

The background features two large, diagonal stripes. A light blue stripe runs from the top-left corner towards the bottom-right, and a darker blue stripe runs from the bottom-left corner towards the top-right, intersecting the first stripe.

Deltek

Deltek Ajera 9

9.80 Release Notes

June 14, 2023

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Version 9.80.08: Improvements

June 14, 2023

Corrections

The following issues have been corrected in this release:

- **Defect 1945098:** You may not have been able to close a project when it contained a marketing phase.
- **Defect 1948360:** After upgrading to 9.80.07, Create Accrual Only payrolls were not showing up in the Payroll Service Accrual widget when you tried to select a pay date to look at and/or adjust accrual numbers.

After upgrading to version 9.80.07, you may have encountered the following issues when printing:

- **Defect 1945116:** You no longer had the option to print specific pages or a selection.
- **Defect 1946607:** Printed reports were defaulting to portrait view instead of landscape view.
- **Defect 1946616:** You could not print to other paper sizes and margin options were not being honored.

Version 9.80.07: Improvements

May 31, 2023

State Tax Change

Utah (UTSWH)	<p>Effective date: 6/1/23</p> <p>The tax rate was decreased to 4.65% from 4.85%</p> <p>The base allowance used in the formulas was increased to \$415 for single employees or \$830 for married employees, up from \$390 or \$780.</p> <p>The amounts subtracted from wages in the formulas increased to \$8,371 for single employees or \$16,742 for married employees, up from \$7,774 or \$15,548.</p>
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Corrections

The following issues have been corrected in this release:

- **Defect 1627979:** When a report or invoice preview was printed using Adobe PDF printer and it was saved, all Ajera tasks would close. A PDF file was created, but you may have encountered an error saying that the file could not be found when trying to open the file.
- **Defect 1916939:** In **Manage > Timesheets**, you were not prompted to save information when sorting timesheets by detail which resulted in information being cleared.
- **Defect 1813593:** If a Financial Statement Group was given the same name as a standard report, you may have encountered the error *Specified cast is invalid* launching ClickOnce.
- **Defect 1906222:** On a vendor invoice based widget located on a project page dashboard, when you changed the project on an invoice, the invoice showed on the original project page as well as the new project page.
- **Defect 1927797:** *CRM only:* Business Development information, such as final disposition and date, were not synced from Vantagepoint to Ajera during the auto sync.
- **Defect 1846526:** When you previewed or printed an uploaded PDF attachment that contained multiple pages with different orientations (portrait vs landscape) in Ajera, some of the pages were not fully displayed.
- **Defect 1716882:** If a project was set up with all phase statuses set to Marketing and the overall project status was set to Marketing, changing the status of one of the phases to Closed set the overall project status to Closed even when other phases were still active.

Version 9.80.06: Improvements

April 19, 2023

State tax changes

Michigan (MISWH)	<p>Effective date: 1/1/2023</p> <p>The state tax decreased from 4.25% to 4.05%.</p> <p>The personal exemption amount remains \$5,400.</p>
West Virginia (WVSWH)	<p>Effective date: 1/1/2023</p> <p>Withholding tax tables updated</p>

Corrections

The following issues have been corrected in this release:

- **Defect 1669848:** In **Manage > Expense Reports** and **Manage > Timesheets**, the **Available for labor entry** and **Available for expense/consultant entry** options set in the Project Command Center were not being applied correctly to the phase list when switching between the two tasks. For example, if you input time to a labor only phase in **Manage > Timesheets**, the labor only phase could incorrectly be selected in the phase field by manually typing it in **Manage > Expense Reports**.
- **Defect 1243964:** In **Manage > Expense Reports**, the phase list was restricted to only show phases where the employee was marked as a resource when the **Restrict time and expense to resources only** option was selected in the Project Command Center.
- **Defect 1676341:** When you created an expense item in Ajera and uploaded attachments for that expense item through the Ajera mobile app, the **Has Attachments** check box in **Manage > Expense Reports** was not being checked and the attachment icon in **Manage > Time & Expense > Expense** tab was not changing to green to indicate an attachment was added.
- **Defect 1899848:** *Arizona state only:* If an employee record never had a percentage entered for state tax withholding, Ajera was calculating the state tax withholding as 2% automatically. With this release, an update script will look for employees with a home state of Arizona that have state withholding enabled, and where the existing **Percent of taxable** was 0.00 or blank, and change the **Percent of taxable** to 2.00.

Note :	If an employee needs to have the Percent of taxable set to 0.00, you will need to go in and manually make this change after installing the update.
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Version 9.80.05: Improvements

March 8, 2023

Government Forms

- The 2023 941 form and e-filing are now available.

API Enhancements

- Get Project Totals now allows for more than 100 phases to be retrieved on a project for API Version 1
- A new version, Version 2, for Ajera API has been added. The new methods include:
 - **Create Projects**
 - You can now create Projects using this new method instead of having to use Update Projects.
 - This new method also allows for the creation of Resources on a project.
 - **Update Projects**
 - You no longer need to include all the fields for a project, just the ones that are being updated.
 - You can now update the Resource via Update Projects.
 - **Get Projects**
 - Resources are now being retrieved along with the Project information.
 - **List Projects**
 - Same functionality as Version 1.

Improvements

Widget Designer

- **Defect 1858971:** On a widget using the Expense Report base, filters were not working on the Credit Card Amount column.
- **Defect 1871132:** On a widget, when a formula contained the multiple dashes in a row (---), you may have encountered the error "*Exception: Your formula is in a format you do not have permission to use. Contact your Ajera Administrator to adjust your security permissions.*" if your user role did not have design access.

Other improvements

- **Defect 1207202:** *API only:* You may have encountered an error with the GetProjectTotals method when a project had more than 100 phases.
- **Defect 1869289:** *Oregon only:* When e-filing the Form W-2, when multiple local taxes are selected when filing for Oregon, you may have encountered the error *The form does not contain an amount on Line 16, the State wages, tips, etc. field. An amount is required for the state of OR.*
- **Defect 1757106:** On the Project Profit report, drilling down on a project that did not have the selected sort order criteria resulted in the error *Must Declare the scalar variable @p_Sort.*
- **Defect 1545892:** *Outsourced payroll:* When saving time on a timesheet, general ledger entries may not have saved completely which caused an error when running payroll.

With this correction, a new option called **Fix Timesheets** has been added to **Setup > Company**. When you run the **Fix Timesheets** option, Ajera will identify any unpaid timesheet entries that are missing general ledger entries, and then it will create the cost and WIP entries for those that are missing. Any entries prior to the **Do Not Allow** date set in **Company > Preferences** are not included.

- **Defect 1871708:** When an attachment was added through **Project Command Center > Attachments** tab from a network folder path instead of a local folder path, the **Show Folder** button remained grayed-out.
- **Defect 1871884:** If using Automated Bank Feed, in **Manage > Bank Register > Reconcile** tab, if the description coming from the bank or Plaid was over 200 characters, you received the error *String or binary data would be truncated in table 'AxBankFeedDetail', column 'bfdDescription'* when updating bank feed transactions.
- **Defect 1879419:** *In-house payroll:* In **Roles > Company** tab, the **Close Fiscal Year** check box was hidden for all user roles except Administrator.

Version 9.80.04: Improvement

February 13, 2023

- **Defect 1875095:** *CRM only:* When syncing 100 or more records, mapping table entries were not created after the 99th record and the integration log noted that the CRM sync mapping failed.

Note: The records were created / updated in CRM and Ajera.

Version 9.80.03: State Tax Change and Improvements

January 25, 2023

State Tax Change

Maryland (MDSWH)	Effective date: 1/1/2023 The minimum amount for the standard deduction was updated to \$1,700. The maximum amount for the standard deduction was updated to \$2,550.
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API Enhancements

- On the Get Employee method,
 - You now have the ability to get all employees.
 - You can search for employees by email address.
 - You can filter the Get method by status.

Other Enhancements

- In **Manage > Schedule**, clicking the refresh button will now retain the selected project.

Corrections

The following issues have been corrected in this release:

Widget designer

- Defect 1838941:** On a widget, when a formula contained the words Case or End as part of a note, you may have encountered the error "*Exception: Your formula is in a format you do not have permission to use. Contact your Ajera Administrator to adjust your security permissions.*" if your user role did not have design access. Case and End are now supported in a formula if they are used as part of a note in the SQL statement.
- Defect 1842710:** On a widget, when a custom field had the same name as a disallowed word in a formula, like Update or Delete, you may have encountered the error "*Exception: Your formula is in a format you do not have permission to use. Contact your Ajera Administrator to adjust your security permissions.*" if your user role did not have design access. Widgets can now report the results of a custom field that has the same name as a disallowed word in a formula.
- Defect 1717711:** When exporting a widget with a lot of columns to PDF, you may have encountered the error "*RPC to Gecko engine process failed. Remote process did not respond within specified time limit.*" With this release, the error message has been revised to indicate the widget has more columns than can export to PDF. To export the widget some columns need to be removed.
- Defect 1835802:** When a Manage Projects Task widget was added to a Projects page and you edited the widget after adding additional columns, the widget would stop displaying data.
- Defect 1825419:** On a Client Invoice based chart widget, you could not chart the prepayment amount.

Other correction

- **Defect 1817699:** Timesheet placeholder transactions were not being removed when a timesheet was submitted in **Manage > Timesheets**.

Version 9.80.02: Federal Form Changes, State Tax Changes and Improvements

January 11, 2023

Please note: *Ajera 9.8 included security updates that improve the verification of formulas on widgets. Because of this change, users may encounter an error message regarding formula permissions when their Security Role does not match the new security requirements to access specific information in a widget formula.*

Please note: *Ajera now supports Microsoft Windows 11 as an operating system on a workstation running Ajera.*

U.S. federal form changes

- Form W-4 has been updated for 2023.
- Form 940 has been updated for 2022.

State Tax Changes

Colorado (COSWH)	Effective date: 1/1/2023 The tax withholding tables have been updated. The flat tax rate decreased to 4.40% from 4.55%. Supplemental Tax rate is 4.40%.
Illinois (ILSWH)	Effective date: 1/1/2023 The tax withholding tables have been updated.
Indiana (INSWH)	Effective date: 1/1/2023 The flat tax rate decreased to 3.15% from 3.23%. The Supplemental tax rate is 3.15%.
Iowa (IASWH)	Effective date: 1/1/2023 The tax withholding tables have been updated.
Mississippi (MSSWH)	Effective date: 1/1/2023 The tax withholding tables have been updated.
Missouri (MOSWH)	Effective date: 1/1/2023 Tax withholding tables have been updated. The withholding formula uses tax rates of zero to 4.95%, instead of the previous range of 1.5% to 5.3%. The flat tax rate for supplemental payments decreased to 4.95%, from 5.3%.
New Mexico	Effective date: 1/1/2023

(NMSWH)	The tax withholding tables have been updated. The flat tax rate for supplemental payments remains at 5.9%.
New York (NYSWH)	Effective date: 1/1/2023 The tax withholding tables have been updated.
North Dakota (NDSWH)	Effective date: 1/1/2023 The tax withholding tables have been updated.
North Carolina (NCSWH)	Effective date: 1/1/2023 Flat tax rate decreased to 4.75% from 4.99%
Michigan (MISWH)	Effective date: 1/1/2023 The tax withholding tables have been updated.
Minnesota (MNSWH)	Effective date: 1/1/2023 The tax withholding tables have been updated. The supplemental tax rate is 6.25%.
Oregon (ORSWH)	Effective date: 1/1/2023 The tax withholding tables have been updated. The supplemental tax rate is 8%.
Rhode Island (RISWH)	Effective date: 1/1/2023 The tax withholding tables have been updated. The supplemental tax rate is 5.99%.
Washington, DC	Effective date: 1/1/2022 The tax withholding tables have been updated.
Vermont (VTSWH)	Effective date: 1/1/2023 The tax withholding tables have been updated.

Corrections

The following issues have been corrected in this release:

- **Defect 1244824:** When e-filing W-2 forms, zero amount W-2 forms will be excluded as Nelco requires an amount on W-2 forms in order to e-file.
- **Defect 1414097:** When printing a 1099 NEC or 1099 MISC for a Vendor with a DBA, the names were printing in the incorrect lines of the form.
- **Defect 1850564:** When using a formula in a widget that used AxSession table information, certain roles would receive an error when the widget was rendered. Now, only specific columns on that table are restricted.

Version 9.80.01: Federal Tax Changes, State Tax Changes, and Improvements

December 15, 2022

U.S. federal tax changes

- Federal Tax Withholding Rates have been updated for 2023.
- The Social Security wage base is \$160,200 in 2023.

Note	Social security and medicare tax rates are unchanged from 2022 and will remain the same in Ajera for 2023.
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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 **AJERA22** until January 31, 2023.

- You can use Ajera e-Filing to file your firm's 2022 W-2, W-3, 1099-MISC, 1096, and 1099-NEC forms electronically.

U.S. federal form changes

- The following forms have been updated for 2022: W-2, W-3, 1099-MISC, 1096, and 1099-NEC.

State Tax Changes

Kentucky (KYSWH)	Effective date January 1, 2023 Tax withholding tables have been updated. The withholding flat tax rate for 2023 will decrease to 4.5% from 5%. Supplemental tax rate is the same as the flat tax and has decreased to 4.5% from 5%.
Arizona (AZSWH)	Effective date January 1, 2023 Tax withholding tables have been updated.
Montana(MTSWH)	Effective date January 1, 2023 Tax withholding tables have been updated to match new tax withholding formulas. The supplemental wages tax rate remains 6%.
Nebraska (NESWH)	Effective January 1, 2023 Tax withholding rates have been adjusted. The supplemental wages tax rate remains 5%.
Maine (MESWH)	Effective January 1, 2023 Tax withholding tables have been updated. Annual exemption has increased from \$4,450 to \$4,700.

California CASWH)	Effective January 1, 2023 Tax withholding tables have been updated.
South Carolina (SCSWH)	Effective January 1, 2023 Tax withholding tables have been updated. The supplemental flat tax rate has decreased from 7% to 6.5%.

Corrections

The following issues have been corrected in this release:

- **Defect 1759110:** When using Ajera CRM, time entered toward already synced projects was not being added to the project in CRM on the next sync and an error was posted in the Integration log.
- **Defect 1829335:** When exporting a table widget to PDF, some columns may not have been included on the PDF.
- **Defect 1820376:** When using Automatic Bank Feed, if an item had a reference number in Ajera, but not in the feed, they would not automatically match.
- **Defect 1819054:** Negative value entries were not allowed on browser-based Expense Reports, Purchase Orders, Journal Entries, or on Revenue Recognition and Payroll Service Accruals widgets.
- **Defect 1741222:** When an attachment was added through **Project Command Center > Attachments tab**, the 'show folder' button remained grayed-out.

Version 9.80.00: Enhanced Chart Widgets, Forgot Password Option for SaaS Clients, and more

November 16, 2022

Enhanced Chart Widgets

With this release there are new chart widget types available. You now have access to the following new chart widgets:

- **Donut:** A donut chart contains the same visual attributes as a pie chart with a hollow center. In the widget designer, chart options allow you to control:
 - **Start/End Angle** which controls if the chart is displayed at 180, 360 or in between
 - **Inner size** which determines the size of the thickness of the donut
 - The placement of the donut in the chart area.
- **Funnel :** A funnel chart is a graphical representation used to visualize how data moves through a process, for example a sales process. In a funnel chart, the dependent variable's value diminishes in the subsequent stages of the process. By viewing the subsequent stages of a process, readers can quickly identify bottlenecks.
- **Note:** The version of our third party charts provider, Highcharts, has been updated. You will see new enhancements to all the chart widgets looks and interactions.

SaaS only: New Forgot Password Option

With this release, SaaS clients now have the option to request a new password if you have forgotten your password.

Enhancements

- When accessing timesheets through **Manage > Timesheets** you now have the ability to sort projects alphabetically ascending or descending.
- The option to Send Data to Deltek has been removed from the **Help** menu.

Manage Projects Task Widget Enhancements

- A new widget option allows you to control if a user has the option to show or hide **Resources** with the new **Enable "Show Resources"** check box option. If this option is not checked, the widget will not display resources and will not display the **Show Resources** checkbox.
- The Action Column now includes the ability to open a project has been added to the **Manage Projects** task widget.

Vantagepoint CRM Integration Enhancements

- You now have the option to sync consultant vendor information from Ajera to CRM providing a full view of project team members for use in future business development efforts. To use this new feature, turn on the **Sync to Vendor** option in your **CRM Integration Settings**.
- When syncing Ajera vendor information, Ajera requires that CRM firms use a unique Firm for vendor type firms and a unique Firm for client type Firms. The Vendor Sync does not support mapping both vendor and client to one firm in CRM. Ajera vendors map to CRM vendor firms and Ajera clients map to CRM client firms, rather than mapping to one firm in CRM.
- When syncing Ajera vendor information, Ajera consultant vendors map to CRM vendor type firms. If an existing vendor type firm with the same name is found, the two records are mapped together. If no existing vendor type firm is found in CRM, a new firm is created.
- When a consultant vendor has entries toward a project entered in vendor invoices in Ajera, during the sync, this vendor will become part of the **Firm** grid on the **Team** tab in the project's **Project Hub** in CRM and the **Associations** tab in the **Firm** Hub within the associated firm.
- To sync consultant vendor information that was entered in Ajera prior to turning on the vendor sync, a new option has been added to **Setup > Utility > Synchronize with CRM**. When using the manual sync option, **Sync historical project consultants to CRM** updates CRM with any consultant vendors entered to mapped CRM projects.
- Vendor contacts can sync to CRM with the new **Integration Vendor** field in **Setup > Contacts**. The **Integration Vendor** field allows you to select a vendor associated with the contact.
- The CRM Gallery widgets have been updated to include Vendor information
- The **Vendor Base** includes new columns for **CRM Vendor ID** and **Delete CRM Mapping**.



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