




Deltek

Deltek Costpoint® GovCon Cloud Moderate

August 2022 Release Notes
(Costpoint MR Version 8.1.10)

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Overview

This document is a compilation of Costpoint, Costpoint Planning, and Time & Expense enhancements and software defect resolutions from July 2022 (CP Maintenance Release 8.1.10) and also includes any regulatory enhancements.

These will be applied to the Cloud environment mid-August. See announcements on your portal page for details.

Note that the version numbers above (for example, 8.1.9) refer to the Costpoint Maintenance Release (MR) upon which this document is based are for reference only.

If you have feedback or questions, please send an email to DeltekDocumentationFeedback@deltek.com.

Important Notes

This section describes important information for this release.

Important Changes in Costpoint BI Scheduling Agents: Frequency of Once an Hour

To avoid performance degradation when using the Costpoint BI scheduling function, Deltek has limited the capability of scheduling agents to a minimum of hourly. What this means is that when you schedule a report or a process to update a Data Set, you can run the process only once an hour. Currently, certain BI users can schedule agents to run down to the minute.

The change does not mean that you have to schedule the update time to run ON the hour (for example, start at 3:00PM and run every hour); you can schedule it to run at any time (for example, start at 3:18 and run every hour at the 18-minute mark).

We have seen many instances where schedules are running every minute or every couple of minutes, and this has caused performance issues for all customers on the same BI server pod. If you have an existing schedule set up by minutes, we ask that you disable it and change to a minimum of once an hour. As always, you have the option to run a report on demand to get immediate results versus scheduling the report to run at a later time.

This change will be enacted concurrently with the 8.1.10 MR during the last week of August. (You will get a notification when this update will be made for your specific company.)

Enhancements

This section includes summaries of the enhancements made to existing features in this release.

Regulatory

State

Idaho Tax Table Update

Idaho's 2022 withholding methods were released by the state tax commission. The percentage method implements tax rate cuts in a bill (H.B. 436). The bill reduced the number of tax rates used to four instead of five and reduces the highest rate used to 6% instead of 6.5%. Other updates include the following:

- The zero-percent tax bracket's upper threshold increased from \$12,550 to **\$12,950** for single employees and heads of households and from \$25,100 to **\$25,900** for married employees.
- The value of Idaho Child Tax Credit Allowance increased from \$3,154 to **\$3,417** annually.
- The tax rate for supplemental payments decreased from 6.5% to **6%**.

To support the state requirements, this release applies changes to the following screens:

- Manage State Tax Tables
- Manage State Standard Deductions
- Manage State Taxes
- Manage State Tax Withholding Adjustments

Attention: For more information, refer to:

- https://tax.idaho.gov/pubs/EPB00744_06-15-2022.pdf
- <https://tax.idaho.gov/i-1026.cfm?seg=compute>

Software Issues Resolved

Accounting

Accounts Payable » Import Vendor Employees

Defect 1670104: You encountered an error when you imported a vendor employee with a blank **Vendor Employee Name**, and their last and first names, when combined, totaled more than 25 characters. As a workaround, enter a first and last name that totals 25 characters or less, and manually update the record on the Manage Vendors or Manage Vendor Employees screen.

Multicurrency » Manage Exchange Rates by Period

Defect 1696754: When you entered period rates, you encountered an invalid tolerance error because the new rates were incorrectly compared to the rates of the previous year instead of the immediate period or last period.

Multicurrency » Manage Period Exchange Rates

Defect 1647344: When you entered period rates, you encountered an invalid tolerance error because the new rates were incorrectly compared to the rates of the previous year instead of the immediate period or last period.

Admin

System Administration » Configure User Preferences

Defect 1688957: Costpoint did not recognize records marked for deletion and incorrectly gave an error when a Group Header name was reused.

System Administration » Manage User Interface Profiles

Defect 1688983: You could not edit the Group Header Lines to change the letter case only in My Menu on the Manage User Interface Profiles screen. An error stating duplicates are not allowed occurred.

Defect 1688995: Costpoint did not recognize records marked for deletion and incorrectly gave an error when the Group Header name was reused in Manage User Interface Profiles.

Workflow » Approval Workflow Models

Defect 1695406: A system error occurred in the Approval Workflow Models application when the **Edit Activity » Updates/Condition** subtask line was left blank and you selected the **Test Mode** check box and saved the workflow process.

CRM & Contracts

Contracts » Manage Contracts

Defect 1674015: Costpoint displayed an error message when you opened a contract with duplicate modifications. In addition, the system automatically created a message record on the Administrative Messages screen in relation to that error.

This defect affects clients with menuOnlyApps in enterprise properties.

Defect 1684683: A system error occurred when you deleted 20 or more records on this screen.

Framework

Change in Behavior

Defect 1698952: You could not save application layout changes in 8.1.x.

External Tools » INTGR

Defect 1698507: Operations with system web services needed to be disabled in the Web Integration Console.

External Tools » XTDESIGNER

Defect 1701358: A Nullpointerexception error occurred when you used the **Required Formula** option in the Extensibility Designer.

Framework

Defect 1440950: A system error occurred when you tried to download the Charge Activity report with Excel 2010 selected as the File Type and charges included special characters like ":" or "/".

Defect 1683169: On the Home Dashboard (DBDHM) screen, the dashpart headers doubled when the Manage Dashpart window was open.

Defect 1692355: A system error occurred when there was an escalate role missing in the workflow approval process.

Defect 1692750: When there was only one application right assigned to a module/domain, you could not see the module/domain. You also could not see the module/domain when you entered the name in Browse Application. You could add the application in My Menu and access it from there. However, if you added another screen within the same module, you could see the module/domain.

Defect 1693477: You received the following error when you entered an email with the special character "&" on the Manage Customers (ARMCUST) screen: "The following field does not contain a properly formatted email address: Email Address."

Defect 1693978: Costpoint did not support Word templates generated with Track Changes turned on.

Defect 1696755: When you tried to set the print options to use System Printer, you received an error that said the Number of Copies must be numeric even though it was set to 1.

Defect 1697283: Batch jobs without a parameter ID would not execute.

Defect 1697318: A Weekly OT validation error occurred when you submitted a timesheet with OT hours in an incomplete week.

Defect 1700157: When you set up an Approval Workflow for the Manage Sales Orders application and the FINISH type was set to update the entity field's value to Approved, the updates that were set in the FINISH type were not triggered when the NOTIFY type was present in the Approval Flow Structure.

Defect 1700331: On the Manage Cost Pools (PJMPPOOL) screen, a Page Unresponsive error occurred when the screen loaded with a saved Application Layout setting and the Use Auto Position mode user interface setting was set to No in Manage Users.

This issue occurred in multiple applications:

- Manage Parts (PDMPART)
- View Part Inventory (INQPINV)
- Manage Manufacturing Orders (PCMMOMNT)
- Manage Work Assignment (SMMWRK)
- View Bank Reconciliation Summary (GLQBKINQ)

Runtime

Defect 1705368: Existing and new content management integration (CMI) attachments were missing for FileNet-related links after you upgraded to Costpoint 8.1.8.

Runtime » Server

Defect 1708019: You could not receive a one-time passcode (OTP) after a Costpoint 8.1 upgrade.

Materials

Engineering Change Notices » Apply Engineering Change Notices

Defect 1688973: When you executed Apply Engineering Notices for a record, you encountered a system error.

Inventory » Enter Quantity Adjustments

Defect 1689251: When you performed quantity and scrap adjustments for an inventory transaction, the system displayed an inaccurate value in the USER_RVSN_FLD table in a multi-revision environment.

Inventory » Enter Scrap Adjustments

Defect 1687677: When you performed quantity and scrap adjustments for an inventory transaction, the system displayed an inaccurate value in the USER_RVSN_FLD table in a multi-revision environment.

Master Production Scheduling » Update Master Production Schedules

Defect 1682886: When you ran the material requirements plan (MRP), the system allocated inventory to sales orders (SO) after inventory was required for planned orders with need dates prior to the SO need date.

Material Requirements Planning » Update Material Requirements Plan

Defect 1621209: When you ran the material requirements plan (MRP), the system allocated inventory to sales orders (SO) after inventory was required for planned orders with need dates prior to the SO need date.

Materials Estimating » Manage Proposal BOM Cost Estimates - Indented

Defect 1689202: You encountered a system error when you opened the Other Cost WS subtask. This happened when the Inventory Abbreviation used for the part was more than 10 characters.

Materials Estimating » Manage Proposal BOM Cost Estimates - Summarized

Defect 1690325: You encountered a system error when you opened the Other Cost WS subtask. This happened when the Inventory Abbreviation value used for the part had more than 10 characters.

Procurement Planning » Manage Purchase Requisitions

Defect 1692710: When you attached a document with a blank drawing revision, the system changed to the next available revision.

Production Control » Manage Manufacturing Orders

Defect 1687406: When you relieved a manufacturing order (MO) with parts that were serial or lot tracked, the system displayed a blank in the non-tracked table column instead of Null.

Defect 1691201: When you queried and checked manufacturing order (MO) requirements, the system created duplicate requirements on MOs with Operationalized Bill of Materials (BOM). This happened when the Manufacturing Bill of Materials (MBOM) part was common stock.

Defect 1700627: When you populated the Build Quantity and Abbreviation before the Build and Part Revision Quantity, the system produced an incorrect Allocation Yield Quantity of zero (0).

Purchasing » Import Purchase Orders

Defect 1687544: When you clicked the gear icon, **Total Records Loaded** and **Total Errors** did not display.

Defect 1698846: When you tried to update the purchase order (PO) due date to a date earlier than the desired date because of shipments received early, you encountered the following error: "The desired date must be less than or equal to the due date."

Purchasing » Import Subcontract Retainage PO Status Updates

Defect 1687591: When you clicked the gear icon, **Total Records Loaded** and **Total Errors** did not display.

Purchasing » View Purchase Order Status

Defect 1694080: When you posted a purchase order voucher and you verified the PO line amounts, the Open amount did not correspond to the Transactional amount.

Receiving » Import Purchase Order Receipts

Defect 1687586: When you clicked the gear icon, **Total Records Loaded** and **Total Errors** did not display.

Receiving » Manage Quality Control Inspections

Defect 1696780: Two new hidden fields (table), S_INVT_TRNS_TYPE_INSP and INVT_TRN_LN_KEY_INSP, have been added to the Serial/Lot Info subtask to store the quality control inspection key and transaction type, and to link these to the Customer Managed Inventory (CMI) setup.

Sales Order Entry » Manage Invoices

Defect 1684590: When you created an invoice with negative quantity, you received a rounding off error in Costpoint.

Defect 1690319: The system doubled the unit cost amount when there were two issue locations.

Sales Order Entry » Manage Sales Orders

Defect 1689377: When you entered a reservation ID and clicked **Save**, you encountered an error. This happened when Warehouse Reservation was not auto-assigned and pending sales order (SO) was included as demand.

Sales Order Entry » Post Sales Order Journal

Defect 1689239: The sales order (SO) journal posted duplicate costs when the SO was issued from two or more locations.

Sales Order Entry » View Sales Order Status Information

Defect 1689224: The system displayed duplicate inventories on the report when the SO was issued from two or more locations.

People

Benefits » Create 1094-C and 1095-C Data

Defect 1618785: The application did not generate ACA 1095-Cs for non-full-time employees that did not have a code of **1G** in line 14 and a code of **2B** in line 16.

If you opt to not install this update, as a workaround, you can manually generate the 1095-C or perform the following steps:

1. Run the Analyze Full-Time Equivalent Eligibility process with the **Include Part-Time Employees** check box selected.
2. On the Manage Full-Time Equivalent Eligibility screen, query the part-time employees, select the following options, and save the record.
 - **Full-Time Equivalent** check box
 - **Life Event** as the **Enrollment Method**
3. Run the Create 1094-C and 1095-C Data process for the part-time employees.

Employee Self Service » Life Events/New Hires

Defect 1652488: A system error occurred after you entered a value in the **Total Dependents** field on the Other Withholding State(s) table of the State Withholding tab.

Labor » Export Data to Deltek Time and Expense

Defect 1695422: When you selected **Supervisor from Salary Setup** as the **Supervisor Source**, the group description (field 5 in the group record) was incorrect.

Labor » Export Project Manufacturing Data

Defect 1692951: When you exported a purchase order (PO) receipt for a serial tracked part, the process failed. You encountered an error with the following message: "Total number of serials must match received qty."

Labor » Manage ADP 2.5 Mapping Values

Defect 1626081: You encountered an error when you queried a record with multiple detail lines.

Labor » Manage Pay Type Restrictions

Defect 1697474: A system error displayed when you saved a new pay type restriction record. This occurred when the synthetic key value in the database (SEQ_GENERATOR.LAST_KEY) was more than four digits.

Labor » Manage Timesheets

Defect 1691233: You were not able to recreate reversing timesheets after you deleted them.

Leave » Manage Leave Types

Defect 1703702: The description of the **Accrual Ceiling Method** should not reference the **Balance Year Ceiling Option**, which only applies to balance ceiling.

Payroll » Create Quarterly SUTA Tax File

Defect 1645895: The SUTA upload file contained the full middle name of the employee. The state format requires only the middle initial of the employee.

Planning

Administration » Report Table Update Process

Defect 1694026: A linked view was created for the dropped table SRC00_BILL_INVC_HDR_HS.

Organization Budgeting » Organization Budgets / Outlooks

Defect 1700649: When you opened either the Direct Utilization Split or Indirect Utilization Split subtask for a resource, the default account was automatically populated with any saved values in the split and caused the labor forecast to double.

Defect 1708629: The default account on the Direct Utilization Split and Indirect Utilization Split subtasks of a new budget outlook (BUD/OLK) was reset to zero in forecast periods.

Project Budgeting » Hours Breakdown

Defect 1708604: Hours were duplicated when a vendor employee had records within the same fiscal year and period in two different companies.

Project Budgeting » Project Budgets / EACs

Defect 1664128: When **Hourly Rates to Use** was set to **Period Rates**, the rates for salaried employees did not calculate correctly.

Defect 1690502: When a budget was not yet created for a project, transaction costs did not display in the Active Level reports.

Project Budgeting » Time Collection Hours

Defect 1705141: Hours for an employee were tripled.

Resource Planning » Budget by Resource

Defect 1696134: You encountered a critical error when selecting a resource in Budget Resource Planning.

Defect 1696137: The process to modify, commit, and save the budget was slow when you made changes in Budget Resource Planning.

Projects

Billing » Calculate Standard Bills

Defect 1684340: If you selected **Include Current Fiscal Year** and entered an alphanumeric fiscal year in the **Fiscal Year** field, Costpoint displayed this error message when you calculated bills: "The following field does not contain a valid number: Current Fiscal Year." This occurred when **Select Retroactive Bill Calculation Type** was set to **Indirect Costs**.

Defect 1689606: The system did not create the Over Ceiling line even if the **Create Zero Retainage and Over-Ceiling Rows** check box was selected in Calculate Standard Bills.

As a workaround, you may set up retainage information on the Manage Project Billing Information screen with **0.00%** in **Percentage** so that the system will not calculate any retainage. And then, recalculate the bill. The Over Ceiling rows should now display on the Manage Standard Bills screen. See sample setup below.

Defect 1703439: The application incorrectly calculated multiplier overrides and account discounts when the **Starting Account** and **Ending Account** selected in Manage Multiplier Overrides were both top-level accounts.

Billing » Print Billing Worksheet

Defect 1692987: When the full amount was on hold, no corresponding entry was created in the BILL_EDIT_DETL table. As a result, that amount did not display even in the hold section of the Billing Worksheet.

The application has been updated to add full hold amounts/hours from the OPEN_BILLING_DETL table to the **Amounts on Hold** and **Hours on Hold** lines in the Supporting Schedule Summary section of the Billing Worksheet, provided that there is an invoice for the selected project.

Inter-Company Work Orders » Create IWO Allocations

Defect 1693864: On the Unbilled line of the sending company's IWO transaction (on the Allocation Detail subtask of Manage IWO Allocations), the **Sending Amount** and **Transactional Receiving Amount** values were interchanged. In addition, the **Functional Receiving Amount** was in the billing currency instead of the functional currency. These issues resulted in incorrect functional and transactional amounts when posted to the General Ledger.

This defect affects clients using MSS databases.

Project Inquiry and Reporting » Update Project Status Report Tables

Defect 1690199: Costpoint created duplicate records in the PSR_HDR table when you ran this application for a fiscal year/period/subperiod combination.

Project Setup » Manage Project User Flow

Defect 1689139: You were unable to change the owning organization via web services. When you tried to make the same change in Manage Project User Flow, Costpoint displayed the Org History subtask. This subtask was read-only unless you modify the **Owning Org** field on the Basic Info tab.

Part of the fix for this defect is enabling the **New** button on the Org History subtask. Note, however, that you still have to edit the **Owning Org** field on the Basic Info tab (which automatically updates the **New Owning Organization** field in Org History) if you want to modify the project's owning organization.

If you need to make an organization change in the Costpoint Web Interface Console (WIC), the system now requires a new <PJMBASIC_ORGHIST> so that the owning organization changes in <PJMBASIC_PROJ> will be allowed to proceed. Here is a sample WIC input:

```
<?xml version='1.0' encoding='UTF-8'?>

<pjmbasic_end xmlns='http://www.deltek.com/enterprise/integration/pjmbasic_end'
xmlns:xsi='http://www.w3.org/2001/XMLSchema-instance'>

  <PJMBASIC_PROJ tranType='UPDATE'>
    <ORG_ID>1.2</ORG_ID>
    <PROJ_ID>ED02</PROJ_ID>
    <PJMBASIC_ORGHIST tranType='INSERT'>
      <PD_NO>1</PD_NO>
      <PJMBASIC_ORGHIST_FY_CD>2021</PJMBASIC_ORGHIST_FY_CD>
      <RETRO_FL>Y</RETRO_FL>
      <SUB_PD_NO>1</SUB_PD_NO>
    </PJMBASIC_ORGHIST>
  </PJMBASIC_PROJ>
</pjmbasic_end>
```

Subcontractor Management » Manage Work Assignments

Defect 1695902: Performance tuning has been conducted to improve this application's processing time when loading work assignments.

Reports & Analytics

Business Intelligence » Business Intelligence

Defect 1707712: You could not run the Effective User Rights report in Costpoint BI. As a workaround, use the Effective User Rights report available in Costpoint, located at **Admin » Security » Security Reports/Inquiries » Print Effective User Rights Report**.

Dashboards » Home Dashboard

Defect 1649734: When you launched an **Approve** task from the Home Dashboard, Costpoint opened the Manage/Approve Timesheets screen showing records with **Approved** and **Signed** statuses, instead of loading approval tasks only. Manage/Approve Timesheets should have opened with **Filter By** set to **Approval Tasks** instead of **Status**.

As a workaround, use the MyDesktop screen.

Time & Expense

Configuration » Resource Information

Defect 1687326: When you created a user in a stand-alone instance of Time & Expense, you received a message confirming the action was successful even though the user had not been created. This occurred only when the Admin schema came from a multi-company system, where several companies were defined, and when the person creating the user did not have access to the user account being created.

Expense » Expense Authorization

Defect 1693600: When abbreviations were enabled, the ABBREV ID displayed instead of the UDT ID, which caused errors related to invalid links.

Defect 1703599: When you submitted an expense authorization, two emails were sent for approval instead of just one.

Expense » Expense Report

Defect 1696833: When you saved an expense in Wizard mode, the Expense Type column did not display.

Defect 1703700: When you clicked **View** to open an attachment, **Save** and **Save & Continue** were enabled even though no modifications were made.

Defect 1708654: When you entered a revision explanation in Expense Report, the verbiage on the Revision Explanation dialog box referred to Expense Authorization.

Defect 1708658: You encountered an error when you modified the dates in **Check-in Date** and **Check-out Date** of an outstanding lodging expense.

Expense » Export ERs / Advances

Defect 1693481: In a multi-company setup where two companies had the same name, the export did not include expense reports for one of them.

Defect 1696727: When you selected **Include Expense Summary** and then previewed the report, it included report details even though **Include Expense Detail** was not selected.

Expense » Print Expense Report

Defect 1707789: When you printed an expense report sorted by Expense Report ID, it printed in descending order instead of ascending.

Time » Timesheet

Defect 1694196: When Group Cache was enabled, the pay type in Charge Lookup was not restricted by timesheet class.

Defect 1696038: When you copied a timesheet line and then clicked the Project (UDT02) field in a different row, you received an error message.

Time » Timesheet Classes

Defect 1696030: When you linked a non-overtime UDT10, **Overtime Type** was set to Level 1 and disabled.

Known Issues

The following are known issues in this release.

Failed Execution of Scheduled Reports in Costpoint Business Intelligence

If you have a report that is scheduled to run frequently during the day, succeeding runs may stop unexpectedly. As a workaround, you can do a manual run of the report and then reschedule the next execution.

This issue has been reported to IBM and is actively working on it.

Unable to Set BI Reports as Homepage

You cannot set a Costpoint BI report as the homepage when its Interactivity Mode is set to Yes. As a workaround, turn off the Interactivity Mode.

This issue has been reported to IBM.

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center is a support website for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the website.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.



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