Deltek Costpoint 8.2.11 Draft Release Notes

Welcome to the **Deltek Costpoint 8.2.11 Release Notes**, which describe the new features, enhancements, and software corrections introduced in this release.

Important Notes

These release notes address all of the modules associated with Deltek Costpoint 8.2.11, some of which your firm may not use. Skip the sections that do not apply to your implementation of Deltek Costpoint.

Release notes are available from the landing page and the Costpoint Information Center.

We want the release notes to be as easy to use as possible. To this end, we will continue to analyze and improve upon the format. If you have feedback, please email DeltekDocumentationFeedback@deltek.com.

Note: The **Build Deployed In** and **Dependent Files** lines for defects and the list of required files included in enhancement descriptions are meant to support the Pick and Choose deployment model. If you have already installed the latest MR, you do not need to install the lower MR versions listed in the defect/enhancement; updates are still packaged as cumulative releases for MRs.

Update W-4 Information of Iowa Employees for 2024 Filing

Important: This action is required if you have Iowa Employees.

Iowa revised the IA W-4 (Employee Withholding Allowance Certificate), resulting in a change to the way an employee's Iowa withholding credit information is determined. Rather than requesting the number of allowances an employee would like to claim, the IA W-4 now requests a dollar amount.

To accommodate the employee setup, updates made in Costpoint MR 8.2.8 included the following:

- A new **Credit Amount** field was added to the Manage Employee Taxes screen and the Taxes subtask on the Manage Employee Information screen, allowing payroll administrators to enter the Total Allowance amount from Line 6 of the IA W-4.
- A new **Credit Amount** field was added to the Costpoint Employee Self Service (ESS) State Withholding screen, allowing employees to enter the total allowance amount they would like to claim.

In Costpoint MR 8.2.9, the Iowa state withholding computation has been updated so that an employee's credit amount will be based on the **Credit Amount** field on the Manage Employee Taxes screen, rather than the **Number of Credits** field. If your Iowa employees have not already reviewed their Iowa W-4 information, you should instruct them to do so before computing payroll. Costpoint Payroll customers with Iowa employees should do the following:

- Costpoint Employee Self Service (ESS) customers:
  - Update the **Web Address** or **Notes** field on the Configure State Tax Settings screen with a link to the latest IA W-4.
  - Instruct your Iowa employees to review their Iowa W-4 **Credit Amount** on the ESS State Withholding screen and update as needed using the following steps:

   1. Go to **People » Employee Self Service » Payroll and Benefits » State Withholding**.
   2. Populate the **Credit Amount** with the total allowance amount from line 6 of your 2024 IA W-4.
   3. Click **Save**.

- Costpoint customers not using Costpoint ESS:
  - Instruct your Iowa employees to file an updated W-4 using the 2024 IA W-4 form.
  - Use the completed IA W-4 form to update the employee's tax setup on the Costpoint Manage Employee Taxes screen or the Taxes subtask on the Manage Employee Information screen.

It is important for Iowa employees to update their IA W-4 information before payroll is computed in Costpoint MR 8.2.9 or a higher version since the Iowa tax withholding computation will be updated in those versions. If you upgrade to one of those versions and an Iowa employee has not yet updated their Iowa W-4 information, their credit amount will be **0.00** and may result in a higher withholding amount than expected.

Update Iowa Setup in ESS Configure State Tax Settings

Iowa updated their marital status options with the release of their 2024 IA W-4 employee withholding allowance certificate. To accommodate the new statuses, Costpoint MR 8.2.9 applied the following:

- Added new HEAD OF HOUSEHOLD filing status
- Changed the description for the SINGLE filing status from "Single" to "Other"
- Changed the description for the MARRIED filing status from "Married" to "Married Filing Jointly"

If your employees use Costpoint Employee Self Service (ESS) to update their state tax information, Deltek recommends you assign the new HEAD OF HOUSEHOLD status to Iowa on the Configure State Tax Settings screen and update the filing status descriptions for the MARRIED (Married Filing Jointly) and SINGLE (Other) filing statuses to be consistent with the 2024 IA W-4.

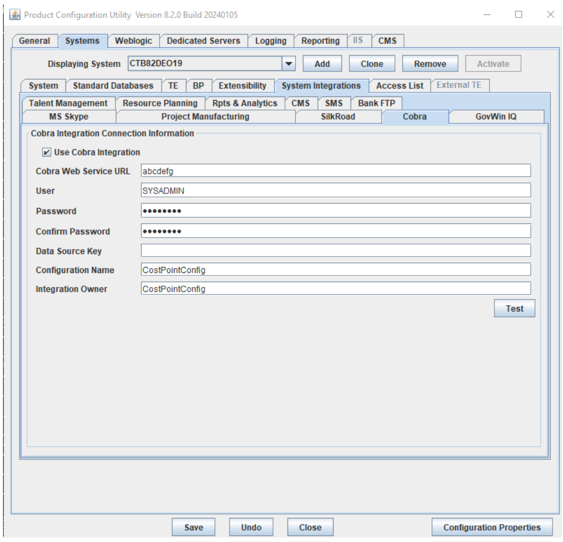
Cobra Integration

With Costpoint 8.2, a change was made so all Cobra applications will be hidden from the Costpoint menus unless the integration has been set up. This change was made to reduce the visibility of unnecessary applications in Costpoint if clients are not licensed or do not have the configuration enabled.

- If you already use the automated integration with Cobra Web Services, there is no action required. The integration in Product Configuration Utility is already set up, and you can see the connection for Cobra in Manage System Integration Accounts.
- If you currently download the Cobra information without the automated integration with Cobra Web Services, then you have not set up the integration in Product Configuration and will not see the connection for Cobra in the System Integration Accounts application. **You MUST enable/configure this connection in the Costpoint Config Utility.** Note that it does not have to be valid values. (Please do NOT click the **Test** button to validate.)

To set up the Product Configuration Utility for Cloud customers, you must complete the following form and submit a Service Request ticket.

[How to request a Costpoint Integration Setup (custhelp.com)]



Project Role Security Replaces Project Manager Security in Costpoint Business Intelligence

Access to secure project data has been greatly enhanced by Project Roles Security, which expands access to other roles beyond the Project Manager. If the necessary configurations are set, any project role, including project managers, can view project data at their level and in the lower project levels.

In Costpoint Business Intelligence 8.2.9 or later, Project Role Security replaces Project Manager (PM) Security. PM Security is no longer supported and has been removed.

If you use Project Manager Security and will upgrade to version 8.2.9 or later, Project Role Security will be applied seamlessly without performing extra steps. The system will follow the BI settings you had before the upgrade and transfer users in CER__PM_MGR to the CER__ROLE_SEC user group. In addition, you can extend role security to other project roles.

Important: If you have users in the CER__PM_MGR user group but have disabled Project Role Security before upgrading to 8.2.9, the users will be transferred to the CER__ROLE_SEC user group after the upgrade and Project Roles Security will be automatically turned on. It is important that your BI administrator selects **No** in the **Use Project Roles Security** field on the Manage BI Settings screen after the upgrade if needed. The Manage BI Settings screen is located in **Report & Analytics » BI Controls**.

For more details in setting up Project Role Security, see the Project Roles Security Setup section in *Deltek Costpoint Business Intelligence 8.2.9 Post Installation and Configuration Guide for On-premises Users*. Additional information is also available in KB article #115682.

This change requires patches 11322 and 11323.

Print These Release Notes or Save as PDF

You can print these release notes or save this page as a PDF. Do one of the following actions:

- **Desktop (Windows)**: Press CTRL+P on your keyboard. On the dialog box that displays, you can choose to save this page as a PDF or select a printer to print the release notes.
- **Desktop (Mac)**: Press COMMAND+P on your keyboard or click **File** » **Print** and select a printer to print these release notes. To save this page as a PDF, click **File** » **Export** and select a name and destination

for the PDF file.

- **Mobile Device**: Printing settings may differ depending on the browser and device that you are using. You can access these settings through the **More** link, **Share** icon, or the browser menu (three vertical dots or three horizontal lines).

Regulatory Enhancements

State

Vermont Child Care Contribution Payroll Tax

Vermont created a new payroll tax called the Child Care Contribution to fund its Child Care Financial Assistance Program under a bill that will partially go into effect on July 1, 2024.

- The payroll tax is 0.44% of an employee's covered wages, or 0.11% of a self-employed individual's self-employment income.
- Employers are responsible for at least three-quarters of the tax but can choose to pay more.
- Employers may deduct one quarter of the tax, or 0.11%, from employees' wages.
- Employers are responsible for withholding the employees' share.
- Under the bill, the tax applies to employers that are required to withhold Vermont income tax from employee wages and to employees who have Vermont income tax withheld from their wages.
- Employers must remit the tax to the state tax department using the same requirements as Vermont's income tax, including the time and manner of payment.
- Wages subject to federal income tax withholding are subject to the tax.

The bill holds employers responsible for the full amount of any unpaid contributions.

To support the state requirements, Costpoint now provides the ability to set up, withhold, and report Vermont's Child Care Contribution payroll tax.

Attention: For more information, see:
https://legislature.vermont.gov/Documents/2024/Docs/ACTS/ACT076/ACT076%20As%20Enacted.pdf

Manage Local Taxes (PRMLTI)

You can now select **Child Care Contribution Tax** option from the **Tax Type** drop-down list when you set up the new payroll tax for Vermont.

New validations were added for the W-2 reporting setup of Vermont Child Care Contribution payroll tax.

Set Up the Employee-Paid Vermont Child Care Contribution Payroll Tax

Use the following steps to create an employee-paid local tax record for Vermont's Child Care Contribution Payroll Tax.

To set up the employee-paid local tax for Vermont:

1. On the Manage Local Taxes screen, enter a local tax code to represent the employee-paid Child Care Contribution Payroll Tax and set other local values as needed.

Field	Description
Locality	Enter a local tax code that represents the employee-paid Child Care Contribution Payroll Tax.
State	Enter **VT**.
Tax Paid By	Select **Employee**.
Tax Type	Select **Child Care Contribution Tax**. **Note**: If this option is not yet available, you may select **Other Income Tax** temporarily and then replace it with **Child Care Contribution Tax** (once available).
W-2 Box 14 Usage	Select which line number to print Child Care Contribution withheld.
Box 14 Description	Enter **CCC**.
Local Tax Details	• **Effective Date**: 07/01/2024 • **Tax Based On**: Gross Pay

2. On the Manage Local Tax Tables screen, add a record for the employee-paid Child Care Contribution Payroll Tax local tax code and enter the corresponding field values for each filing status.

Field	Description
Effective Date	Enter **07/01/2024**.
For Taxable Income Over	Enter **0.00**.
Base Tax Plus	Enter **0.00**.
Percent of Excess	Enter **0.11%**.

Note: An employer may choose to withhold up to one quarter of the Child Care Contribution from an employee's wages. The total CCC payroll tax on wages is 0.44% (or 0.0044), which means that the maximum an employer may elect to withhold from an employee is 0.11% (or 0.0011) of the employee's wages.

3. On the Manage Local Standard Deductions screen, add a record for the employee-paid Child Care Contribution Payroll Tax local tax code for **07/01/2024** and set all values to **0.00**.

4. On the Manage Employee Taxes screen, assign the employee-paid local tax code to applicable employees.

Set Up Employer-Paid Vermont Child Care Contribution Payroll Tax

Use the following steps to create an employer-paid local tax record for Vermont's Child Care Contribution Payroll Tax.

To set up the employer-paid local tax for Vermont:

1. On the Manage Local Taxes screen, enter a local tax code to represent the employee-paid Child Care Contribution Payroll Tax and set other local values as needed.

Field	Description
Locality	Enter a local tax code that represents the employee-paid Child Care Contribution Payroll Tax.
State	Enter **VT**.
Tax Paid By	Select **Employer**.
Tax Type	Select **Child Care Contribution Tax**. **Note**: If this option is not yet available, you may select **Other Income Tax** temporarily and then replace it with **Child Care Contribution Tax** (once available).
W-2 Box 14 Usage	Not applicable. Only the employee-paid amount is reported on the W-2 form. The employer should report the portion of CCC withheld from the employee for the tax year on Box 14 of the employee's W-2.
Box 14 Description	Blank
Local Tax Details	• **Effective Date**: 07/01/2024 • **Tax Based On**: Gross Pay

2. On the Manage Local Tax Tables screen, add a record for the employer-paid Child Care Contribution Payroll Tax local tax code and enter the corresponding field values for each filing status.

Field	Description
Effective Date	Enter **07/01/2024**.
For Taxable Income Over	Enter **0.00**.
Base Tax Plus	Enter **0.00**.
Percent of Excess	Enter **0.33%**.

Note: Employers are responsible for at least three-quarters of the tax but can choose to pay more.

3. On the Manage Local Standard Deductions screen, add a record for the employer-paid Child Care Contribution Payroll Tax local tax code for **07/01/2024** and set all values to **0.00**.

4. On the Manage Employee Taxes screen, assign the employer-paid local tax code to applicable employees.

Virginia 2024 Tax Table Update

Virginia updated its formula for computing tax to be withheld effective for wages paid after April 1, 2024, for taxable year 2024 and after filers. The standard deduction increased from $8,000 to **$8,500**.
Attention: For more information, refer to https://www.tax.virginia.gov/sites/default/files/vatax-pdf/employer-withholding-tables.pdf.

To support the state requirements, this release adds records to the following screens:

- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Taxes (PRMSTI)

This enhancement requires the following:

- Patch dbc_820_11372

Enhancements

Reports & Analytics

Business Intelligence

Improved Project Health Drill Through Report

Modifications were made to the security view in support of Project Role Security. The updates provide better performance when running any report or dashboard from the following packages.

- Accounts Receivable
- Billing
- Project Reporting
- Project Analysis

Software Issues Resolved

Admin

System Administration >> Configure System Settings

Defect 2104506: An error occurred when you updated the **Allow Collection of Usage Statistics** and **Enable In-App Guidance** settings.

Materials

Bills of Material >> Manage Manufacturing Bills of Material

Defect 2115967: When you added a new line in the UI or via the Web Integration Console (WIC), set a non-default scrap percentage, and then saved the record, the scrap percentage changed back to the default value. However, when you changed the scrap percentage on an existing line, it saved successfully.

Procurement Planning >> Create Purchase Orders

Defect 2117650: The DPAS and contract ID did not print on the purchase order (PO) that you generated from the purchase requisition.

Production Control >> Enter Manufacturing Order Issues

Defect 2117651: When you used two requirement lines with the same part number, the TIP to Costpoint interface updated the wrong requirement line.

Production Control >> Manage Manufacturing Orders

Defect 2110086: When you implemented a reschedule order message, Costpoint calculated the lead time differently between the Manage Manufacturing Orders application and the reschedule order message with MRP.

Supplier Portal >> Manage Invoices

Defect 2117657: When you printed the subcontractor invoice, the SUBC_TS_LN_AUDIT.INVC_FL table was not updated.

People

Employee Self Service >> Dependents/Beneficiaries

Defect 2115729: A critical error occurred when you attempted to save changes to the Home or Office Phone information of a record. This occurred when you had the following setup on the Configure Self Service Settings screen:

- The **Phone Format** option was **(000) 000-0000**.
- **Format Edit** was set to **Soft Edit** or **Hard Edit**.

Employee Self Service >> Life Events/New Hires

Defect 2103703: A system error displayed if the employee selected a new beneficiary before selecting a new coverage. This occurred on the following tabs:

- Accident

- AD&D
- Sup AD&D
- Sup Life
- Travel

The screen should not allow you to select a new beneficiary until a new option is selected from the Select New Coverage Level subtask.

Labor >> Create Leave Payout Timesheets

Defect 2116718: When you created a leave payout timesheet, the application set the value in the **Entered Hours** field to zero.

Payroll >> Compute Payroll

Defect 2105946: The taxable amount for Employer Medicare was incorrect when the amount should be negative.

Payroll >> Manage Employee Earnings History

Defect 2109983: A system error occurred when you saved a Z record with a labor amount that was not a whole number.

Planning

Administration >> Report Table Update Process

Defect 2121723: During refresh of the EREPORT_PROJ_DETAILS table, pending burden and revenue amounts were not updated.

Project Budgeting >> Import Budget/EACs from Excel

Defect 2106539: When **Import Budget/EAC Projects** was set to **Projects with no error**, the upload failed, and no records were imported, not even those which were error free.

Project Budgeting >> Project Status

Defect 2115189: In Project Status Report (PSR), the pending routine did not use the pool rate ceiling values from Projects to calculate pending burden.

Project Budgets / EACs

Defect 2120061: You encountered slow system performance when large budgets or EACs were loading.

Defect 2121444: When the date of the last closed period was the same as the budget end date, the last period on the Analysis by Period subtask displayed a Raw Cost value of zero even though hours existed for that employee within that same period.

For Pick & Choose deployment: If you choose not to apply this hotfix, as a workaround, create an EAC based on the budget and extend the end date one more period.

Defect 2122934: When you tried to create a budget or modify an existing budget, you received the critical system error "ORA-00904: 'S_BILL_RT_TYPE_CD': invalid identifier" that caused Costpoint to close.

Projects

Billing >> Print Billing Worksheet

Defect 2119386: When you ran this application with **ID/Name** or **Both** selected under **Show for T&M Projects**, the values in the **ITD Hrs Billed Including this Billing** column were duplicated in the **ITD Hrs Incurred** column.

Cost and Revenue Processing >> Compute Revenue

Defect 2119385: When you ran this application, the recaptured over ceiling amounts were reset to zero. The previously calculated OVER_FEE and OVER_CST amounts were cleared out for lower-level projects since the ceiling was removed.

Reports & Analytics

Business Intelligence

Defect 2108937: The Costpoint Authentication Provider or CAP file did not include a value of **Y** or **N** for the

ENABLE_PROJ_ROLE_SECCURITY session parameter. The session parameter should have matched the selection made on the Manage BI Configuration Settings screen. This defect affects you if you are trying to enable the new Project Role Security.

Defect 2109065: The Deltek_CAP.log file was not updated after the upgrade to Cognos Analytics with Watson 11.2.4 FP2. This defect prevented you from seeing the log activities while using Cosptoint Authentication Provider (CAP) withi Costpoint Business Intelligence. This defect affects both cloud and on-premises customers where the fix for cloud has been applied. If you are an on-premises customer, you need to set up the new **DeltekCAP.jar** file released in Costpoint BI 8.2.11.

To set up the new DeltekCAP.jar file:

1. In your Cognos Analytics with Watson server, create a new **AAA** folder in the **ibm\cognos\analytics\webapps\p2pd\WEB-INF** directory.

2. Create a **lib** folder in **the ibm\cognos\analytics\webapps\p2pd\WEB-INF\AAA** directory.

3. Open the **webapps\p2pd\WEB-INF\lib** directory and remove the **DeltekCAP.jar** file.

4. Copy the latest **DeltekCAP.jar** file in this **webapps\p2pd\WEB-INF\AAA\lib** directory.

   The latest **DeltekCAP.jar** file is found in the **\zSupport Files\CAP8.2** folder of the Costpoint BI 8.2.11 installation.

5. Copy the following files from the **webapps\p2pd\WEB-INF\lib** directory to the **ibm\cognos\analytics\webapps\p2pd\WEB-INF\AAA\lib** directory:

   - log4j-api-2.x.jar

   - log4j-core-2.x.jar

6. In your Costpoint BI 8.2.11 installation, open the **\zSupport Files\CAP8.2\sample_configuration** folder and look for the **log4j2_deltek.xml** file.

7. Copy the **log4j2_deltek.xml** file into the **ibm\cognos\analytics\configuration** directory.

8. Open the **log4j2_deltek.xml** via Notepad.

9. Set the logging level as either:

   - **debug** to log debug information. For example:

     Logger name="com.deltek" additivity="false" level="**debug**"

     OR

   - **warning** to log warning information. For example:

     Logger name="com.deltek" additivity="false" level="**warning**"

Deltek_Costpoint_CAP.log log4j2_deltek.xml

```
<?xml version="1.0" encoding="UTF-8"?>
<Configuration status="warning">
<Properties>
<Property name="basePath">../logs</Property>
</Properties>
<Appenders>
<RollingFile name="FA"
             fileName="${basePath}/Deltek_Costpoint_CAP.log"
             filePattern="${basePath}/Deltek_Costpoint_CAP-%d{yyyy-MM-dd}.log">
<PatternLayout>
<pattern>%d{dd MMM yyyy HH:mm:ss,SSS} %-5p [%t]-[%c] %m%n</pattern>
<!--
                    <pattern>%-5p [%t] %c - %m: %d{DATE}%n</pattern> -->
</PatternLayout>
<Policies>
<SizeBasedTriggeringPolicy size="10MB" />
</Policies>
<DefaultRolloverStrategy max="5">
<Delete basePath="${basePath}" maxDepth="10">
<IfLastModified age="30d" />
</Delete>
</DefaultRolloverStrategy>
</RollingFile>
<Console name="console" target="SYSTEM_OUT">
<PatternLayout>
<pattern>%d{dd MMM yyyy HH:mm:ss,SSS} %-5p [%t]-[%c] %m%n</pattern>
</PatternLayout>
</Console>
</Appenders>

    <Loggers>
<Logger name="com.deltek" additivity="false" level="debug">
<AppenderRef ref="FA" />
<AppenderRef ref="console" />
</Logger>
</Loggers>
</Configuration>
```

Defect 2116428: A filter for **Company**, which should have been set as 1 by default, was not applied to the Project Health report. In addition, the dates were not formatted as mm/dd/yyyy.

Defect 2116441: The subtitle of the Accounts Receivable drill through report of Project Health did not follow the report layout standards.

Defect 2116445: The subtitle of the Open Billing drill through report of Project Health did not follow report layout standards. The drill through report also included rows with a total value of zero (0) when they should have been removed.

Defect 2116448: The subtitle of the Unposted Invoices drill through report of Project Health was missing. The drill through report also included rows with a total value of zero (0) when they should have been removed.

Defect 2116449: The header and subtitle of the Unbilled drill through report of Project Health did not display the company name and ending period.

Defect 2116453: There were errors in the Project backlog drill through report of Project Health, which were:

- The ITD Revenue (Target) and ITD Revenue (Actual) were not added to the Project Backlog drill thru report.
- The subtitle of the report did not follow the report layout standards.

Defect 2116454: There were errors in the Funded Backlog drill through report of Project Health, which were:

- The ITD Revenue (Target) and ITD Revenue (Actual) were not added to the Project Backlog drill through report.
- The subtitle of the report did not follow the report layout standards.

Defect 2119999: When you viewed the drill through report of Project Health and drilled through further to Project Status Report (PSR), Accounts Receivable (AR) Aging, or Open Billing, all projects were displayed. The report should have displayed only your selected projects.

Security Enhancements

There are no security enhancements or security issues addressed in this release.

Known Issues

Widget Errors on Dashboards

An intermittent query service error display for some widgets upon launching a dashboard. This has been reported to IBM. As a workaround, close the dashboard and reopen.

User Token Error Upon Opening Business Intelligence

An intermittent user token error displays when you open Business Intelligence (BI) for the first time. This happens when Costpoint attempts to launch the BI screen before user authentication has been completed. The error message is, “The user token is not valid, please contact your Costpoint administrator.”

As a workaround, close the BI screen by clicking the X button on the upper-right side. And then, reopen Business Intelligence via the Costpoint menu path: Reports & Analytics » Business Intelligence.

Database Changes

Database Change documents detail data dictionary changes from one release to the next. To see the Database Change document for this MR, refer to 8.2.x Data Dictionary Updates.

Other Links

Online Help

Costpoint Information Center (CIC)

Costpoint Cloud Information Center (CCIC)

Return to Top