Deltek

Deltek WorkBook 13.3

Release Notes

Revised February 24, 2023

December 15, 2022

This edition published February 2023.

Contents

Overview

This document provides the following information:

- Release Notes for WorkBook Release 13.3

Additional Documentation

You can perform a Deltek Support Center search for additional documents at the following link:

https://deltek.custhelp.com/app/answers/detail/a_id/79935

For information about the WorkBook API, you can access the *Deltek WorkBook API Guide* at the following link:

https://workbookapi.deltek.com/?version=latest

Feedback

If you have comments or questions about this document, you can submit them to DeltekDocumentationFeedback@deltek.com.

Installation

See the *Deltek WorkBook 13.2 Installation Guide* for requirements and instructions for installing the WorkBook software.

Supported Products

Compatibility Matrix

Information about platform requirements is maintained in the Deltek Product Support Compatibility Matrix, located on the Deltek Support Center. In the Matrix, search on “WorkBook” to navigate quickly to the information that you need.

Deltek Product Support Compatibility Matrix

WorkBook Release 13.3

Version DB 13.3.308 / HTML 13.3.31

For release on December 15, 2022

NOTICE: Important Change

RefType Column Removed from CapUsed Database Table

If you have a custom databoard or other type of query against the database that uses the **RefType** column, **you must update that databoard/query not to reference the RefType column**.

If your databoard or query filters on CapUsed.RefType = 1, you can remove that part of the query, and the databoard or query will continue to function.

Databoards that are affected by this change produce the following error:

> The data presentation system encountered an error while querying the database. Invalid column name ‘RefType.’

On-premises clients who have integrations that read or write directly from or to the WorkBook database might need to update the model definition for the CapUsed table in their applications to no longer include the RefType column.

API changes are associated with this change, as well. For more information, see the *Deltek WorkBook API Guide* at the following link:

> https://workbookapi.deltek.com/?version=latest

Features and Enhancements Added or Changed

Agents

Agent Type 143 Optimized

Agent Type 143 – Job Teams Clean-Up has been optimized to make it run faster.

Improved Performance of Daily Currency Calculation

The overnight update of currencies has been improved. This avoids a rare issue where currency was not updated correctly.

Overnight General System Maintenance Optimized

The overnight general system maintenance has been optimized, resulting in faster completion, with less chance of timing out.

ConceptShare Integration

ConceptShare Provision Callback Process/Integration

This feature provides several improvements:

- It simplifies the WorkBook/ConceptShare setup process.
- It automates the WorkBook and ConceptShare callback process, which means that you do not need to do a refresh to apply changes that you made in ConceptShare to WorkBook.
- If you update or remove a ConceptShare link that change is automated via the API.

More details about these improvements are provided in the following.

ConceptShare Instances Linked to Another WorkBook Instance

When the same ConceptShare instance is linked to another WorkBook instance, account callbacks are automatically created in ConceptShare for both WorkBook instances, and both WorkBook instances are subscribed to the same events.

ConceptShare Settings – ConceptShare Provision Callback Automation

When a WorkBook–ConceptShare integration is set up, account callbacks are automatically added to ConceptShare so that the changes that users make to reviews directly in ConceptShare are displayed in real time in WorkBook. In addition, when users edit or delete reviews, those changes are automatically shown in ConceptShare.

Updated/Removed ConceptShare–WorkBook Link

When you update or remove the ConceptShare–WorkBook link (via WorkBook » Settings » ConceptShare Settings) while you are logged in to ConceptShare as a user who can manage callbacks, and callbacks to your WorkBook instance were automatically created in ConceptShare, those callbacks are deleted.

Job-Level Reviews are Redesigned

Job-level reviews have been redesigned to bring more information from ConceptShare into WorkBook, following ConceptShare's introduction of Review Chains. Previously, you could view, create, edit, and delete reviews in WorkBook.

Now, the following additional functionality is also available in WorkBook:

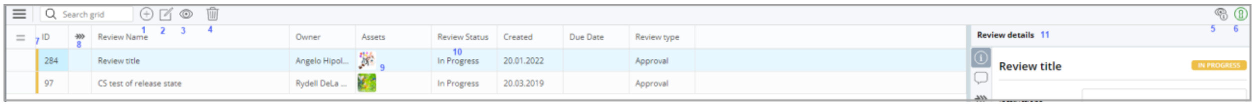
- View comments on a review
- View asset and review details
- See who is in a review
- Search the Reviews grid

When you navigate to Jobs » Jobs List » Reviews and log in to WorkBook ConceptShare, the Reviews Grid displays all reviews. You can select a review on the Reviews grid and view more detail about the review and/or update the review using the tabs that the new Review Details side panel at the right side of the grid provides.

The following additions and changes also support these functions.

Review Grid Toolbar

When you access the Review Grid, the redesigned toolbar includes icons, symbols, and color coding that enable you to access and interact with review information.



- 1 – Add New Review – Opens the Review Builder so that you can create a review.
- 2 – Edit Current Review – Opens the Review Builder with the selected review's settings/configuration loaded.
- 3 – View Current Review – Opens the Proofing Workspace with the selected review loaded.
- 4 – Delete Review – Displays a confirmation dialog box asking if you want to delete the selected review. Note that you can only delete the last review in the review chain, if it belongs to a review chain.
- 5 – Toggle Review Details – Displays or hides the Review Details side panel.
- 6 – You Are Logged In [Company Name] – Log On/Log Off ConceptShare (at the right side of the toolbar) – Displays a dialog box that enables you to log in or out of ConceptShare.
- 7 Color Bar – Review status color, which comes from ConceptShare.
- 8 Review chain icon and color – The icon indicates that the review is part of a review chain. The color indicates all of the reviews that are part of the same review chain. The color is specified in WorkBook.
- 9 Asset Thumbnails – You can load assets in WorkBook and/or ConceptShare.
- 10 Review Status – Drop-down list whose options you can select: Not Started, In Progress, Completed.
- 11 Review Info Side Panel – Provides tabs where you can interact with a review that you select in the Review Grid: Review Details tab, Comments tab, and Review Chains tab. The tabs also display additional information such as the review status, user name, user's avatar, and user's role.

Review Details Tab

This tab provides more detailed information about a review that you select on the Reviews Grid, including:

- Its name
- Status
- Instructions
- Due date
- Start rule
- Auto-approve rule
- Tags to be set when the review is complete
- Thumbnails of the assets in the review
- Information about each review participant: name, avatar, review role, indicator of the status of their review action (no action, action pending, action completed), and number of comments they posted in the review

Review Chains Tab

This tab displays all of the reviews within the review chain that correspond to the review that you selected in the Reviews Grid. Each review in the chain is displayed on a review card; the card for the selected review is highlighted. Review cards are displayed in the order that represents the review chain sequence, with the first review in the chain at the top. You can click through the review cards to select a review to see its information, which is the same information as listed for the Review Info tab.

The Review Chains tab provides the following functions:

- Launch Review
- Edit
- Minimize Panel

> **Note:** If you have highlighted a review in the Reviews Grid that is not part of a review chain, it still is displayed in the Review Chains tab.

Comments Tab

This tab displays all of the comments that are related to the review that you selected in the Reviews Grid. The following information is displayed for each comment:

- Comment text
- Thumbnail of the marked-up asset
- Date stamp that shows when the comment was posted
- Avatar and name of the person who posted the comment
- Number of replies made on the comment
- Comment flag, if there is one

Comments are searchable.

Task-Level Reviews Available for Basic Users and Advanced Users

If you are a Basic or Advanced User you now have access to task-level review functionality via Task Card » Reviews – ConceptShare. A new Reviews – ConceptShare icon within the Task Card enables you to access and log in to ConceptShare to create, view, and edit review details on the Task Settings pane.

> **Tip:** On the ConceptShare side, the Account Role Permits Third-Party Integration setting must be set to Yes.
>
> In addition, if Automatically Grant Access to New Pages is selected, Basic Users should have access to the Reviews – ConceptShare pages under the Task Card by default.
>
> If this is not the case, you must manually grant access to the group Reviews – ConceptShare under the Tasks Group for each access role. See the *Deltek WorkBook Integration Guide for ConceptShare* for more details.

Dashboards

Business Intelligence Widget Added in Dashboards Module

You can now add a business intelligence widget on a WorkBook dashboard using the new Intelligence Widget option on the Add a Widget context menu. The intelligence widget is an iFrame. It is a full-screen widget in which you can present various business intelligence displays.

> **Tip:** This business intelligence widget functionality is not part of—and is different from—WorkBook Intelligence dashboards.

If you are the owner you can change the default title from *Intelligence Widget*. Owners can also set and view the associated URL parameter and close the widget. Non-owners cannot do these things.

Users can reload the intelligence widget using a soft refresh button within WorkBook or by using the widget's reload button.

Dashboard Widget Close Confirmation

If you manually close a widget in the dashboard stage in Dashboards » My Dashboards by clicking the Close button, a dialog box asks you to confirm that you want to close the widget.

Finance & Administration

Changes to System and Company Variables to Enable Company-Level Control of Some Finance Settings

The following enhancements and changes have been made to improve the posting configuration process and make posting configuration easier to use.

Company Variable 75 (Job Adjustment Method) Replaces System Variable 971

System Variable 971 (Job Adjustment Method) has been converted to Company Variable 75, which has the same name. This enables you to manage this setting at a Company level, rather than at the system level.

Company Variable 75 has the same possible values that System Variable 971 did:

- **1 – Balance Sheet Method**
- **2 – P/L Method**
- **3 – P/L Method Including PQ Line Level**

Company Variable 75 also has the same default value, **1 – Balance Sheet Method**.

When you upgrade to WorkBook 13.3, the new Company Variable 75 takes on the value that you had previously assigned to System Variable 971, which is no longer active.

Company Variable 75 Added to Copy Finance Settings when Creating a Company and Copying Finance Settings

Company Variable 75 (Job Adjustment Method) has been added to replace System Variable 971.

When you create a Company and select another Company in the Copy Financial Settings from Company field, WorkBook copies the value of Company Variable 75 to the newly created Company.

When you create a Company without selecting another Company in the Copy Financial Settings from Company field, WorkBook applies the default value of Company Variable 75 to the newly created Company. The default value of Company Variable 75 is **1 – Balance Sheet Method**.

The possible values of Company Variable 75 are:

- **1 – Balance Sheet Method**
- **2 – P/L Method**
- **3 – P/L Method Including PQ Line Level**

Company Variable 75 Description Explains Function of its Options

In WorkBook, the description of new Company Variable 75 (Job Adjustment Method) provides the following information about how to use the options that you can choose from its drop-down list.

> Used to define how job revenue adjustments are to be calculated and posted.
>
> - Balance Sheet method assumes that the balance of Work in Progress (WIP) is used to determine the value of the adjustment
> - P/L method assumes that the value of revenue to be recognized in the P/L is used to determine the value of the adjustment
> - P/L method including PQ line level allows a revenue adjustment to be made to the P/L using Price Quote lines as the means of calculating the value of the adjustment

The default value is **1 – Balance Sheet Method**.

Automatic WIP Adjustments and New Company Variable 75

When you run the Automatic WIP Adjustment agent (Agent Type 141), automatic adjustments are made on jobs in Companies that have the new Company Variable 75 (Job Adjustment Method) set to option 1 – Balance Sheet Method.

Debtor Invoice Filter – Updated Icon

The Client icon on the Debtor Invoice filter has been updated to the  icon to be consistent with the analogous icon that is used on the Resource filter.

Creditors – Improved Creditor Voucher Approval Data Load

The following pages now load significantly less data:

- Finance & Administration – Creditor Invoices
- Tasks – Creditor Invoice Approval

Previously, for these pages WorkBook loaded data that was not used or required, which could cause a crash.

Databoards – Databoard 1098 (US 1099-NEC) is Now Available

As of the 2023 calendar year, support for US 1099 reporting is no longer provided directly within WorkBook through reports. US 1099 reporting is instead supported through data export and use of 1099 PRO, third-party software.

You can now select Databoard 1098 – US 1099-NEC in Databoards. The data export format matches the criteria required by 1099 PRO.

For more information about 1099 PRO, see https://www.1099pro.com/.

Debtors – Email Statement of Accounts

Finance Users need the ability to generate multiple emails with an attached selected debtors statement/transaction report to send to selected debtors, without having to wait for the process to complete. This batch processing functionality has been implemented to make this workflow more efficient.

Create Email Statement of Accounts via New Button

You can now create email drafts of Statement of Account reports 223 (Statement of Accounts (Open Items)), 225 (Statement of Accounts (Transactions)), and 522 (Statement of Accounts (Transactions Currency)).

When you click on the Send Statement of Accounts Reports button located on the header of the Debtor List view, the Email Statement of Accounts Reports dialog box opens so that you can specify the required information. When you click OK, WorkBook generates a draft email with report(s) attached and sends it to the Email Draft menu on the application header, where you can update, send, or delete the email.

Finance Budget Page – New Label Clarifies How Budget Handles Credits and Debits

The Finance Budget page now displays a label that says Positive Numbers are Debit, Negative Numbers are Credit, to clarify how the budget handles credits and debits as positive and negative numbers.

General Ledger – Finance Account Subtypes Expansion

Additional financial account groups—beyond Operating and Balance Sheet accounts—are now supported, such as Fixed Assets and Stock. A new, optional field has been added to support this. In addition, the following rules have been defined to ensure appropriate use:

- Only Operating Accounts can be set as Revenue.
- Only Balance Sheet accounts can be set as Assets.

Additional information is provided in the following.

Finance Account Subtypes – Add, Edit, and Delete those that are not Predefined for Operating and Balance Sheet Accounts

If you are an Admin or Advanced User, and you have access to Settings » Finance » Finance Account Subtypes, you can now add, edit, and delete Finance account subtypes that are not predefined for Operating and Balance Sheet accounts. However, you still cannot add, edit, or delete predefined account subtypes; they are hardcoded.

The following restrictions exist:

- When you add an account subtype that is not predefined, the Account Subtype Name field allows up to 256 characters. It cannot contain null, '', or ' ' values.
- When you edit an account subtype that is not predefined, the Account Subtype Name field allows up to 256 characters. It cannot contain null, '', or ' ' values. In addition, you cannot change the parent account type if the account subtype is already used in any Financial account.
- When you delete an account subtype that is not predefined, you cannot delete the account subtype if it is already used in any Financial account.

Subaccounts Drop-Down List Added to Chart of Accounts Sidebar

When the Account Type is Operating Account or Balance Sheet Account, the Account Subtype drop-down list is available on the Chart of Accounts sidebar. The Account Subtype field has no default value upon deployment, and it is not mandatory. The content of the Account Subtype drop-down list is filtered by Account Type and Company ID. If you change the Account Type, that clears the Account Subtype. You can also clear the Account Subtype field manually.

If the Account Type is neither Operating Account nor Balance Sheet Account, the Account Subtype drop-down list is not visible.

General Ledger – Chart of Accounts – Controlling Access to Create New Account Button

System Admin Users can now control which users can access the following on the Chart of Accounts tab:

- Create New Account button
- Delete Account button
- Setup » All Settings grid
- Settings sidebar

You enable this access by going to Settings » Employee Settings » Employee Cross-Company Access and selecting the checkbox in the Allow Access to Settings column.

If your access is revoked, the Create New Account and Delete Account buttons on the Chart of Accounts List tab are not displayed, and the Setup » All Settings grid and Settings sidebar are read-only.

If you have been given access, you can create accounts and delete accounts on the Chart of Accounts List tab, and you can change values on the Setup » All Settings grid and the Settings sidebar.

General

Default Page After Error and Restart

When a system error occurs, and you are forced to restart WorkBook, the page that you are returned to defaults to the Tasks » To-Do » Tasks page.

Email Import – Microsoft Exchange Deprecates Basic Authentication

Microsoft Exchange Basic Authentication has been deprecated. As a result, if you are using WorkBook version 12.2 and Office365, you can no longer import emails. The following changes and enhancements have been implemented to resolve this issue.

Email-Handling Component Updated

The third-party software that WorkBook uses for email handling (Mailbee) has been updated.

OAuth 2.0 Implemented for Emails

OAuth 2.0 is now implemented for further use of Microsoft Exchange as follows:

- A Sign-In with Microsoft button has been added to My Settings » Email Import Settings.
- New agents using the OAuth 2.0 mail import configuration have been added:
  - Ticket Import Public Agent (OAuth 2.0) – Agent Type 180
  - Mail Import Agent (OAuth 2.0) – Agent Type 178
  - Mail Import Public Agent (OAuth 2.0) – Agent Type 176
  - Mail Archive Agent (OAuth 2.0) – Agent Type 179
- The Connected to OAuth 2.0 column has been added to the grid at Settings » Advanced Tools » Employee Email Sync. Use this column to track users who are connected and actively working in OAuth 2.0.

Faster Login to WorkBook

The process of logging in to WorkBook is now faster.

Overnight System Maintenance is Improved

The performance of the overnight system maintenance has been improved.

HTML Sanitizer Version is Updated

HTML Sanitizer has been updated from version 3.3.142 to version 7.1.512.

Improved Handling of Voucher Attachment File Uploads to Storage Provider

When you try to upload a file as an attachment to a voucher, WorkBook checks its type against the list of file types (file extensions) that is specified as the value of System Variable 1034, File Extensions Allowed when Uploading a File to a Voucher.

If a file’s type is not one of the types that System Variable 1034 specifies, WorkBook blocks the upload and displays the following error message:

> The file type that you are trying to upload is not allowed. Please check System Variable 1034 for the allowed file extensions.

System Variable 1034 permits the following file types by default: .png, .jpg, .jpeg, .txt, .htm, .html.

Your System Administrator(s) might have specified a different set of valid file types in System Variable 1034.

> **Warning: System Variable 1034 cannot be blank or null.** If you try to use a blank or null value for System Variable 1034 a system error occurs.
>
> In addition, **the following file types are never allowed:** app, bat, bin, cmd, dll, dmg, exe, jar, js, msi, ps1, sh, src, vb, vbs. If you try to include any of these file extensions in the value of System Variable 1034 a system error occurs.

Improved Performance of Drop-Down Lists Throughout WorkBook

Dimensions – Optimized Loading of Dimension Drop-Down Lists

The loading of drop-down lists for some dimensions has been optimized so that WorkBook only loads them when users begin typing in the drop-down list box. The following are the affected pages and drop-down lists:

- CRM – Pipelines – Sidebar – Pipeline Dimensions
- Finance & Administration – Assets – Sidebar – Asset Dimensions
- Jobs – Job Properties Sidebar – Job Dimension Settings
- Settings – Subscription Billing – Dimensions (Tab)

Inbox – @mentions are Optimized in Conversations

Resource mentions via @ in conversations have been optimized.

Indexes Added to Database Tables

A number of new indexes have been added to database tables to improve the performance of several queries.

iOS Push Notifications Now Available

Push notifications are now available on iOS. If WorkBook is closed (in the background), and you receive a message, a notification from the sender and the first lines of the message are shown as a native notification on your phone.

Note: You must be using WorkBook 13.1 or newer to use this feature.

Login – Deferred Loading Google Maps API until It is Needed, Instead of Loading it on Login Screen

The Google Lookup entry field on the Create Client page has been set to beta status.

Performance of Notifications Improved

The performance of notifications has been improved, with the result that any request that uses notifications now has an improved completion time.

Proof HQ Page Removed

The Proof HQ page has been removed from the job and task sidebars. In addition, the Proof HQ settings have been removed from the Settings module (Settings » Global System Settings » Proof HQ).

Quick Menu – Search Jobs Tab is Rewritten

The Jobs tab that you access via the Quick Menu Search icon » Search Jobs » Jobs (Tab) has been rewritten to Vue. It maintains all of its previous features and functions.

Sarbanes-Oxley Act References have been Removed from WorkBook

The Sarbanes-Oxley Act (SOX Act) is a US Federal law that introduced new and/or expanded requirements for the regulation of corporate governance and financial practices for public companies. This law was created to help protect shareholders, employees, and the public from accounting errors and fraudulent financial practices.

These practices and requirements are US-specific and are related to users and how they (and their organizations) use software, rather than to the software itself. WorkBook is not required to be SOX-compliant. Rather, it enables users to configure their environments such that their processes are SOX-compliant.

All references to SOX and Sarbanes-Oxley have been removed from WorkBook so that there is no confusion or possible misinterpretation that would lead anyone to infer that WorkBook is SOX-compliant.

Global System Settings – System Variables – SOX Related Variables Category Removed

The SOX-Related System Variables category has been removed from Settings » Global System Settings » System Variables and is no longer displayed in the user interface if you search manually.

Global System Settings – System Variables – SOX Related Variables Redistributed

Because the SOX-Related Variables category has been removed from Settings » Global System Settings » System Variables, all of its System Variables are now redistributed to their designated categories.

WorkBook Initialization is Improved

WorkBook's initial loading screen has been optimized, lowering the time that is required to enter the application.

Inbox

Caching Enhances Overall System Performance

Company Variables, System Variables, user settings, and user-translated messages are now cached on the server side. This means that if WorkBook must read the actual value of one of these objects, it is only required to fetch the value from the database once. This should have a positive impact on performance.

Clean Up Conversation List Button Added to Inbox Toolbar

The Clean Up Conversation List button has been added at the right side of the Inbox conversation list toolbar. When you click this button, the Clean Up Conversation List dialog box prompts you to select the type(s) of conversations that you want to remove from your Inbox:

- Tasks where I'm done
- All done tasks
- Tickets where I'm done
- Closed tickets
- Latest comment by me
- Latest comment before

The last option provides a calendar so that you can select a date.

You can select multiple options.

Click OK to remove the selected types of conversations.

Query that Loads the Inbox is Optimized

The query that loads the Inbox no longer loads data that it does not use, which improves the speed of loading the conversation Inbox list. The unused field One2OneLatestComment was removed, which also means that less data is loaded, resulting in increased speed of loading.

In addition, the HasAttachment field now shows the correct value that is returned; previously, only one value was returned.

Jobs

Change to FollowUpPriceQuoteApprove API Approval Logic

Users must now have Extended Access to price quote approval status approved externally to be able to set Price Quotes as externally approved when using the Follow-up Price Quote Approve API.

Change to JobPriceApproveRequest API Approval Logic

Users must now have Extended Access to price quote approval status approved externally to be able to set Price Quotes as externally approved when using the Job Price Approve Request API.

Costing Code and its Description Displayed in Additional Places

For jobs- and tasks-related pages and dialog boxes, the Costing Code column now displays the concatenation of the Costing Code and its description as follows.

- For jobs-related information:
  - Simplified Jobs List
  - Jobs List
  - Job Creation Dialog
- For tasks-related information:
  - Tasks grid on the Tasks page

Job Filter – Updated Icons

The following icons on the Job filter have been updated to be consistent with the analogous icons that are used on the Resource filter:

  - – Client (under the Client & Groups field
  - – Company (under the Properties field)

> **Note:** The Client icon on the Debtor Invoice filter (in the Finance & Administration module) has also been updated to the icon.

Job Lists View – Set Simplified Jobs List as Default

When you log in to WorkBook, and you open the Jobs List in the Jobs module, it now defaults to the Simplified Jobs List view.

This is based on browser session, so when you select a different view and move to other pages or modules, switching back to the Jobs List shows the last view that you selected. However, if you log out and then log back in to WorkBook, it defaults to the Simplified Jobs List view once again.

Job Lists Views – Out-of-Sync Indicator Added to Job List Grids

In all Job List views—except for Gantt View (6)—when a job that is displayed in the grid becomes outdated, its row is not immediately reloaded. Instead, a Refresh icon appears in the leftmost column of that job's row to indicate that the job is out of sync. Click the Refresh icon to refresh the grid and update outdated row(s).

JobCopyPlan Procedure has been Optimized

The JobCopyPlan procedure has been optimized, which has enhanced its performance.

JobCreateRequest Procedure has been Optimized

The JobCreateRequest procedure has been optimized with code improvements and for heavy application load scenarios. The procedure is now more stable during heavy application use.

Price Quote (PQ) – Ability to Limit Access to Approval from Status-40 to Status-50 via Extended Access

You can now restrict external approval of PQs to specific user groups, using extended access. This enables you to ensure that internal regulations are complied with. Your established approval flow still directs the formal PQ approval process from Status-10 to Status-40. However, using this enhanced functionality, only those users with extended access can move approval of a PQ from Status-40 to Status-50.

You can manage this at the Company level, using the new Company Variable 76 (Price Quote Approve Button Sets Status: Internally/Externally Approved), which replaces System Variable 252. See Company Variables – Converted System Variable 252 to Company Variable 76 for more information.

Price Quote (PQ) – Header – Approve PQ Button Behavior when PQ Reaches Status-50

The Approve Price Quote button is now disabled if a PQ has reached Status-50 (Approved Externally).

To be able to set a PQ as externally approved when using the Approve Price Quote button and Approval Status selector, users must have Full Access on the Extended Access of the pricequote.approvalstatus.approvedexternally element.

Price Quote (PQ) – PQ Copy no longer Loads too much Data

When you create a PQ using the Create a PQ from Another Job copy method, the runtime performance of the dialog box is no longer affected by an excessive API request that loaded too much data.

Tasks – Department Column Added to Booking Subgrid

The Department column has been added to the Booking subgrid at Jobs » Tasks » Booking subgrid » Matrix View.

Tasks – Gantt Report Export – Improved Security when Exporting Gantt Data

Exporting data from the Gantt pages no longer sends unnecessary data to the remote server for generating PDF files; this now complies with GDPR. For the same reason, you can no longer export data from the default calendar synchronization job. (See System Variable 295, Calendar Synchronization Default Job for Imported Calendar Items. When the calendar synchronization is active. WorkBook will import calendar entries and add these as tasks to the job you assign in this variable.)

MediaForce Integration

MediaForce Renamed to GaleForceMedia

The name MediaForce has been changed to GaleForceMedia throughout WorkBook because the name of the product that is integrated with WorkBook was changed to GaleForceMedia.

> **Note:** In future Release Notes the category *MediaForce Integration* will be replaced by *GaleForceMedia Integration*.

My Settings

Google Sign-In JavaScript Library is Migrated to New Google Identity Services Software Development Kit (SDK)

WorkBook has migrated the Google Sign-In JavaScript Library to the new Google Identity Services SDK. This affects the area and function of My Settings » Calendar Synchronization Settings » Calendar Connection Settings » Calendar Client.

Grid Settings – Box Around Cell Selection – Improved Contrasting Color

When you select the Box Around Cell Selection checkbox in My Settings » Grid Settings, WorkBook now uses a more contrasting color to indicate cell selection. This makes it easier for you to locate the selected cell(s).

Notifications

Absence Entry Notifications Appear in Inbox after Approval, Cancellation, or Deletion

When an absence entry is approved, cancelled, or deleted, the absence entry notification for the manager, timesheet manager, and traffic manager appears in the Inbox.

User Notification for Large Job List Data Loads

You can sometimes trigger large data loads inadvertently when you move from one Job List to another, using a filter that loads a large number of jobs. Before Release 13.3, when this happened, you did not have the opportunity to adjust the filter before you were committed to waiting for that large number of jobs to load.

Now WorkBook warns you before starting to perform the load, so that you can decide whether to continue or to adjust the filter to identify a smaller result set to load.

Large Job List Data Load Notification Message

You can set a threshold value for how many jobs users can try to load into certain Job List views before WorkBook warns them that they are about to load a large number of jobs, which can impact performance. This is true whether a user is accessing the Job List view initially or is changing filter criteria such that the resulting number of jobs is very high.

When that threshold is met or exceeded, a dialog box displays the following message:

> **You are about to load a very large number of jobs.**
>
> This can take a long time and degrade system performance. Recommended best practice is to further filter the list of jobs to reduce the number.

Users can click Adjust Filter to reduce the number of jobs or click Continue to load the large number of jobs anyway. Closing the notification dialog box is the equivalent of clicking Continue: WorkBook proceeds to load the large number of jobs.

You set the threshold for the number of jobs as the value of System Variable 1189.

This threshold affects the following:

- Jobs List (1)
- Status Report (2)

- Expenditure Overview Cost Prices (3)
- Expenditure Overview Sales Price (4)
- Jobs List with Dimension Settings (13)
- Expenditure Overview Cost and Sale (17)

System Variable Added to Notify Users Who are Loading Large Jobs List

Use System Variable 1189 (Prompt User to Narrow a Page's Filter When More than the Following Number of Items are being Loaded) to set the threshold value for how many jobs users can try to load before WorkBook displays a notification that they are about to load a large number of jobs.

When the number of jobs triggers this warning, the message described in Large Job List Data Load Notification Message is displayed:

Users can then do any **one** of the following:

- Click **Adjust Filter** and then narrow the job filter to reduce the number of jobs.
- Click **Continue** to load the large number of jobs anyway.
- Close the notification dialog box, which has the same effect as clicking Continue.

If you set System Variable 1189 to 0 (zero), the notification dialog box is not displayed.

The default value is 0.

System Variable 1189's threshold affects the following:

- Jobs List (1)
- Status Report (2)
- Expenditure Overview Cost Prices (3)
- Expenditure Overview Sales Price (4)
- Jobs List with Dimension Settings (13)
- Expenditure Overview Cost and Sale (17)

Resources

Anonymized Employees' Names do not Appear in Background Tasks List

When you have anonymized employees, background tasks no longer show the employees' names.

Job Statistics Performance Improvement

When you navigate to the Job Statistics tab on a Resource card the Time Used vs. Time Booking graph now displays correct numbers based on hours spent and hours booked.

Scheduling

Calendar Views – New Dialog Box with Task and Job Information

A new dialog box that displays task and job information has been added to the following views: Scheduling Calendar, Timeline Calendar, and Personal Calendar. You open this dialog box by single-clicking on a booking.

Costing Codes – Extended Visibility of Costing Codes

The Costing Code column has been added to the following grids:

- Scheduling » Task Matrix
- Scheduling » Weekly Schedule » Booking Details subgrid (Task Grid View)
- Scheduling » Task List
- Tasks » To-Do » Tasks » Grid View
- Tasks » To-Do » Tasks » Week View

Scheduling – Group Scheduling Resources (GSR) – Booking Empty GSRs is Allowed

You can now book empty group scheduling resources if new Company Variable 78 (When Enabled, Allows Booking of Hours Against an Empty GSR) is enabled. See Company Variables – New Company Variable 78 to Allow Booking Hours Against Empty Group Scheduling Resources (GSRs).

Scheduling – Job Scheduling – Basic User Access to Scrum Board

Basic Users can now access the Scrum Board under Scheduling and under Job Scheduling.

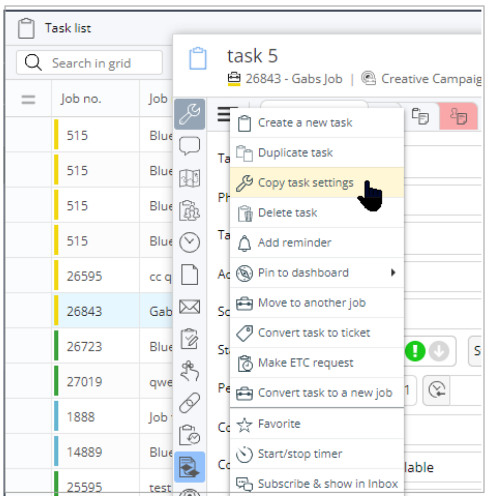
Tasks – Enhanced Task Settings Copy Functionality

Previously, you could only create multiple tasks simultaneously by using an automated process, such as copying from a Price Quote (PQ) to a schedule. However, using such a method, you could not apply settings to the tasks as you created them; you had to add settings individually later.

Copy Settings Values from One Task to Others in the Same Job Added

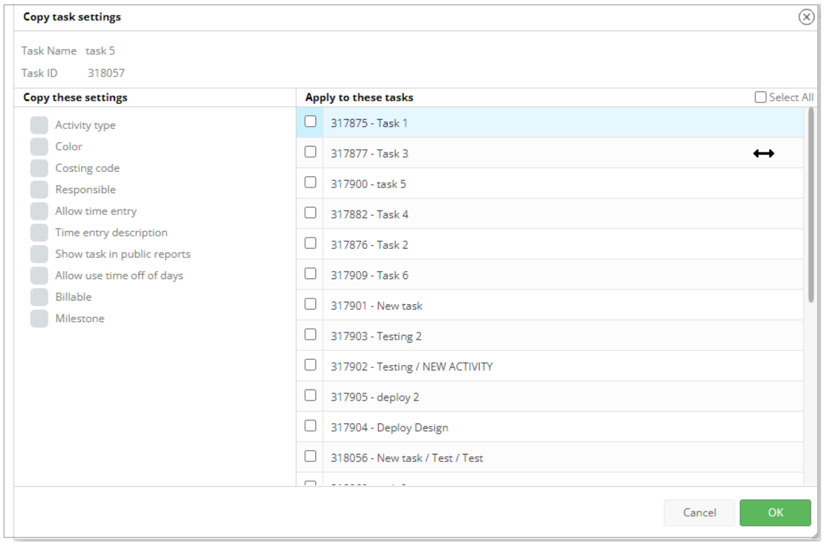
You can now copy task-level settings from one task to one or more selected tasks in the same job.

You access this functionality from the Task Basic Settings ≡ hamburger menu.



Settings Selection Dialog Box Added

When you select Copy Task Settings on the Task Basic Settings ≡ hamburger menu, the Copy Task Settings dialog box is displayed, where you can select the settings that you want to copy and the tasks to which you want to copy them. Alternatively, you can select the Select All checkbox to copy the settings to all tasks that are listed in the Copy Task Settings dialog box.



You can copy the following settings:

- Activity Type
- Color
- Costing Code
- Responsible
- Allow Time Entry
- Time Entry Description
- Show Task in Public Reports
- Allow Use Time Off of Days
- Billable
- Milestone

When you click OK, the values of the selected settings in the source task are copied to the analogous settings in the selected target task(s).

This includes null values; that is, if a setting on the source task does not have a value/selection, that setting is set to null on the target task. For example, if the source task does not have an Activity Type, the target task's Activity Type is set to null.

Copy operations are logged as normal.

Task Matrix – Allow Approvers to Approve Status-20 Bookings in Task Matrix

You can now approve bookings that were sent for approval (Status-20) directly from the Task Matrix view.

Task Matrix – Percentage Display Option

The ability to view bookings data in additional scheduling views beyond the Weekly view was a requirement for supporting resource planning by percentage. This assists those who are moving away from resourcing in hours.

Using percentages also provides better data insights such as resource bookings across clients. It provides a quick overview of Utilized Capacity by percentage.

To enable this functionality, the Percentage Display Option has been added to the Task Matrix in the Task Total, Period Total, and Calendar cells. These options are read-only and are now available in the Day and Month views, as well as the Weekly view.

Toggle Booking Colors – Calendar and Timeline Calendar

New radio buttons Use Client Colors and Use Task Colors have been added to the View Options dialog box on the Calendar and Timeline Calendar views. These buttons enable you to display bookings using colors that identify particular clients or standard task colors, respectively. Click either radio button, then click Apply.

- Use Client Colors – Display bookings in the color assigned to the client.
- Use Task Colors – Display bookings in the relevant standard task color.

If you choose one of these color options and then navigate away from the Calendar or Timeline Calendar view, the last option that you chose is still in effect when you return to that view.

Settings

Added Ability to Mark Departments as Inactive

Previously, you could delete a department if no employee resources were allocated against it, or you could merge departments. Merging departments moves allocated resources from one to another. Deleting and merging departments are not always appropriate options because of the possible impact on historical data, including complete and closed jobs. Now you can set a department to inactive, which enables you to retain historical data, and which removes the inactive department from field option lists so that it can no longer be selected.

When departments have been set to inactive, visual indicators make that status clear.

The impact of the ability to set a department to inactive status is widespread, as described in the following.

Activities – Behavior of Inactive Departments within Activity Department Settings

When you view Activity department settings at Settings » Activities, inactive departments are hidden from view. When you select the Show Inactive Departments checkbox, inactive departments are displayed in the grid, and their header text is shown in red and enclosed in parentheses.

Clients – Inactive Departments are Filtered Out

When you open a client card, resource information is displayed. When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), that department no longer appears in the drop-down list of values in the Department field in New Job Settings » Client Defaults.

Clients – Inactive Departments are Filtered Out of Drop-Down Lists

In the Client Resource Information and Resource card, inactive departments are removed as an option from drop-down list fields or cells so that only relevant data is displayed.

Company Settings – Departments – Ability to Mark Departments as Inactive

If you are an Admin User or Advanced User with access to Settings, you can now mark departments as inactive, or reset them to active. Navigate to Settings » Company Settings » Departments, where a new Active column has been added. The Active column contains a checkbox for each Company row. Select the checkbox for a Company (or set of Companies) to set the Company(ies) to active, or clear the checkbox to set the Company(ies) to inactive.

Company Settings – Departments – Inactive Departments are Filtered out of Merge Department Drop-Down List

In Settings » Company Settings » Departments, all inactive departments are removed from the options in the Merge Department drop-down list and thus are not available for selection.

Company Settings – Departments – Marking Departments as Inactive – Confirmation Dialog Box

When you clear the checkbox in the Active column to set a department to inactive, a dialog box prompts you to confirm that you want to change the department's status to inactive. Click Yes to mark the department as inactive; otherwise, click No to cancel.

To mark a department as active, select the checkbox in the Active column in that department's row in the Departments grid.

Company – Inactive Departments are Filtered out of Drop-Down Lists

In the Company Resource Information and Resource card, inactive departments are removed as an option from drop-down list fields or cells so that only relevant data is displayed.

Company Approvals – Price Quote (PQ) Approval – Department Dimension Details – Inactive Departments Removed from Drop-Down List

When a department is marked as inactive at Settings » Company Settings » Departments » the Active column, that department no longer appears in the drop-down list in the Price Quote Approval – Department Dimension Details in Settings » Company Approval.

In addition, when you view a PQ approval role, and that role has an inactive department selected in the Dimension Value column, that department is shown in red and enclosed in parentheses.

CRM – Pipelines – Pipelines Grid – Inactive Departments Identified Visually

In Pipelines » Pipelines Grid » the Department column and Prospect card, in the Department field, names of inactive departments are shown in red and enclosed in parentheses.

Dimensions – Dimension Detail Role Setup – Inactive Departments Identified Visually

On the Settings » Dimensions » Dimension Detail Role Setup » Department grid view, when a department that is displayed or selected is inactive, it is shown in red and enclosed in parentheses.

Employees – Inactive Departments are Filtered Out

When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), that department no longer appears in places where employee details are displayed and updated, such as employee creation (Add New Employee dialog), opening an existing employee's resource card, and when in the Resource module » Employee settings grid (vertical and horizontal resource information).

Finance & Administration – Creditors – Creditor Invoices – Creditor Invoices with Inactive Departments cannot be Approved

You can no longer approve creditor invoices from Status-10 / Status-20 to Status-40 / Status-50 if they have inactive departments. Any attempt to move a creditor invoice from Status-10 or -20 to Status-40 or -50 now results in a message that the department is inactive.

Finance & Administration – Creditors – Creditor Invoices – Inactive Departments are Filtered out of Drop-Down List

When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), that department no longer appears in the drop-down list in the Creditor Invoice Line Details Department column in Creditors » Creditor Invoices. For creditor invoices whose status is Under Preparation or For Approval, inactive departments are displayed in parentheses and highlighted in red. For creditor invoices whose status is Approved, For Booking, or Booked, inactive departments are displayed in parentheses.

Finance & Administration – Debtors – Debtor Invoices – Inactive Departments Identified Visually

When you view a debtor invoice under Debtor » Debtor Invoices » Drafts view, and that invoice belongs to a job that has an inactive department, that department is displayed in parentheses and highlighted in red.

For debtor invoices under Debtor » Debtor Invoices » Electronic view whose status is Approved, Ready for Print, or Finalized, inactive departments are displayed in parentheses.

Finance & Administration – General Ledger – Journals – Approval Blocked when Department is Inactive

Journals that have inactive departments cannot be approved. The error message field in the top right of the Journal Entry page indicates that the department is inactive.

Finance & Administration – General Ledger – Journals – Journal Entry – Inactive Departments are Filtered out of Drop-Down List

When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), that department no longer appears in the drop-down list in the Journal Entry Department column in Finance & Administration » General Ledger » Journals » Journal Entry. For journals whose status is Under Preparation or For Approval, inactive departments are displayed in parentheses and highlighted in red. For journals whose status is Approved or Booked, inactive departments are displayed in parentheses.

Folders, Reports, & Documents – Storage and Folders –- Storage Provider – Inactive Departments Identified Visually and Filtered Out of Drop-Down Lists

When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), and that department is used by an entry in Storage Provider » Job Folder setup, that department is displayed in red highlighting and enclosed in parentheses.

In addition, inactive departments are no longer included in drop-down list fields or cells if you try to change departments that are used in the Job Folder setup.

Invoices – Inactive Departments Identified Visually and Filtered Out of Drop-Down List

When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), that department no longer appears in the drop-down list field (cell) for invoice lines departments at Jobs » Jobs List » (Selected) Job » Invoice » Lines (Tab) » Departments (Column). For records that are in Status-40 and above, inactive departments are displayed in parentheses.

Jobs – Booking Approvals Blocked when Resource Department is Inactive

If a resource’s department is inactive, approval of bookings for that resource is blocked.

Jobs – Job Invoice – Invoice Approvals Blocked when Departments is Inactive

When an invoice has an inactive department on one or more invoice lines, submitting that invoice for approval (moving it from Status-10 to Status-20) and approving that invoice (moving it from Status-20 to Status-40) are now blocked.

Jobs – Jobs List with Dimensions Settings (13) – Inactive Departments are Filtered Out of Drop-Down List and Identified Visually

When you open a Jobs List with Dimensions Settings (13) via Jobs » Jobs List (View) » Jobs List with Dimensions Settings (13) » Department column, if the existing department was marked as inactive (via Settings » Company Settings » Departments » Active column), that department no longer appears in the drop-down list for the Department column. For jobs whose status is Invoiced or Canceled, inactive departments are displayed in parentheses in the job's Department column.

Jobs – Jobs List Grid – Inactive Departments are Filtered Out of Drop-Down Lists

When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), when you create a job via Jobs » Jobs List Grid » Create New Job, or when you select an existing job from the Jobs List View grid and open the job properties sidebar, that department no longer appears in the drop-down lists under Department fields.

Jobs – Purchase Order (PO) – PO Approvals Blocked when Department is Inactive

When the department that is assigned on a PO header is inactive, submitting that PO for approval—moving it from Status-10 to Status-20—and approving that PO—moving it from Status-20 to Status-40—are now blocked.

Jobs – Purchase Order (PO) Header – Inactive Departments are Filtered Out of Drop-Down List

When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), that department no longer appears in the drop-down list in the Sent from Department field in Jobs » Jobs List » (Selected) Job » Purchase Order » Header (Tab).

Jobs – Price Quote (PQ) – Inactive Departments are Filtered out of Drop-Down List and Identified Visually

When you have marked a department as inactive (via Settings » Company Settings » Departments » Active column), that department no longer appears in the drop-down list in the PQ lines Department column in Jobs » Price Quote » Lines. For PQs whose status is Under Preparation or For Approval, inactive departments are displayed in parentheses and highlighted in red. For PQs whose status is Approved Internally, Approved Externally, or Cancelled, inactive departments are displayed in parentheses.

Jobs – Price Quote (PQ) – PQ Approvals Blocked when Department is Inactive

When a PQ has an inactive department on one or more PQ lines, submitting that PQ for approval (moving it from Status-10 to Status-20) and approving that PQ (moving it from Status-20 to Status-40) are now blocked.

Settings – Price Lists & Activities – Adding New Price List Data with Inactive Department

On the Settings » Price Lists & Activities » Price Lists » Price List Setup tab, when you add an entry on the grid via the Add New Price List Data dialog box, a department that is displayed as the default source reference on the grid is shown in red and enclosed in parentheses if it is inactive. (Active departments are shown normally.)

Tasks – Booked Resources Subgrid – Inactive Departments Displayed

When you view a booked resource in the Jobs » Tasks » Task » Booked Resources subgrid » List View or Matrix, if that resource is assigned to an inactive department, that department is shown in red and enclosed in parentheses for bookings that are Under Preparation or For Approval status.

Teams – Team Matrix – Inactive Departments Identified Visually

In the Settings » Teams » Team Matrix » Teams grid, inactive departments are shown in red and enclosed in parentheses. This makes them easy to identify or filter.

Company Variables – Converted System Variable 252 to Company Variable 76

System Variable 252 (Price Quote Approve Button Sets Status: Internally/Externally Approved) has been converted to Company Variable 76, which has the same name. This enables you to manage this setting at a Company level, rather than at the system level.

Company Variable 76 has the same possible values that System Variable 252 did: 40 – Internally Approved; or 50 – Externally Approved. Company Variable 76 also has the same default value, 40 – Internally Approved. Company Variable 76 provides the same behavior that System Variable 252 did.

System Variable 252 is no longer active.

Company Variables – New Company Variable 78 to Allow Booking Hours Against Empty Group Scheduling Resources (GSRs)

Use Company Variable 78, (When Enabled, Allows Booking of Hours Against an Empty GSR) to allow booking empty group scheduling resources. An empty GSR has no assigned resources; thus, it has no calculated capacity. You enable this Company Variable 78 by selecting its checkbox. Disable it by clearing its checkbox. The default value is disabled (cleared).

Folders, Reports, & Documents – Storage and Folders – Storage Provider – Google Storage Provider Authentication Updated not to Use Out-of-Band (OOB)

Google Storage Provider setup now uses an alternative flow for OAuth, rather than the OOB flow, which Google has deprecated.

When you set up a new Google Storage Provider, after you successfully grant access to your Google Drive account, a pop-up window shows the message Authentication success. You can now close this window.

> **Attention:** The OOB flow used previously would have shown a token that you would have been required to copy over into WorkBook.
>
> **This step is no longer required.**

Global System Settings – System Variables – System Variable Added to Control Default Jobs List Behavior

Use System Variable 1190 (Force the Default Job List Shown to be Simplified Job List) to control whether the Simplified Job List is the default jobs list view. When System Variable 1190 is enabled, WorkBook only tracks and applies the last-shown jobs list during the browser session; you are instead directed to the Simplified Job List. Enabling this System Variable can improve overall system performance.

You enable System Variable 1190 to set the Simplified Job List as the default. To enable System Variable 1190, select its checkbox. Clear its checkbox to disable it. The default value of System Variable 1190 is disabled (cleared).

Global System Settings – System Variables – System Variable Added to Control Allowed File Types when Uploading Files

Use System Variable 1192 (File Extensions Allowed when Uploading a File) to control which file types users can upload as attachments to items other than vouchers. (For valid file types for attachments to vouchers, see changes to System Variable 1034 described in Improved Handling of Voucher Attachment File Uploads to Storage Provider.)

The default value of System Variable 1192 is doc, docx, heic, jpeg, jpg, png, svg. In addition, the following file types are always allowed: bmp, csv, data, gif, htm, html, mht, odt, pdf, rtf, txt, wav, xls, xlsx, xml.

The following file types **are never allowed** in the value of System Variable 1192: app, bat, bin, cmd, dll, dmg, exe, jar, js, msi, ps1, sh, src, vb, vbs. If you enter any of them in the value of System Variable 1192, an error occurs with an appropriate error message.

The value of System Variable 1192 cannot be blank or null. If you try to use a blank or null value, an error occurs with an appropriate error message.

Global System Settings – System Variables - SOX Related Variables Category Removed

The SOX-Related System Variables category has been removed from Settings » Global System Settings » System Variables and is no longer displayed in the user interface if you search manually.

Global System Settings – System Variables - SOX Related Variables Redistributed

Because the SOX-Related Variables category has been removed from Settings » Global System Settings » System Variables, all of its System Variables are now redistributed to their designated categories.

Proof HQ Settings Removed

The Proof HQ settings have been removed from the Settings module (Settings » Global System Settings » Proof HQ). In addition, the Proof HQ page has been removed from the job and task sidebars.

Recalculate JobKeyFigures (Financial Figures on a Set Frequency

Key job Financial figures are now recalculated periodically, which means that the numbers in grids might be somewhat outdated when you view them. The header in Jobs Lists now tells you when figures were last calculated and provides a button that enables you to recalculate them on demand instead of waiting.

System Variables – System Variable Added to Control Frequency of Calculation of Job Key Figures

Use System Variable 1188 (Frequency of Recalculation of Jobs Financial Figures in Minutes) to set the interval at which the recalculation of job key figures occurs. You specify a number of minutes for the value of this System Variable.

The default value is 0 (zero), which means that unscheduled updates of jobs occur whenever they are needed because changes were made to job key figures.

Any positive value means that an interval of that number of minutes elapses before jobs are updated when job key figures are changed.

Recalculations occur in the background. When recalculations have been performed, the Reload button appears in job lists on rows that are out-of-sync as a result. Click Reload to do a manual refresh; note that this refresh reloads all of the rows, not just those that became out-of-sync when recalculations were performed.

Time Since Last Data Update and Manual Update Button Added to Jobs List Header

When System Variable 1188 is enabled, the amount of time (in minutes) since the last data update is displayed at the right side of the Jobs List header. Next to this information, an Update Now button is provided so that you can manually update the job key figures, rather than wait the remainder of the interval that System Variable 1188 specifies.

User Access Rights – Nonexistent Pages Removed from Access Rights Lists

Multiple pages that appeared in the tree view on the Access tab and in the list on the Override tab did not actually grant or remove access to any pages because they were placeholders for pages that did not exist. These items have been removed.

This change affects only Admin Users. The following items have been removed.

At Settings » Advanced Tools » User Access Rights » User Access Setup tab » Access tab:

- Schedule plan settings
- Move task to another resource
- Xdce dxchart
- Xdce grid
- Xdce dxpiechart
- Wb board script editor
- Xdce dxchart
- Xdce grid
- Xdce dxpiechart
- Wb board script editor
- Database explorer tables
- Database explorer table fields
- Database explorer table data
- Database explorer views
- Database explorer views fields
- Database explorer enums
- Database explorer functions
- Database explorer stored procedure
- Database Explorer Main
- Payment information control
- Payment information control
- Schedule plan settings
- Move task to another resource
- Payment information control
- Document template
- Price line dimensions
- Job invoice valuation
- Partial invoice valuation
- Move time entries settings
- Move time entries select hours

- Creditor adress informations
- Manage address specification fields
- Debtor adress information
- Manage address specification fields
- Move time entries settings
- Move time entries select hours
- Create client order
- Job invoice card
- Manage conversation groups
- Inbox add resources to jobteam
- Inbox add resources to jobteam
- Task overuse follow-up
- Sla settings
- Create client order
- Client Order

The following pages at Settings » Advanced Tools » User Access Rights » User Access Setup tab » Override tab:

- Kanban List View
- SVG Library
- Gantt task view
- Schedule Plan Settings
- Job Invoice Card
- Job Invoice Valuation
- Partial Invoice Valuation
- Move Time Entries Settings
- Move Time Entries Select Hours
- Job Book List Filter V2
- Inbox Add Resources To Jobteam
- Document template
- Add new report profile
- Move Task To Another Resource
- Deactivate Dilog
- Payment Information Control
- Creditor Default Card
- Report Profile Setup Access
- Price Line Dimensions
- Database Explorer Tables
- Database Explorer Views
- Database Explorer Enums
- Database Explorer Functions
- Database Explorer Stored Procedure
- Database Explorer Table Fields
- Database Explorer Table Data
- Database Explorer Views Fields

- Database explorer main
- Notification Parameter Sidebar
- Add Notification Schedule
- General Ledger DataImport Selector
- Task Overuse Followup
- ProfitForecastDataDetail
- Customer SLA
- Client Order Create Dialog
- Debtor adress information
- Addressgroups
- Special tax setup
- Job dimension multi update
- Job dimension list update
- Tasks, Approvals & Followups list
- Manage Address Specification Fields
- Manage conversation groups
- DevExpress Chart Editor X
- xDCE dxChart
- xDCE dxPieChart
- xDCE Grid
- wbBoardScriptEditor
- Checklist Individual Template Setup
- Debtor Invoices Container
- Pipeline Billing Plan
- Test and bechmarks
- Subscription Agreement Miscellaneous setup
- Creditor Payment Proposal Merge
- New Pipeline Card
- Media Force Buy Import Dialog
- Client order
- Client orders

Storage

Job Folder Setup – Duplicate Folder Paths Allowed for Different Departments

For job folder setup, you can now have duplicate/multiple entries with the same Company and Storage Provider with the same folder path, as long as the Departments of the entries are different.

For resource folder setup, you can now also use the folder path that you use for job folder setup on resource folder setup.

Tasks

Costing Code and its Description Displayed in Additional Places

For jobs-related and tasks-related pages and dialogs, the Costing Code column now displays the concatenation of the Costing Code and its description as follows.

- For tasks-related information:
  - Tasks grid on the Tasks page
- For jobs-related information:
  - Simplified Jobs List
  - Jobs List
  - Job Creation Dialog

Creditor Voucher Approval Data Load Improvement

The following pages now load significantly less data:

- Tasks – Creditor Invoice Approval
- Finance & Administration – Creditor Invoices

Previously, for these pages WorkBook loaded data that was not used or required, which could cause a crash.

Scheduling Views – Percentage Display Option Added to Task Matrix

A percentage display option has been added to the Task Matrix in the Task Total, Period Total, and Calendar cells.

Time & Expense

Time Entry – Additional Data is Logged

Additional data is now logged for time entries. This data is used for referencing tasks and jobs after time entries are deleted.

Time Entry – Deletions Now Tracked

When you delete time entries that have hours recorded, the deletion is logged in the TimeRegLog table.

Time Entry – Regulatory Time Entry Requirements

To meet various regulatory requirements related to time entry, several enhancements and other changes have been made. These affect the Whereabout functionality, timesheets, and time entry. To implement this functionality, a Company Variable has also been added, and another Company Variable's options have been expanded.

Company Variables – New Company Variable 77 to Prevent Employees from manually Adjusting Default Time Stamp Sequence on Time Tracking

Use Company Variable 77 (Block Employees Required to Track Time from manually Adjusting the Default Time Stamp Sequence) to block employees who are required to track time (as set by Company Variable

74, (Require Employees to Track Time Using Whereabout) from editing the default time stamp sequence on time tracking using whereabout.

If you are an Admin User, you enable Company Variable 77 by selecting its checkbox. Disable it by clearing its checkbox. The default value is disabled (cleared).

Company Variables – New Option for Company Variable 74

A new option, Required for Some Employees, has been added to Company Variable 74 (Require Employees to Track Time Using Whereabout). The set of possible values is now as follows:

- **1 – Not Required**
- **2 – Required for All Employees**
- **3 – Required for Some Employees**

The default value remains unchanged: **1 – Not Required**.

Timesheet – Daily View – Column Added to Identify Where Time Must be Tracked

A column has been added on Time & Expense » Timesheet » Daily View to identify where a specific employee must track time. The Time Entry icon is displayed in the column header to identify the days (time) that must be tracked, or the tracked time, during the day(s) for that employee. The tooltip for this column is Time Entered has been Sufficiently Tracked.

This column is displayed on employee timesheets when an employee is required to track time—that is, the employee belongs to a Company where Company Variable 74 (Require Employee to Track Time Using Whereabout) is set to 2 – Required for All Employees, or Company Variable 74 is set to 3 – Required for Some Employees, and the user setting for tracking time is also enabled for the employee.

This column contains a checkbox that is checked if the employee has tracked time on the whereabout that is at least equal to the time entered on the employee's time sheet. The column is read-only.

Timesheet – Weekly View – Time-Tracking Compliance is now Displayed

On the Time & Expense » Time Sheet » Weekly view, indicators of time-tracking compliance have been added to day columns for users who are required to track time on specific dates with sufficient time entries in accordance with whereabout time tracked for those dates.

These indicators are only displayed in the Weekly view if Company Variable 74 is enabled—that is, it is set to either of the following values:

- **2 – Required for All Employees**
- **3 – Required for Some Employees**

For option 3, the employee basic setting User Must Track Time must also be enabled for the indicator to be displayed.

The column displays when time tracked using whereabout is equal to or exceeds the time entered on time entry for the day. When this check mark is not displayed, the employee has either not entered time or time entry, or has not sufficiently tracked time using whereabout.

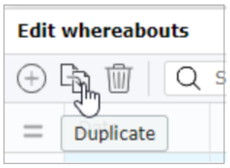
Whereabout – Ability to Delete Past Entries Added

You can now delete whereabout entries set in the past.

Whereabout – Ability to Duplicate Entries Added

You can now duplicate existing whereabout entries and add the duplicates to the whereabout grid. This functionality has been added to all whereabout entry views, such as personal, Time & Expense, Finance & Administration, and so on.

Select the whereabout entry that you want to duplicate in the grid, and click the Duplicate button on the toolbar.



WorkBook asks you to choose a date. Use the date-picker calendar to select a date or accept today's date as the default and click OK.

Note that you can duplicate one entry at a time; you cannot duplicate multiple whereabout entries simultaneously.

Whereabout – Dialog Box to Confirm Manual Selection Added

When you click the whereabout indicator in the WorkBook footer with the default or reset status for whereabout, and then you select another status from the list of available options, a dialog box prompts you to confirm the selection.

Whereabout – Reset Option Added to Manual Whereabout

When you click the whereabout indicator in the WorkBook footer, the whereabout status displays available options, such as In Office, Online, Not Available, and so on.

A Reset Status option has been added to this list. Select that option to reset or revert your whereabout status to its original state.

> **Note:** The Reset Status option is not available to employees who are required to track time as specified by Company Variable 74 (Require Employees to Track Time Using Whereabout).

Whereabout Page – Column Added

The Last Updated Date column has been added to the Whereabout page: This new column displays the date and time when an entry was last modified.

Whereabout Page – Columns Added

The following columns have been added to the Whereabout page:

- Hours – Displays the number of hours of the whereabout entry.
- Updated by – Displays the resource who last updated the whereabout entry.

Tracked against Time – Displays a checkbox that is selected if the whereabout type of the selected whereabout entry is configured to be included in time-tracking calculations. You specify

- whether a whereabout type is included in time-tracking calculations via Settings » Employee Settings » Whereabout page » Include in Time Tracking Calculations (Agent) column.

Timesheet – Enhancements to Approval Functionality

The process for approving timesheets has been improved. For example, if your organization's timesheets cover periods that are longer than one week, you can now send timesheets for the full time period for approval in one transaction. Additional information is described in the following.

Approval Date Range Added

On the Time & Expense » Timesheet Weekly and Daily views, the shortcut (context) menu now provides an additional Approve Date Range option so that you can define the time period for which you want to approve timesheets.

Ability to Define Date Range for Approving Time Entries Added

The new Approve Date Range option on the shortcut (context) menu displays a new dialog box where you can define the start and end dates of the time period for which you want to approve timesheets.

The date range can be a maximum of 31 days long, and it can straddle calendar months.

Time Entry – Approvals – Optimization

The approval of time entries has been optimized. The time to approve days or individual entries has been improved by up to 70 percent.

Timesheet – Display Public Holiday Hours on Timesheet

When you enter time on a timesheet—or when someone enters time on your behalf—there are now clear visual indicators of days that are public holidays, as identified by the Company holiday calendar of the Company to which the employee belongs. Public holidays appear in a blue shading and are accompanied by the beach ball icon.

These indicators appear on Daily and Weekly time entry pages and on the detail expansion on the Weekly view, which you access via the icon on the Weekly view.

Time Entry – Change Bank Holiday Icon to Prevent Confusion

The icon for bank holidays has been changed from the beach ball icon to the icon to clarify which days are registered as absences, and which are bank holidays.

Timesheet – Display Public Holiday Hours on Timesheet – Daily View

On the Timesheet – Daily View, the way in which public holidays are displayed has been improved. The Company holidays are indicated on the timesheet in the color that is associated with the Company to which the employee who owns the timesheet belongs.

Timesheet – Display Public Holiday Hours on Timesheet – Weekly View

On the Time & Expense » Time Sheet » Weekly view, the way in which public holidays are displayed has been improved. The Company holidays are indicated on the timesheet in the color that is associated with the Company to which the employee who owns the timesheet belongs.

Timesheet – Time Entry Approval – Optimization of Loading, Approval, and Rejection of Time Entry Records

The loading of time entry records and their approval or rejection have been optimized and are now faster.

Timesheet Status – Color of Selected Cell

In Timesheet Status, when you select a cell, the background color now turns darker.

Known Issues

Agents

Notification Missing Time Tracking Agent – Some Time Entries not Included

Deltek Tracking No. 1833130

Description: Time entries that are registered on the same date as the Look-Up start date (selected in the agent's parameters) are not included in the Missing Time Tracking notification when the Notification Missing Time Tracking agent runs.

Workaround before Fix: Set the Look-Up start date in the agent's parameters to one day before the chosen date. For example, if you want to include time entries that were registered on May 5 in the notification, select May 4 as the Look-Up start date.

Finance & Administration

Creditors – Creditor Invoices – Voucher Search Fields do not Synchronize

Deltek Tracking No. 1702634

Description: When you search for a voucher using the Voucher Number field in the filter sidebar, the voucher search above the toolbar is not updated to display that same search.

Creditors – Creditor Invoices and GaleForceMedia Orders – Error on No or Close

Deltek Tracking No. 1842133

Description: When you open the delete or confirm option for both GaleForceMedia orders and creditor invoices, and then you click the No or Close button, an error occurs.

Creditors – Creditor Invoices Line Details – Inactive Departments Displayed in Parentheses for Approved, For Booking, or Booked Creditor Invoices

Deltek Tracking No. 1762987

Description: When you view creditor invoice line details that contain inactive departments, and the creditor invoice is in Approved, For Booking, or Booked status, the departments are displayed in parentheses.

Debtors – Debtor Invoices with Inactive Departments Display Departments in Parentheses

Deltek Tracking No. 1763549

Description: When you view a debtor invoice on the Approved, Ready for Print, Finalized, or Electronic Delivery view, and the invoice belongs to a job that has an inactive department, the department is displayed in parentheses.

General Ledger – Chart of Accounts – Change Log is not Updated on Change of Account Subtype

Deltek Tracking No. 1834556

Description: When an account subtype is changed in the Chart of Accounts, the change log is not updated.

General Ledger – Chart of Accounts – Erroneous Backslash in Account Name Column

Deltek Tracking No. 1841323

Description: If one of your Finance accounts has an apostrophe in its name, WorkBook displays a backslash in the Account Name column on the Chart of Accounts grid.

General Ledger – Journals – Inactive Departments Displayed in Parentheses for Approved or Booked Entries

Deltek Tracking No. 1758380

Description: When you view journal entries that contain inactive departments, and the journal is in status Approved or Booked, the departments are displayed in parentheses.

Jobs

Purchase Order (PO) – Activating an Inactive Department does not Add the Department to the Sent Department Drop-Down List

Deltek Tracking No. 1815209

Description: When you activate an inactive department (via Settings » Company Settings » Departments » Active column), that department does not appear in the Sent department drop-down list (in the PO header).

Resources

Cannot Delete All Values Using Delete Key

Deltek Tracking No. 1588423

Description: At Client Settings » New Job Settings » Company Defaults, you cannot delete values in all fields by using the keyboard Delete key.

Time & Expense

Time Entry – Time-Tracking, Whereabout Entries Spanning Days, and Inaccurate Hours Column

Deltek Tracking No. 1814879

Description: When time-tracking using whereabout is required, and you view whereabout entries that span multiple days and were created when time-tracking was not required, the hours calculated in the Hours column may seem to be inaccurate. This is because the From and To dates are not displayed in the grid.

Software Issues Resolved

Agents

Voucher Hot Azure Agent Background Process Fails

Deltek Tracking No. 1709815

Description: When you ran the Voucher Hot Azure agent, the background process failed with the exception code error message Sequence Contains No Elements.

API

Reports – Cannot Retrieve Data on Certain API Endpoints when Using ReadOnly SecondaryDatabase

Deltek Tracking No. 1727098

Description: Requests that were called with header SecondaryDatabase = True that were resolving other requests internally caused an exception, which resulted in being unable to retrieve data.

Email

Unable to Send Emails because of MagickImage Insufficient Memory

Deltek Tracking No. 1682550

Description: When a WorkBook system was heavily used (for example, 500+ users), and you sent emails that converted PDF or DOCX files to HTML, a System Issue error occurred.

Workaround before Fix: Restart the Reporting Site.

Finance & Administration

Creditors – Creditor Invoices – Costing Code Validation is not Performed when Approval is Triggered for Invoice in Status-20

Deltek Tracking No. 1765296

Description: When you approved a creditor invoice that was in Status-20 and had an invalid costing code on a job or task, the invoice status was changed to either Approved or Ready for Booking.

Debtors – Debtor List – Emails – Error when Replying to Email

Deltek Tracking No. 1833881

Description: When you clicked the Reply/Forward Email button at Debtors » Debtor List » Emails, a System Issue Error with Status Code 500 occurred.

GaleForceMedia Import – Creditor Invoice Tab – System Issue Error

Deltek Tracking No. 1769489

Description: When you navigated to Finance & Administration » Export, Import, & Maintenance » GaleForce Media Import » Creditor Invoice Tab a System Issue dialog box was displayed.

General Ledger – Chart of Accounts – Trying to Delete Operating Accounts or Balance Sheet Accounts Causes an Error

Deltek Tracking No. 1634941

Description: When you tried to delete an operating account or a balance sheet account in a consolidation operating company, a System Issue Error was displayed that said Error reporting has been disabled. The system will restart.

Workaround before Fix: Change the account type to Sum From or Header.

Additional Notes: A new information message has been implemented that appears when you delete an operating account or a balance sheet account in a consolidation company that is used in a consolidation journal. This new message says **Cannot delete finance account when used for consolidation**.

General Ledger – Chart of Accounts and Debtors List – Cannot Select Multiple Rows Using the CTRL Key

Deltek Tracking No.1719397

Description: When you tried to select multiple rows in the grid in the Chart of Accounts or the Debtors List by holding down the CTRL key and clicking on rows, the rows that you clicked on were not selected.

General Ledger – Project Postings – Cannot Post Invoices with Invoice Numbers Over 50 Characters

Deltek Tracking No. 1569383

Description: If a sales invoice’s invoice number was longer than 50 characters, and the sales invoice was ready for booking, when you tried to book the sales invoice from the Project Posting page(s), a WorkBook information message was displayed indicating that the invoice could not be booked.

Month-End – Bank Reconciliation – Report 447 (Bank Reconcile Report) Shows Wrong Balance if Multiple Lines were Imported on Same Date

Deltek Tracking No. 1569017

Description: Report 447 (Bank Reconcile Report) displayed the wrong balance if multiple lines were imported on the same date.

Revenue Forecast – Financial Budget Figures are Included as They Are

Deltek Tracking No. 1569895

Description: When you included a budget in a Revenue Forecast, the budget amounts were displayed as you entered them—that is, positive budget amounts were displayed as positive amounts in the Revenue Forecast, and negative budget amounts were displayed as negative amounts in the Revenue Forecast.

Revenue Forecast – Forecasted Amounts in Revenue Forecast Show Incorrect Values when Using an RF Method with Probability on Price Quotes

Deltek Tracking No. 1631176

Description: When you forecasted multiple Price Quotes spread over different months on one job, based on their billing plans and probability, the forecasting calculated a probability average and used the average for all months.

Revenue Forecasts Created before Inter-Company do not Include Inter-Company when Updating Forecast

Deltek Tracking No. 1628469

Description: When there was an existing Revenue Forecast, and subsequently you created inter-company entries, those entries were not included in the existing Revenue Forecast when you updated it.

Workaround before Fix: Create another Revenue Forecast.

General

Caches – Wrong Item Loaded from Cache in Rare Circumstances

Deltek Tracking No. 1569881

Description: Some cached data in the WorkBook system was invalidated in very rare cases.

Grids – Error in Task Column if No Task Name

Deltek Tracking No. 1812985

Description: On grids, a blank task name caused an error on infrequent occasions.

Inappropriate Legacy Terms Exist in WorkBook

Deltek Tracking No. 1736108

Description: Inappropriate legacy terms—such as whitelist, dummy, and master (applied to Price Quote, job, and activity)—existed in the WorkBook application.

Additional Notes: These terms were replaced with the terms allowlist, placeholder, and primary, respectively.

WorkBook Login via Okta with Long User Name Produces Wrong Error Message

Deltek Tracking No. 1741112

Description: If you logged in to WorkBook via the Okta sign-in page using a user name of more than 40 characters, an incorrect error message was displayed.

Inbox

Inbox List – Conversation – Comment Input Field – System Issue Error Occurs when Hovering over Special Characters

Deltek Tracking No. 1751322

Description: When you navigated to Inbox » Inbox list » Conversation thread and entered a set of special characters or a script in the Comment field—for example @DELTEK.COM or @import'http://ha.ckers.org/xss.css'—when you hovered the cursor over those characters a System Issue error occurred.

Jobs

Client Settings – Company Defaults – Job Account Manager Field – Deactivated Resource is not Shown in Parentheses

Deltek Tracking No. 1570193

Description: After a resource was deactivated, the associated user name was not shown in parentheses in the Job Account Manager field at Client Settings » New Job Settings » Company Defaults.

Costs – Hours – Change Tasks on Time Entries does not Work

Deltek Tracking No. 1569726

Description: When multiple users edited time entries' tasks on the same job using the Change Tasks on Time Entries option on the shortcut menu at Jobs » Costs » Hours, changes might have been saved incorrectly.

Cost Views – No Values in Actual Sales Price Column

Deltek Tracking No. 1718715

Description: When System Variable 119 (Disallow Access to Resource Sale when Related to Resources) was set to 0 – Full Access to Advanced and Basic Users, no values were displayed on the Actual Sales Price column (at Jobs » Costs » Summary » Summary incl No of Hours » Actual Sales Price column) for Advanced Users.

When System Variable 119 was set to 1 – Disallow Access to Resource Sale from Advanced and Basic Users or 2 – Disallow Access to Resource Sale from Basic Users, no values were displayed on the Actual Sales Price column for Advanced and Basic Users.

Duplicate Job – Price Quote (PQ) Locked for Changes when You Duplicate a Job

Deltek Tracking No. 1625558

Description: When you duplicated a job that contains a PQ that is in status 20, 40, or 50, and the Price Quotes option is selected on the copy settings, the request was terminated, and the message Price Quote is Locked for Changes was displayed.

Job Dimension Settings – Drop-Down List Width is not Fixed Width

Deltek Tracking No. 1570171

Description: When you selected a job in the Jobs List and then opened the job dimension settings in the Job Property sidebar, the drop-down list in the sidebar shrank when you switched to another job.

Jobs List – Job Filter – Properties – Job Create Date

Deltek Tracking No. 1568959

Description: When you filtered using Job Create Date (adding the filter in Properties), and you selected the same date in the Job Create Date range (also in Properties), the results did not appear in the Jobs List.

Purchase Orders (PO) – System Variable 464 (Block Purchase Order Approval if Purchase Order Cost Price Exceeds the Approved Price Quote (PQ) Purchases) – Improved Currency Rate Handling

Deltek Tracking No. 1569102

Description: When a PQ and a PO had the same currency but with different currency rates, and System Variable 464 was set to 1 or above—that is, any value other than 0 (zero)—the PO could not be approved.

Price Quote (PQ) – Billing Plan Tab Displays Incorrect Update Date and User

Deltek Tracking No. 1592591

Description: On the PQ Billing Plan tab, the Update Date field displayed the current date instead of the date of the last update. In addition, the Update Resource field displayed the currently logged-in user instead of the user who actually made a change.

Price Quote (PQ) – Empty Activity Text when Creating Budget and Adding New Lines with Activities

Deltek Tracking No. 1569927

Description: When you created a PQ and added new lines with activities, their Activity Text columns were empty if the activity translation for the selected PQ language was set to an empty string.

Resource Card – Account Manager Information is not Updated when a User is Deactivated

Deltek Tracking No. 1573970

Description: If a resource that was to be deactivated was set as an Account Manager via Client Card » Client Settings » New Job Settings » Client Default tab and Company Default tab, another resource that was set to inherit all data from that deactivated resource in the Disable Employee pop-up dialog box was not updated in the Client Default tab and Company Default tab.

Scheduling Views – Dragging Task Start/End Dates in Gantt Snaps Duration to Entire Month

Deltek Tracking No. 1628770

Description: When you dragged the start or end dates of a task in the Gantt view, the task duration snapped to the entire month.

Task Card – Basic Settings – Recurring Bookings – Cannot always Edit Start/End Time Fields

Deltek Tracking No. 1569555

Description: When you added new recurring bookings, you could not always edit the start/end time fields.

Tasks – Able to Change Job Status on Task without Costing Code

Deltek Tracking No. 1730571

Description: When a task had no costing code set, and Company Variable 73 (Determines if Costing Code is Required on Jobs/Tasks) was set to 3 – Required on Jobs and Tasks, you could change the job's status.

Tasks – Gantt Views – Basic Users can Resize Tasks with Read-Only Access to Gantt View

Deltek Tracking No. 1599031

Description: When as a Basic User with read-only access to the Gantt View, as well as read-only access to the Gantt Control – Resize Tasks extended access, you tried to resize Gantt tasks, you were allowed to do so.

Tasks – Gantt Views – Dates do not Follow Formatting Set in My Settings

Deltek Tracking No. 1569142

Description: Fixed dates that were shown in Gantt views did not follow the correct formatting that you specified in My Settings.

Tasks – Scheduling – Unable to Copy Price Quote (PQ) to Schedule

Deltek Tracking No. 1626680

Description: When you tried to copy a PQ to Schedule without a resource, it caused an exception. A System Issue error dialog box was displayed.

Reports

Planning – Report 263 (Employee Holiday and Flex View) Number of Holidays Used is Incorrect

Deltek Tracking No. 1707553

Description: When you printed Report 263, the number of holidays used that was shown on the report was incorrect.

Resources

Employee Card – Absence Overview – Holiday Period – Error when Trying to Add an Earned Holiday Value to Employees

Deltek Tracking No. 1645744

Description: When you edited the value of the Earned column, an error occurred.

Scheduling

Holidays – Improved Performance of the Recalculate Capacity Calendar Option

Deltek Tracking No. 1830824

Description: The Recalculate Capacity Calendar option stalled on holidays with large numbers of employees.

Additional Notes: This performance improvement also affects other places where employee capacity is recalculated.

Reporting – Scheduling Views – Manual Booking Grid does not Display Selected Employee when Switching Tasks

Deltek Tracking No. 1704181

Description: When you switched the task selection while you had the manual booking grid open, the manual booking grid displayed information from the previously selected booked employee, not the currently selected booked employee.

Resource Booking – Updating Resource Booking Resets View to Top of Grid

Deltek Tracking No. 1736807

Description: When you updated resource bookings, the view reset to the top of the grid.

Schedule Overview – Timesheet Status – Cannot See Highlighting on Selected Cell in Grid

Deltek Tracking No. 1570039

Description: When you navigated to Scheduling » Schedule Overview » Time Sheet Status and clicked a cell under a specific date on the grid, it was difficult to see that the cell was highlighted.

Task List – Skills Filter in Tasks List of Scheduling does not Produce Correct Result Set

Deltek Tracking No. 1645846

Description: When you added a skill in the filter, the grid did not show relevant data.

Tasks – Task Start and End Dates are not Applied Correctly

Deltek Tracking No. 1699274

Description: When you created tasks in Scheduling using the Create Task dialog, the end date that you entered was changed to a default value, while the work days value was not updated.

Settings

Advanced Tools – Session Log Overview – Dashboards – Error Prevents Viewing Graph

Deltek Tracking No. 1570192

Description: When you navigated to Settings » Advanced Tools » Session Log Overview » Dashboard tab, an error occurred before the graph was loaded.

Agents – Agent 172 Notification: Missing Time Tracking does not Work because of Incorrect Index

Deltek Tracking No. 1689506

Description: When you navigated to the grid at Settings » Advanced Tools » Agent Setup and ran Agent 172 Notification: Missing Time Tracking, the agent could not run, with the error message KeyNotFoundException: The given key was not present in the dictionary.

Agent Setup – Group Scheduling Resource Recalculation – Agent Causes OutOfMemoryException Error

Deltek Tracking No. 1604094

Description: When you ran the Group Scheduling Resource Recalculation agent, a System.OutOfMemoryException error was displayed.

Company Settings – Unable to Update Holiday Calendar

Deltek Tracking No.1729903

Description: A performance-related issue prevented you from changing the holiday calendar for Companies that have many employees.

Databoards – Databoard 333 (Employee Login Session History) – Errors when Selecting Admin Employee

Deltek Tracking No. 1626652

Description: When you navigated to Settings » Advanced Tools » Databoards » Databoard (333) Employee Login Session History and selected Admin in the Employee field, and then you selected the same date that contained data for both the From and To fields, no data was returned.

Databoards – Databoard 1108 (Jobs – Costs by Department) – No Output when You Select * for All Departments

Deltek Tracking No. 1569600

Description: When you navigated to Settings » Databoards » Databoard 1108 » Overview tab, and you selected * in the Departments field to show all departments, WorkBook did not display any output on the grid.

Failure to Upload a Valid File on Job Briefing Attachments and Report Attachments because of Incorrect Mapping to System Variable 1034 (File Extensions Allowed when Uploading a File to a Voucher)

Deltek Tracking No. 1836730

Description: When you tried to upload a file of a valid type on a Job Briefing's attachments and Report attachments (under Settings), the upload failed with the following message:

> The file type you are trying to upload is not allowed. Please check System Variable 1034 for the allowed file extensions.

Folders, Reports, & Documents – No Message when Trying to Upload a PDF

Deltek Tracking No. 1569057

Description: When you navigated to Settings » Folders, Reports, & Documents » Report Layouts and Watermarks and tried to upload a file in PDF format, no information message that says that the file is invalid appeared.

Group Scheduling Resources not Displayed as Options in Drop-Down List in Weekly Schedule

Deltek Tracking No. 1615116

Description: When you used Move Task to another Resource within the Weekly Schedule booking details, group scheduling resources were not shown as options in the drop-down list.

Storage

Imports and Create Draft Email with Report Attached Use Wrong System Variable

Deltek Tracking No. 1833691

Description: Even when System Variable 1192 (File Extensions Allowed when Uploading a File) specified the correct file extensions, you could not attach an import file and use Create a Draft Email with Report Attached. The following error message was displayed: The file type that you are trying to upload is not allowed. Please check System Variable 1034 for the allowed file extensions.

Renaming Client Creates Duplicate Folder in Storage Provider

Deltek Tracking No. 1748800

Description: When you renamed a client, WorkBook created a duplicate folder in the storage provider.

Spaces Between Valid File Extensions in System Variables 1192 and 1034 only Allow Upload of First File Type in the List of Values

Deltek Tracking No. 1829783

Description: When the values of System Variable 1192 (File Extensions Allowed when Uploading a File) and 1034 (File Extensions Allowed when Uploading a File to a Voucher) contained spaces between the listed file extensions, WorkBook only allowed the uploading of files of the type of the first extension that was listed in the System Variable's value.

Additional Notes: For System Variable 1192, the file types that are always allowed—bmp, csv, data, gif, mht, odt, rtf, wav, xls, and xml—were not affected by this issue.

Tasks

Task Card – Basic Settings – Copy Task Settings – Select All Setting Remains Selected

Deltek Tracking No. 1752550

Description: After you used the Select All button in the Copy Task Settings dialog box, if you exited that dialog box and then re-entered it, all tasks were still selected. You could not then select just one single task.

Workaround before Fix: Perform a WorkBook hard restart to remove cache.

Time & Expense

Absence Overview – Holiday Status – Incorrect Balance Earned from Previous Holiday Year is Displayed

Deltek Tracking No. 1570209

Description: When you opened the Absence Overview page, the Last Vacation Period Data showed an incorrect balance earned from the previous holiday year.

Material – When You Switch Jobs Filter then Revert, Job Value Remains

Deltek Tracking No. 1569729

Description: When you selected a job, and you switched the filter from All Active Jobs to Jobs I am Booked on or PM, and then you reverted to All Active Jobs, the job value remained in parentheses.

Time Entry – Incorrect Message Shown when User is not Allowed to Enter Time Entry on Tasks

Deltek Tracking No. 1763673

Description: When the Allow Task Entry option was turned off, the message that was displayed if you tried to enter time on a task was not correct.

Timesheet – Change Task Drop-Down List does not Filter on Costing Code

Deltek Tracking No. 1583233

Description: When you changed the task for an existing time entry, the Change Task to drop-down list displayed tasks that have invalid costing codes.

Timesheet – Daily Tab – Tooltip Displays Incorrect Missing Time

Deltek Tracking No. 1839168

Description: When you were in the UTC time zone, and you navigated to Time & Expense » Timesheet » Daily tab » Time Entered has been Sufficiently Tracked column, the tooltip that was displayed for a specific date that had hours logged for both timesheet and whereabout displayed incorrect missing time.

Whereabout – Double-Clicking Date or Start/End Time Cells to Edit, then Leaving Them Blank Changes Date to 1/1/1970

Deltek Tracking No. 1629412

Description: When you double-clicked on the date cell of an existing whereabout entry, and then you deleted it, the date changed to 1/1/1970.

Additional Note: Now when you delete the date value, and then you click outside the cell, it reverts to its previous value.

Whereabout – Editing Start/End Time Clears Out the Hours Column

Deltek Tracking No. 1737726

Description: If you edited the start time or end time of a whereabout entry, the value in the Hours column was cleared out.

Workaround before Fix: Do a soft refresh to redisplay the recalculated value.

Whereabout – Whereabout Default Date Issues Related to Time Near End of Day

Deltek Tracking No. 1629903

Description: When you created a whereabout type and registered a time that was near the end of the current day, the default date that was displayed while you were editing the time appeared differently, and was not according to the local time or the current time zone.

In addition, the default dates on the date filters on the Whereabout page toolbar were incorrect when the time was near the end of the current day.

Both of these issues were caused by a time zone problem.

Whereabout Page – Error when Updating a Current-Dated Whereabout to an Available Date from the Past

Deltek Tracking No. 1629256

Description: When you added a current-dated whereabout to the grid, and then you updated it with an available date from the past, the date in the cell automatically displayed yesterday's date, and the following error message was displayed: There is already a whereabout registered in this period.

About Deltek

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