Deltek Vision® Navigator 1.5

Release Notes

June 27, 2013

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Contents

Overview

Welcome to the Deltek Vision Navigator 1.5 Release Notes. These release notes contain a summary of the following:

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

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide 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 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 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.

If You Need Assistance

If you need assistance installing, implementing, or using Vision Navigator, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

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

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- 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
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions

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 do not have a username and password for the Customer Care Connect site, contact your firm's Vision Administrator.

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

Additional Documentation

The following table lists the Deltek Vision Navigator documentation.

Document Name	Description
Vision Navigator Integration Guide	This guide contains details on how the Vision application works with Vision Navigator, and descriptions of the changes to the Vision Online Help.
Vision Navigator Installation Guide	This guide contains the server installation and client requirements for installing and running Vision Navigator.
Vision Navigator FAQ	This guide provides basic answers to the more frequently asked questions about Vision Navigator.

Pre-Installation Information

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

Server Installation Prerequisites

- Windows Server 2008 or Windows Server 2008 R2 are supported platforms.
- Deltek Vision 7.0 (SP1) (GA) or Deltek Vision 7.1 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)

Browser

- Internet Explorer 8 (Chrome frame plug in required)
- Internet Explorer 9
- Internet Explorer 10
- Chrome 18 or later
- Safari 5 or later
- Firefox 11 or later

Device

- Android Tablets
- iPad

New Features

This section includes summaries of the new features included for this release.

Consultants

The Planning tab of Vision Navigator is now divided into Labor and Consultants. When you open the Planning tab, the Labor charts and grid are the default view. However, there is a new option that allows you to select which information you want to view: Labor or Consultants.

When you select Consultants, the new Consultants charts and grid display. You can view consultant details on the charts and assign consultants to the current Navigator plan on the grid. Consultants can be planned at the following levels: WBS1, WBS2, or the lowest level. You configure the default for this setting on the Plan Settings tab in **Vision » Configuration » Planning**. However, you can override this setting for each individual plan in Plan Settings in Navigator.

In order to see Consultants, the following must be true:

- The **Enable Consultant Planning** option must be selected for your company on the General tab in **Vision » Configuration » Planning » Plan Settings**.
- Your Vision Security Role allows access to Consultants on the Navigator tab in **Vision » Configuration » Roles**.

Consultants Dashparts and Charts

The new Consultants feature includes both dashparts that display on the Navigator Dashboard and charts that display on the Consultant tab. Similar to the Labor tab, when you click through the WBS levels on the Consultant tab in the Consultant grid, the charts change to represent that selected WBS level. Refer to the following for a description of the information included in these charts.

Consultant Progress

The Consultant Progress dashpart and chart displays the progress of each Consultant on a project by showing their job-to-date (JTD) against their planned balance.

Consultant Plan Summary

The Consultant Plan Summary dashpart displays the contract, planned, and JTD amounts by reimbursable consultants and direct consultants.

Consultants Grid

The Consultants grid allows you to plan the consultants for a project. Consultants can be planned at the following levels: WBS1, WBS2, or the lowest level. You configure the default for this setting on the General tab in **Vision » Configuration » Planning » Plan Settings**. However, you can override this setting for each individual plan in Plan Settings in Navigator. Similar to the Labor tab, the WBS structure and descriptions come from the Project as defined in the Vision Project Info Center.

The dates on the Consultants grid are read-only and are populated directly from the Labor tab. In the grid, you can add the type of consultants that will be working on your project. Then, you can select specific consultant names and add planned amounts to budget each of the assigned consultants.

Before you plan for consultants on your project, it is necessary to determine the plan settings. Navigator prompts you to enter these settings by automatically displaying the Plan Settings dialog box when you create a new plan.

Use the Consultant Type Lookup

To begin the process of assigning consultants to a plan, it is first necessary to select the WBS element in the grid for which you want to budget consultants. When you click the **Add Consultant** button, the Add Consultants Type dialog box displays. This dialog box allows you to select the types of consultants for your plan. You can choose to show direct and/or reimbursable consultant account types, use a **Search** field to search your results list, and sort the columns on the results list in ascending or descending order by Consultant Type, Type, and Account. When you click **Finish**, the consultant is added to the WBS element and you can further define the consultant and budget information.

Consultant Type are the same as the Account Names for Account Types equal to Reimbursable Consultant and Direct Consultant from the Vision Chart of Accounts

Consultants Functions

The save baseline, publish, revert, and delete menu options now apply to consultants.

Consultants Grid Row Menu

The **Menu** button on the Consultants grid includes **Copy** and **Delete** options that allow you to copy and delete consultant records on the grid.

The **Menu** button does not display if the plan is not checked out, you don't have the appropriate access rights, or you are viewing a Vision plan.

Switch Consultant Amounts from Billing to Cost

A new **Billing/Cost** toggle button displays on the Consultants tab under the following circumstances:

- The project has a Vision plan and the **Calculate Consultant Billing Amounts** option is selected on the Rates tab of Project Planning.
- The project has a Navigator plan and the **Calculate Consultant Billing from Cost** option is selected on the Plan Settings dialog box in Navigator.

To switch the amount from Billing to Cost, click the **Bill** option Bill button to toggle to the **Cost** option Cost.

You can enter planned amounts when the **Calculate Consultant Billing from Cost** option is selected in Navigator Plan Settings and the toggle is set to **Cost**. The bill amounts are automatically calculated based on the **Rate Method**, **Rate Table**, and/or **Multiplier** that are set in Navigator Plan Settings.

When you toggle between the **Cost** and **Bill** options, the **Baseline**, **Planned**, **JTD**, and **Planned Less JTD** grid columns change to reflect the type of amount. The header colors also change to serve as a visual indicator for the type of amount that you are viewing.

The markups only apply to Reimbursable Consultants.

Timesheet

Required Fields

Required Timesheet fields display in yellow.

Grid

Tools Options

The Timesheet grid includes a new tools button that provides access to the following grid functions: **Insert**, **Copy**, and **Delete**. Click this button to open the tools options and perform the respective functions on the grid.

Tab through Timesheet Grid Fields

As you enter timesheet data, you can use different keyboard functions to move through the editable grid fields:

- Tab — Use the **Tab** key to move the focus to the next editable grid column. If you are at the end of a grid row, you will move to the first column in the next grid row.
- Shift + Tab — Press these keys simultaneously to move the focus to the previous editable grid column. If you are at the beginning of a grid row, you will move to the last column of the previous grid row.

You cannot use the Tab functions to move the focus to the Timesheet context area.

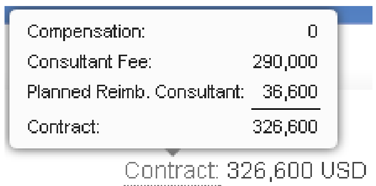
Resize Timesheet Columns

You can change the size of the columns in the left section on the timesheet grid to view more or less data. When you mouse over the vertical line between two timesheet grid columns (or, if using a tablet, tap and hold the column divider), an arrow displays. Click or tap the arrow and drag the vertical grid line left or right to resize the width of the column; repeat for each column, as needed.

Dashboard and Planning Tabs

Updated Field Labels and Calculations Tooltips

Some of the field labels have been updated, and the calculations for fields, such as **Contract** or **EAC**, now include a dotted line under the field label. You can click this line for a tooltip that is specific for that field.



Toggle Bar

The toggle bar on the Planning tab allows you to quickly switch between viewing Labor and Consultant information. Click each label to switch between views.

Switch Dashparts

The Switch Dashpart dialog box now includes the following Consultant dashpart options:

- Consultant Plan Summary
- Consultant Progress

Actions Button

The **Actions** button on the Planning tab acts as the indicator for the state of the Navigator plans. As you update a plan, both the button's color and label change to reflect the state. When only one Action is possible under the **Actions** button, the word "Actions" is replaced with that specific action to save you from a click. This occurs for the following actions: **Check Out**, **Convert**, and **Create**.

For example, the button changes to gray and the label is **Convert** 

when the plan is a Vision plan and you have the option to convert it to a Navigator plan.

Plan Settings

The Navigator Plan Settings dialog box automatically displays when you create a new plan. This prompts you to set the necessary plan information during plan creation.

The Plan Settings dialog box contains Labor and Consultants sections, depending on your access rights assigned in Vision Security. Use these options to define your plan multipliers, rates, levels, and calendar scale. Most of the fields will be filled in with the defaults set on the General tab and Rates tab in **Vision » Configuration » Planning » Plan Settings**. Navigator Plan Settings allows you to override those defaults for each individual plan as needed.

Navigator and Vision

Security

Navigator Tab

Vision Security Configuration includes a Navigator tab that allows the 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.

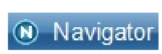
In addition, this tab provides the ability to define record level access for Navigator projects and plans. Use the **Record Level View** and **Record Level Update** fields to access lookups that enable you to build queries that grant or restrict different levels of access for Navigator projects and plans.

Consultant Updates When Converting Plans from Vision to Navigator

When plans are converted from Vision to Navigator, the following takes place:

- Planned consultants on plans marked **Include in Utilization** are converted.
- Plans with the same consultant type but without a vendor are combined if they are assigned multiple times under the same WBS ID.
- When the same consultant type and vendor combination are assigned more than once under the same WBS ID, they are combined.
- Baseline converts at the same level as planned.
- Planned amounts are re-spread for the WBS IDs date range.
- Baseline time-phased assignments stay in their original time-phased buckets.
- When plans are converted, the system automatically assigns the consultant plan level on the Navigator Plan Settings dialog box based on the highest WBS level on which any of the consultants were planned.

Navigator Button on Vision Toolbar

When you use Navigator with Vision, 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.

Known Issues

The following are known issues with the Vision Navigator 1.5 release.

Defect 377211

Description: When changing the Consultant Type on a Consultant row that already has JTD, Planned, and Baseline, the following warning message displays: **"<existing consultant type name>" has JTD that cannot be moved to <new consultant type name>. The planned and baseline amounts will be moved to <new consultant type name>, but <existing consultant type name> will remain on the plan."** When you click **OK** to continue, a new consultant row is added to the grid. This row contains the new consultant type with the planned and baseline amounts. The original row remains on the grid with the JTD amount. When you then click **Save**, the baseline moves back to the original consultant row, while everything else correctly stays.

Example: A plan's Consultant Type is Structural Consultant, the JTD is 82, Planned is 31, and Baseline is 25. When you change the Consultant Type to Other Consultant, a new row is automatically inserted on the Consultants grid, and the Planned and Baseline are copied over. This new row will list Other Consultant as the Consultant Type, with a Planned amount of 31 and a Baseline of 25. The Structural Consultant and its JTD of 82 remain on the original row on the plan. When you click **Save**, the Baseline Amount changes to 0 on Other Consultant and Structural Consultant Baseline Amount becomes 25.

Customers Impacted: This issue applies to Vision Navigator 1.5 users.

Workaround Before Fix: Use the **Add** button to add the new Consultant Type instead of adding by changing an existing grid row.

Additional Notes: None.

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: 340585

Description: Even though their access rights in Vision Security Roles provided access to create plans, users could not create and save a plan within Navigator.

Customers Impacted: Vision Navigator 1.5.

Workaround Before Fix: In Vision Role Security, make a change to the role, click Save, and then undo the change and save again.

Additional Notes: None.

Defect: 365401

Description: Access to Project Management was denied due to issues with user rights on the Record Access tab of Role Security.

Customers Impacted: Vision Navigator 1.5.

Workaround Before Fix: Open Vision and check the Vision Resource Planning License information under Configuration » Module Activation. If the Resource Planning module is licensed, your role must have the **Project Planning** option selected on the General Tab of Vision Roles. If the Resource Planning module is not licensed, the access on the Project Planning row on the Role's Record Access tab must be set to **Full**, **Read Only**, **Modify Only**, or **Add/Modify**. If set to **None**, you cannot access Navigator Project Management.

Additional Notes: None.

Defect: 367063

Description: User must refresh Navigator after entering a URL directly into the browser.

Customers Impacted: Vision Navigator 1.5

Workaround Before Fix: Click the Refresh button.

Additional Notes: None.

Defect: 369099

Description: The following Navigator help topic incorrectly stated that the Resource Utilization report was available when the Vision Resource Planning module was not installed: Vision Features that are Impacted When the Vision Resource Planning Module is Not Installed.

Customers Impacted: Vision Navigator 1.5.

Workaround Before Fix: None.

Additional Notes: None.

Defect: 374443

Description: When using timesheets in the Navigator Employee Workspace, the WBS2 for a project was not visible when the WBS1 contained an ampersand (&).

Customers Impacted: Vision Navigator 1.5.

Workaround Before Fix: Run Vision's Key Convert utility on the project to not include the ampersand (&).

Additional Notes: None.

Deltek is the leading global provider of enterprise software and information solutions for professional services firms, government contractors, and government agencies. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. Over 14,000 organizations and 1.8 million users in approximately 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resource, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.®

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