Deltek Vision® Navigator 1.7

Release Notes

December 11, 2013

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The information contained in this publication is effective as of the publication date below and is subject to change without notice.

Contents

Overview

Welcome to the Deltek Vision Navigator 1.7 Release Notes. These release notes contain a summary of the following:

- Pre-Installation Information
- Major New Features
- Enhancements
- Software Issues Resolved

Pre-Installation Information

Refer to the following server installation prerequisites, client requirements, and client notifications when using Vision Navigator.

Server Installation Prerequisites

- Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, and Windows Server 2012 R2 are supported platforms.
- Deltek Vision 7.1 or Deltek Vision 7.2 must be installed.
- Microsoft .NET Framework 4.0 must be installed on the Deltek Vision web/application server.
- You must be a local administrator on the Deltek Vision web/application server to run the setup.
- Vision Navigator must be installed on your Deltek Vision web/application server.

Client Requirements

Client Operating Systems

- Windows 7
- Windows 8
- Windows Vista (SP2)
- Windows XP (SP3) — Chrome only

Browser

- Internet Explorer 9
- Internet Explorer 10
- Chrome 18 or later
- Safari 5 or later
- Firefox 11 or later

> Vision Navigator 1.7 is not supported on Internet Explorer 8 or Chrome Frame.

Device

- Android Tablets — Chrome only
- iPad

Client Notifications

Chrome Frame

Chrome Frame is not supported with Navigator 1.7. The following warning message will display if you attempt to log in to Navigator while using Chrome Frame:

Windows Internet Explorer with Chrome Frame - Warning

We have detected that you are using Windows Internet Explorer with Chrome Frame. You can continue to log into Navigator; however, Navigator no longer supports any version of Internet Explorer with Chrome Frame.

Navigator is supported on Internet Explorer 9 or higher.

Internet Explorer 8

Internet Explorer 8 (IE8) is not supported with Navigator 1.7. The following message displays if you attempt to log into Navigator while using IE8:

Vision Navigator is not designed to work on Internet Explorer 8. If you continue, you may experience unexpected results. We apologize for any inconvenience.

Safari

Safari with private browsing enabled is not supported with Navigator 1.7. The following message will display each time you attempt to log in until you disable private browsing:

Safari – Private Browsing

We have detected that you are using Safari with private browsing enabled. To use Navigator on this computer or device, you must disable private browsing.

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 Navigator 1.7 release.

Deltek Vision Navigator Guides	
Deltek Vision Navigator Version 1.7 Release Notes for Vision Versions 7.1 and 7.2	These release notes contain a summary of the installation requirements, enhancements, and software issues resolved in Vision Navigator.
Deltek Vision Navigator Version 1.7 Installation Guide for Vision Versions 7.1 and 7.2	This guide describes the server prerequisites, client requirements, and installation process for Vision Navigator.
Deltek Vision Navigator Version 1.7 Frequently Asked Questions for Vision Versions 7.1 and 7.2	This document contains frequently asked questions about the use and configuration of the 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, you can move your 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.

Login

Forgot your password or User ID?

The Navigator login dialog box includes a **Forgot your password or User ID?** link. In the event that you forget your Navigator login credentials, you can click this link to access a Login Assistance dialog box and reset your password or retrieve your User ID.

Multiple Languages

If your firm has enabled multiple languages in Vision, Navigator can support the same group of languages. This impacts several areas of the Navigator interface, including the Login dialog box, toolbar and menu options, field labels, button labels, and so on.

When you open the Navigator login dialog box, a **Languages** drop-down list displays. Use this list to select the language that you want to apply to the interface. The Navigator login dialog box will convert to the selected language, and after you log in, all Navigator forms and fields will display in the selected language.

Project Management Workspace

Dashboard

ETC (Navigator) Field

The **Estimate to Complete** field was changed to **ETC (Navigator)** to support the new calculations for Navigator expenses and consultants. This field displays the total estimate-to-complete (ETC) bill amount required to complete the project from tomorrow through the end of the plan.

This amount is calculated by adding the ETC values from the respective planning pages and summing them at the project level as follows:

- Labor = ETC amount
- Expenses = ETC (Navigator)
- Consultants = ETC (Navigator)

You can click the **ETC (Navigator)** label to see a breakdown of the amount that displays.

> There is a potential discrepancy in the **ETC (Navigator)** amount versus what displays for the ETC in Vision.

EAC (Navigator) Field

The **Estimate at Completion** field was changed to **EAC (Navigator)** to support the new ETC calculations for Navigator expenses and consultants. This field displays the total estimate-at-completion (EAC) bill amount required from tomorrow forward, through the end of the plan.

You can click the **EAC (Navigator)** label to see a breakdown of the amount that displays.

Switch Dashparts Dialog Box

The Switch Dashpart dialog box was reformatted to organize dashparts by function: **Projects**, **Labor**, **Expenses**, and **Consultants**. The Projects grouping also includes the new Project Plan Summary and Project Progress dashpart options for selection.

New Dashparts

The following new project-related dashparts were added to Navigator. These dashparts are available from the Switch Dashparts dialog box:

- **Project Progress** — The Project Progress dashpart provides a view of the overall percent complete for the project's assigned labor, expenses, and consultants, which allows you to quickly assess where you stand on the project.

- **Project Plan Summary** — The Project Plan Summary dashpart provides a summary of the project's labor, expense, and consultant JTD and ETC billing amounts at the project level. This dashpart provides one detailed view that shows how the project is trending against the contract amount as of the current date.

Updated Dashparts

The Expense Progress and Consultant Progress dashparts were updated as follows:

- Planned Balance was removed and ETC (Navigator) was added.
- The calculations were updated to show % Complete (JTD/EAC) instead of % Expended.
- Tooltips were updated to summarize these calculations.

The bars on these charts were updated as follows:

- **Expense Progress** — The Expense Progress bars were updated to reflect what percent of the total planned bill amount is complete through today, and what percent of the planned bill amount remains for each expense type.

- **Consultant Progress** — The Consultant Progress bars were updated to reflect what percent of the total planned bill amount is complete through today, and what percent of the planned bill amount remains for each consultant type.

Baseline

The **Save Baseline** feature allows you to take a snapshot of your plan at a particular point in time, which you can then compare against the current plan to check for trends. In previous versions of Navigator, you could change a baseline (for example, replace one resource who had baseline amounts with another), which ultimately altered the original baseline and did not give an accurate "snapshot" of the plan. This has been changed in Navigator 1.7 so the **Save Baseline** option and adjusting the Planning Level in your plan's settings (on the Plan Settings dialog box), are the only ways you can change the baseline.

The following Navigator processes have been updated due to the changes in the **Save Baseline** feature:

- Replace labor, expenses, or consultant resources
- Delete labor, expenses, or consultant resources
- Change the expenses or consultants planning level

Shift Plan Dates

As plans evolve, you can shift planning dates on the Labor planning grid's work breakdown structure rows. If you need to change a start date, Navigator checks for assigned resource rows with planned or ETC hours. If they don't exist, you now have the option to shift the start and end dates to maintain the plan's range.

Consultants and Expenses Pages

Consultants and Expenses Grids

ETC (Navigator)

The **Planned Less JTD** column was replaced on these grids with the **ETC (Navigator)** column. This column displays the sum of the estimate-to-complete as calculated by Navigator for consultants or expenses. When the planned amount is less than the JTD amount, the ETC (Navigator) amount defaults to zero. However, when the planned amount is greater than or equal to the JTD amount, the ETC (Navigator) is calculated as the planned amount minus the JTD amount.

> There is a potential discrepancy in the ETC (Navigator) amount versus what displays for the ETC in Vision.

JTD

The JTD columns now include a notification when the JTD amount is greater than the planned amount. A ⚑ red flag displays in the corner of the field. Each WBS row amount is checked and a flag can display for any row.

Consultants and Expenses Charts

The Expense Progress and Consultant Progress charts were updated as follows:

- Planned Balance was removed and ETC (Navigator) was added.
- The calculations were updated to show % Complete (JTD/EAC) instead of % Expended.
- Tooltips were updated to summarize these calculations.

The bars on these charts were updated as follows:

- **Expense Progress** — The Expense Progress bars were updated to reflect what percent of the total planned bill or cost amount is complete through today, and what percent of the planned bill or cost amount remains for each expense type.
- **Consultant Progress** — The Consultant Progress bars were updated to reflect what percent of the total planned bill or cost amount is complete through today, and what percent of the planned bill or cost amount remains for each consultant type.

Employee Workspace

Timesheet

Revision Explanation Dialog Box

When you use Vision 7.2 and Navigator 1.7, and you revise the hours entered on an existing timesheet for a day prior to today, your system administrator may require you to provide an explanation for the revision. When explanations are required, the Revision Explanation dialog box displays either when you save, or when you submit, your timesheet. This is determined by your settings in Vision Timesheet Configuration.

Locked Columns

If timesheet audits are enabled and revision tracking has started on the timesheet, the Navigator timesheet rows are now locked to maintain the integrity of the timesheet data. You cannot change the entries (for example, project, phase, etc.) in the left grid and you cannot delete the row.

See the Configuration » Time & Expense » Company Timesheet » Timesheet Audit section on page 15 for additional information on Timesheet Audit settings.

Timesheet Lookups

The Navigator Timesheet lookups were updated to reflect the **Budget Validation** settings in the Vision Project Info Center. If your system administrator or project manager activates budget validations, you are notified immediately if you select a project, phase, task, or labor code that is not budgeted. In prior versions, this notification did not occur until you saved or submitted your timesheet.

In addition, the Labor Code Lookup dialog was updated and can now be filtered to only display budgeted levels.

Timesheet Reports

Navigator Timesheet now includes a **Report** option where you can generate a PDF view of either a summary or detailed view of your timesheet charges for a labor period.

To access the report option, click **Timesheet Options** and select **Report**.

> Navigator Timesheet reports do not include revision audit information, even when Timesheet Audits are enabled in Vision. Use the Summarized and Detailed Timesheet reports in Vision to obtain this level of detail.

The Report dialog box also includes a **Page Break by Project** option that allows you to print timesheet data for each project on a separate page of the report.

After you generate a timesheet report, it displays as a PDF file on your local machine. Use your default PDF viewer to save the report locally or print as needed.

Kona Integration

The Kona panel now includes the ability to add conversations, tasks, and events as well as view related details.

Starting with Navigator 1.7, you must own a Kona Business license to access Kona in Navigator. With that license, you receive a Kona Business token that you enter in Vision to activate the Kona features. This token is entered in the **Kona Account Key** field in Vision Configuration. See the Configuration **»** General **»** System Settings **»** Miscellaneous section on page 15 for information on entering the **Kona Account Key** to enable Navigator and Kona integration.

Vision Updates

The following Vision updates impact the Navigator 1.7 release.

Vision 7.2

Info Center » Time tab of Employee Info Center

The **Disable Timesheet Revision Auditing** option displays when the **Enable timesheet revision auditing** option is selected on the Timesheet Audit tab of Company Timesheet Configuration. Select the **Disable Timesheet Revision Auditing** option to disable timesheet revision auditing for the current employee. Typically, timesheet and billing transfer auditing is enabled for all employees within a company; selecting this option overrides the company setting when there is an employee who is an exception and does not require revision auditing.

Configuration » Time & Expense » Company Timesheet » Timesheet Audit

The new Timesheet Audit tab enables you to configure Vision to create an audit trail when changes are made to employee timesheets in both Vision and Navigator. You can track these changes in an audit trail that is triggered whenever employees, approvers, or timesheet administrators update, delete, insert, and/or submit timesheet records.

Revision Explanations

An additional feature of Timesheet Audits is the ability to require an explanation when a timesheet is revised. When you use Vision 7.2 and Navigator 1.7, your system administrator can use the options on the Timesheet Audit tab to require an explanation for any Navigator timesheet revision that is made to a date prior to today.

Vision 7.1 and 7.2

Configuration » General » System Settings » Miscellaneous

Kona Account Key

Starting with Navigator 1.7, you must own a Kona Business license to access Kona in Navigator. With that license, you receive a Kona Business token that you enter in Vision to activate the Kona features. This token is entered in the **Kona Account Key** field. When this is activated, you can link a Kona space to project.

Software Issues Resolved

Descriptions of Software Issues

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

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

Defect: 383193

Description: When the **Project Management Workspace** option was not selected on the Navigator tab of Vision Roles Security, an error occurred when Navigator was launched from within Vision.

Customers Impacted: This defect applies to Navigator 1.6.

Workaround Before Fix: Open the Navigator application independently from Vision.

Additional Notes: None.

Defect: 389371

Description: When the **Restrict Charge Companies** option was selected for a phase or task on the Accounting tab of the Project Info Center, the associated project (WBS1) did not display in the Navigator timesheet lookup results.

Customers Impacted: This defect applies to Navigator 1.5.

Workaround Before Fix: None.

Additional Notes: None.

Defect: 390499

Description: When **Number** was selected as the **Sort** option on a Navigator Timesheet lookup, the WBS level three lookup list results did not sort correctly.

Customers Impacted: This defect applies to Navigator 1.5.

Workaround Before Fix: None.

Additional Notes: None.

Defect: 391686

Description: When you logged in to Navigator after adding a third organizational level to Vision, the following error displayed: **The given key was not present in the dictionary.**

Customers Impacted: This defect applies to Navigator 1.5.

Workaround Before Fix: After backing up your database, run the script that was provided.

Additional Notes: None.

Defect: 396481

Description: The **Labor EAC Multiplier** displayed on the Dashboard even though the Vision plan's Budget Type was set to Billing.

Customers Impacted: This defect applies to Navigator 1.6.

Workaround Before Fix: None.

Additional Notes: None.

Defect: 400452

Description: When the point at the "today" line was plotted for the **Actual** line on the Labor Plan Timeline chart, the amount incorrectly included today's planned amount.

Customers Impacted: This issue applies to Vision 7.1 and Navigator 1.6.

Workaround Before Fix: None.

Additional Notes: None.

Known Issues

Negative Amounts

The ETC (Navigator) calculation for expenses and consultants was changed so that when the planned amount is less than the JTD amount, the ETC (Navigator) amount defaults to zero. In rare situations, a negative planned amount may be assigned which could then result in an incorrect ETC (Navigator) amount.

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