Deltek

Deltek Ajera 9

9.30 Release Notes

May 14, 2020

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Version 9.30.10: Improvement

May 14, 2020

Correction

The following issue has been corrected in this release:

- If you had additional federal withholding in **Setup** > **Employees** > **Payroll Taxes**, the additional federal withholding was incorrectly added to the regular federal withholding when creating a supplemental paycheck in **Manage** > **Payroll**.

Version 9.30.09: Improvements

April 22, 2020

CRM Enhancement

- When syncing from CRM to Ajera, the project name logic has been improved to avoid errors for duplicate projects. Now, Ajera will first look at the long name of a project record. For example, if the long project name is over 40 characters, Ajera will use the first 80 characters of a long project name. Conversely, if the Long Project Name is 40 characters or less, the Short Name will be used.

Corrections

The following issues have been corrected in this release:

- **Defect 1265428**: If you are using effective cost but do not bill using effective cost, you may see an improvement to the time it takes to load the client invoice list.

Version 9.30.08: Improvements

March 25, 2020

State tax updates

- The tax library has now been updated for Arkansas, Maryland, Missouri, and District of Columbia.
- There is now a permanent fix for the issue where Federal Withholding amount was not being calculated on paychecks when the 2020 W4 check box in **Setup** > **Employee** > **Payroll taxes** tab was selected

Government forms

- The 2020 941 form and e-filing are available.

Enhancements

- Full Ajera functionality is now supported in Microsoft Windows Server 2019.

Corrections

The following issues have been corrected in this release:

- **Defect 1241556**: In **Manage > Expense Reports**, when you created a new expense report, if you exceeded the 80 character limit in the **Reference** field and saved the report, a processing error was thrown. As a result, Ajera truncated the Reference information.
- **Defect 1251134**:When the **Allow Expense Report Changes by Supervisor** check box was unchecked on the **Time & Expense Entry** in **Setup > Company > Preferences**, if a supervisor tried to approve an expense report after Accounting approved it, the following browser error was thrown: Warning: One or more Expense Reports were not Approved.
- **Defect 1251182**_Ajera API only_: A recent security update white listed some file extensions and restricted others. As a result, although you could upload .PDF files via the browser, ClickOnce, and mobile, you were unable to upload .PDF files via the Ajera API.

Version 9.30.07: Improvement

March 4, 2020

Correction

The following issue has been corrected in this release:

- **Defect 1259852**:For a number of states, employees who selected the **2020 W4** checkbox in **Setup > Employee > Payroll Taxes** tab reported that they had no Federal Withholding amount calculated on their paychecks.

  As an interim fix for this issue, the tax library updates were reverted to a previous version for Arkansas, Maryland, Missouri and District of Columbia. Emended tax libraries will be added in a future Ajera release.

Version 9.30.06: State Tax Changes and Improvements

February 26, 2020

State Tax Changes

Arkansas (ARSWH)	Effective date:03/01/2020 The supplemental withholding rate has changed to 6.60% (from 6.90%). The standard deduction remains the same at $2,200 and the value of an allowance remains the same at $26.
Maryland (MDSWH)	Effective date: 01/01/2020 Updated the minimum standard deduction to $1,550. Updated the maximum standard deduction to $2,300.
Missouri (MOSWH)	Corrected the state tax
District of Columbia (DCSWH)	Effective date: 01/01/2020 Updated the multi-state tax withholding

Enhancements

Browser Enhancement

- Full Ajera functionality is now supported in Microsoft (Chromium-based) Edge. If you use the Microsoft Edge browser, then you must also enable the ClickOnce application to run all tasks. Type edge://flags in the Edge browser to open the ClickOnce support page.

Expense Report (Browser) Enhancements

- In **Manage > Expense Reports** (Browser), you now can remove new transaction rows from the expense report by selecting **Cancel** in the Action menu.
- In **Manage > Expense Reports** (Browser), a new **Unapprove** option on the **Action** menu has been added that allows supervisor and accounting level roles to unapprove expense reports that has not been at both levels. This is only available if both approval levels have been set.

Corrections

CRM Integration

The following CRM sync issues have been corrected in this release:

- **Defect 1248633**: When you ran a sync to CRM, if the client record either had no status or the status column was hidden in CRM, then the **Active** clients in CRM were set to an **Inactive** status in Ajera.

- **Defect 1230981**: When multiple contacts with the same name existed in CRM, sometimes contact information from Ajera was updating the wrong contact in CRM.
- **Defect 1239658**: In **Setup > Client**, if you created a new client in Ajera and then ran a CRM sync, in Vantagepoint via **Hubs > Firms**, the **Firm Type** was missing for the newly created client.

Other Corrections

The following issues have been corrected in this release:

- **Defect 1247523**: In **Manage > Expense Reports**, when you added a date, project and phase, and then selected the **Expense Item** drop-down list, the *Expense Item required* message obscured the drop-down list. As a result, you could not select some of the options in the list.
- **Defect 506316**: On the Labor tab in **Setup > General > Billing Rate Tables**, when you selected the **No Premium Markup** check box in the Labor Markups grid, instead of excluding the premium markup, Ajera calculated the premium markup on Overtime hours.

Version 9.30.05: State Tax Changes and Improvements

January 22, 2020

State Tax Changes

Colorado (COSWH)	Effective date: 1/1/2020 The State filing status has been updated to include Head of Household.
Mississippi (MSSWH)	Effective date: 1/10/2020 The tax-free annual income increased to $3,000 from $2,000. Tax bracket thresholds between $5,000 and $10,000 and tax rates remain the same. The standard deduction remains $2,300 for single individuals. There is no supplemental wages tax rate.

Enhancements

- In **Manage > Expense Reports**, when you customize the width of columns and save, the next time you log in the column width change will still be applied.

Corrections

The following issues have been corrected in this release:

- **Defect 1236790**: In **Setup >Employees**, on the **Payroll Taxes** tab when you entered an amount in the **Additional federal withholding** field on the 2020 W4 form, additional withholdings were not calculated correctly.
- **Defect 1234652**: When you printed the 2019 W2 form, the **Control Number** value on Copy C was displayed incorrectly in **Box 10** instead of **Box d** on every other form.

CRM

- **Defect 1235546** *API Only* In **Integration > CRM**, an issue in syncing Ajera to Vantagepoint occurred due to an unexpected special character on Project Type records in the API.
- **Defect 1234666** *API Only*:In **Integration > CRM**, when you ran a synch from Ajera to Vantagepoint, some employee organizations could not be validated.

API

- **Defect 1235378**: In a rare instance in **Setup > Utility > Set Up Integration > API Settings tab** an API-generated URL was found to be invalid.

Other Corrections

- **Defect 1214859**: In **Manage > Purchase Orders**, if you entered a purchase order number that had extra characters in the date format (for example, 20190812ab), and then tried to save changes to the PO, you received an invalid date error message.

- **Defect 1209172**: In **Manage > Email Client Statements**, for any project that had multiple Invoice Groups, if you sent an email statement to just one Invoice Group,only the first invoice group's billing contact email address was used even if that invoice group was not part of the invoice being emailed.

- **Defect 1238316**: In **Reports** > **Government Reporting** > **Form W2**, if you filled out a W2 Nelco efil-ing form that had 5 or more deductions in Box 12, and if you then selected a state, when you tried to transmit the electronic file, the following error was thrown: *StateWagesTipsEtcOne- The form does not contain an amount on Line 16, the state wages, tips, etc. field*.

- **Defect 1232042** : In **Manage > Payroll**, when a **Deduction limit** maxed out on a pay check and the check was then edited, the **Net Pay amount** was incorrectly updated.

- **Defect 1204934**: In **Manage > Expense Reports (Browser)**, the footer "1 - 500" on the list of expense reports was obscured by a horizontal scroll bar each time you scrolled to the end of the list, and then the scroll bar disappeared when you clicked it. This occurred when using the following browsers: Internet Explorer, Edge, Chrome, and Firefox.

- **Defect 1210015**: In **Manage > Timesheets**, a supervisor selected **Employee Time** and was able to access timesheets for all employees instead of just those employees they supervise.

- **Defect 1227652**: When you used the Firefox browser, you encountered problems clicking into and expanding the Notes and Manager Notes fields on detail rows on expense reports in **Manage > Expense Reports (Browser)** and on journal entries in **Manage > Journal Entries (Browser)**.

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Version 9.30.04: State and Federal Tax Changes

January 8, 2020

Federal Form Changes

The 2020 W-4 tax calculation formula changes have been completed.

The new 2020 W-4 form in **Reports** > **Government Reporting** > **Form W4** should be completed for all new employees. Information for the new 2020 W4 can be entered in **Setup** > **Employees** > **Payroll Taxes** tab. Existing employees can opt to complete a new 2020 W-4 form, but are not required to do so.

Visit the Learning Center to find out more.

Federal Tax Changes

- The federal allowance amount has increased to $4,300 from $4,200.
- The standard deduction when using the new 2020 W-4 form has increased to $8,600 from $8,400 for single employees and $12,900 from $12,600 for married employees.

State Tax Changes

California (CASWH)	Effective date: 1/1/2020 Withholding tax tables have been updated.
Colorado (COSWH)	Effective date: 1/1/2020 Withholding tax tables have been updated.
Illinois (ILSWH)	Effective date: 1/1/2020 Exemption allowance has increased to $2,325 from $2,275.
Maine (MESWH)	Effective date: 1/1/2020 Withholding tax tables have been updated.
Maryland (MDSWH)	Effective date: 1/1/2020 Seven Maryland county taxes have been updated, which impacts the withholding for the state tax.
Massachusetts (MASWH)	Effective date: 1/1/2020 The flat tax has decreased from 5.05% to 5%. The supplemental tax rate has decreased from 5.05% to 5%. The Head of Household subtraction amounts have been updated. The Blind subtraction amounts have been updated.
Michigan (MISWH)	Effective date: 1/1/2020 Personal exemption amount has increased to $4,750 from $4,400.
Minnesota (MNSWH)	Effective date: 1/1/2020 The withholding allowance increased to $4,300 from $4,250.

	The tax table dollar amounts have been updated.
Missouri (MOSWH)	Effective date: 1/1/2020 The standard deduction has increased to $12,400 from $12,200 for Single, Married and Spouse Works, and Married Filing Separate filing status. The standard deduction has increased to $24,800 from $24,400 for the filing status Married and Spouse Does Not Work. The standard deduction has increased to $18,650 from $18,350 for the filing status Head of Household.
New Mexico (NMSWH)	Effective date: 1/1/2020 Withholding tax tables have been updated.
North Carolina (NCSWH)	Effective date: 1/1/2020 Tax tables have been updated for 2020. The standard deduction amounts have changed.
Oregon (ORSWH)	Effective date: 1/1/2020 Withholding tax tables have been updated. Supplemental wage payment withholding has decreased to 8% from 9%. The federal tax withholding amount has increased to $6,950 from $6,800. Standard deduction amounts have increased.
Rhode Island (RISWH)	Effective date: 1/1/2020 The dollar amounts in the wage brackets for the annual percentage method, the "amount of income tax withheld," and the "excess over" amounts have all been updated.
South Carolina (SCSWH)	Effective date: 1/1/2020 Withholding tax tables have been updated.
Vermont (VTSWH)	Effective date: 1/1/2020 The percentage method withholding tables have been updated. The value of one withholding allowance has increased to $4,350 from $4,250.

Corrections

The following issue has been corrected in this release:

Defect 1232656:When you printed a 3-Up version of the 2019 W2 form, Copy 2 for the Employee's State Tax form printed incorrectly: Box 1 displayed Box 2's value and Box 2 was blank.

Version 9.30.03: State Tax Changes and Improvements

December 18, 2019

U.S. Federal Tax Changes

- Federal Tax Withholding Rates have been updated for 2020.
- Social security wage base limit is $137,700 in 2020.

Note :	Social security and medicare tax rates are unchanged from 2019 and will remain the same in Ajera for 2020.

Ajera e-Filing

Ajera customers can receive 10% off any e-filing purchase in WRC (one time use only) with code **AJERA19** from Nelco.

- You can now use Ajera e-Filing to file your firm's 2019 W-2, W-3, and Form 1099 MISC forms electronically.

U.S. federal form changes

- The following forms have been updated for 2019: W-2, W-3, 940, 1099 MISC, and 1096.
- The 2020 W-4 form is now available to print.

Note :	The 2020 W-4 changes the tax calculation formula for 2020. These changes will be available in a future release.

U.S. Federal form correction

- **Defect 574874**: On the 1099 MISC form, now when the **Payer** and **Recipient** fields exceed 35 characters, the text is truncated.

State Tax Changes

- Miscellaneous multi-state corrections, as well as the following list of changes:

Iowa (IASWH)	Effective date: 1/1/2020 Standard deduction has increased to $1,880 if an employee claims 0 or 1 allowances, and $4,630 if an employee claims at least 2 allowances. The tax bracket thresholds were adjusted.
Kentucky (KYSWH)	Effective date: 1/1/2020 The standard deduction has increased to $2,650.
North Dakota (NDSWH)	Effective date: 1/1/2020 The supplemental tax rate remains the same.

	There are two withholding methods for supplemental wages.
New York (NYSWH)	Effective date: 1/1/2020 The withholding allowance will be $3,200. The state deduction, allowance, and supplemental rates remain unchanged.
Ohio (OHSWH)	Effective date: 1/1/2020 The percentage method tax rates changed for 2020, but the value of the standard deduction remains the same at $650.

Corrections

The following issues have been corrected in this release:

- **Defect 1119217**: On the Revenue Recognition widget, you may have encountered a time out error when trying to load revenue detail.

- **Defect 1161125**: In **Manage** > **Time & Expense**, **Expense Reports**, or in **Touch Expense for Ajera**, the uploaded attachment would sometimes disappear from the list in the Attachment dialog.

- **Defect 1214821**: In **Email Client Statements** and **Email Client Invoices**, HTML tags were not working correctly when sending emails.

- **Defect 1221403**: In **Manage** > **Expense Reports**, sometimes an error message would appear when you clicked on the **Project** field on a detail row.

- **Defect 1224673**: For on premises clients, sometimes you were unable to log in if your username contained a space.

- **Defect 1120680**: *Georgia state only*: If the Marital Allowance field and the State Exemption Allowance field were both being used, the exemptions total was incorrect. The Marital Allowance field has been removed so that the state exemption field totals correctly.

Version 9.30.02: Important Technology Changes and Improvements

December 4, 2019

Important Technology Changes

Microsoft is ending support for Windows 7 and Windows Server 2008 R2 starting January 14, 2020. This means these operating systems will no longer receive security patches and updates after January 14th, making them prone to attacks. Deltek will no longer support the Windows 7 and Windows Server 2008 R2 operating systems starting January 14th. With this change:

- Users will need to have Microsoft Windows 8.1 or higher installed on all workstations.
- Servers will need to be upgraded to Microsoft Windows Server 2012 or higher with Microsoft .NET Framework 4.6.

Enhancements

API

- The GetGLAccount method will now include balance sheet account types.
- A new API method called GetProjectswithResourcesMethod is now available.

Corrections

The following issues have been corrected in this release:

CRM

- **Defect 1190792**: If you had an employee record in which both a **Termination Date** and also a **Rehire Date** had been defined, when you synced from Ajera to Vantagepoint CRM, the status of the employee record was set to **Terminated** instead of **Active**.

Reports

- **Defect 785140**: *Multi-company only*: Non-calendar fiscal years were not recognized correctly on the Profit and Loss report. To report on your specific fiscal year for a company, enter the start and end date of the fiscal year in **Setup** > **Company Preferences** > **General** tab.
- **Defect 1212342**: On the Multi-company Reconciliation report, the Intercompany Sales Tax amount displayed with no description, date, or link to indicate where the amount was coming from and clicking the amount resulted in an error message.
- **Defect 1162049**: On the Ledger report, the sales tax amount was not included for intercompany prepayments.

Other corrections

- **Defect 1151268**: If you were recognizing revenue using Billed + WIP and changed the revenue method to Billed, changing an entry to non-billable did not reverse the WIP.
- **Defect 948784**: In **Manage** > **Timesheets**, editing time on an overhead, marketing, or non-billable phase would create General Ledger WIP entries.

- **Defect 1189550**: In **Time & Expense**, **Expense Reports**, and **Vendor Invoices**, some phases on the Phase List were not selectable or did not display.

- **Defect 1221403**: In **Manage** > **Expense Reports**, you may have encountered an error when clicking a project field on an expense report detail row.

Version 9.30.01: Improvements

November 8, 2019

Corrections

The following issues have been corrected in this release:

- **Defect 1213045**: In Vendor Invoices and In-house Expenses, new Filestream attachments were not being uploaded.
- **Defect 1213019**: *Montana state only*: You may have encountered an error when running payroll.

Version 9.30.00: Expense Reports in the browser

October 24, 2019

State tax changes

Minnesota (MNSWH)	Effective date: 1/1/2019
	The withholding tax tables have been revised as of 9/4/19 and are effective 1/1/2019.
	The withholding allowance remains the same at $4,250, but the dollar amount brackets have changed for single and married, as well as most percentage and additional amounts
Virginia (VASWH)	Effective date: 1/1/2019
	The standard deduction has increased to $4,500 for single filers.

Important Technology Changes

Ajera requires a minimum version of Microsoft .NET Framework 4.6 be installed on the Ajera workstations. With the release of Ajera 9.3, if your workstations do not have the correct .NET version installed you will be unable to open any ClickOnce tasks in Ajera. The download can be found on Microsoft's official website.

Introducing Expense Reports in the browser

Users can now enter expense reports and approve expense reports from a browser-based task making it easier and more intuitive for all users.

With the new expense report feature you get:

- A new interface where you see the expense report and expense report detail all on one screen. Entering expense report details and saving will not close the details window because everything is on one screen. This screen also breaks out totals at the top.
- The ability for users to enter expense reports from browsers like Chrome or Firefox in addition to Internet Explorer.
- Separate security for Timesheets and Expense Reports.
- The ability to print, submit, and approve multiple expense reports.
- The same functionality with the new expense reports features as the old, with the exception of the ability to cancel a detail row and unapproving an expense report in the browser. This functionality will be available in a future release.
- The following attachment types in both expense reports in the browser and **Manage** > **Time & Expense**: pdf, xps, txt, rtf, jpeg, jpg, png, heif, heic, tiff, xls, xlsx, numbers, doc, docx, pages. Other file types will not be uploaded.
- Access to **Manage** > **Time & Expense** remains. You control when employees can access the new expense report feature by giving them access to the menu option in **Roles**.
- Expense report widgets that open or create new expense reports will use the new browser expense entry if the employee's role has access to the **Manage** > **Expense Reports**.

Visit the Learning Center to find out more.

Enhancements

CRM

- With this release, we now integrate using the Vantagepoint Restful API's. With this new feature you can also sync List table values like Project Template, Project Type, and Employee Type from Ajera to Vantagepoint. There are important steps you have to take to start using the new API's.

  [Visit the Learning Center](#) to find out more.

- When a new project is created in Ajera from CRM during the sync, the project manager, principal, project type, and client will be copied to the phase. If none of the information is entered in CRM, the information will come from the template.

API

- A new method called GetGLAccounts with Balances is available. This returns the GL accounts with balances.

Other enhancements

- The following pre-built widgets have been added to the widget gallery:
  - **CRM List Sync Details Administration** - These widgets report on the syncing details for Project Template, Project Type, Employee Type, and Client Type to Vantagepoint. These widgets are filtered to only display records that are syncing. View the corresponding CRM IDs for each mapped record or if applicable, view the Ajera key associated with the map record. Use the Delete CRM Mapping column to delete the mapping for a particular record.

Corrections

The following issues have been corrected in this release:

- **Defect 1199917**: In **Manage** > **Timesheets**, managers were not able to enter notes when rejecting individual cells.
- **Defect 1183939**: *CRM only*: After running the sync, the Weighted Fee field for the project was set to None in Vantagepoint CRM.

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