Deltek Vision® 7.1

Release Notes

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Overview

Welcome to the Deltek Vision Version 7.1 release. These release notes contain a summary of the following:

- Pre-Installation Information
- Enhancements
- Software Issues Resolved
- Database Changes

Important Note for Customers Upgrading from Vision 6.x

If you are upgrading to Vision 7.1 from a version earlier than Vision 7.0 SP1, you should read the Vision 7.0 SP1, 7.0, 6.2, and any prior relevant release notes to ensure that you understand all the technology, software changes, and enhancements that have been implemented and how these changes may affect you.

You can download the release notes from the Deltek Customer Care Connect site at http://support.deltek.com.

Pre-Installation Information

Please review the contents of this section before you install Deltek Vision 7.1.

See the *Deltek Vision Technical Installation Guide* for instructions on how to download and install the Vision software. You can download this guide from the Deltek Customer Care Connect site at http://support.deltek.com.

Non-Supported Environments

The following are non-supported environments for Vision 7.1:

- Vision does not support using Microsoft Windows® XP, Widows Vista™, or Windows 7 for production server installation.
- Vision is not compatible with Microsoft Windows 95, 98, ME, 2000, or NT® 4.0 as a client or server Operating System.
- Vision no longer supports Microsoft SQL Server™ 2000 or Microsoft SQL Server 2005.
- Vision no longer supports Windows 2000 Server or Windows Server 2003.
- Vision no longer supports Actuate.
- You cannot perform a Single Server deployment on the Microsoft Small Business Server. Only the Vision database tier or report tier can be installed on this server.
- You cannot install any Vision tier on the Microsoft ISA server, or any other software-based firewall (except Windows firewall).
- You cannot install any Deltek Vision tier on any server with Microsoft Terminal Services (Application Mode Only) running. Terminal Services in remote administration is fully supported.
- You cannot install any Vision tier on a Domain Controller.
- You cannot install any Vision tier on any version of Microsoft Exchange Server.
- You cannot install any Vision tier (except Document Management) on any version of SharePoint Server.
- Vision is not compatible with Microsoft Project 2003. Importing and/or exporting to Microsoft Project 2003 from the Planning application will produce an error.
- Platform Virtualization is a new technology that allows multiple operating systems and platforms to run simultaneously as separate virtual machines on a single set of server hardware. See Deltek's Virtualization Statement, available on the Deltek Customer Care Connect site, for limitations of support for virtualized deployments.
- Microsoft's Application Request Routing (ARR) 3.0 is not supported in Windows Server 2012 because at the time of release of Vision 7.1, ARR 3.0 was still in Microsoft Beta.

Technical Considerations

The following are technical considerations for Vision 7.1:

Technical Consideration	Description
Running multiple versions of Vision	Vision 7.1 and earlier versions of Vision cannot be run at the same time on the same Web/Application server.
Microsoft .NET Framework 3.5 SP1	Microsoft .NET Framework 3.5 SP1 must be installed on the following: ▪ All client workstations running Deltek Vision. ▪ The servers hosting the Vision Application and the Process servers.
64-bit processing	Vision supports 64-bit processing for: ▪ All Vision logical tiers (web/application, database, and report tiers) ▪ The client tier (Windows 7, Windows Vista, and Windows XP)
Windows Server versions	Vision supports the following Windows Server versions: ▪ Windows Server 2012 Document Management is **not** supported on Windows Server 2012 because SharePoint 2010 is not yet supported on Windows Server 2012. ▪ Windows Server 2008 R2 SP1 ▪ Windows Server 2008 SP2
SQL 2012 Availability Groups	Although Vision 7.1 supports SQL 2012, it does not yet support SQL 2012 Availability Groups. If you install Vision 7.1 to a SQL Server that is configured with Availability Groups and you add your Vision database to that Availability Group, you may see a **Use Availability Groups** check box on the General tab in Vision Weblink. Do not select this check box. Vision support for SQL 2012 Availability Groups, specifically Read-Only Routing, will be announced at a future date.
Microsoft SQL Server Database Engine and Reporting Services and Analysis Services	Vision supports the following versions of Microsoft SQL Server Database Engine and Reporting Services: ▪ Microsoft SQL Server 2012 SP1 + CU1 ▪ Microsoft SQL Server 2008 R2, SP2 + CU1 ▪ Microsoft SQL Server 2008, SP3 + CU6

Technical Consideration	Description
Microsoft SQL Server Reporting Services	Microsoft SQL Server Reporting Services: ▪ Must be installed and configured before you run the Vision installation. Follow the Microsoft documentation for your installation. ▪ Are supported in Native Mode configuration only. The SharePoint Integrated Mode is not supported.
Microsoft SQL Server Analysis Services	This is supported in Multidimensional Mode only. The Tabular Mode introduced with SQL 2012 is not supported.
Windows Server with IIS	Vision supports: ▪ Windows Server 2012 with IIS 8.0 ▪ Windows Server 2008 with IIS 7.0 ▪ Windows Server 2008 R2 with IIS 7.5
Microsoft Windows	Vision can be run as a client on any of the following: ▪ Microsoft Windows XP (SP3) ▪ Microsoft Windows Vista (SP2) ▪ Microsoft Windows 7 SP1 ▪ Microsoft Windows 8
Microsoft Internet Explorer	Vision can be run with Microsoft Internet Explorer versions 10.0, 9.0, 8.0, and 7.0.
Microsoft Office 2010	▪ Vision supports the 32-bit version of Microsoft Office 2010. ▪ Microsoft Office 2010 is also supported for use with Vision Connect for Microsoft Outlook.
Microsoft Project	Vision is compatible with: ▪ Microsoft Project 2010 ▪ Microsoft Project 2007
Vision Document Management	Vision supports the following for Document Management: ▪ Microsoft SharePoint Server 2010 SP1 ▪ Microsoft SharePoint Foundation Server 2010 SP1 ▪ Microsoft SharePoint Server 2007 SP3 ▪ Microsoft SharePoint Services 3.0 SP3

Technical Consideration	Description
	Document Management is **not** supported on Windows Server 2012.
Vision Connect for Microsoft Outlook	Vision Connect for Microsoft Outlook: ▪ Is **not** supported with Microsoft Windows 8. ▪ Is supported with Microsoft Office 2010.

Important Notes About the Vision Installation

This section provides important information specific to the Vision 7.1 installation.

Microsoft SQL Server Express Edition

Deltek Vision 7.1 supports Microsoft SQL Server Express with Advanced Services.

If you are implementing SQL Server Express Edition, Deltek recommends that you use SQL Server 2012 SP1 Express with Advanced Services as the Database and Report Server for your Vision implementation. The Express Edition with Advanced Services contains the Database Engine and Reporting Services that are required for managing the database and running reports.

Deltek no longer distributes the SQL Express Server installation. You can download the appropriate SQL Server Express edition with Advanced Services that matches your operating system platform (32-bit/x86 or 64-bit/x64) from Microsoft. For example, install the 32-bit/x 86 on a 32/x 86 system only and the 64-bit/x 64 on a 64-bit system only. You cannot mix the operating system types.

For your convenience and to avoid confusion, we have provided the direct links for the SQL Server 2012 SP1 with Advanced Services installation packages. Click the following link to access the download page:

http://www.microsoft.com/en-us/download/details.aspx?id=35579

Use these links for the two downloads:

- 64-bit / x64 Installation for 64-bit Operating Systems:

  http://download.microsoft.com/download/5/2/9/529FEF7B-2EFB-439E-A2D1-A1533227CD69/SQLEXPRADV_x64_ENU.exe (1.9 GB)

- 32-bit / x86 Installation for 32-bit Operating Systems:

  http://download.microsoft.com/download/5/2/9/529FEF7B-2EFB-439E-A2D1-A1533227CD69/SQLEXPRADV_x86_ENU.exe (1.9 GB)

After you install SQL Server Express, Deltek recommends that you download and install the following cumulative update package 1 (CU1) for SQL Server 2012 Service Pack 1 from Microsoft: http://support.microsoft.com/kb/2765331.

The following Microsoft link provides information on prerequisite requirements, release notes, installation guide and other helpful links for performing the SQL Server Express installation of SQL Server: http://technet.microsoft.com/en-us/sqlserver/install

Supported Versions of Microsoft SQL Server

The following versions of Microsoft SQL Server Database Engine and Reporting Services can be used with Vision 7.1:

- **Supported versions**:
  - Microsoft SQL Server 2012 SP1 + CU1 (build 11.00.3321) Standard and Enterprise editions
  - However, SQL Server 2012 is not yet supported for creating Vision custom reports with SQL Server 2012 report writing tools—Report Builder 3.0 and SQL Server Data Tools (formerly called Business Intelligence Development Studio).
  - Microsoft SQL Server 2008 R2 SP2+ CU1 (build 10.50.4260.0)
  - Microsoft SQL Server 2008 SP3 + CU6 (build 10.00.5788.00)
- **Compatible versions**:
  - Microsoft SQL Server 2008, SP3 (build 10.00.5500.00)
  - Microsoft SQL Server 2008 R2 SP1+ CU1 (minimum build required 10.50.2769.0)
  - Microsoft SQL Server 2008, SP2 (minimum build required 10.00.4000.00)

Supported versions are the most current, actively tested technologies used to deploy Vision. Compatible versions are recent technologies that have been previously supported and tested for deploying Vision. However, these are not actively being tested but are believed to be compatible with Vision.

For a full explanation of supported versus compatible versions and a more detailed list of Microsoft SQL Server releases (R), service packs (SP), and cumulative updates (CU) that Vision supports, see the *Deltek Product Support Compatibility Matrix*. You can download this PDF document at the Deltek Customer Care Connect site at http://support.deltek.com.

Windows Server 2008 R2

If you deploy Deltek Vision 7.1 with Windows Server 2008 R2, you must configure the DeltekVisionAppPool Identity (IIS) and the Report Server Windows Username (Report Server tab of Weblink) to be the same domain account. This must also match the domain account profile where your network printers are installed on the Vision web/application server.

Vision Document Management and Microsoft SharePoint Foundation 2010

With the release of Deltek Vision 7.0 and later, SharePoint® Foundation 2010 (SPF) will replace Windows SharePoint Services 3.0 (WSS)—if all operating system prerequisites have been satisfied.

The following list contains important information about SPF and the Vision Document Management installation as it relates to new installations and upgrades:

- SharePoint Foundation 2010 hardware and software requirements can be found here: http://technet.microsoft.com/en-us/library/cc288751.aspx
- SPF requires either Windows Server 2008 x64 or Windows Server 2008 R2 x64 as the operating system for installation.
- If the Vision Document Management installation is run on either Windows Server 2008 x64 or Windows Server 2008 R2 x64, SPF will be the default version of SharePoint installed.
- If the Vision Document Management installation is run on Windows Server 2008 (x86), WSS 3.0 SP2 will be the default version of SharePoint installed.

x64 for the database tier is required by SPF 2010.

The Vision Document Management installation **does not** check to ensure the database prerequisites have been met.

- The SPF installation requires that a number of prerequisite components be installed and it includes an installation program to install these prerequisite components. The Vision Document Management installation will run the Prerequisite Installer and check the log file to validate that it completed successfully.
- Upgrades of Vision Document Management will only upgrade the Deltek-specific files. Upgrades from WSS to SPF are not supported with the installation. Upgrade information from Microsoft can be found here: http://technet.microsoft.com/en-us/sharepoint/ee517215.aspx.

Deltek highly recommends that any upgrades from WSS to SPF be performed **before** the installation of Vision Document Management and that any previous installations of Vision Document Management be uninstalled so that the installation can handle the version of SharePoint correctly as a new installation rather than an upgrade.

For additional information, see the *Deltek Vision Document Management Installation Guide*. You can download this guide (in PDF format) from the Deltek Customer Care Connect site at http://support.deltek.com.

Connect for Microsoft Outlook

New Users are Unable to Install Connect for Microsoft Outlook and Existing Connect for Microsoft Outlook Users are Unable to Synchronize

This section applies if you are upgrading to Connect for Microsoft Outlook 7.1 from an earlier version.

After you upgrade your Vision Web server to Vision 7.1, you must download and install Connect for Microsoft Outlook 7.1 onto your Vision Web server from the Download Software Manager (DSM). If you have multiple Web servers, complete this step for each server.

If you upgrade the Vision software, but do not upgrade the Connect for Microsoft Outlook software, new Connect for Microsoft Outlook users will be unable to install the Connect for Microsoft Outlook client from Vision Utilities. They will receive a “500” error message from the Web server. In addition, existing users will not be able to synchronize because they have the old Connect for Microsoft Outlook version installed.

See the *Deltek Vision 7.0 SP1 Connect for Microsoft Outlook Installation Guide* for specific instructions for performing new and upgrade deployments.

Microsoft SQL Server Reporting Services and Custom Reports

The software requirements for creating Vision custom reports with Microsoft SQL Server Reporting Services have changed in Vision 7.0 and later releases. To create custom Vision reports, use either of the following:

- **Report Builder 2.0** — Report Builder 2.0 is available in Microsoft SQL Server 2008 SP1. See http://blogs.msdn.com/b/sqlrsteamblog/archive/2009/04/07/sql-server-2008-sp1-and-report-builder-update.aspx for more information. Report Builder 1.0 is no longer supported for creating Vision custom reports.

- **Microsoft Business Intelligence Development Studio 2008** (also known as BIDS 2008 or Report Designer 2008) — BIDS 2005 is not supported for creating Vision custom reports.

Copying Template Files

When you create custom reports on your workstation with BIDS 2008, you must copy the .rdl template files to the following location on your workstation:

C:\Program Files\Microsoft Visual Studio 9.0\Common7\IDE\PrivateAssemblies\ProjectItems\ReportProject

instead of this location:

C:\Program Files\Microsoft Visual Studio 8\Common7\IDE\PrivateAssemblies\ProjectItems\ReportProject

Modifying Custom Properties

In BIDS 2008, you can now modify custom properties for a report on the Properties window of the report. In the Properties list, navigate to **CustomProperties**. Click the ellipsis button to open the Custom Properties dialog box. Previously, you had to use the View Code option to modify custom properties.

Custom Reports Created with Microsoft SQL Server Reporting Services 2005

For Vision custom reports that were created with Microsoft SQL Server Reporting Services (SSRS) 2005, you must use BIDS 2008 or Report Builder 2.0 to upgrade the reports to SSRS 2008 before you can use them in Vision 7.0 and later releases.

After you upgrade the reports, you must update report queries to revise any database table names that have changed in Vision 7.0 and later releases.

Vision Table Name Changes that Affect Custom Reports

Table Name in Vision 6.x	Table Name in Vision 7.0
CFGCountry	FW_CFGCountry
CFGCurrency	FW_CFGCurrency
CFGPhoneFormat	FW_CFGPhoneFormat
CFGEnabledCurrencies	FW_CFGEnabledCurrencies
InfoCenterTabHeadings	FW_InfoCenterTabHeadings
ReportPrinters	FW_ReportPrinters

Other Vision 7.0 framework changes that are applied within the report business objects may affect your custom reports after you upgrade, causing them to not work properly. If a custom report does not work properly after you upgrade it to SSRS 2008 and update any renamed database tables, Deltek recommends that you recreate the custom report using Vision 7.0 and BIDS 2008 or Report Designer 2.0.

Consider the following before you recreate a custom report with BIDS 2008 or Report Builder 2.0:

- Do you still need the custom report?
- Are there standard reports in Vision 7.0 that provide the information that you need?

- Is the custom report that you created with BIDS 2005 or Report Builder 1.0 based on a Vision standard report? If so, you can start with a standard Vision report and modify it in BIDS 2008 or Report Builder 2.0 to recreate your custom report.

If you need additional assistance with custom reports, contact the Deltek Consulting Services Group at CustomServices@Deltek.com.

For detailed information and training on how to design a Vision report with BIDS or Report Builder, Deltek University offers report writing classes.

For class offerings, see http://www.deltek.com/services/deltekuniversity.

Specific instructions on upgrading custom reports created with SSRS 2005 in BIDS 2008 and Report Builder 2.0 are included in the *Deltek Vision 7.0 Custom Reports and Microsoft SQL Server Reporting Services Guide*.

Custom Invoice Templates and Other Custom Forms Created with Microsoft SQL Server Reporting Services 2005

You must use BIDS 2008 to upgrade custom invoice templates and other custom reports used for Deltek forms (such as Purchase Order forms, Purchase Requisition forms, and Request for Price Quotes) that were created with SSRS 2005. You must upgrade them before you can use them in Vision 7.0 and later releases.

The information in the previous section titled "**Custom Reports Created with Microsoft SQL Server Reporting Services 2005**" also applies for invoice templates and other custom Deltek forms. Refer to that section for information on how to upgrade invoice templates and other custom forms.

Known Issues with the Vision 7.1 Installation

- In certain circumstances, the databases.enc entries for the Report Server Configuration tab are not being filled in. Please check your database entries using Weblink, and test the database and Report Server configurations to ensure that they are accurate.
- If you are upgrading from a 6.x version of Vision and you use a Microsoft SQL Server Session State that is located in a database other than your Vision database, see KB article #72573 for additional instructions. During the Vision upgrade process, the SessionState table is renamed. However, if the table is not located in the Vision transaction database, it will not be renamed. You must manually rename the table using the instructions in the KB article.

If you encounter any problems with your installation, contact Deltek's Global Services team at DGSConsultants-PES@deltek.com.

Deploying Vision 7.1 on Client Workstations

The switch to Smart Client technology beginning with Vision 6.0 requires that compiled application code be stored on each user's PC. ClickOnce is the Microsoft technology used to install this code without requiring that IT manually install Vision on each user's machine. The code is downloaded automatically when Vision is opened on the user's PC.

You must manually install .NET 3.5 SP1 on each workstation on which Vision 7.1 will be run.

Each time that you open Vision, the application automatically checks the server for any changes, such as a hot fix or a version upgrade. If no change is detected, Vision opens. If software updates are available (and they have been pushed out by your IT department) the updates are downloaded automatically.

When you open Vision 7.1 for the first time:

1. The Deltek Vision launch page displays. Click **Run** on this page to continue. Vision downloads the files required to open the Login screen.

   The Deltek Vision Login screen then displays.

2. Enter your **Username** and **Password**, select a **Database**, and click **Login**.
3. When you click **Login**, Vision downloads a zip file to your workstation (an Application Downloader dialog box displays during this process). This zip file is extracted into the local ClickOnce cache on your workstation. This is similar to the way temporary Internet files are stored for browser applications. After the zip file is extracted, the Vision application opens and you can start working.

On subsequent logins, assuming no software updates have been received from Deltek, the Vision application opens on your workstation when you log in—no download will be necessary. When Deltek provides a new version of the software, or a hot fix, and your IT administrator installs the new version or hot fix, Vision will detect and download the update automatically when you log in.

Upgrade Considerations

Deltek encourages clients to upgrade to the latest version of Vision because:

- New features are added only to the latest version.
- Except in critical situations, Deltek fixes software issues only in the latest version.
- Deltek support is typically available only for the latest and the next previous versions.
- The latest version incorporates the newest technologies and tools.

Before upgrading, you should first review these release notes and perform a test conversion and test installation of the new version to ensure that your firm's business processes are working properly in the new version.

If you are upgrading to Vision 7.1 from a version earlier than Vision 6.1, see the 6.1 release notes. You can download them (in PDF format) from the Deltek Customer Care Connect site at http://support.deltek.com.

Knowledge Center article 66930 provides a list of all the 7.x documentation.

Deltek's Global Services team is available to support you as you plan for this upgrade. We offer both technical and custom services to ensure the best possible Deltek experience. Contact DGSConsultants-PES@deltek.com.

Custom Programming

Before you upgrade to Vision 7.1:

- Review all existing custom work at least eight weeks prior to your intended go-live date.
- Compare your custom work to the new functionality provided in this release.
- If this new version possesses the functionality contained in your custom work, these custom programs may no longer be needed. If the functionality contained in your custom work is not provided in this release, you must ensure the custom work remains intact through the upgrade process.
- Identify any hot fixes or patches that you plan to deploy with your Vision 7.1 upgrade. Ensure that, following the hot fix or patch deployment, you retain all custom functionality.
- Deltek strongly recommends that when you upgrade, you first deploy an instance of Vision 7.1 in your test environment. This allows for functional User Acceptance Testing (UAT) to ensure that all mission-critical custom features are still available to the user community. Typical deployments call for a 30–45 day test period before upgrading into your production environment.

Deltek's Technical Services team is available to support you as you plan for this upgrade. We offer both technical and custom services, ensuring the best possible Deltek experience. Contact DGSCONSULTANTS-PES@Deltek.com.

Custom Programming and Custom Reports

If you are upgrading to Vision 7.1 from a version earlier than Vision 6.0, and you have developed custom programming and/or reports in the earlier versions of Vision:

- All existing custom programming developed prior to the Vision 6.0 release must be rewritten in Smart Client.
- If you have developed custom reports using the Actuate e.Report Designer, you must recreate those reports using Microsoft SQL Reporting Services. Because the SQL Reporting Services report designers are much more intuitive than Actuate, you may decide to develop new versions of your custom reports on your own. Or, you can contact Deltek for assistance.

Custom Database Objects

If you have created any custom objects on your existing Vision database (including custom tables and custom triggers), you must review these objects before you upgrade to Vision 7.0 or later versions. If you have created custom triggers, you must turn them off before you begin the upgrade process, because they might cause the upgrade to fail.

Vision Screen Designer

Screen design changes applied in versions prior to Vision 6.0—using the Vision Screen Designer—may not display correctly in Vision 7.0 and later versions because Vision now uses different font and field sizes than those used in previous releases. Therefore, you should review any screens that you previously changed using the Vision Screen Designer and modify them as needed.

Known Issues in Vision 7.1

Microsoft SQL Server Reporting Services (SSRS) 2008 R2 and Billing Invoices

If you use Deltek Vision 7.1 with Microsoft SQL Server Reporting Services (SSRS) 2008 R2, your billing invoices will print with extra space in the header when one or both of the following occur:

- The top margins for an invoice are expanded.
- An invoice is configured to have the header start on the second page. This is common when a logo or image is included in the header starting on page two.

This is a known issue with Microsoft SSRS 2008 R2. If you plan to upgrade to Microsoft SSRS 2008 R2, please carefully review your invoice templates, and wherever possible, reduce the top margins using the Vision Invoice Template Editor to prevent the extra space issue from occurring.

Downgrading to an earlier SQL Server version is not a recommended solution because SQL Server 2008 R2 resolved an issue with the summing of calculated field amounts on the total lines within reports and invoices.

IMPORTANT NOTE for Existing Vision Performance Management (DSP) Customers:

If you upgrade your existing Vision installation to Vision 7.1 and you have a Performance Canvas URL specified in Weblink, you will receive an HTTP 500 error when you load the Vision dashboard. This is a known issue that will be resolved with the first Vision 7.1 hot fix.

If you have not yet upgraded to 7.1, remove the Performance Canvas URL from all of your database entries using the Vision Weblink utility before you upgrade to Vision 7.1. This prevents you from receiving the HTTP 500 error.

If you have already upgraded to 7.1, you must recreate your databases.enc file using the following steps:

1. Ensure that you have all of the information available to recreate your database entries, including server names, URLs, user names and password, and other configuration settings. We recommended that you take screenshots of all available databases and tabs.
2. Use Internet Information Services (Administrative Tools) to stop Internet Information Services.
3. In Windows Explorer, browse to the Vision installation directory, and rename the databases.enc file to databases.old.
4. Launch the Vision Weblink utility on the server, and re-enter all of your database and configuration information.

7.1 Online Help

The online help in Vision 7.1 is the help from 7.0 SP1. The Help is being entirely rewritten using a robust new tool that will allow Deltek to update the Help constantly to provide you with the most current and accurate information. The new help system will be easier to navigate and use.

To access the help topics that have been updated and added for the new features in 7.1, see the **DeltekVision71EnhancementsOnlineHelp.pdf** file. You can link to this PDF from the first page of the online help, in either of two ways:

- Click **Help » Contents** from the top of the Vision screen.

- If you are already in the help system, navigate to the first page, “Welcome to the Deltek Vision Help System.”

The PDF is also available on the Deltek Customer Care site from DSM (Download Software Manager) or in Knowledge Base article 74449.

Google Chrome Frame and the Vision Online Help

If you have Microsoft Windows XP, Internet Explorer 8 (IE8), and Google Chrome Frame installed on a workstation, you will not be able to view the Help that displays in a popup window when you click a popup link within a Vision Help topic. To work around this issue, you can uninstall Chrome Frame. This allows the popup windows to display correctly in Help. However, if you also use Deltek Kona, then when you uninstall Chrome Frame, you must install Google Chrome in order to access Kona.

For Additional Information

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Customer Care Connect site provides:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes

For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In**.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

The following is a complete list of documentation that is available for the Deltek Vision 7.1 release.

Annual Guides

Starting with the 7.1 release, some of the Vision guides such as the Concepts guide and Implementation guide and the Quick Reference Cards (QRCs) will be updated and published only once a year at the end of the year instead with each release. The title page of these annual guides will refer to 7.x instead of a specific version. The information in these guides will apply to the current release at the time that the guides are published. The current release will also be noted on the title page of the guide. Any software changes made after the annual guides are published will be included in the next annual update.

Because this is being implemented in the middle of the year, the annual guides will be published with the 7.1 release, and their content will apply only for the 7.0 SP1 release. When the guides are republished at the end of the year, they will include the 7.1 content.

Vision 7.1 Documentation	
Deltek Vision Getting Started and Concepts Guides	
Deltek Vision Getting Started Guide	This guide contains information about the Vision Web interface and all the Vision applications, with tips for navigating through the system, using the dashboard, and finding and opening records.
Deltek Vision Concepts Guide	This guide describes the concepts underlying the basic accounting, project control, and customer relationship management (CRM) functions of the Vision application.
Deltek Vision Installation and Implementation Guides	
Deltek Vision Technical Installation Guide	This guide contains detailed instructions for installing all the technical components of Vision, including the servers, the database, and the application itself.
Deltek Vision Advanced Technical Administration Guide	This guide provides IT staff and system administrators with instructions for installing and configuring advanced technical components of Vision.
Deploying Deltek Vision at a Hosting Provider	This guide contains instructions for deploying Deltek Vision at a hosting provider.
Deltek Vision Implementation Guide	This guide contains information about configuring and setting up Vision applications and features.
Deltek Vision Migration Guides	
Deltek Advantage to Deltek Vision Migration Guide	This guide contains information about migrating from Advantage to Vision, including the steps in the migration process and an overview of Vision features.
Deltek FMS to Deltek Vision	This guide contains information about migrating from FMS to

Vision 7.1 Documentation	
Migration Guide	Vision, including the steps in the migration process, discussions of the key migration decisions, and procedures for verifying the converted data.
Deltek Sema4 to Deltek Vision Migration Guide	This guide contains information about migrating from Sema4 to Vision, including the steps in the migration process and an overview of Vision features.
Deltek Vision Quick Reference Cards	
Deltek Vision Quick Reference Cards	Quick reference cards provide snapshots of specific business processes or Vision forms, with tips for entering data and using application toolbars. The following quick reference cards are available: ▪ Accounts Payable (Create a Voucher from a Purchase Order) ▪ Create Client from Vendor Utility ▪ Dashboard ▪ Expense Report ▪ Navigation Tree Designer ▪ Project Planning ▪ Purchasing (Create a Standard Purchase Order) ▪ Resource Management (Generic Resource Assignments and Resource Utilization) ▪ Screen Designer ▪ SF330 Proposals ▪ Template Based E-mails ▪ Timesheet ▪ User Options ▪ Visualization
Deltek Vision Document Management Guide	
Deltek Vision Document Management Installation Guide	This guide contains detailed information on the necessary prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.
Deltek Vision Interface to Microsoft Project	
Deltek Vision Interface to Microsoft Project 2010	This guide describes how the manual scheduling feature in Microsoft Project 2010 impacts the two-way interface between Deltek Vision and Microsoft Project 2010.
Deltek Vision Performance Management Guides (Analysis Cubes and Performance Dashboards)	
Deltek Vision Installation Guide	This guide provides instructions on how to install and configure the

Vision 7.1 Documentation	
for Performance Management (Analysis Cubes and Performance Dashboards)	following components of the Deltek Vision Performance Management module: ▪ Analysis Cubes ▪ Performance Management Dashboards
Deltek Vision Performance Management Content and Functionality Overview	This guide provides an overview of Vision Performance Management functionality and the pre-built visualizations that are included with it.
Tableau Server 8.0 Administrator Guide	This administrator guide, produced by Tableau Software, Inc., is a complete reference for handling administrative tasks on Tableau Server. Use Tableau Server and Tableau Desktop, along with Vision Analysis Cubes and Microsoft SQL Server Analysis Services components, to create role-based graphical performance dashboards.
Deltek Vision Reporting Guides	
Deltek Vision Custom Reports and Microsoft® SQL Server Reporting Services	This guide provides instructions to create, deliver, and generate Vision custom reports with Microsoft SQL Server Reporting Services and its report writing tools.
Deltek Vision Microsoft SQL Server Reporting Services Licensing FAQ	This guide explains the Microsoft SQL Server Reporting Services licensing implications for Vision.
Deltek Vision Connect for Microsoft Outlook Guides	
Deltek Vision Connect for Microsoft Outlook Installation Guide	This guide contains an overview of Vision Connect for Microsoft Outlook, as well as technical installation, setup, and maintenance information.
Deltek Vision Customizing Configuration Settings for Connect for Microsoft Outlook	**This guide was formerly named *Deltek Vision Connect for Microsoft Outlook Presets Configuration Guide*.** The guide is intended for system administrators, IT staff, or custom developers. It provides instructions on how to create presets to: configure default behavior for converting Microsoft Outlook contacts; control the display of the Synchronization Control Panel when issues occur during synchronization; and implement default and custom synchronization filters.
Deltek Vision Connect for Microsoft Outlook Frequently Asked Questions	This document contains frequently asked questions (FAQs) on topics regarding deployment, customization, environment, usage, and functionality.
Deltek VisionXtend Guide	
Deltek VisionXtend Web Services and APIs for Deltek Vision	This guide explains how to use the Deltek VisionXtend platform to integrate Vision with other applications, access web services, implement data validation routines, and establish workflow procedures using the Microsoft .NET Framework.

Vision 7.1 Documentation	
Deletk VisionXtend Testing the Vision Web APIs / Web Services	This guide provides basic information about testing Vision APIs using soapUI.
Deltek Vision Project Connect Guides	
Deltek Vision Project Connect Installation and Administration Guide	This guide contains detailed information on installing and administering Project Connect for integrating Microsoft Project with Deltek Vision.
Deltek Vision Project Connect User's Guide for Microsoft Project 2010	This guide contains information for integrating Microsoft Project 2010 with Deltek Vision.
Deltek Vision Project Connect User's Guide for Microsoft Project 2007	This guide contains information for integrating Microsoft Project 2007 with Deltek Vision.
Deltek Vision Navigator Guides	
Deltek Vision Navigator Version 1.5 Release Notes for Vision Versions 7.0 SP1and 7.1	These release notes contain a summary of the installation requirements, enhancements, and software issues resolved in Vision Navigator.
Deltek Vision Navigator Version 1.5 Installation Guide for Vision Versions 7.0 SP1 and 7.1	This document describes the server prerequisites, client requirements, and installation information for Deltek Vision Navigator.
Deltek Vision Navigator Version 1.5 Integration Guide for Vision Versions 7.0 SP1 and 7.1	This guide contains details on how the Vision application integrates with Deltek Vision Navigator and provides descriptions of the various changes to the Vision online help. Refer to the topics within this guide for the most current information.
Deltek Vision Navigator Version 1.5 Frequently Asked Questions for Vision Versions 7.0 SP1 and 7.1	This document contains frequently asked questions about general product details on the use and configuration of the Deltek Vision Navigator product.

Adding Custom Notes to a Guide or to These Release Notes

If you would like to add custom notes to a guide or these release notes that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it here free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at the far right.
2. In the **Annotations** pane that displays, click **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.

Deltek recommends that you save the document to a slightly different filename so as to keep the original file from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

Enhancements

This section includes summaries of the new enhancements included in this release.

Adobe InDesign Merge Templates

You can now create Vision merge templates with Adobe InDesign as an alternative to creating merge templates with Microsoft Word. Merge templates are used to create merged documents in the Vision Info Centers and in Custom Proposals. Merge templates created with InDesign give you more flexibility with formatting and structuring a merged document.

Prerequisites

The following are required before you can use Adobe InDesign to create Vision merge templates and generate merged documents:

- You must have InDesign installed on your workstation.
- InDesign versions CS5.5 (7.5) and later are supported for Vision. InDesign via the Creative Cloud solution in not yet supported.

  If you use InDesign CS6, you must install InDesign on the same drive as your Windows Users directory on your workstation. If they are not located in the same directory, you cannot create or edit Vision InDesign templates. You will receive a message that InDesign has never been run as an administrator, and InDesign will not open. This issue does not occur with InDesign CS5.5.
- InDesign must be included in the Windows registry on your workstation in order for it to work with Vision. For more information, see the "Create the Adobe InDesign Registry Entry" help topic in the **DeltekVision7.1Enhancements-OnlineHelp.pdf** file.

  You can link to this PDF from the first page of the online help, in either of two ways:

  - Click **Help » Contents** from the top of the Vision screen.
  - If you are already in the help system, navigate to the first page, "Welcome to the Deltek Vision Help System."

  The PDF is also available on the Deltek Customer Care site from DSM (Download Software Manager) or in Knowledge Base article 74449.
- You must enable Microsoft SQL Server FILESTREAM because InDesign merge templates are uploaded and saved to Vision using FILESTREAM technology. See the Advanced Technical Installation Guide for instructions on enabling FILESTREAM.

Creating Merge Templates

Configuration » General » Merge Templates

You create merge templates with InDesign when InDesign is launched automatically from within Vision Merge Templates Configuration (**Configuration » General » Merge Templates**). In the same step that you add the merge template to the Vision database, you also create the merge template (an InDesign .indt file). This allows the Vision database tables and fields to be available within InDesign.

Importing InDesign Merge Templates

You can also import InDesign merge templates into Vision that were created outside of Vision using the **Import Adobe InDesign Template** option when you click **Add** on the **Merge Templates grid** on the Merge Templates form in Merge Templates Configuration.

Sample InDesign Merge Templates

You can download sample InDesign merge templates from the Deltek Customer Care Connect site. See Knowledge Base article # 73879. Use these samples to see what InDesign templates look like as you learn how to create InDesign merge templates. You can also import sample merge templates in **Configuration » General » Merge Templates**, and then use them to create other merge templates.

Using InDesign Merge Templates to Generate a Merged Document

Info Centers

On an Info Center form, when you click the **Merge** icon on the toolbar to create a merged document, the **Merge Templates** grid in the Merging dialog box form now displays a **Type** column that indicates whether a merge template was created with Word or InDesign.

Custom Proposals

In Custom Proposals, when you click the **Sections** icon on the toolbar to set up sections and their merge templates, the Templates Lookup dialog box that opens when you click the lookup icon in the **Merge Templates** column in the Configure Sections dialog box now includes both Word .rtf files and InDesign .indt files.

Billing Invoice Approvals

Invoice Approvals is a new optional feature that requires Billing invoices to be approved before they are accepted and posted.

This feature allows you to efficiently move draft invoices through the submittal, rejection, approval, and acceptance stages to produce final invoices. Electronic alerts are sent automatically to the appropriate employees to notify them that the next action in the approval process is ready for them to complete. You can enter approval comments for invoices that can be shared easily with others.

Configuration

You turn on the Invoice Approvals feature on the Miscellaneous tab in **Configuration » Billing » General**. If you have multiple companies in Vision, you must turn on and set up the Invoice Approvals feature for each company.

After you turn on the feature, you complete the following configuration:

- Set up invoice approval processes in **Configuration » Billing » Invoice Approval Process**.

  You specify:

  - Who, within a project (project manager, principal, and so on), can approve and reject submitted invoices.
  - Who will receive alerts when invoices are submitted, approved, rejected, and unsubmitted.

  - How and when alerts are delivered, and the message in the alerts.
- Specify in a project's billing terms (on the Misc tab) whether or not a project will use invoice approvals and which invoice approval process it will use.
- On the General tab of the Project Info Center, enter the person who is responsible for creating the Billing invoices for a project in the new **Biller** field.

  If you currently use the Vision Screen Designer, you may need to adjust the location of the **Biller** field to fit the screen that you designed.
- As needed, you can specify on the General tab in User Options a delegate to approve invoices in your absence if you are an invoice approver.

You can use the Search and Replace utility (in **Utilities » Advanced Utilities**) to easily enable invoice approvals, update the invoice approval process, and enter the biller for a group of projects.

Processing

The following menu items have been added to the Billing menu to support the Invoice Approvals feature:

- **Invoice Approvals** – Use this program to review multiple invoices at a time and approve or reject them.
- **Interactive Approvals** – Use this program to review and approve or reject individual invoices, one at a time.

To move invoices through the approval process, you:

- Submit invoices for approval in Interactive Billing or Batch Billing.
- Preview invoices, review comments, review transaction detail that is associated with submitted invoices, and update percent completes in Interactive Approvals or Invoice Approvals.
- Approve or reject invoices in Interactive Approvals or Invoice Approvals.
- Final accept invoices in Interactive Billing or Batch Billing after they are approved.

Reports

The Invoice Approval Report provides an audit trail of comments and the current approval status of invoices that go through an approval process.

Configuration

General Tab of Plan Settings

If you use Vision Navigator, the General tab of Plan Settings was updated to allow you to set the defaults for various plan settings in Navigator when the Resource Planning module is in use. Refer to the *Navigator* section of these release notes for further information.

Dashboard Formatting—Use Flat Dashboard Styling

The General tab of User Options has a new **Use flat dashboard styling** check box that allows you to switch the Dashboard format to a flat style. This style includes a different style of graphics and color selections for the header bar, but you must log out and back into to Vision for your changes to take effect.

Exchange Rates

Exchange rate fields in Vision now have 10 decimal places instead of 6.

Expiration Dates for Vision Modules

Depending on your Vision software license type, each Vision module may have an expiration date. After you enter a password for a module in **Configuration » Module Activation**, the **Expiration** column displays either of the following:

- **n/a** — This displays if you have an unlimited license for the module. An unlimited license has no expiration date.
- ***<date>*** — This is the expiration date for the module.

License Expiration Reminder

A reminder email will be sent to your Vision help desk email address if you entered one in the **Default Help Desk** field on the Email tab in Vision **General » System Settings**. Also, on the Email tab, you must enter the address of your email server. Vision users with an administrator type security role will also receive a reminder message when they log on to Vision.

Frequency of the Reminder

The expiration reminder email or message for administrators is sent or displayed 14, 10, 7, 5, 4, 3, 2, and 1 day before the expiration date.

You also receive a reminder 30 days before your license expires if the license is a temporary license that provides more than 30 days of software use.

What Happens When Your License Expires

When the license for a module has expired, the following occur:

- In Vision Configuration » Module Activation, the License column on the Module Activation form displays Expired for the expired module.
- The menu item for the module does not display in the Vision Navigation menu.
- The module does not display anywhere in Vision Security » Roles.

How to Renew an Expired License

Contact your Deltek account manager to renew the license for a module.

Export to Text Feature Supports SEPA XML File Formats

The Vision Export to Text feature, which allows you to create text (.txt) files for Accounts Payable and Employee Expenses payments, now supports the Single Euro Payments Area (SEPA) .xml file format that is commonly used in the Netherlands.

The following new items have been added to Vision to support the new SEPA feature:

Area of the Software	New Items

Area of the Software	New Items
Banks Configuration	• On the Bank Codes tab, **SEPA** has been added to the drop-down list in the **Export to Text Format** field. • A new SEPA File Format tab has been added to the Bank Codes form.
Employee Info Center	The Accounting tab has a new **SEPA** section with two new fields—**IBAN** and **BIC**—for the employee's bank account.
Vendor Info Center	The Accounting tab has a new **SEPA** section with two new fields—**IBAN** and **BIC**—for the vendor's bank account.
Accounts Payable Payment Processing and Employee Expense Payment Processing	On the Check Printing and Numbering form in Accounts Payable Payment Processing and Employee Expense Payment Processing, when you click the **Export to Text** button for a bank making the SEPA payments, a dialog box displays to allow you to create the SEPA export file. You can save or open the file, which is an .xml file.

Grid Export to Microsoft Excel in .XLSX Format

In previous versions, when you exported the contents of grids to Excel, the export process created an .XLS file. However, that file format had an upper limit of 65,000 grid rows. To avoid that limitation, the export process now creates the Excel file in the .XLSX format.

As a result of this change, you cannot open the export file with older versions of Excel that are not compatible with the .XLSX format. You must have Excel 2007 or Excel 2010. (Though Vision no longer supports Microsoft Office 2003, you may also be able to open .XLSX files with Excel 2003 if you have installed the Microsoft Office Compatibility Pack.)

Kona

If you are using the Deltek Kona application, the following features are available within Vision.

User Options

The Misc tab of Vision User Options includes **Kona Username** and **Kona Password** fields. Use these fields to record your Kona username and password. This allows you to open Kona directly from within the Vision application.

If your Kona credentials are not entered in User Options, you must enter your Kona credentials when you launch the Vision application using the Kona global icon and the Info Center functionality described below.

Kona Global Icon

A Kona icon 

displays on the toolbar of Vision's main screen. Click this icon to open the Kona application directly from within Vision. If the current project is associated with a Kona space, the associated Kona space opens automatically.

Info Centers

The General tabs of the Project and Opportunities Info Centers now include a **Kona Space** option. Use this option to associate a Kona space with the selected project or opportunity. The Kona space's image displays. You can select the space to open Kona directly from within Vision.

Navigator

If you use Vision Navigator, the following updates apply to your Vision application.

Toolbar

The Navigator icon 

displays on the toolbar of Vision's main screen. Click this icon to open the Vision Navigator application from within Vision. If the current project is associated with a Navigator plan, the plan opens automatically in Navigator. If Navigator is not installed or configured, an error message displays.

Configuration

The General tab of Plan Settings has been updated to allow you to set the defaults for various plan settings for Consultant Planning in Navigator when the Resource Planning module is in use. These consultant settings are **Enable Planning tabs/Consultants** and **Consultant Plan Level**. **Consultant Plan Level** is a new field and is only used by Navigator.

On the Rates tab of Plan Settings, the **Calculate Consultant Billing Amounts**, **Consultant Rate Method**, **Rate Table**, and **Multiplier** options are now also the defaults for Navigator. With the exception of **Consultant Plan Level**, all of these default settings for Consultants are used by both Project Planning and Navigator. **Consultant Plan Level** is only used by Navigator.

When the Resource Planning module is not in use, new fields were added to Plan Settings for Consultant Planning in Navigator. These new fields include **Enable Consultants Planning**, **Consultants Plan Level**, **Consultant Rates: Calculate Consultant Billing Amounts**, **Rate Method**, **Rate Table**, and **Multiplier**.

Security

A new Navigator tab was added to Security Roles Configuration (**Configuration » Security » Roles**). This tab allows a system administrator to configure a role's access rights to the Vision Navigator application. This includes the ability to log in to Navigator and to access the Project Management and Employee workspaces and their various features.

In addition, this tab provides the ability to define record level access for Navigator projects and plans. Use the **Record Level View** and **Record Level Update** fields to access lookups that enable you to build queries that grant or restrict different levels of access for Navigator projects and plans.

When you install Vision 7.1, this tab is automatically configured to grant each role the same access rights to Navigator that the role had before the installation.

Performance Management

Performance Management Dashboards

For those who purchase Vision Performance Management (VPM), Vision 7.1 adds a completely redesigned suite of sample performance dashboards. Performance dashboards are business intelligence tools that executives and managers use to view and interact with critical organizational performance data using a variety of graphical representations of that data.

The sample performance dashboards provide out-of-the-box visualizations of your Vision Analysis Cubes data. However, you are not limited to the sample dashboards. VPM also includes a new dashboard authoring tool from Tableau Software that enables you to modify the sample dashboards or to create and deploy dashboards that you design yourself.

Sample Performance Dashboards

The 38 sample performance dashboards provided in Vision 7.1 are divided into sets that are designed for the following specific management and responsibility roles in your firm:

- Business development manager
- Executive
- Finance
- Organization manager
- Principal
- Project manager
- Resource manager

Many of the dashboards include automatically applied filters so that when you display them, the charts and tables only present data that is relevant to you. For example, if you display one of the organization manager dashboards, the dashboard, by default, only includes data for the organization to which you are assigned in Vision. And all of the sample performance dashboards offer multiple options for filtering and drilling into the data.

While you can use the sample performance dashboards as they are, they are also valuable as examples of the capabilities of performance dashboards and as starting points for building your own dashboards.

Dashboard Access

Vision users can add published performance dashboards—both sample dashboards and dashboards that you create—as Web dashparts to their Vision Dashboard, or they can display them from Vision Reporting in the standard Preview window.

You can also make the dashboards available to users from outside Vision, through a browser, for example, or on supported mobile devices.

To support collaboration, all of the dashboards offer options for saving, sharing, and distributing key views of the data.

Dashboard Authoring

Those in your firm who are interested in exploring your Vision Analysis Cubes data in new ways can use Tableau Desktop to design and build their own dashboards. Tableau Desktop is an extremely flexible and intuitive authoring tool, ideal for trying out innovative approaches to data analysis. The dashboards created with Tableau Desktop can be strictly for the author's own use, or they can be published and made available to others who use VPM. Your VPM license includes full access to Tableau Desktop for any number of users.

Additional Changes to Support the Performance Dashboards

To support the new performance dashboards, some additional changes to existing Vision applications were necessary.

Resource Kit: New Performance Management Tab

To support the new performance dashboards in Vision Performance Management, a Performance Management subtab has been added to the Database tab in the Vision Resource Kit. Use the options on that tab to do the following:

- Specify configuration settings for Tableau Server.
- Select one or two organization levels by which you want to filter the performance dashboards that are designed to be filtered by organization.
- Publish Tableau workbooks that contain new or updated performance management dashboards.
- Apply the Vision Analysis Cubes KPIs to the template workbook so they are available as calculated members in new workbooks that you create based on the template.
- Export Vision users so you can import them into Tableau Server to set up dashboard access and security for Vision Performance Management users.

Analysis Cubes Configuration: Option to Restore Required Configuration Settings

The sample performance dashboards in Vision Performance Management require that the Analysis Cubes include a specific set of dimensions, measures, and KPIs. If one of those required data items has been removed from the Analysis Cubes, you may receive errors when you try to publish or display the sample dashboards or your custom dashboards that are based on those sample dashboards.

If you receive an error when you publish or display a dashboard, and the message indicates that required data is missing from the Analysis Cubes, click **Restore Required Configuration** on the toolbar on the Analysis Cubes form (**Configuration » General » Analysis Cubes**) to restore all of the dimensions, measures, and KPIs that the performance dashboards need. You must also reprocess the Analysis Cubes to apply the updated configuration.

> This option is available only if you have activated the Performance Management edition of the module. If you have only activated the Performance Management Analysis Cubes edition, it is not displayed.

System Labels: Reminder to Reprocess Analysis Cubes after Changes

When you change a system label on the Label tab of the General System Settings form (**Configuration » General » System Settings**), Vision now displays a warning that you may receive errors when you display the sample performance dashboards if you do not also use the Resource Kit to apply the updated labels to the Analysis Cubes and republish all of the performance dashboards that access those Analysis Cubes.

This message only displays if the Performance Management edition of Vision Performance Management is activated. It is not displayed if the Performance Management Analysis Cubes edition is activated or if neither edition of Vision Performance Management is activated.

Vision Dashboard: Removal of Dashparts for Old Performance Dashboards

If you implemented the performance dashboards in earlier versions of Vision, the upgrade process for Vision 7.1 removes all Web dashparts that were created to display those old performance dashboards on the Vision Dashboard.

Photo Upload

The Project Info Center toolbar and the Opportunity Info Center toolbar now include a  **Photo** button. Click this button to access the Photo Upload dialog box, and add a photo to a project or opportunity record.

Project Info Center List View—Populated with Phase and Task Records

The following additions have been implemented in Vision to allow you to populate the List View in the Project Info Center with phase and task records (work breakdown structure (WBS) level 2 and 3).

Advanced Project Lookup Dialog Box in the Project Info Center

This applies for the Advanced Project Lookup dialog box only in the Project Info Center.

On the Advanced Project Lookup dialog box use the **Display** field to select whether to populate the List View or Detail View of the Project Info Center with project, phase, task, or all records.

The search results list at the bottom of the dialog box now displays phases or phases and tasks depending what you selected in the **Display** field before you clicked the **Search** button.

When you click the **Select All** button or select some of the records in the search results list and then click the **Select** button, the List View or Detailed View is populated with the records that you selected.

List View in the Project Info Center

The **Projects** grid in the List View of the Project Info Center now includes the following additional columns by default: **Phase Name** and **Task Name**. You can removed these using the **Select Fields** option on the **Projects** grid toolbar.

You can manually add the **Phase** (phase number) and **Task** (task number) columns to the **Projects** grid using the **Select Fields** option on the **Projects** grid toolbar.

Report Administration: Option to Delete Archived Reports

Vision automatically deletes archived reports based on the number of archive hours specified when each archived report is generated. Now, however, you can also use the Report Administration utility (**Utilities » Report Administration**) to delete archived reports.

The grid under **Report Archives** on the Database Cleanup tab lists all archived reports that currently exist in Vision. Displayed for each report are

- Username of the person who created the archived report
- Type of report
- Report name
- Date the archived report was created
- Date and time that Vision will automatically remove the archived report

You can use the **Report Archives That Are Older Than This Number of Days** field to restrict the list to the older archived reports. To delete an archived report, select the grid row for the report and click **Delete**.

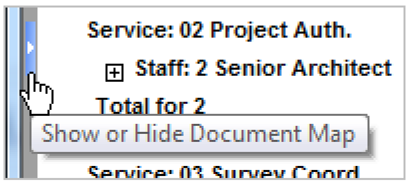
This addition to the Report Administration utility is also useful as a way to monitor, in one location, the system-wide accumulation of archived reports. Before, you had to display the list of archived reports for each report type individually in Vision Reporting.

Reporting

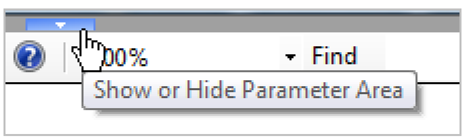
Preview Window Updated

Deltek upgraded the software underlying the report preview window. For the most part, the new version functions exactly the same as the prior one, but a few differences exist:

- This upgrade resolves some HTML display defects in the earlier version.
- How you display the document map has changed. Now you click the bar on the left edge of the Preview window to display the document map.

  Click the similar bar on the right edge of the document map pane to hide the document map.
- How you display the parameter area has changed. Now you click the bar on the top edge of the Preview window toolbar to display the parameter area.

  Click the similar bar at the bottom edge of the parameter area to hide the parameter area.

Roles Summary Report

For Vision Navigator users, the Roles Summary report now includes a **Navigator** option in the **Report Sections to Include** group box.

Turn HTML Formatting On or Off for Report Memo Fields

If you include a column for a memo field on a report and you do not want to apply HTML formatting (bold, underlining, colors, and so on) to the contents of the column based on the formatting applied when the text was originally entered in each memo field, you can turn off the HTML formatting for that report column using the **HTML** grid column on the Columns tab of the report's Options dialog box. If you clear the check box in that grid column, the report displays the text without any special formatting. You may want to do this if, for example, the formatting was applied inconsistently during data entry or the formatting is unsatisfactory for some other reason.

For reports that do not have the option to select report columns, you can use the new **HTML Formatting** check box on the Layout tab of the report's Options dialog box to turn off or on HTML formatting for all memo fields on the report.

Tax Analysis

The Tax Analysis report was updated to support the ability to run on Vendor Selection criteria.

Web Dashpart

The Web dashpart includes a new **Hide Toolbar** option to hide the Reporting toolbar on the web dashpart. This is useful for providing extra space on reports that contain graphs. You must reload the Dashboard for the change to take effect.

Security Configuration

Password Policies

The Password Policies feature is now separate from the Users application. Use Password Policies Security to establish policies that dictate the criteria for acceptable Vision passwords. These policies apply when users change their own passwords, which they can do after the initial log in. These policies do not apply to the **Password** field on the Users tab.

Roles

The Roles application of Vision Security Configuration was updated as follows:

General Tab

The General tab includes a **Force User to Reset Password at Next Login** option that forces the user to reset their password the next time they log in. When this option is selected, the following occurs:

- The Vision Welcome screen displays with an active Change Password dialog box.
- The **Cancel** and **Exit** buttons are disabled.

The user must complete the fields on the Change Password dialog box and click **OK**. The password is reset and the **Force User to Reset Password at Next Login** option is no longer selected upon logging in.

Navigator Tab

A new Navigator tab was added to Vision Roles in Vision 7.1. When you install Vision 7.1, this tab is automatically configured to grant each role the same access rights to Navigator that the role had before the installation.

Record Access Tab

The Record Access tab includes the following new options:

- **Allow modification of Disable Login user setting in Users when read-only access —** Select this option to give users in this role access to modify the enable/disable login user setting when they only have read-only access to the Users application.
- **Allow modification of Passwords in Users when read-only access —** Select this option to give users in this role access to modify user passwords even if they only have read-only access to the Users application.

Users

Vision Security Configuration now includes a Users application. This feature functions like an Info Center, and allows you to create, update, and manage user information in one location. The feature includes the following tabs:

- General tab — Use this tab to create a username for an employee, assign the user to a security role, force a user to change their password at a specific time, and set up default report settings for the user. You cannot exceed the number of users that you are licensed to set up.

- Generate Users tab — Use this tab to create Vision users from employee records in the Employee Info Center. This is helpful when you need to create many users at one time. You cannot exceed the number of users that your firm is licensed to set up.

Transaction Auto Numbering

The new Transaction Auto Numbering tab in **Configuration » Accounting » System Settings** allows you to set up auto numbering for your Vision transactions. When auto numbering is enabled, Vision automatically generates a reference number for each transaction. These reference numbers can be sequential as you add transactions to your database, and you can define the structure of these identification numbers to match your firm's business requirements.

Auto numbers can be set up by company and/or by bank. When autonumbers are in use and you create a new record, **[**AUTONUMBER**]** displays in the following field types for the record: **Reference** or **Check.**

Transaction Document Management (TDM)

Transaction Document Management (TDM) is a new feature that allows you to attach documents in support of accounts payable vouchers and employee expense reports. You can select individual documents for each transaction or choose to have a document apply to all lines in an accounts payable voucher or employee expense report. Supported file types include image files, .pdfs, Microsoft Word documents, and Microsoft Excel spreadsheets. These supporting documents are then integrated with the Vision billing system and are exposed and available as a part of the invoicing process.

TDM Configuration

TDM uses FILESTREAM functionality, a native Microsoft SQL Server feature, to store supporting documents. TDM is configured through the Microsoft SQL Server configuration and is enabled in the Vision Weblink Utility by selecting the **Enable Transactional Document Management** option. See the Advanced Technical Installation Guide for instructions on enabling FILESTREAM.

Vision also includes a new Files Administration utility where you can search for and view the supporting documents that were uploaded for transactions and confirm that the files between the Vision and FILESTREAM databases are synchronized.

Utilities

The Search and Replace Advanced Utility was updated to remove the CA.Type field from the Available Change list.

Vision Login Password/User ID Reminder

The Vision login dialog box includes a Password and User ID reminder option. Select this option to reset your Vision password or receive a reminder of your User ID in the event that they are forgotten.

Weblink Utility

Database List View Tab

The Database Grid View tab has been renamed. It is now the Database List View tab.

The **Up** and **Down** toolbar options for the grid on this tab have been renamed to **Move Up** and **Move Down**. Use these buttons to control the order of the databases listed in the grid. This order can control the order of the databases in the drop-down list in Deltek Vision Login dialog box, but only if you complete the additional steps to modify the web.config file. For instructions on how to modify this file, see the help topic titled “Modify the Web.config File to Add the Vision Database Sort Order.” If you do not modify the web.config file, the order of the databases in the drop-down list in the Deltek Vision Login dialog box is alphabetical by database description.

Document Management Tab

To provide a more logical organization of Weblink options, Deltek added a new Document Management tab and moved the **Document Management** options from the System Settings tab to the new tab.

General Tab

SaaS / Hosted Instance Check Box

When you select the **SaaS / Hosted Instance** check box in the **Configuration** section on the General tab, the **Number of days to retain audit history** field in the Info Center Audit Trail section on the Audit Trail tab in **Configuration » General » System Settings**, allows a value of only 30 or less.

Software Issues Resolved Since Vision 7.0 SP1

This section includes summaries of the software issues resolved since the Vision 7.0 SP1 release. For summaries of the software issues that were resolved in the 7.0 SP1 hot fixes since the 7.0 SP1 General Availability release, see "Appendix A: Vision 7.0 SP1 Hot-Fixed ." These 7.0 SP1 hot-fixed items are also fixed in 7.1.

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.

Accounting

Accounts Payable

Vendor Review

Deltek Defect Tracking Number: 341661

Description: On the Vouchers tab in Vendor Review, tax amounts were omitted from the amounts in the voucher **Amount** and **Balance** columns after you change the payment currency on the Voucher Details dialog box.

Customers Impacted: This defect applies to Vision 7. 0 and later releases.

Workaround Before Fix: Unpost the Accounts Payable voucher file in Vision. Before you unpost it, make sure that the payment currency is the same as when it was originally posted.

Additional Notes: None.

Intercompany Billing

Deltek Defect Tracking Number: 257616

Description: Vision did not generate an intercompany invoice when the net amount in the billing currency was zero but the underlying functional currency amount was non-zero. The missing subledger AR entry caused an out-of-balance condition.

Customers Impacted: This issue applies to Vision 6.1 SP3 and later versions.

Workaround Before Fix: In Intercompany Billing, process the transaction postings that net to zero separately.

Additional Notes: None.

Deltek Defect Tracking Number: 257617

Description: When an Intercompany billing invoice amount was non-zero and the underlying functional amount should have been zero, the functional amount was not zero.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround: In Intercompany Billing, process the transaction postings that net to zero separately, so that the “net zero” case does not occur.

Additional Notes: None.

Void Check

Deltek Defect Tracking Number: 368477

Description: When a posting contained checks and EFT payments and the EFTs were cleared in Bank Reconciliation, the checks did not display in Void Check Processing.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: Temporarily unclear the EFT in Bank Reconciliation. Void the check, and then clear the EFT again in Bank Reconciliation.

Additional Notes: None.

Architecture

Deltek Defect Tracking Number: 365314

Description: When you attempted to use an SSL termination device, you received a connection refused error on port 443 (SSL) and were unable to run reports. The existing Vision architecture was sending SSL requests to the report server, which does not have an SSL certificate installed.

Customers Impacted: This defect applies to Vision 6.1 SP4 and later defects.

Workaround Before Fix: None.

Additional Notes: None.

Billing

Deltek Defect Tracking Number: 341829

Description: Using the Vision Text Editor to edit the Description in Billing Terms resulted in an unwanted space on the associated invoice. This occurred when pressing the Enter key, which added unwanted <p> </p> HTML tags.

Customers Impacted: This issue applies to Vision 7.0 SP1 and later.

Workaround Before Fix: Copy and paste the description into Notepad, and the delete the description from Billing Terms. Save Billing Terms. and then use the Edit button and paste or type the description back in (do not press Enter).

Additional Notes: If you use the Text Editor and do not press Enter, you will not have an issue. When you press Enter, the <p> </p> html tags get added and cause the space on the invoice. (If you delete the carriage return these paragraph tags remain.)

Interactive Billing

Deltek Defect Tracking Number: 367989

Description: An error occurred when you previewed invoices from Japanese currency projects (that have zero decimal places) if the rate required rounding.

Customers Impacted: This defect applies to Vision 6.2 SP2 and later versions.

Workaround Before Fix: Modify the billing rate table to not use precision that would need rounding to the whole number. For example, if you change the rate of 9983.9 to 9984, that would fix the problem.

Additional Notes: None.

Deltek Defect Tracking Number: 260592

Description: If you used a font other than the default font (Arial) and you sent invoices directly to the printer rather than previewing them and printing from the preview window, the print quality was blurry.

Customers Impacted: This defect applies to Vision 6.2 SP2 and later versions.

Workaround Before Fix: Preview the invoice and then print it from the preview window.

Additional Notes: None.

Calendar

Activities

Deltek Defect Tracking Number: 369471

Description: When you created a new activity and attached a PDF file from the Deltek database to email to employees, when you clicked **Send**, you received an error.

Customers Impacted: This defect affects Vision Essentials -- SaaS 7.0 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Activity Manager

Deltek Defect Tracking Number: 365048

Description: When you set up a monthly recurring activity, you received the following error "You have chosen a recurring pattern that does not fit the start date."

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Connect for Microsoft Outlook

Deltek Defect Tracking Number: 263062

Description: User-defined memo fields (**Type** = **Memo**) prevented Connect for Microsoft Outlook from synchronizing.

Customers Impacted: This defect applies to Vision 6.2 SP2 and later Connect for Microsoft Outlook users.

Workaround Before Fix: None.

Additional Notes: None.

Configuration

General

Alerts

Deltek Defect Tracking Number: **256624**

Description: When you entered an alert with special characters such as a tilde (~), the special character did not display correctly in email notifications that were sent for the alert.

Customers Impacted: This defect applies to Vision 6.1 SP4 and later.

Workaround Before Fix: None.

Additional Notes: None.

Organization

Individual

Deltek Defect Tracking Number: 364318

Description: In **Configuration » Organization » Individual**, the labels on the Gains and Losses tab were missing.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Security

Deltek Defect Tracking Number: 367584

Description: You were unable to select multiple employees in the User Lookup dialog box that opens from the following location:

- Click **Configuration » Security » Roles**, and open the Record Access tab.
- In the **Activity Access** section, select **Use Query** in the **Record Level View** field.
- In the unlabeled field to the right of the **Record Level View** field, click the **Find** icon to open the Activities Filter dialog box.
- In the **View by Association** grid, click the **Find** icon in the **Records** column for the **Created By** type of association.
- In the User Lookup dialog box, select **Employee** in the **Search By** field, and then click the **Search** button.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: Manually type the list of employees.

Additional Notes: None.

Human Resources

Export to PayChex

Deltek Defect Tracking Number: 366218

Description: The process for exporting timesheets to ADP was slow.

Customers Impacted: This issue applies to Vision 6.1 SP4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Payroll

Quarterly Processing

Deltek Defect Tracking Number: 366385

Description: The quarterly processing file for New York was missing the count of 1E records in Record 1F-Final Record in **Human Resources » Payroll » Quarterly Processing.**

Customers Impacted: This issue applies to Vision 7.1 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Info Center

Deltek Defect Tracking Number: 367545

Description: User-defined fields were missing from reports when a user-defined field had a value list, but it was not limited to that list and the value of items in that list had been changed.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: Delete and re-add the user-defined field code and description so the value matches the code. Or, switch to Grid View and download to Excel.

Additional Notes: None.

Login

Deltek Defect Tracking Number: 369164

Description: An employee who was terminated was able to gain access to the Vision using the **Forgot your password or User ID?** link on the Deltek Vision Login screen.

Customers Impacted: This defect applies to Vision 7.1 Beta.

Workaround Before Fix: None.

Additional Notes: None.

Purchasing

Deltek Defect Tracking Number: 366238

Description: The Purchase Order would not close when the **First Name** or **Last Name** fields were blank. Vision displayed a **Required field, data must be entered** message.

Customers Impacted: This issue applies to Vision 6.1 SP4 and later versions.

Workaround Before Fix: Fill in the **First Name** fields.

Additional Notes: None.

Reporting

Deltek Defect Tracking Number: 372130

Description: When you scheduled reports to run on the process server, the reports failed with this error: "The given key was not present in the dictionary."

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Deltek Defect Tracking Number: 266624

Description: Customers experienced assorted printing problems, including the following: option to print multiple copies not working, blurry text, lines printing thicker than normal and slow printing on WANs.

Customers Impacted: This defect applies to Vision 6.2 SP2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Accounts Receivable

Deltek Defect Tracking Number: 351479

Description: The statement date on the AR Statement report was printing higher on the page.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: Increase the top margin on the Layout tab. This moves the report contents down.

Additional Notes: None.

Billing

Deltek Defect Tracking Number: 255260

Description: The Fee Remaining report displayed incorrect amounts in **Previous Fee** and **Fee Amount** if the project's fee billing terms were not set up at the WBS level to which the fee amounts were posted and if **Enter Prior Fee Billing in Billing Terms** was not selected on the Miscellaneous tab of the Billing Setup form so that previous fee amounts could be entered on the Billing Terms form.

Customers Impacted: This defect applies to Vision 5.0 and later versions.

Workaround Before Fix: Select **Enter Prior Fee Billing in Billing Terms**, and enter previous fee amounts on the Billing Terms form.

Additional Notes: None.

Deltek Defect Tracking Number: 255491

Description: If the billing terms for a project included a labor category table override, the Unbilled Detail report correctly listed the override billing rates but listed the original labor categories rather than the override labor categories in the **Labor Category** column.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Project

Deltek Defect Tracking Number: 263995

Description: The Project Summary report had incorrect JTD Revenue amounts when you ran the report without expenses.

Customers Impacted: This defect applies to Vision 5.1 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Resource Kit

Deltek Defect Tracking Number: 373506

Description: You received an error in the Vision Resource Kit when you opened the Web/Application Server tab, opened the Web.config sub-tab, and then changed **AllowFileSave** to **Y**.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: Manually make the change in the web.config file.

Additional Notes: None.

Utilities

Advanced Utilities

Data Import

Deltek Defect Tracking Number: 368282

Description: When you processed an A/P Voucher Data Entry import, you received the following error: "Invalid match of Currency Code EUR and Bank Account Currency Code USD."

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: Enter the data directly into Vision.

Additional Notes: None.

VisionXtend

Deltek Defect Tracking Number: 374001

Description: If you use VisionXtend APIs, custom fields were not returned with the GetSchema method.

Customers Impacted: This defect applies to VisionXtend 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Database Changes

This section lists the database table and column changes included in this release.

Deltek creates the Vision Data Dictionary using a live connection to the Vision development database. Tables and columns related to features in a future release may appear in the data dictionary without descriptions, or with the phrase **reserved for future use**. You may also see tables and columns for features you have not purchased or enabled.

New Tables

Table Name
APDocuments
APDocumentsDetail
CFGBillApprovalActionAlerts
CFGBillApprovalActions
CFGBillApprovalData
CFGBillApprovalDescriptions
CFGMobileCRMSections
CFGTransAutoNumBank
CFGTransAutoNumType
EKDocuments
EKDocumentsDetail
FW_Files
FW_PerfManagement
FW_Workbook
FW_WorkbookFilters
InvoiceApproval
InvoiceApprovalActions
LedgerDocuments
OpportunityPhoto

Removed Tables

Table Name
CFGDSPURL

Renamed Tables

No tables were renamed.

New Columns Added to Existing Tables

Table Name	Column Name	DataType
apppChecks	SEPAIndicator	varchar(1)
BIED	InvoiceStatus	varchar(1)
BILD	InvoiceStatus	varchar(1)
BT	InvoiceApprovalCode	varchar(10)
BT	InvoiceApprovalEnabled	varchar(1) NOT NULL
BT	SupportDocuments	varchar(1) NOT NULL
BT	SupportDocumentsAP	varchar(1) NOT NULL
BT	SupportDocumentsBkupRpt	varchar(1) NOT NULL default ('Y')
BT	SupportDocumentsEX	varchar(1) NOT NULL
BTDefaults	InvoiceApprovalCode	varchar(10)
BTDefaults	InvoiceApprovalEnabled	varchar(1) NOT NULL
BTDefaults	SupportDocuments	varchar(1) NOT NULL
BTDefaults	SupportDocumentsAP	varchar(1) NOT NULL
BTDefaults	SupportDocumentsBkupRpt	varchar(1) NOT NULL default ('Y')
BTDefaults	SupportDocumentsEX	varchar(1) NOT NULL
CFGBanks	SEPAAddress1	varchar(70)
CFGBanks	SEPAAddress2	varchar(70)

Table Name	Column Name	DataType
CFGBanks	SEPABIC	varchar(35)
CFGBanks	SEPACountry	varchar(2)
CFGBanks	SEPAFormat	int NOT NULL default (0)
CFGBanks	SEPAIBAN	varchar(35)
CFGBillMain	DefaultInvoiceApprovalCode	varchar(10)
CFGBillMain	InvoiceApprovalEnabled	varchar(1) NOT NULL
CFGEKMain	ShowSeqNumber	varchar(1) NOT NULL default ('N')
CFGResourcePlanning	ConWBSLevel	smallint NOT NULL default (3)
CR	SEPAIndicator	varchar(1)
CR	StatementNumber	varchar(12)
EM	SEPABIC	varchar(35)
EM	SEPAIBAN	varchar(35)
EM	TaxRegistrationNumber	varchar(15)
EMInitiation	SEPABIC	varchar(35)
EMInitiation	SEPAIBAN	varchar(35)
EMInitiation	TaxRegistrationNumber	varchar(15)
exChecks	SEPAIndicator	varchar(1)
FW_CustomNavTreeData	Icon	varchar(255)
ICBillingWK	AmountBillingCurrency	decimal(19,4) NOT NULL default (0)
ICBillingWK	CashBasisSubledgerTrans	varchar(1) NOT NULL default ('N')
ICBillingWK	LabComment	varchar(max)
ICBillingWK	RealizedGainsCreditAccount	varchar(13)

Table Name	Column Name	DataType
ICBillingWK	RealizedGainsCreditWBS1	varchar(30)
ICBillingWK	RealizedGainsCreditWBS2	varchar(7)
ICBillingWK	RealizedGainsCreditWBS3	varchar(7)
ICBillingWK	RealizedGainsDebitAccount	varchar(13)
ICBillingWK	RealizedGainsDebitWBS1	varchar(30)
ICBillingWK	RealizedGainsDebitWBS2	varchar(7)
ICBillingWK	RealizedGainsDebitWBS3	varchar(7)
ICBillingWK	RealizedLossesCreditAccount	varchar(13)
ICBillingWK	RealizedLossesCreditWBS1	varchar(30)
ICBillingWK	RealizedLossesCreditWBS2	varchar(7)
ICBillingWK	RealizedLossesCreditWBS3	varchar(7)
ICBillingWK	RealizedLossesDebitAccount	varchar(13)
ICBillingWK	RealizedLossesDebitWBS1	varchar(30)
ICBillingWK	RealizedLossesDebitWBS2	varchar(7)
ICBillingWK	RealizedLossesDebitWBS3	varchar(7)
ICBillingWK	ReclassAsGainLoss	varchar(1) NOT NULL default ('N')
LD	InvoiceStatus	varchar(1)
LedgerAP	InvoiceStatus	varchar(1)
LedgerAR	InvoiceStatus	varchar(1)
LedgerEX	InvoiceStatus	varchar(1)
LedgerMisc	InvoiceStatus	varchar(1)
MergeTemplates	FileID	uniqueidentifier
MergeTemplates	Type	varchar(1) NOT NULL
Opportunity	KonaSpace	int NOT NULL default (0)

Table Name	Column Name	DataType
PNPlan	ConWBSLevel	smallint NOT NULL default (3)
PR	Biller	varchar(20)
PRDefaults	Biller	varchar(20)
PRTemplate	Biller	varchar(20)
RPPlan	ConWBSLevel	smallint NOT NULL default (3)
SE	AllowChangeDisableLogin	varchar(1) NOT NULL
SE	AllowChangePassword	varchar(1) NOT NULL default ('N')
SE	AllowChangeSupportDocument	varchar(1) NOT NULL default ('N')
SE	NavConsultant	varchar(1) NOT NULL default ('N')
SE	NavDashboard	varchar(1) NOT NULL default ('N')
SE	NavEmpWorkspace	varchar(1) NOT NULL default ('N')
SE	Navigator	varchar(1) NOT NULL default ('N')
SE	NavLabor	varchar(1) NOT NULL default ('N')
SE	NavPlanning	varchar(1) NOT NULL default ('N')
SE	NavPMWorkspace	varchar(1) NOT NULL default ('N')
SE	NavTimesheet	varchar(1) NOT NULL default ('N')
SE	NavUsePlanningAccess	varchar(1) NOT NULL default ('N')
SE	NavUsePlanningUpdate	varchar(1) NOT NULL default ('N')

Table Name	Column Name	DataType
SE	NavUsePlanningView	varchar(1) NOT NULL default ('N')
SE	NavUseProjectAccess	varchar(1) NOT NULL default ('N')
SE	NavUseProjectUpdate	varchar(1) NOT NULL default ('N')
SE	NavUseProjectView	varchar(1) NOT NULL default ('N')
SEUser	DelegateEmployee	varchar(20)
SEUser	DelegateInvoiceApproval	varchar(1) NOT NULL
SEUser	FlatDashboardStyling	varchar(1) NOT NULL default ('N')
SEUser	ForceChangePassword	varchar(1) NOT NULL
VEAccounting	SEPABIC	varchar(35)
VEAccounting	SEPAIBAN	varchar(35)

Changes to Existing Columns

Table Name	Column Name	New DataType	Old DataType
AnalysisCubesCurrencyExchange	Rate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
apDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
apDetail	PaymentExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
apMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
apMaster	PaymentExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL

Table Name	Column Name	New DataType	Old DataType
apppChecksW	ExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
billINMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
billInvMaster	Address1	varchar(250)	varchar(100)
billInvMaster	Addressee	varchar(250)	varchar(100)
cdDetail	CheckNo	varchar(32) NOT NULL	varchar(12) NOT NULL
cdDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
cdMaster	CheckNo	varchar(32) NOT NULL	varchar(12) NOT NULL
cdMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
CFGCurrencyExchange	Rate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
CFGCurrencyExchangePeriod	PeriodAvgRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
CFGCurrencyExchangePeriod	PeriodEndRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
CFGICBillingTerms	ICBillingVoucherOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
CFGSuffixDescriptions	Suffix	varchar(150) NOT NULL	varchar(20) NOT NULL
crDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL

Table Name	Column Name	New DataType	Old DataType
crDetail	RefNo	varchar(32) NOT NULL	varchar(12) NOT NULL
crMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
crMaster	RefNo	varchar(32) NOT NULL	varchar(12) NOT NULL
cvDetail	CheckNo	varchar(32) NOT NULL	varchar(12) NOT NULL
cvDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
cvMaster	CheckNo	varchar(32) NOT NULL	varchar(12) NOT NULL
cvMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
ekDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
ekDetail	PaymentExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
ekMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
ekMaster	PaymentExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
exDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
exDetail	PaymentExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
exMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT

Table Name	Column Name	New DataType	Old DataType
			NULL
exMaster	PaymentExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
ICBillingWK	VoucherOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
inMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
jeDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
jeDetail	RefNo	varchar(32) NOT NULL	varchar(12) NOT NULL
jeMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
jeMaster	RefNo	varchar(32) NOT NULL	varchar(12) NOT NULL
miDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
miMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
POVoucherDetail	PaymentExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
POVoucherMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
POVoucherMaster	PaymentExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
PR	BillingExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT

Table Name	Column Name	New DataType	Old DataType
			NULL
PR	ProjectExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
PRDefaults	BillingExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
PRDefaults	ProjectExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
prDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
prMaster	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
PRTemplate	BillingExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
PRTemplate	ProjectExchangeRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
ReportPresentationCurrency	Rate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
unDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL
upDetail	CurrencyExchangeOverrideRate	decimal(19,10) NOT NULL	decimal(19,6) NOT NULL

Removed Columns

Table Name	Column Name	DataType
ICBillingWK	CashBasisTimePost	varchar(1) NOT NULL default ('N')

Table Name	Column Name	DataType
ICBillingWK	ErrorMsg	varchar(max)

Renamed Columns

No columns were renamed.

New Objects

Object Name	Object Type
GetConCatEmpRole	Function
PM$tabPlanHasNonNavData	Function
PN$ConRate	Function
PN$ExpConMult	Function
PN$tabConRes	Function
PN$tabConTask	Function
AddDefaultFilter	Stored Proc
CreateApproverTable	Stored Proc
PNDelConsultant	Stored Proc
PNSpreadConTPD	Stored Proc
DeleteCFGBillApprovalTrigger	Trigger
InsertCFGBillApprovalTrigger	Trigger
PNSyncOpportunityTrigger	Trigger
PNSyncProjectTrigger	Trigger
UpdateCFGBillApprovalTrigger	Trigger
CFGBillApproval	View

Removed Objects

Object Name	Object Type
CreateDefaultKPI	Stored Proc

Renamed Objects

No objects were renamed.

Appendix A: Vision 7.0 SP1 Hot-Fixed Software Issues Resolved

The following are summaries of the software issues that were resolved in the 7.0 SP1 hot fixes issued after the 7.0 SP1 General Availability release that are also fixed in the 7.1 release.

Software Issues Resolved in Hot Fix 001

Vision

Deltek Defect Tracking Number: 352571

Description: After you upgraded to version 7.0, all previously created user-defined grids now had one blank row. The row could not be deleted.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: None.

Additional Notes: If you had user-defined grids that contained some required fields and you entered a new record that did not need data to be entered in the user-defined grids, the record could not be saved without entering data in the required grid field. You were unable to delete the grid row.

Deltek Defect Tracking Number: 363574

Description: In Vision Navigator Timesheets, if you had Windows Authentication enabled and you submitted a timesheet with an electronic signature, you received an error message.

Customers Impacted: This defect applies to Vision 6.2 SP2 Navigator.

Workaround Before Fix: None.

Additional Notes: None.

Deltek Defect Tracking Number: 363992

Description: When a Workflow button was added to a user-defined info center, the workflow was processed for all records within the user-defined info center instead of the currently selected record.

Customers Impacted: This issue applies to Vision 7.0 SP1 users.

Workaround Before Fix: None.

Additional Notes: None.

Connect for Microsoft Outlook

Deltek Defect Tracking Number: 343931

Description: After you installed Connect for Microsoft Outlook 7.0 SP1 and synchronized, you received the following error: "Internal Error On Database - Invalid escaping used when generating controls_attributes.js." This occurred because there was a backslash "\" in a screen designer label.

Customers Impacted: This applies if you installed Vision 7.0 SP1 Connect for Microsoft Outlook.

Workaround Before Fix: None.

Additional Notes: None.

Deltek Defect Tracking Number: 365203

Description: In Connect for Microsoft Outlook, the **Organization** field was missing for Opportunities.

Customers Impacted: This issue applies to Vision 6.2 SP2 and later versions of Connect for Microsoft Outlook.

Workaround Before Fix: None.

Additional Notes: None.

Configuration

Workflow

Deltek Defect Tracking Number: 347620

Description: When using the **Create Project from Opportunity** feature with a stored procedure workflow, the associated custom fields were not updated and the project record was not created.

Customers Impacted: This issue applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

User Initiated Workflows

Deltek Defect Tracking Number: 365033

Description: When you inserted a Create Activity action into the **Actions** grid on the User Initiated Workflow form, the Activity Configuration dialog box displayed. However, the toolbar at the top of the **Notes** field in that dialog box did not have an **Insert Field** option. That option was previously available in version 5.1 and should have been available in subsequent versions.

Customers Impacted: This defect applies to Vision 6.0 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Human Resources

Payroll

Quarterly Processing

Deltek Defect Tracking Number: 364856

Description: New York Electronic File showed an incorrect wage amount in the Gross Wages Paid This Quarter field.

Customers Impacted: Affects clients processing quarterly taxes for New York.

Workaround Before Fix: The file may be edited manually.

Info Center

Deltek Defect Tracking Number: 364106

Description: When a user-defined info center name is too long, you could not create a user-defined field that linked back to the info center.

Customers Impacted: This issue applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Mobile CRM

Deltek Defect Tracking Number: 348316

Description: The following error displayed in Touch CRM upon login: **Cannot retrieve global settings**. The underlying error was **Max JSON string length exceede**. These errors prevented you from continuing into the application.

Customers Impacted: This issue applies to Vision 6.2 SP2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Planning

Deltek Defect Tracking Number: 348889

Description: When you clicked the **Include in Utilization and Project Reports** check box to select it, Vision took a long time to process that mouse click and display the check mark.

Customers Impacted: This defect applies to customers using Planning in Vision 6.2 SP2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Reporting

General Ledger

Deltek Defect Tracking Number: 352502

Description: If you included a column for a user-defined currency field on the Balance Sheet and generated the report in a presentation currency, the report contained no data.

Customers Impacted: This defect applies to customers using the Multicurrency feature in Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Utilities

Advanced Utilities

Project Closeout

Deltek Defect Tracking Number: 356144

Description: When Project Closeout processed, the application did not update Unbilled Services Gains and Losses WBS1 in Individual Profit Centers and in Company Setting/Gains and Losses.

Customers Impacted: Affects clients with Gains and Losses enabled.

Workaround Before Fix: After closeout is processed, manually modify the WBS1 Unbilled Services Gains and Losses WBS1 in Individual Profit Centers and in Company Setting/Gains and Losses.

Additional Notes: None.

Key Conversions

Deltek Defect Tracking Number: 352515

Description: Several Key Conversions and Key Formats processes did not convert work breakdown structure elements for unbilled services gains and losses accounts on the Gains and Losses tabs of Accounting Company Settings (**Configuration » Accounting » Company Settings**) and Individual Organization Setup (**Configuration » Organization » Individual**). Those processes are listed below under **Additional Notes**.

Customers Impacted: This defect applies to Vision 7.0 SP1 and later versions.

Workaround Before Fix: After running the Key Conversions or Key Formats process, manually make the changes on the configuration forms.

Additional Notes:

Key Conversions processes:

- Account
- Project WBS1
- Phase WBS2
- Task WBS3
- Enabled Phases/Tasks
- Disable Phases/Tasks

Key Formats processes:

- Account
- Project WBS1
- Phase WBS2
- Task WBS3

Weblink Utility

Deltek Defect Tracking Number: 365976

Description: If a Web server error occurred when you accessed Vision or Weblink, you received a "Variable SaaSInstance not found" error instead of a message describing the actual problem.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

State of Idaho — Regulatory Update

Idaho has made the following updates:

- Personal exemption amount increased to $3,800.
- Tax tables are updated.

Software Issues Resolved in Hot Fix 002

Vision

Deltek Defect Tracking Number: 366639

Description: A user whose role had Subtotals Only access to labor cost rates and amounts could see employee labor cost amounts on the Project Progress report if they generated the report with seven or more grouping levels and displayed subtotals by employee (i.e., if either **Current by Employee** or **JTD by Employee** was selected in **Labor Detail** on the Labor & Expense tab of the Options dialog box for the report).

Customers Impacted: This defect applies to Vision 7.0 SP1 and later versions.

Workaround Before Fix: None.

Additional Notes: The multiple grouping levels that resulted in the problem could have been a combination of labor code levels selected for display on the Labor & Expense tab of the Options dialog box and grouping options selected on the Sorting/Grouping tab.

Billing

Deltek Defect Tracking Number: 262462

Description: When an expense item that included a business reason was transferred from direct to reimbursable, the business reason did not display on the Billing Backup report.

Customers Impacted: This issue applies to Vision 7.0 SP1 and later.

Workaround Before Fix: None.

Additional Notes: None.

Deltek Defect Tracking Number: 341601

Description: You received an error when you accepted an invoice in Interactive Billing if all of the following were true:

- Your Vision configuration on the Reporting tab of the Accounting System Settings form has **Reporting Realization by Employee** selected and **Frequency** set to **Invoice.**
- The Windows Regional Settings on your computer were set up to use a comma as the decimal separator.
- The invoice information was displayed at the WBS1 (project) level in Interactive Billing when you accepted the invoice.

- The records to be billed on the invoice included a labor record with a non-zero cents amount.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: Make sure you are not at the WBS1 level in Interactive Billing when you accept the invoice.

Additional Notes: None.

Batch Billing

Deltek Defect Tracking Number: 368063

Description: If you scheduled Batch Billing to run on the Process server, the process failed and returned a termination error.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Connect for Microsoft Outlook

Deltek Defect Tracking Number: 347343

Description: If a client or vendor had duplicate primary addresses, this caused the Connect for Microsoft Outlook synchronization to fail.

Customers Impacted: This defect applies to Vision 6.1 SP2 and later Connect for Microsoft Outlook users.

Workaround Before Fix: None.

Additional Notes: None.

Info Center

Deltek Defect Tracking Number: 349378

Description: The auto numbering option was not recognizing Values Mapped when using a lookup from the User-Defined Info Center.

Customers Impacted: This issue applies to Vision 7.0 SP1 and later versions.

Workaround Before Fix: For a custom drop-down list, remove the **Limit Entry to Values List** option so the value from the User-Defined Info Center can be applied and mapped correctly.

Additional Notes: None.

Reporting

Accounting

Deltek Defect Tracking Number: 349814

Description: For Payroll and Employee Expense checks, when a payment to an employee was split between a check and an EFT, the check did not display on the check register.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: For Payroll payments, see the Bank Reconciliation report and Payroll Journal. For Employee Expense payments, see the **Accounting » Check Review**. On the Check Detail screen, the check amount is listed in the **Payment Amount** field. The EFT amount is listed in the **Direct Deposit** grid.

Additional Notes: None.

Accounts Receivable

Deltek Defect Tracking Number: 350079

Description: If you previewed the AR Aged report with any option other than **None** in **Client Info to Display** on the Options tab of the Options dialog box for the report, and then you clicked the Show or Hide Advanced Search icon in the Preview window to perform an advanced search, some search criteria that should have returned results did not do so. The Results tab was blank.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Employee

Deltek Defect Tracking Number: 346601

Description: If you included a user-defined calculated field as a column on the Time Analysis report and that field was defined with **Perform Calculation On** set to **Detail Lines** and with **Sum Up Calculated Amounts on Total Lines** selected, some total amounts in that report column were not correct.

Customers Impacted: This defect applies to Vision 6.0 and later versions.

Workaround Before Fix: Select the **all detail and total lines** option in **Perform Calculation On.**

Additional Notes: None.

Project

Deltek Defect Tracking Number: 269059

Description: If you generated the Office Earnings report with a selection other than **Project Budgeting** in **Budget Source** on the Budget tab of the Option dialog box for the report, the **% Labor Comp. Rpt** and **% Expense Comp. Rpt** columns on the report were blank.

Customers Impacted: This defect applies to Vision 7.0 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Transaction Center

Deltek Defect Tracking Number: 365540

Description: Performance was very slow when using the Units by Transaction entry. This was caused by large numbers of unit tables and unit combinations in the database, and the fact that the Unit grid row was automatically populated by a default unit table when none was defined.

Customers Impacted: This issue applies to all Vision versions.

Workaround Before Fix: None.

Additional Notes: As part of this performance improvement, the unit table drop-down list was changed to a lookup dialog box.

Regulatory—International (Billing Invoices)

Description: In previous versions, Vision did not include tax codes with a 0 tax rate on client invoices or in the transactions posted for those invoices. However, to conform to regulatory requirements, firms in many European countries and in Australia need to display tax codes on client invoices even when the tax rate for a tax is 0. This enhancement meets that need. If tax auditing is enabled and if the tax basis is not 0, tax codes with 0 rates are now included, as applicable, on both regular and retainage invoices at the WBS level at which taxes are applied.

Software Issues Resolved in Hot Fix 003

Vision

Deltek Defect Tracking Number: 340414

Description: If a project associated with the realized gain or realized loss account for unbilled services in either Accounting Company Settings (**Configuration » Accounting » Company Settings**) or Individual Organization Setup (**Configuration » Organization » Individual**) used a revenue method other than N (No Revenue Recognition), the Revenue Generation process could have unexpected and incorrect results. To avoid this situation, Vision now only allows you to select from projects that use the N revenue method when you associate a project with a realized gain or realized loss account for unbilled services.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

API

Deltek Defect Tracking Number: 368702

Description: If you use VisionXtend APIs to import employee expense data entry into Vision and you use the Multicurrency feature, you received the following error message even for valid accounts: "The AccountCurrencyCode of the Account does not match the CurrencyCode of the master record."

Customers Impacted: This defect applies to VisionXtend 7.0 SP1 only if you use the

Multicurrency feature.

Workaround Before Fix: None.

Additional Notes: None.

Billing

Deltek Defect Tracking Number: 349551

Description: If, in the billing terms for a project, you selected the option to display timesheet comments on the the Billing Backup report, the report displayed extra lines with a 0.00 amount for overtime hours.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: Either generate the report as a Microsoft Word document and remove the extra lines, or do not select the option to include timesheet comments.

Additional Notes: This problem only occurred when overtime was entered separately from regular hours. If overtime was entered on the same row as regular hours in a timesheet, for example, this problem did not occur in that case.

Calendar

Activities

Deltek Defect Tracking Number: 363993

Description: When the employees on the Attendees tab in **Calendar » Activities** were changed by a user other than the originator, an error occurred.

Customers Impacted: This issue applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Configuration

Security

Deltek Defect Tracking Number: 366532

Description: When Pending Account Review is selected on the Project lookup on the Record Access tab, the proper security rights were not applied and access was still available to all records.

Customers Impacted: This issue applies to Vision 7.0 SP1 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Human Resources

Payroll

Quarterly Processing

Deltek Defect Tracking Number: 368826

Description: In the New York Quarterly SUTA electronic file, record 1E, fields 3-4, does not report the quarter correctly. Instead, it defaults to 12 as the quarter, no matter which quarter is being processed.

Customers Impacted: Affects all payroll users filing New York Quarterly SUTA electronic file.

Workaround Before Fix: Edit the file manually by changing record 1E fields 3-4 to one of the following ending quarters: 03, 06, 09, 12.

Deltek Defect Tracking Number: 369887

Description: The CA Quarterly Electronic Filing .xml file is rejected due to errors that fail the state validation rules.

Customers Impacted: Affects all clients submitting CA .xml files.

Workaround Before Fix: Manually modify the .xml file.

Proposals

SF330 Proposals

Deltek Defect Tracking Number: 367103

Description: When you merged an SF330 proposal, you received an “Invalid character” error message for some of the proposal sections.

Customers Impacted: This defect applies to Vision 6.2 SP2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Reporting

Project Planning

Deltek Defect Tracking Number: 367414

Description: The graph section of the Resource Utilization by Organization report always included only hard book hours, even if you selected **Soft Book Hours** under **Show on Plan Level Rows** on the General tab of the Options dialog box for the report. Thus, if you selected that option, the data in the graph section may have been incorrect.

Customers Impacted: This defect applies to customers using Planning in Vision 6.2 SP2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Software Issues Resolved in Hot Fix 004

Human Resources

Payroll

Deltek Defect Tracking Number: 368714

Description: In the Employee Info Center, there was an incorrect validation that did not allow you to add a second withholding code when processing payroll.

Customers Impacted: This issue applies to Vision 7.0 SP1 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Reporting

Project

Deltek Defect Tracking Number: 367019

Description: The **Start Date** and **End Date** fields on the Project Earnings report displayed **1/1/1900** instead of the correct dates.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Software Issues Resolved in Hot Fix 005

Vision

Deltek Defect Tracking Number: 370571

Description: If you use VisionXtend APIs, custom fields were not returned with the GetSchema method.

Customers Impacted: This defect applies to VisionXtend 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Billing

Interactive Billing

Deltek Defect Tracking Number: 345824

Description: The amount in **Invoice Total** in the grid in the Employee Realization window was not correct when you displayed realization information for a lower level of the WBS structure (a phase, for example). When employees at the phase (WBS2) or task (WBS3) level display in the grid, the amount in **Invoice Total** should equal the sum of the realization amounts in the grid. Instead, it displayed the amount for whatever WBS element was previously selected.

Customers Impacted: This defect applies to Vision 7.0 SP1.

Workaround Before Fix: None.

Additional Notes: None.

Connect for Microsoft Outlook

Deltek Defect Tracking Number: 372436

Description: When you added Vision clients in Connect for Microsoft Outlook, the **Client ID** field did not populate. This caused associated client inserts to fail in the same synchronization.

Customers Impacted: This defect applies to Vision 6.2 SP2 Connect for Microsoft Outlook and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Proposals

SF330 Proposals

Deltek Defect Tracking Number: 368324

Description: After you installed the Vision 7.0 SP1 Hot Fix 001, some existing merge templates produced merged .rtf documents with incorrect formatting.

Customers Impacted: This defect applies to Vision 7.0 SP1 Hot Fix 001.

Workaround Before Fix: None.

Additional Notes: None.

Utilities

Advanced Utilities

Data Import

Deltek Defect Tracking Number: 370631

Description: When using the Data Import Utility for a Cash Receipt data import, you received an import error for a cash receipt record with an asset account if the account was not mapped.

Customers Impacted: This defect applies to Vision 7.0 SP1 and later versions.

Workaround Before Fix: Use Vision to enter the cash receipt.

Additional Notes: None.

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