 4, 2024

Enhancements

- This release will help you identify workstation and server changes required when installing future versions. **On-Premise customers will need to upgrade to 9.90.11 prior to installing the upcoming Ajera 10.0 release.**
- The Q1 2024 941 form and e-filing are now available.

Correction

The following issue has been corrected in this release:

- **Defect 2095111:** If a client already existed in i3 Merchant Solutions' Bill & Pay prior to Ajera version 9.90.05, running the **Re-sync Historical** option did not sync any additional client information, such as email address or phone number, from Ajera to Bill & Pay.

Version 9.90.10: State Tax Changes

February 28, 2024

State tax changes

Iowa (IASWH)	Effective date: 1/1/2024 The withholding formula has been revised.
North Dakota (NDSWH)	Effective date: 1/1/2024 The state tax tables have been updated.

Other state changes

- Iowa state only:* In **Setup > Employees > Payroll Taxes** tab, a new field called **Total Allowance** has been added. This field defaults to \$40.

Correction

The following issue has been corrected in this release:

- Defect 2083826:** API only: Create Phase on a project failed when the billing type did not match the last phase on the project.

Version 9.90.09: State Tax Changes

January 24, 2024

Other state changes

- *Montana state only:* In **Setup > Employees > Payroll Taxes** tab, two new filing status called **Head of Household** and **Married Dual Income** have been added.

State tax changes

Georgia (GASWH)	Effective date: 1/1/2024 The state tax tables have been updated.
Illinois (ILSWH)	Effective date: 1/1/2024 The state tax tables have been updated.
Indiana (INSWH)	Effective date: 1/1/2024 The state and county tax tables have been updated. The state's Departmental Notice No. 1 was updated to add a third deduction constant table for a new exemption for adopted children. The \$3,000 annual exemption for adopted children was added in legislation.
Maryland (MDSWH)	Effective date: 1/1/2024 The state and county tax tables have been updated.
Massachusetts (MASWH)	Effective date: 1/1/2024 The threshold for Massachusetts State Tax to begin calculating the new 4% surtax for 2024 was updated from \$1,000,000 to \$1,053,750. per the latest Circular M draft.
Michigan (MISWH)	Effective date: 1/1/2024 The state tax has increased from 4.05% to 4.25%. The personal exemption amount increased from \$5,400 to \$5,600.
Minnesota (MNSWH)	Effective date: 1/1/2024 The state tax tables have been updated.
Mississippi (MSSWH)	Effective date: 1/1/2024 The state tax tables have been updated.
Montana (MTSWH)	Effective date: 1/1/2024 The state tax tables have been updated. Supplemental tax rate decreased to 5% from 6%.
North Carolina (NCSWH)	Effective date: 1/1/2024 The state tax tables have been updated.
Oregon	Effective date: 1/1/2024

(ORSWH)	The state tax tables have been updated.
Rhode Island (RISWH)	Effective date: 1/1/2024 The state tax tables have been updated.
Vermont (VTSWH)	Effective date: 1/1/2024 The state tax tables have been updated.

Version 9.90.08: Improvement

January 11, 2024

Correction

The following issue has been corrected in this release:

- **Defect 2065614:** After upgrading to version 9.90.06, in Manage > Project Time Approval, if you clicked into an hours cell on a timesheet, you encountered the error Cannot read properties of undefined (reading '_EmployeeKey').

Version 9.90.07: Federal Form Changes and Improvements

January 3, 2024

U.S. federal form changes

- Form 940 has been updated for 2023.

Correction

The following issue has been corrected in this release:

- **Defect 1908964:** In **Manage > Expense Reports**, when adding new lines to an expense report, you may have encountered the error *The incoming request has too many parameters. The server supports a maximum of 2100 parameters.*

State tax changes coming soon

Tax changes for the following states are coming soon:

- Georgia
- Indiana
- Iowa
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Montana
- North Carolina
- Oregon
- Rhode Island
- Vermont

Version 9.90.06: Federal Tax Changes, State Tax Changes, and Improvements

December 20, 2023

U.S. federal tax changes

- Federal Tax Withholding Rates have been updated for 2024.
- The Social Security wage base is \$168,600 in 2024.

Note	Social security and medicare tax rates are unchanged from 2023 and will remain the same in Ajera for 2024.
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Ajera e-Filing

Ajera customers can receive 10% off any e-filing purchase through Nelco (one time use only) with code **AJERA23** until January 31, 2024.

- You can use Ajera e-Filing to file your firm's 2023 W-2, W-3, 1099-MISC, 1096, and 1099-NEC forms electronically.

U.S. federal form changes

- The following forms have been updated for 2023: W-2, W-3, 1099-MISC, 1096, and 1099-NEC.

State tax changes

Alabama (ALSWH)	<p>Effective date: 1/1/2024</p> <p>January 1, 2024 through June 30, 2025, overtime wages will not be taxable for the Alabama state tax.</p> <p>Any wages set up as the overtime wage type will no longer be taxed or counted towards subject wages when calculating the Alabama state tax.</p> <p>Visit the Alabama Department of Revenue website to learn more about the overtime exemption.</p> <p>Visit the Learning Center to learn how to set up this exemption</p>
Arkansas (ARSWH)	<p>Effective date: 1/1/2024</p> <p>The highest rate decreased to 4.4% from 4.7%.</p> <p>The standard deduction used in the formula increased to \$2,340 from \$2,270.</p>
California (CASWH)	<p>Effective date: 1/1/2024</p> <p>The annual low income exemption threshold increased to \$17,769 from \$17,252 for single or \$35,538 from \$34,503 for married.</p> <p>The annual standard deduction increased to \$5,363 from \$5,202 for single or \$10,726 from \$10,404 for married.</p> <p>The value of a state allowance increased to \$158.40 up from \$154.</p>

Colorado (COSWH)	<p>Effective date: 1/1/2024</p> <p>For employees with a federal filing status of married filing jointly or qualifying surviving spouse, the standard deduction amount rises to \$10,000, from \$9,000.</p> <p>For all other filing statuses, the standard deduction increased to \$5,000 from \$4,500.</p>
Connecticut (CTSWH)	<p>Effective date: 1/1/2024</p> <p>The two lowest tax rates in the withholding calculation rules were reduced to 2% and 4.5%, instead of 3% and 5%, for all withholding codes.</p> <p>The Phase-Out Add-Back tax rate decreases to 2% (from 3%).</p> <p>The Tax Recapture table has been updated.</p>
Kentucky (KYSWH)	<p>Effective date: 1/1/2024</p> <p>Income tax rate decreases to 4% from 4.5%.</p> <p>The standard deduction increases to of \$3,160 from \$2,980.</p>
Maine (MESWH)	<p>Effective date: 1/1/2024</p> <p>The value of a state allowance increased to \$5,000 from \$4,700.</p> <p>The maximum standard deduction increased to \$11,750 from \$11,000, for single employees and to \$26,350 from \$24,850, for married employees.</p> <p>The standard deduction decreased for single employees who earn more than \$97,150 annually, up from \$91,500, or for married employees who earn more than \$194,300 annually, up from \$183,050.</p> <p>The deduction reaches zero when a single employee earns at least \$172,150 annually, up from \$166,500, or when a married employee earns at least \$344,300 annually, up from \$333,050.</p> <p>The tax brackets used in the percentage method were adjusted.</p>
Massachusetts (MASWH)	<p>Effective date: 1/1/2024</p> <p>The Massachusetts State Tax will begin calculating a 4% surtax on annual income over \$1 million.</p>
Missouri (MOSWH)	<p>Effective date: 1/1/2024</p> <p>The tax brackets have been updated, and the highest tier percentage has decreased from 4.95% to 4.8%</p> <p>The supplemental flat rate has decreased from 4.95% to 4.8%</p> <p>Annual Standard Deduction amounts have increased to \$14,600 from \$13,850 Single/Married Spouse Works/Married Filing Separate, to \$27,700 from \$29,200 for Married/Spouse Does Not Work, and to \$21,900 from \$20,800 for Head of Household.</p>
Nebraska (NESWH)	<p>Effective date: 1/1/2024</p> <p>The annual state allowance increased to \$2,250 from \$2,140.</p> <p>The percentage method tables have been updated.</p> <p>Tax Withholding Percentage Method Tables have been updated.</p>
New Mexico (NMSWH)	<p>Effective date: 1/1/2024</p> <p>The Unemployment wage base has increased to \$31,700 from \$30,100.</p>

Oklahoma (OKSWH)	Effective date: 1/1/2024 The top tax bracket was increased for married employees.
South Carolina (SCSWH)	Effective date: 1/1/2024 The value of a state allowance increased to \$4,610 from \$4,310. The maximum standard deduction increased to \$6,925 from \$6,475. The tax brackets used in the percentage method were also adjusted.

Enhancement

- You can now void/NSF a receipt in Ajera that originated in i3 Merchant Solutions' Bill & Pay. The payment record is removed from Bill & Pay so the invoice balance is properly reflected in Bill & Pay.
- *API only*: Pagination is now available on List methods to limit the number of records returned in a call.

Corrections

The following issues have been corrected in this release:

- **Defect 2012913**: In **Manage > Expense Reports**, you were unable to select a project if the **Restrict time and expense to resources only** check box was selected for the project and the resource was on a Labor only phase.
- **Defect 2038026**: In **Reports > Setup > Employee**, if you have the **Print pay information** option selected in the customize options, the additional pays were not showing the correct calculation method.
- **Defect 1588951**: *North Dakota and Oregon state only*: You may have encountered an error when e-filing the North Dakota and Oregon Form W-2.

Version 9.90.05: Improvements

November 16, 2023

State tax changes

Ohio (OHSWH)	Effective date: 11/01/2023 New withholding tables are available
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Enhancements

- *API Version 2 only*: The ability to add and update project resources has been added to the Create Projects and Update Projects API methods. The Percent Complete and Percent Complete Date columns are available when creating resources using the Create Project method.

Note:	This method requires Ajera Complete.
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- The following client information will now sync from Ajera to i3 Merchant Solutions' Bill & Pay:
 - Phone 1
 - Phone 2
 - Fax
 - Email
 - Mailing Address

Note :	If you are already using Bill & Pay and would like these fields to sync from Ajera to Bill & Pay, run Resync Historical from Setup > Company > Preferences > Integration > Bill & Pay or Setup > Company > Companies > Integration > Bill & Pay if using multi-company.
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Corrections

The following issues have been corrected in this release:

- **Defect 2028037**: After upgrading to version 9.90.04, old invoices (prior to 2013) that contained adjustment phases may have mistakenly displayed on the Client Invoice Aging report.
- **Defect 1961120**: In **Manage > Import Time**, if an employee's first name ended with the same syllable their last name started with, it caused an error when time was imported.

Version 9.90.04: Improvements

October 12, 2023

- *On Premise Only*: After updating to the latest Microsoft Edge version, you may receive an error trying to download ClickOnce. If you receive this error, please reinstall Ajera version 9.90.04.

Corrections

The following issues have been corrected in this release:

- **Defect 555459**: On the Client Invoice Register and Client Invoice Aging reports, the labor billed on a zero dollar invoice with an adjustment was not reflecting correctly.
- **Defect 1970198**: *CRM only*: When mapping unsynced projects to CRM, the first company in Ajera was syncing to the project in Vantagepoint instead of the company assigned on the Ajera project which resulted in the project being incorrectly changed in Vantagepoint.
- **Defect 2010523**: *CRM only*: When syncing multiple contacts created in Vantagepoint to Ajera at the same time, the contacts were created in Ajera but were sometimes mapped to the wrong record or were not mapped at all.
- **Defect 2000520**: *API only*: When using the GetProjects V2 call in the API, if the first column in the field was a custom field, the first custom field was returned with no value.
- **Defect 2001235**: *API only*: When using the Update Projects V2 call in the API to update custom fields, a message indicated the fields were updated successfully but the values were not actually updated for the custom fields.
- **Defect 2012920**: *API only*: When using the Update Projects V2 call in the API, the Reported Percent Complete and Reported Percent Complete Date were not updating.

Version 9.90.03: Improvement

September 13, 2023

Correction

The following issue has been corrected in this release:

- **Defect 2003879:** Ajera's integration with i3 Merchant Solutions' Bill & Pay through Deltek Payments is now available in Ajera Core.

Version 9.90.02: Improvements

August 30, 2023

State Tax Change

Illinois (ILSWH)	<p>Effective date: 6/7/2023</p> <p>The personal exemption allowance amount decreased from \$2,625 back to the 2022 amount of \$2,425 per person.</p> <p>However, current employees that have been receiving paychecks throughout 2023 (with the higher basic allowance amount of \$2,625) will instead use a personal exemption allowance amount of \$2,225 for the rest of 2023 in order to balance this out.</p>
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Enhancements

- When a credit card payment from Bill & Pay is imported, the method of Credit Card will be assigned in **Manage > Client Receipts**.

Corrections

The following issues have been corrected in this release:

- Defect 1755840:** In the Widget Designer, when you created a formula column with the percent check box selected and used a select statement to pull in the denominator, the formula would validate, but then the widget would not render and displayed the error *Cannot perform an aggregate function on an expression containing an aggregate or a subquery*.
- Defect 1600965:** When using the Microsoft Edge or Google Chrome browsers, if the Add Column window in the Widget Designer did not fit completely on the screen or you had to scroll down in the main window to click **OK** or **Cancel**, clicking **OK** or **Cancel** scrolled the screen back to the top instead of saving/adding the columns or closing the window.
- Defect 1986477:** After upgrading to Ajera 9.90.00, when you exported a widget to PDF, the information was not scaling to fit onto one page resulting in information being cut off in the exported PDF.

Version 9.90.01: Improvement

August 3, 2023

Correction

The following issue has been corrected in this release:

- After upgrading to version 9.90.00, Ajera was not correctly saving the PDF copy of the final invoice in the **Folder Path** set in **Company > Preferences** or **Company > Companies** when you selected to **Save a PDF copy** when printing final invoices. Instead it saved the PDF copy directly in to the **Save PDF to** folder defined in the Print Invoice dialog.

Version 9.90.00: Introducing Integration with Deltek Payments

July 15, 2023

Introducing Ajera's Integration with Deltek Payments

Deltek Payments has partnered with i3 Merchant Solutions, powered by Bill & Pay, to streamline the accounts receivable process for Ajera.

Ajera's integration with i3 Merchant Solutions' Bill & Pay through Deltek Payments provides you with a user-friendly interface that lets clients pay invoices via credit cards, debit cards, or ACH.

Customers can create an online payment portal that is customized for their company. The portal allows them to either put the payment portal on their website or use a unique link into their invoices, helping them get paid faster. Fees are charged separately, not deducted from the invoice amounts.

With the integration with Ajera, invoices can be sent to the portal easily and the transaction data from Bill & Pay will be sent back to Ajera, making the entire accounts receivable process seamless.

Bill & Pay will generate a unique "pay now" URL link in client invoices emailed from Ajera. The link provides Ajera's clients access to a web portal to pay their outstanding balance through ACH payments or credit/debit cards. Once payments are made, Ajera imports payment information and automatically applies the payment to the appropriate invoice.

For more information on taking advantage of Deltek Payments in Ajera, contact your Account Manager or Customer Success Manager.

New Bubble Chart Type Now Available

A new chart type called Bubble is now available.

Bubble charts tell a story visually between different data sets using three fields of data. Bubble charts are used when data needs a third dimension to provide richer information to viewers. Bubble charts are not ideal if you want to see exact values, if you want to plot more than two values on the X/Y axis, if there are overlapping bubbles, or there are negative or zero values.

Bubble charts also provide a way to visually identify outliers.

For Ajera charts, this is the first time that we are graphing two decimal/numeric/percentage values on the two axes of a chart. All previous X/Y-Axis charts displayed the X-Axis as your grouping and the Y-Axis as an amount. Bubble charts typically have amounts on both the X and Y-Axis.

With the bubble chart, you will need to designate two decimal/numeric/percentage columns, one as the X-Axis and one as the Y-Axis, to render the widget. Optionally, you can select a third column as a Bubble Value (Z).

State Tax Changes

Arkansas (ARSWH)	<p>Effective date: 6/1/2023</p> <p>The tax brackets have been updated based on the latest Withholding Tax Formula.</p> <p>The net taxable income threshold has decreased from \$91,801 to \$91,301.</p> <p>The supplemental tax rate for flat withholding decreased from 4.9% to 4.7%.</p>
Idaho (IDSWH)	<p>Effective date: 5/15/2023</p> <p>The number of withholding tax brackets has decreased from five brackets to two brackets.</p> <p>The annual value of an allowance has also increased from \$3,417 to \$3,534.</p> <p>The supplemental tax rate for flat withholding decreased from 6% to 5.8%.</p>
North Dakota (NDSWH)	<p>Effective date: 6/1/2023</p> <p>The number of withholding tax brackets has decreased from six brackets to just three brackets.</p> <p>The value of an annual allowance of \$4,300 will remain the same. The supplemental tax rate for flat withholding of 1.84% will also remain the same.</p>

Technology Changes

- The default SQL version installed for Ajera has changed from SQL 2014 Express to SQL 2019 Express.

Dashboard & Widget Enhancements

- You can now easily view when a final client invoice has been emailed with the following 3 new columns available on the Client Invoice widget base:
 - Is Invoice Emailed
 - Email Invoice User
 - Email Invoice Date/Time
- The following two columns have been added to the Client Invoice widget base:
 - Project Email Invoice Template
 - Project Client Statement Template
- When importing dashboards, the default option selected in the Dashboard Import/Export will now be Single Tab to help avoid accidentally overriding the entire dashboard during import.
- You now have the option to print a single page of a table widget to PDF.
- The following new widget gallery items are now available:
 - Average Days to Collect AR:** This widget displays the average days to collect AR using the Cash Forecast Base. This is a formula column to return the days in a percent so that it totals correctly on the chart.
 - Department Project Profit:** This bubble chart uses Billed + WIP and Cost on the X/Y Axis and Profit % as the bubble size (Bubble Value Z), grouped by department. Quickly view outliers where Profit % is larger or smaller than others.

- **Firm Pipeline:** This funnel chart allows you to view BD contract amounts grouped by Stage for an easy-to-read pipeline funnel.
- **Billing & Payment Trend:** This is a quick view of the project Billing and Received amounts trending for the last 12 periods.
- **My Project's Profit - Project Manager:** This bubble chart shows Billed + WIP and Cost on the X/Y Axis with Profit Percent as the bubble size (Bubble Value Z). It is filtered to Project Manager is me and is grouped by project. This allows a project manager to quickly view project outliers.

Manage Projects Task Widget Enhancements

- The following enhancements have been made to the Manage Projects Task widget:
 - You can now expand and collapse different levels of the work breakdown structure similar to the Project Command Center.
 - You can now roll up Actual Start and Actual Completion Dates.
 - The Actual Completion Date and Actual Start Date columns are now editable fields.
- Note:** In the Properties section for the column, ensure the **Enable Editing** check box is selected.

Browser-based Timesheet Enhancements

- In **Manage > Timesheets**, you can now sort timesheets by employees easier using the following new optional columns:
 - First Name
 - Middle Name
 - Last Name
- The following optional columns have been added to **Manage > Timesheets**:
 - Submitted Date
 - Submitted By
 - Accounting Approved Date
 - Accounting Approved By
 - Supervisor Approved Date
 - Supervisor Approved By

Enable Windows Authentication Log in Only

- When the Azure integration is enabled, you now have the option to restrict user log in to Windows Authentication only.
- *On-premise only:* When you have Microsoft Azure enabled for single sign-on and **Enable Windows Authentication Log in Only** selected in **Company > Preferences > Integration > Azure** tab, the username and password field on the Ajera log on screen will be disabled.
- *Ajera Cloud only:* When you have Microsoft Azure enabled for single sign-on and you enter your user-name and password, if that database has **Enable Windows Authentication Log in Only** selected in **Company > Preferences > Integration > Azure** tab, the Azure 2FA Window will be launched for the user to log in using their Windows credentials.

Other Enhancements

- You now have the option to sort columns in **Manage > Expense Reports**.
- You can now refresh the Billing Review dialog, available in the Project Command Center, Client Invoices, and the dashboard, to reflect changes made such as adding a new row, changes to an existing row, or changes to a date/time. (1926543)
- In **Setup > Clients**, you can now select a default invoice delivery preference to make it easier to know if an invoice for a project should be delivered via email or printed. With this change, an optional column called Invoice Delivery Preference has been added to the following places:
 - **Setup > Clients** (Client List window)
 - Client base
 - Client Invoice base
 - Project base

Corrections

The following issues have been corrected in this release:

- **Defect 1946695:** After upgrading to version 9.80.07, when you tried to open a custom report with the same name as a standard report, the standard report would open instead of the custom report.
- **Defect 1912455:** In the Project Command Center, some fields were not selected when you used the Tab key on your keyboard to switch between fields.
- **Defect 1938819:** In browser-based expense reports, the Unit field was allowing four decimal places when it should have been limited to two decimal places.
- **Defect 1863438:** When exporting a widget with a lot of information to PDF, you may have encountered the error "RPC to Gecko engine process failed. Remote process did not respond within specified time limit."
- **Defect 1916340:** On the Manage Projects task widget, the columns Labor Cost Rate and Labor Fee Rates did not show values at the Resource level.
- **Defect 1847166:** You may have encountered the error *Error Updating Integration Mapping. Total Errors: 1* on the Integration log when the auto-sync has run.
- **Defect 736232:** In **Manage > Schedule**, when you changed the employee type, the billing rates were not updated to the correct rate for the employee type.
- **Defect 1169972:** On a Client Invoice based widget, you may have encountered an error rendering a widget when using a formula for notes and grouping the widget by Project Manager.
- **Defect 1930572:** On a Utilization based widget, expense and consulting amounts were being included so the amounts did not match the Employee Utilization Report.



About Deltek

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