




Deltek

Deltek Costpoint® 8.1.16

Release Notes

January 18, 2023



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Overview

Welcome to Deltek Costpoint 8.1.16 Release Notes. These release notes contain a summary of the following:

- Enhancements
- Software Issues Resolved
- Known Issues

These release notes address all of the modules associated with Deltek Costpoint 8.1.16, some of which your firm may not use. Skip the sections that do not apply to your implementation of Deltek Costpoint.

New Release Notes Format

Costpoint Release Notes are now delivered in HTML format and can be viewed at this link: <https://help.deltek.com/product/Costpoint/8.1/ReleaseNotes>. This web page contains links to the Release Notes for each release version as well as links to the Costpoint online help, Costpoint Information Center (CIC), and Costpoint Cloud Information Center (CCIC).

We will continue to provide PDFs for the next few releases as we transition to the new format.

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

Combined Costpoint 8.1.15 and 8.1.16 MRs

Calendar Year-End Regulatory updates and defects for Costpoint 8.1.15 and 8.1.16 have been combined into one maintenance release: the 8.1.16 MR.

For Costpoint Business Intelligence, updates to both versions have also been compiled into one deployment file. Use **DeltekCostpointBusinessIntelligence8115.exe** to apply the latest updates to Costpoint BI.

deltek_cap_sql.properties File for Oracle Users

The **deltek_cap_sql.properties** file for Oracle is now available. Use this file to configure the Costpoint Authentication Provider (CAP) in Costpoint BI.

Enhancements

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

Regulatory

Federal

2022 Forms 1094-C/1095-C Updates

Costpoint now allows you to print 1094-C and 1095-C data on forms that will be accepted by the IRS for tax year 2022 filing. The 2022 PDF template file for 1094-C and 1095-C forms are now available in Costpoint, which will let you create PDF files with data for the calendar year 2022. You can then use the PDF files to print the forms on plain paper.

Print 1094-Cs (HBR1094C)

The Print 1094-Cs application now uses the 2022 1094-C PDF template file if you print for calendar year 2022.

Print 1094-C Forms with Data on Plain Paper

Use the Print 1094-Cs screen to print 1094-C forms on plain paper instead of on pre-printed forms.

To print 1094-C forms on plain paper:

1. On the Print 1094-Cs screen, enter the selection ranges for the calendar year and taxable entity for the 1094-C Form.
2. In the **Options** group box, select the options for the report.

Field	Description
1094-C Type	Select Regular , Correcting , or Correcting 1095-Cs .
PDF File Options	<p>Select One PDF File for all Taxable Entities if you want to create only one PDF file for all 1094-C forms.</p> <p>The generated PDF file will have the following file name format: 1094C_<Calendar Year>_<Timestamp>.pdf</p> <p>Select One PDF File per Taxable Entity if you want to create a separate PDF file for each taxable entity so that only one 1094-C form is included in each file.</p> <p>The generated PDF file will have the following file name format: <Taxable Entity>_1094C_<Calendar Year>_<Timestamp>.pdf</p>
File Location	Enter the location where to save the PDF files.

3. Select the **Print 1094-C Forms with Data** option from the Action Menu to generate 1094-C PDFs with data.

The application saves the forms as PDF files in the specified file location.

4. In a PDF reader, open the generated PDF files and review the data on the 1094-C forms.

5. Load your printer with the appropriate plain paper and print the forms using black ink. You must configure your printer settings to print the forms in actual size. If you opt to print the form on plain paper, you must use 8.5 x 11-inch plain paper.

Print 1095-Cs (HBR1095C)

The Print 1095-Cs screen provides the following updates:

- The application uses the 2022 1095-C PDF template file if you print for calendar year 2022.
- You now have the option to create the PDF file in portrait mode.
- You now have the following new option on the screen:

Field	Description
Exclude Instructions for Recipient (Portrait Orientation)	Select this checkbox if you want to exclude the Instructions to Recipient page in the PDF file. This option is applicable only for the portrait orientation of Form 1095-C. You must not select this checkbox if you are printing the PDF file to plain paper. However, you must select this checkbox if you are printing to a portrait blank stock with backer (with instructions at the back).

- The application now allocates two lines for the names in Part III – Covered Individuals.
- The existing **Options for Printing Forms with User Data** group box is now the **Options for Printing Forms with Data** group box.

Print 1095-C Forms with Data on Blank Stock or Plain Paper

Use the Print 1095-Cs screen to print 1095-C forms on blank stock or plain paper instead of on pre-printed forms.

To print 1095-C forms on blank stock/plain paper:

1. On the Print 1095-Cs screen, enter the selection ranges for the 1095-C Form.
 - Employee Name/Employee ID/Social Security Number/Home Organization/Mailing Address State/Mailing Address Postal Code/Locator Code
 - Taxable Entities
 - Calendar Year
2. In the **Report Options** group box, select the options for the report.
 - 1095-C Type
 - Orientation
 - 1st Sort
 - 2nd Sort
 - Print Test Pattern
 - Truncate Payee Identification Numbers (Employer and Employees)
3. In the Options for Printing Forms with Data, select the applicable options and enter the PDF file location.

Field	Description
PDF File Options	<p>Select One PDF File for all Employees if you want to create only one PDF file for all 1095-C forms. The generated PDF file will have the following file name format: 1095C_<Calendar Year>_<Timestamp>.pdf</p> <p>Select One PDF File per Employee if you want to create a separate PDF file for each employee so that only one 1095-C form is included in each file. The generated PDF file will have the following file name format: <Employee ID>_1095C_<Calendar Year>_<Timestamp>.pdf</p>
File Location	Enter the location where to save the PDF files.
Exclude Instructions for Recipient (Portrait Orientation)	Select this checkbox if you want to exclude the Instructions to Recipient page in the PDF file. This option is applicable only for the portrait orientation of Form 1095-C. You must not select this checkbox if you are printing the PDF file to plain paper. However, you must select this checkbox if you are printing to a portrait blank stock with backer (with instructions at the back).

4. Select the **Print 1095-C Forms with Data** option from the Action Menu to generate 1095-C PDFs with data.

The application saves the forms as PDF files in the specified file location.

5. In a PDF reader, open the generated PDF files and review the data on the 1094-C forms.
6. Load your printer with the appropriate plain paper or blank stock and print the forms using black ink. You must configure your printer settings to print the forms in actual size. If you opt to print the form on plain paper, you must use 8.5 x 11-inch plain paper.

2023 Federal Income Tax Withholding

The 2023 federal income tax withholding methods were released by the Internal Revenue Service.

- The percentage method's tax brackets were adjusted.
- The annual additional amount, if the nonresident alien employee was first paid wages before 2020 and has not submitted a Form W-4 for 2020 or later, increases from 8,650 to \$9,550.
- The annual additional amount, if the nonresident alien employee has submitted a Form W-4 for 2020 or later or was first paid wages in 2020 or later, increases from 12,950 to \$13,850.
- The deductions in the W-4 Deductions Worksheet were updated.
 - **Head of Household:** 20,800
 - **Married:** 27,700
 - **Single:** 13,850
- The ACA Safe Harbor Affordability Rate is **0.0912** (9.12%) for 2023.

To support the federal requirements, Costpoint adds updates to the following screens:

- Manage Federal Tax Tables
- Manage Federal Taxes

- Compute Payroll

Attention: For more information, refer to the following:

- **Federal Income Tax Withholding:** <https://www.irs.gov/pub/irs-pdf/p15t.pdf>
- **W-4 Amounts:** <https://www.irs.gov/forms-pubs/about-form-w-4>
- **Safe Harbor Affordability Rate:** <https://www.irs.gov/pub/irs-drop/rp-22-34.pdf>

Note: This update requires patch dbc_810_11039.

State

2023 SUTA Wage Base

This Costpoint release adds tax table records effective January 1, 2023 on the Manage State Taxes screen for states where the unemployment-taxable wage base has been updated for tax year 2023.

Alaska

The unemployment-taxable wage base increases from \$45,200 to **\$47,100**.

Arkansas

The unemployment-taxable wage base decreases from \$10,000 to **\$7,000**.

Hawaii

The unemployment-taxable wage base increases from \$51,600 to **\$56,700**.

Idaho

The unemployment-taxable wage base increases from \$46,500 to **\$49,900**.

Kentucky

The unemployment-taxable wage base increases from \$10,800 to **\$11,100**.

Minnesota

The unemployment-taxable wage base increases from \$38,000 to **\$40,000**.

Montana

The unemployment-taxable wage base increases from \$38,100 to **\$40,500**.

New Mexico

The unemployment-taxable wage base increases from \$28,700 to **\$30,100**.

North Dakota

The unemployment-taxable wage base is to rise from \$38,400 to **\$40,800**.

Oklahoma

The unemployment-taxable wage base increases from \$24,800 to **\$25,700**.

Oregon

The unemployment-taxable wage base is to rise from \$47,700 to **\$50,900**.

Rhode Island

The unemployment-taxable wage bases will be **\$29,700** for employers assigned the highest tax rate and **\$28,200** for all other employers.

Utah

The unemployment-taxable wage base increases from \$41,600 to **\$44,800**.

Note: These updates require the following patches:

- [dbc_810_11024](#)
- [dbc_810_11026](#)
- [dbc_810_11031](#)
- [dbc_810_11034](#)
- [dbc_810_11039](#)

Colorado 2023 Tax Table Updates

Colorado released 2023 versions of withholding formula and its optional withholding certificate.

The changes to the withholding formula included the lower tax rate and a clarification in the instructions that amounts of zero entered on Form DR 0004, Colorado Employee Withholding Certificate, must still be used in the formula. In the November elections, voters approved a proposition to reduce the state income tax rate to 4.4% from 4.55%.

The standard amounts used in the formula increases if an employee either does not submit Form DR 0004 or leaves Line 2 of the form blank:

- For employees with a federal filing status of married filing jointly or qualifying widow or widower, the standard amount increases from \$8,000 to **\$9,000**.
- For all other filing statuses, the standard amount rises to from \$4,000 to \$4,500.

To support the state updates, this release adds records on the following screens:

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

Attention: For more information: refer to the following:

- **DR 0004:** <https://tax.colorado.gov/sites/tax/files/documents/DR%200004.pdf>
- **DR 1098 Colorado Withholding Worksheet for Employers:**
<https://tax.colorado.gov/sites/tax/files/documents/DR%201098.pdf>

Note: This update requires patch dbc_810_11031.

State Withholding (ESMSTATEWH)

The labels of existing options in the **Colorado Annual Withholding Allowance** group box were updated to the following:

- Use the federal standard deduction amount for my filing status (\$9,000 if married filing jointly or qualifying widow(er); or \$4,500 otherwise)
- Specify an annual withholding allowance amount based on the Standard Allowance table or Worksheet 1 from the DR 0004 Colorado Employee Withholding Certificate (If you want a greater amount withheld, you may enter a smaller amount than either calculation, including zero.)

Note: This update is also reflected on the State Withholding tab of the Life Events/New Hires screen.

Indiana W-2 Reporting Box 20 Format

The Indiana Department of Revenue issued an information bulletin that provides employers with the necessary information to indicate correctly the Indiana adjusted gross income tax withheld and county income tax withheld on the state copy of Federal Form W-2, Wage, and Tax Statement.

All Indiana state and county income tax withheld by an employer must be designated in the appropriate boxes of the state copy of the W-2 form.

- Box 15 – abbreviation IN
- Box 16 – amount of wages subject to Indiana income tax
- Box 17 – amount of Indiana income tax withheld
- Box 18 – amount of wages subject to county income tax
- Box 19 – amount of county income tax withheld
- Box 20 – enter C and the adopting county code in box 20

Prior to this release, if the local tax was a county income tax in the State of Indiana, Box 20 was automatically populated with the description of the locality code when you ran the Create W-2 Table application. The description may not necessarily be the county code number in the correct format.

To support the state requirement, Costpoint updates the following applications to ensure that the county code assigned to Indiana is correct.

Manage Local Taxes (PRMLTI)

The Manage Local Taxes screen now ensures that the county code assigned to Indiana is a valid two-digit number.

Enhancements

- The screen provides a validation to ensure that the county code assigned to Indiana is a valid two-digit number. A valid Indiana county code is within **01** to **92**.
- If you enter an Indiana county code that is a non-zero one-digit number, the application adds a leading zero.

Create W-2 Table (PRPCW2)

The Create W-2 Table screen can now populate Box 20 in W-2s with Indiana's county code in the required format.

If the local tax is a county income tax linked to the State of Indiana, the application retrieves the county number from the **County Code (IN)** field on the Manage Local Taxes screen (instead of from the locality name), and then populates Box 20 with the letter C and the 2-digit county number in the following fields:

Application	Field
Manage W-2s	Locality Name (Box 20)
Manage W-2Cs	Previously reported – 20 Locality name
Manage W-2Cs	Correct information – 20 Locality name

Manage W-2s (PRMW2)

The Manage W-2s screen can now populate Box 20 in W-2s with Indiana's county code in the required format.

If the local tax is a county income tax linked to the State of Indiana, the application populates the **Locality Name (Box 20)** field with the letter C and the two-digit county number from the **County Code (IN)** field on the Manage Local Taxes screen. The screen displays a warning message if the **Locality Name (Box 20)** field is blank or not a valid two-digit Indiana County Number in the required format.

Manage W-2Cs (PRMW2C)

The Manage W-2Cs screen now can populate Box 20 in W-2s with Indiana's county code in the required format.

If the local tax is a county income tax linked to the State of Indiana, the application populates the following fields with the letter C and the two-digit county number from the **County Code (IN)** field on the Manage Local Taxes screen:

- Previously reported – 20 Locality name
- Correct information – 20 Locality name

The screen displays a warning message if the **Previously reported – 20 Locality name** field or the **Correct information – 20 Locality name** field is blank or not a valid two-digit Indiana County Number in the required format.

Attention: For more information, refer to *Income Tax Information Bulletin #16*:
<https://www.in.gov/dor/files/reference/ib16.pdf>.

Indiana 2023 Tax Table Updates

Effective on or after January 1, 2023, the state income tax rate decreases from 3.23% to **3.15%**.

To support the state requirement, Costpoint adds updated records to the following screens:

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

Attention: For more information, refer to the Departmental Notice #1 (R40/12-22): <https://www.in.gov/dor/files/dn01.pdf>.

Note: This update requires patch dbc_810_11031.

Iowa 2023 Tax Table Updates

Iowa's 2023 withholding formula and instructions were released with the following updates:

- For 2023 Iowa withholding calculations, federal withholding is no longer subtracted from taxable wages.
- The amounts of the standard deduction (in Step 1), rates, and brackets (in Step 2) have been updated for 2023.

To support the state requirements, Costpoint adds updated records to the following screens:

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

Attention: For more information, refer to the Iowa Withholding Formula For Wages Paid Beginning January 1, 2023: <https://tax.iowa.gov/sites/default/files/2022-11/IAWithholdingFormulaAndInstructionsTY2023.pdf>.

Note: This update requires patch dbc_810_11026.

Maine 2023 Tax Table Updates

Maine released the 2023 withholding methods, which provide the following updates:

- The value of a state allowance increases from \$4,450 to **\$4,700**.
- The maximum standard deduction increases from \$10,100 to **\$11,000** for single employees and from \$23,050 to **\$24,850** for married employees.
- The standard deduction decreases according to a formula for single employees who earn more than **\$91,500** annually, up from \$85,850, or for married employees who earn more than **\$183,050** annually, up from \$171,700.
- The deduction reaches zero when a single employee earns at least **\$166,500** annually, up from \$160,850, or when a married employee earns at least **\$333,050** annually, up from \$321,700.

Enhancements

- The tax brackets used in the percentage method were also adjusted.

To support the state requirements, Costpoint adds updated records to the following screens:

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

Attention: For more information, refer to the *2023 Withholding Tables for Individual Income Tax*: https://www.maine.gov/revenue/sites/maine.gov.revenue/files/inline-files/23_wh_tab_instr.pdf.

Note: This update requires patch dbc_810_11024.

Maryland 2023 Tax Table Updates

Six Maryland counties made changes to their income tax rates for 2023, including two counties that introduced graduated rates.

To support the state changes, Costpoint adds updated records to the following screens:

- Manage State Taxes
- Manage State Tax Tables

Warning: Maryland's 2023 withholding guide was recently released by the state comptroller's office. However, in this release, the rates were still taken from the existing 2022 guide (2022 Withholding Guide: https://marylandtaxes.gov/forms/22_forms/Withholding_Guide.pdf).

The 2023 withholding guide provides the following updates which will take effect in the next Costpoint maintenance release (MR):

- The minimum and maximum standard deduction has increased.
- Anne Arundel County will use the combination of 2.75% and 2.85% tables.
- Frederick County will use the combination of 2.75% and 3.00% tables.

For more information, refer to:

https://marylandtaxes.gov/forms/Tax_Publications/Tax_Facts/Withholding_Tax_Facts/Withholding_Tax_Facts_2023.pdf.

Note: This update requires patch dbc_810_11031.

Allegany County

Allegany County decreased tax rates from 3.05% to **3.03%**.

Note: There are no changes to Allegany County as it will still be using the 3.05% withholding tables.

Anne Arundel County

Anne Arundel County introduced graduated tax brackets. Anne Arundel County, which used a tax rate of 2.81% in 2022, now uses that rate for taxable income of more than \$50,000 in 2023 and uses a 2.7% rate for taxable income of up to \$50,000.

Note: Maryland's recently released 2023 withholding guide added a percentage method corresponding to a 2.75% local tax rate, which means that Anne Arundel County will use the combination of 2.75% and 2.85% tables. This change will be reflected in the next Costpoint MR.

Cecil County

Cecil County decreased tax rates from 3% to **2.8%**.

Note: Cecil County will now use the 2.85% withholding tables.

Frederick County

Frederick County introduced graduated tax brackets. Frederick County used a tax rate of 2.96% in 2022. In 2023, a 2.75% rate applies when an employee earns up to \$100,000 and has a filing status of married filing jointly, head of household, or qualifying widow/widower with dependent child, or when an employee earns up to \$50,000 and has a filing status of single, married filing separately, or dependent. Otherwise, the rate of 2.96% applies.

Note: Maryland's recently released 2023 withholding guide added a percentage method corresponding to a 2.75% local tax rate, which means that Frederick County will use the combination of 2.75% and 3.00% tables. This change will be reflected in the next Costpoint MR.

St. Mary's County

St. Mary's County decreased tax rates from 3.1% to **3%**.

Note: St. Mary's County will now use the 3.00% withholding tables.

Washington County

Washington County decreased tax rates from 3% to **2.95%**.

Note: There are no changes to Washington County as it will still be using the 3.00% withholding tables.

Manage State Tax Withholding Adjustments (PRMSTAC)

The application now allows multiple rows for **Supplemental Tax Rate** type by enabling the **For Annualized Wage Over/Wage Basis** field.

Prior to this update, when you added a second row, you could specify a new rate in the **Other Rate 1** field but you could not specify a different value in the **For Annualized Wage Over/Wage Basis** field since the field was disabled and set to zero.

Note: This update is applicable to all states.

Compute Payroll (PRPCPR)

For bonus payroll processing, the application now retrieves the appropriate **Supplemental Tax Rate 1** value based on the value of the **For Annualized Wage Over/Wage Basis** field if the **Type** is **Supplemental Tax Rate**.

Note: This update is applicable to all states.

Manage Payroll Records (PRMPTF)

For bonus payroll processing, the application now retrieves the appropriate **Supplemental Tax Rate 1** value based on the value of the **For Annualized Wage Over/Wage Basis** field if the **Type** is **Supplemental Tax Rate**.

Note: This update is applicable to all states.

Minnesota 2023 Tax Table Updates

The following are the tax updates for Minnesota effective January 1, 2023:

- In the 2023 computer formula, the value of a state allowance increased from \$4,450 to **\$4,800**.
- The formula's tax brackets were also adjusted, and tax rates continue to range from 5.35% to 9.85%.

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

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

Attention: For more information, refer to the *Withholding Computer Formula*: https://www.revenue.state.mn.us/sites/default/files/2022-11/wh_inst_23_0.pdf.

Note: This update requires patch dbc_810_11026.

Missouri 2023 Tax Table Updates

Missouri's 2023 employer's guide and withholding methods were released with the following updates:

- The withholding formula uses tax rates of zero to 4.95%, instead of the previous range of 1.5% to 5.3%.
- The standard deduction for employees who are married with nonworking spouses increased from \$25,900 to **\$27,700**.

Enhancements

- The standard deduction for heads of households increases from \$19,400 to **\$20,800**.
- The standard deduction for other filing statuses increases from \$12,950 to **\$13,850**.
- The flat tax rate for supplemental payments decreases from 5.3% to **4.95%**.

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

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

Attention: For more information, refer to: https://dor.mo.gov/forms/4282_2023.pdf.

Note: This update requires patch dbc_810_11026.

New Mexico 2023 Tax Table Updates

New Mexico's 2023 withholding methods were released by the state Taxation and Revenue Department.

- The percentage method's tax brackets were adjusted.
- The tax rates continue to range from 1.7% to 5.9%.

To support the state updates, this release adds updated records on the following screens:

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

Attention: For more information, refer to: <https://www.tax.newmexico.gov/businesses/wp-content/uploads/sites/4/2021/03/FYI-104.pdf>.

Note: This update requires patch dbc_810_11039.

New York 2023 Tax Table Updates

The withholding methods for New York state and the city of Yonkers, effective January 1, 2023, were released and the annual tax rate tables used in the exact calculation method (Method II) were adjusted.

To support the state updates, this release adds updated records on the following screens:

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

Attention: For more information, refer to:

- **New York State Withholding:**
https://www.tax.ny.gov/pdf/publications/withholding/nys50_t_nys_123.pdf
- **Yonkers Withholding:**
https://www.tax.ny.gov/pdf/publications/withholding/nys50_t_y_123.pdf

Note: This update requires patch dbc_810_11024.

North Carolina 2023 Tax Table Updates

North Carolina's flat tax rate decreases for 2023. The tax rate for 2023 is **4.75%**, down from 4.99%, which means the rate used for withholding is **4.85%** in 2023, instead of 5.09%.

To support the state updates, this release adds updated records on the following screens:

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

Attention: For more information, refer to: <https://www.ncdor.gov/media/13802/open>.

Note: This update requires patch dbc_810_11034.

Rhode Island 2023 Tax Table Update

Rhode Island's 2023 withholding methods were released by the state taxation division.

- Tax rates used in the withholding methods continue to range from 3.75% to 5.99%, and the brackets used in the percentage method were adjusted.
- The annual wage threshold above which the value of a state allowance is zero increased from \$241,850 to **\$260,550**.

To support the state updates, Costpoint adds updated records to the following screens:

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

Attention: For more information, refer to: https://tax.ri.gov/sites/g/files/xkgbur541/files/2022-12/2023%20Withholding%20Tax%20Booklet_12162022.pdf.

Note: This update requires patch dbc_810_11039.

Vermont 2023 Tax Table Updates

The Department of Taxes of Vermont released the 2023 withholding methods, which include the following updates:

- The value of a state allowance in the withholding methods increased from \$4,500 to **\$4,850** annually.
- The tax brackets used in the percentage method were adjusted.

To support the state requirements, Costpoint adds updated records to the following screens:

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

Attention: For more information, refer to <https://tax.vermont.gov/sites/tax/files/documents/GB-1210-2023.pdf>.

Note: This update requires patch dbc_810_11039.

Time & Expense

Allow Users to Request Leave from the Timesheet Screen

A new button was added to the Timesheet screen that enables you to submit a leave request or enter planned leave without navigating to the Work Schedule/Leave screen. If you are required to request leave, the button name is **Request Time Off**; otherwise, it displays as **New Planned Leave**.

This enhancement is related to a Timesheet improvement initiative described in KB Article [109655](#).

Updates to Charge Code Search

You are now able to search for charge codes by Account Number, Project Code, or Description.

This enhancement is related to a Timesheet improvement initiative described in KB Article [109655](#).

Software Issues Resolved

Descriptions of Software Issues

You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. For the most part, these issues were addressed before this release through hot fixes, and the additional information was developed to help you decide whether or not you needed to install the hot fixes.

When you install this release, you must install all fixes in the release; you cannot choose to install some and not others. Nevertheless, this additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

Accounting

Accounts Payable » Import Vendors

Defect 1741927: You encountered an error when you imported an input file that contained more than 20 vendor records, or an input file that contained more than 40 lines of combined vendor and address records.

As a workaround, break the large input file into multiple smaller files.

Defect 1831879: The **Vendor Approval** status of an existing and previously approved vendor was overwritten to **Not Approved**.

This occurred when:

- The **Requires Approval** checkbox was cleared on the Configure Accounts Payable Settings screen.
- You selected the **Overwrite the existing records** checkbox.
- You imported an input file that contained an existing vendor and a new vendor.

As a workaround, temporarily select the **Requires Approval** checkbox and manually approve the vendor.

Accounts Payable » Manage Purchase Order Vouchers

Defect 1736058: When you entered and posted a purchase order (PO) voucher for an Intracompany Work Assignment (IWA), you encountered the error message "The posting you are attempting is not in balance for Voucher #, This program does not allow unbalanced postings."

Accounts Payable » Print/Create 1099s and Magnetic Media

Defect 1845671: When you printed form 1099-MISC, the mark for box 7 was not printed in the center of the checkbox.

Consolidations » Create Consolidation Entries

Defect 1765411: When you created consolidation entries using new parameters, you encountered the error message "One or more of the exchange rates is not valid. You must enter the exchange rates subtask and select an exchange rate."

As a workaround, save the new parameters first before executing the process.

Admin

System Administration » File Download

Defect 1845558: In File Download, you could not fetch rows when you queried results that begin with a letter.

Defect 1861132: When you queried records on the Download Files from Alternate File Location table window, files that displayed were not filtered based on the query criteria you entered.

This defect affects both Oracle and MSS database users.

System Administration » Import Active Directory ID

Defect 1845500: On the Import Active Directory ID screen, the **Percent Complete** field displayed values over 100%, such as 345% and 695%.

Workflow » Approval Workflow Models

Defect 1850956: Your approval workflow might have been rejected as "case expired" seconds after being approved.

Workflow » Manage Approval Workflow Case Status

Defect 1761657: When you used the **Delegate Pending Activities to User** option to delegate just one Approval Role to another user, all Approval Roles in the workflow were delegated to the specific user.

Framework

Framework

Defect 1816040: When you dragged columns in Table View, the columns stopped at the left-most or right-most visible column and you had to manually move the horizontal bar to make the remaining columns visible to continue dragging the selected column to its desired position.

When you used the Arrange Table Columns dialog box, you could move up only seven rows at a time, and then you had to move the scrollbar up to display the next seven rows to move them again.

Defect 1833278: A system error occurred when you reviewed updates that were created in Offline mode.

Defect 1850912: When you approved pending purchase orders, Costpoint would hang during the second approval.

Runtime » Client

Defect 1837585: You might have received a "You are already logged in" warning message on the Costpoint Login page when you tried to log in to Costpoint.

Installation

MR Installer

Defect 1853306: The Costpoint 8.1 Integration package is now compatible with TIP (QA and/or SFE) version 16.02.02.

Defect 1858773: When you ran the MR Installer, /z"filedynamicdownload=true" did not work when used as a command line parameter.

Materials

Engineering Change Notices » Apply Engineering Change Notices

Defect 1824611: When you entered an engineering change notice (ECN) for a part that was both in Company 1 and 2, the part in Company 2 was updated, but the part in Company 1 was not.

Product Definition » Manage Parts

Defect 1754084: When you cloned a part, the comments in the part was not included in the cloned part.

Production Control » Manage Manufacturing Orders

Defect 1825276: When you changed a manufacturing order (MO) requirement line from Make to Buy, the **Stop Explosion** checkbox did not update on the Reservation Line.

Purchasing » Manage Purchase Orders

Defect 1830760: When you updated the quantity on the purchase order (PO) line and tabbed out or saved the record, the application stalled and validated each line with a check mark. To resolve this, the validation has been changed to improve performance from the user interface (UI).

Defect 1847189: When you changed the cost on the purchase order (PO) line, the total on the PO header and PO Totals subtask were calculated incorrectly. It was only after you saved the PO that the PO lines and total amount were calculated correctly.

Sales Order Entry » Create Invoices

Defect 1725580: When you created an invoice by packing slip ID, you encountered a system error.

Sales Order Entry » Manage Sales Orders

Defect 1823442: When you changed the **Process Components** of a sales order (SO) with part to **Yes**, the SO still had the reservation number even though it was deleted and the View Part Inventory showed a reservation quantity.

Defect 1823450: When you generated a sales order (SO) for for an inventory item and the **Process Components** was set to **Yes**, a reservation was generated for the line item. When a change was made to the SO line, the reservation was deleted from the table, but the reservation ID remained in the SO table and the quantity remained in the reserved quantity of the Inventory table.

People

Benefits » Manage Benefit Packages

Defect 1825366: You were unable to delete a coverage option from a benefit package that did not have dependent data.

Employee » Import Employee Data

Defect 1814727: The estimated annual hours in the employee's salary information record was updated to zero (0) when the field was not included in the import file. This occurred when the Estimated Annual Hours was zero on the Manage Employee Salary Information screen.

Employee Self Service » Benefits Enrollment

Defect 1831222: An error displayed if you entered values to the hundredths place in the **Allocation %** field for contingent beneficiaries. For example, you entered 33.33, 33.33, and 33.4 for three beneficiaries, which was 100% in total.

Defect 1831229: Some of the benefits that the employee confirmed on the Benefits Enrollment screen were not marked as **Confirmed**.

Employee Self Service » Designate Beneficiaries

Defect 1834453: An error displayed if you entered values to the hundredths place in the **Allocation %** field for contingent beneficiaries. For example, you entered 33.33, 33.33, and 33.4 for three beneficiaries, which was 100% in total.

Employee Self Service » Life Events/New Hires

Defect 1821920: Some of the new hire life events that the employee confirmed on the Life Events/New Hires screen were not marked as **Confirmed**.

Defect 1833864: An error displayed if you entered values to the hundredths place in the **Allocation %** field for contingent beneficiaries. For example, you entered 33.33, 33.33, and 33.4 for three beneficiaries, which was 100% in total.

Labor » Apply Weighted Average Rates to Timesheets

Defect 1837489: A fatal error occurred when you processed a timesheet that had a certain combination of pay types (for example, an Overtime pay type together with a Cost-only pay type that is eligible for labor cost recalculations).

Labor » Export Project Manufacturing Data

Defect 1846640: The exported XML file with leave balances contained values with more than two decimal places. For example, 146.51999999999998.

Leave » Manage Leave Periods

Defect 1833134: The application took a long time to query records.

Payroll » Compute Payroll

Defect 1842730: The employee's taxable amount was set incorrectly if:

- The employee used a pay type that was marked as taxable but not subject to withholding.
- The employee had a local tax based on YTD and had already reached the annual limit.

Warning: Costpoint Payroll users must ensure that the **Annual Ceiling Limit** on the Manage Local Taxes screen is set correctly for all local taxes based on YTD. Otherwise, if the **Annual Ceiling Limit** is not set, the local taxable wages will be **0.00**.

Payroll » Create Accounts Payable Vouchers

Defect 1833105: If you use a multi-company database, a critical system error occurred when you attempted to create AP vouchers.

Payroll » Create W-2 Table

Defect 1857545: A system error (PRIMARY KEY constraint) displayed when you ran the Create W-2 Table process. This issue occurred if a record with a Pennsylvania Worksite PSD Code and a record without a Pennsylvania Worksite PSD Code both existed for the same employee with different check dates within a year in the Employee Earnings Local Taxes table.

Note: As an additional fix, an error message in the report file will not be displayed if the employee has no Pennsylvania Worksite PSD Code in the Employee Earnings Local Taxes table or Employee Local Taxes table when the Locality is set up for Box 14.

Payroll » Export Payroll Taxes

Defect 1852227: The Export Payroll Taxes file for the fourth quarter of the year displayed zero (0) for the local values. This issue occurred even though the Earnings and Local Withholding report displayed the correct values for the fourth quarter for all types (gross, tax, and others).

Payroll » Manage W-2Cs

Defect 1744172: If you viewed the screen in landscape mode on a smart phone, the screen layout displayed issues like overlapping fields.

Payroll » Print Bank ACH File Report

Defect 1755076: A system error displayed when you attempted to print the report.

Planning

Administration » Post Install Setup

Defect 1837577: You received "Post-install process is complete." as an error message instead of an informational message.

Administration » Report Table Update Process

Defect 1814344: The Refresh Process has been revised to enable checking and updating of PAG while updating the BI report tables.

New Business Budgeting » Create Project Budget from New Business Budget

Defect 1831783: Staff Escalation was not copied when you created a project budget from a business budget.

Organization Budgeting » Budget Errors

Defect 1850998: You encountered an error running Budget Errors when the value of the ID is more than 12 characters long.

Organization Budgeting » Organization Budgets/Outlooks Mass Utilities

Defect 1768885: The temporary tables for plug calculations were missing.

Planning

Defect 1756229: The Adjustment Period setting in Config returned incorrect values.

Project Budgeting » Earned Value Status Report

Defect 1845583: When you use **ONE** as the Project option, the project lookup has been limited to budget level for ease of use.

Project Budgeting » Project Budgets / EACs

Defect 1823726: When cost pools were not set up for a future fiscal year and you created a budget for that year, Burdened Cost was not calculated for the corresponding pool.

Defect 1827017: The employee rates from the Link PLC Rates to Employee/Vendor were not used in calculation and resulted in incorrect revenues.

Defect 1848134: BUDGET_REV displayed incorrect values because all budgeted revenues, regardless of project version and project ID, were updated during BUD and EAC calculations.

Project Budgeting » Project Status

Defect 1847328: The Timesheet Pending Hours did not display in the Project Status Report.

Project Budgeting » Revenue Breakdown

Defect 1835782: The **Cost Type** drop-down list in the header has been removed so that Revenue Breakdown displays all rows in a drill-down style.

Project Budgeting » Update Project Progress %

Defect 1845579: The project lookup has been limited to budget level for ease of use.

Resource Planning » Budget By Resource

Defect 1831699: When you used **Generic Staff** as the Resource Type, the default Home Org ID did not display in the lookup table.

Defect 1838901: Hours were doubling for committed budgets on the Add/Edit/Delete Assignments subtask.

Defect 1838904: The following error displayed when you tried to copy committed budgets: "Cannot create Budget\EAC 0400.003 at this project level because one exists at a higher level."

Projects

Billing » Calculate Standard Bills

Defect 1828970: Calculate Standard Bills was taking too long to complete processing. This issue affects MSS database users only.

Performance tuning has been conducted by using a dynamic table instead of a regular table for Z_BLPGBILL_WRK4_TEMP to improve processing time.

Billing » Manage Standard Bills

Defect 1731722: When you posted an invoice without a pool number, Costpoint updated the tables correctly. However, in the next invoice that was created and posted, the record without the pool number did not populate as cumulative in the BILLING_EDIT_DETL table. Once the second invoice was posted (which did not include a line with no pool number), the BILLING_SUM table no longer has the record with the blank pool number, causing the BILLING_SUM table not to reconcile with the other billing tables.

As a workaround, you can reverse the invoice in which the pool number was blank. And then, generate the invoice again, and manually correct the pool number in the history record.

Billing » Print Progress Payment Bills

Defect 1841082: This application has been updated to print Form 1443 (Contractor's Request for Progress Payment) in the latest version. To see the current copy of the form, refer to <https://www.gsa.gov/forms-library/contractors-request-progress-payment>.

Cost and Revenue Processing » Process Organization Changes

Defect 1830769: The sum of billed accounts receivable (Billed A/R) amounts created by the journal entry (JE) from Process Organization Changes was greater than the total sum in the GL_POST_SUM table.

Subcontractor Management » Create Subcontractor Invoices

Defect 1765474: You received the following incorrect message on the Manage Purchase Order Vouchers screen: "Error(s) The posting you are attempting is not in balance for Voucher # (). This program does not allow unbalanced postings."

The Create Subcontract Invoices application has been updated to help address this issue. This screen now includes the discount and the line charges in the vendor labor amounts.

Reports & Analytics

[Business Intelligence » Business Intelligence](#)

Defect 1837705: An error occurred when the Labor Utilization Report was generated. This defect affects Oracle users of Costpoint BI.

Defect 1842453: The Employee Information Report displayed multiple rows of salary information for the same employee. This error also affected the incorrect Turnover data on the HR Management Dashboard. A fix has been made to get the latest employee data so as to display the correct information.

Time & Expense

[Configuration » Import Master Data](#)

Defect 1848736: After you imported new MO charges, "MO" was prepended to the UDT02 ID.

[Configuration » Resource Information](#)

Defect 1748875: When you added a deleted record to the resource information, you received an error message that a field was required.

Defect 1840894: The wrong taxable entity was populated when you created a new user account.

[Expense » Expense Authorization](#)

Defect 1824635: When you entered a mileage value in the miles field, you received an error stating it contained an invalid number.

[Expense » Expense Report](#)

Defect 1782430: After you selected a UDT02 charge type in Charge Allocations, the ID was cleared from the UDT02 field, but you were still able to save the record.

Defect 1819041: When you entered two identical meals as an Entertainment expense but did not save prior to entering the second one, you did not receive a duplication error.

Defect 1849034: After the 8.1.14 upgrade, the correct UDT09 (Org) value did not display by default after you selected the charge type.

[Expense » Manage/Approve Expense Reports](#)

Defect 1828446: When you approved an expense report with a blanket expense authorization, the authorization was changed to **Processed** even though it was still open.

[Time » Approve Timesheet Charges](#)

Defect 1830936: When the work assignment results initially displayed, the **Approve** and **Reject** buttons were disabled.

[Time » Manage/Approve Timesheets](#)

Defect 1753618: To approve more than one timesheet at a time, the **Mass Approve** button was added.

Time » Timesheet

Defect 1766857: When you saved a charge favorite with the description set to the project long name, it displayed the short name (project level only) when it auto-loaded in the next period.

Defect 1812625: After you cleared a value from either the UDT01 or UDT10 field and then selected another line, you did not receive the revision validation message. This issue also affected other applications.

Affected Applications	Defect No.
Manage/Approve Timesheets	1812631

Defect 1826082: You were unable to sign a timesheet with a termination date. This issue also affected other applications.

Affected Applications	Defect No.
Manage/Approve Timesheets	1826084

Defect 1845398: You were unable to select and print multiple timesheets. This issue also affected other applications.

Affected Applications	Defect No.
Manage/Approve Timesheets	1845399

Defect 1847761: MO charges were missing from charge lookup after version 8.1.12 or later was installed. This affected both co-deployed and stand-alone installations.

Time » Work Schedule/Leave

Defect 1830933: A user with no rights to edit the daily schedule was still able to edit the Leave column.

Known Issues

The following are known issues in this release.

Unable to Display Barcode in HTML Format

If you run the MO Pick List report via a Chrome or MS Edge web browser, you could not see the barcode in the report. As a workaround, use Mozilla Firefox as web browser or print the MO Pick List report as a PDF.

This issue has been reported to Google.

Failed Execution of Scheduled Reports

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.

Unable to Set BI Reports as Homepage

You cannot set a Costpoint BI report as homepage when its **Run with full interactivity** field is set to **Yes**. As a workaround, set **Run with full interactivity** to **No**.

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.



About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com