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Deltek Vision® 7.3

Release Notes: New Features and Enhancements

August 29, 2014

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Overview

Welcome to Deltek Vision 7.3 Release Notes: New Features and Enhancements. This guide describes the new enhancements available in this release.

> For information regarding installation of the software, software issues resolved, known issues, and database changes in this release, refer to the *Deltek Vision 7.3 Release Notes: Technical Considerations*.

Important Information

Images for Invoice and Purchase Order Templates

As of Vision 7.2, you can upload images for customizing billing invoices and purchase orders directly from Vision. Previously, a system administrator had to upload images on the Vision server.

To upload the images into Vision, click the **Image** option on the toolbar of the Invoice Template Editor form in **Billing » Invoice Template Editor** or the Purchase Template Editor form in **Purchasing » Purchase Template Editor**. On the Available Images dialog box, select the images to upload into Vision. For detailed instructions, see the "Upload Custom Images for Invoice Templates" and "Upload Custom Images in Purchase Template Editor" topics in the online Help.

To add uploaded images to an invoice or purchase order template, open the template, and on the Images tab on the template editor form, insert the images in the grid. For detailed instructions, see the "Use Custom Images on Invoices" and "Use Custom Images on Purchasing Invoices" topics in the online Help.

> **Uploading images directly on the Vision server is no longer supported.**
>
> **If you are upgrading to Vision 7.3 from Vision 7.1 or earlier:** Existing images that you added to Vision in version 7.1 and earlier must be uploaded again into Vision using the **Image** option on the toolbar on either the Invoice Template Editor form or the Purchase Template Editor form. Then you must use the Images tab on these template editor forms to associate uploaded images with the invoice and purchase order templates that use the images. If you do not re-upload and re-insert the images, they will be missing from invoices or purchase orders when you print them.

Upgrading from an Earlier Vision Version

If you are upgrading to Vision 7.3 from a version earlier than Vision 7.2, you should read the release notes of Vision 7.2, 7.1, 7.0 SP1, 7.0, 6.2, and any prior relevant versions to ensure that you understand all of the technology, software changes, and enhancements that have been implemented and how these changes may affect you.

You can download the release notes from the Deltek Customer Care Connect site.

For Additional Information

Customer Care Connect Site

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

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

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

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

Access Customer Care Connect

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

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

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

Documentation for this Release

The table below lists the Deltek documentation available for this release. You can download this documentation from the Deltek Customer Care Connect site—on the Product Download page or on the Enterprise Search page using the Release Documents search.

> Starting with Vision 7.3, the release notes have been split into two separate documents:
> - Deltek Vision 7.3 Release Notes: New Features and Enhancements
> - Deltek Vision 7.3 Release Notes: Technical Considerations

Vision 7.3 Documentation

*Any document that is not relevant to Deltek Vision Essentials cloud customers is marked with an asterisk.

Deltek Vision Release Notes

Deltek Vision Release Notes: New Features and Enhancements	These release notes contain a summary of the enhancements introduced in Vision 7.3.
Deltek Vision Release Notes: Technical Considerations	These release notes describe the installation requirements, software issues resolved, known issues, and database changes in Vision 7.3.

Deltek Vision Getting Started and Concepts Guides

Deltek Vision Getting Started Guide	This guide contains information about the Vision interface and all the Vision applications, with tips for navigating through the system, using the dashboard, and finding and opening records.
Deltek Vision Concepts Guide	This guide describes the concepts underlying the basic accounting, project control, and customer relationship management (CRM) functions of the Vision application.

Deltek Vision Installation and Implementation Guides*

Deltek Vision Technical Installation Guide*	This guide contains detailed instructions for installing all the technical components of Vision, including the servers, the database, and the application itself.
Deltek Vision Advanced Technical Administration Guide*	This guide provides IT staff and system administrators with instructions for installing and configuring advanced technical components of Vision.
Deploying Deltek Vision at a Hosting Provider*	This guide contains instructions for deploying Deltek Vision at a hosting provider.
Deltek Vision Implementation Guide*	This guide contains information about configuring and setting up Vision applications and features.

Deltek Vision Migration Guides*

Deltek Advantage to Deltek Vision Migration Guide*	This guide contains information about migrating from Advantage to Vision, including the steps in the migration process and an overview of Vision features.
Deltek FMS to Deltek Vision Migration Guide*	This guide contains information about migrating from FMS to Vision, including the steps in the migration process, discussions of the key migration decisions, and procedures for verifying the converted data.
Deltek Sema4 to Deltek Vision Migration Guide*	This guide contains information about migrating from Sema4 to Vision, including the steps in the migration process and an overview of Vision features.

Vision 7.3 Documentation

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Deltek Vision Quick Reference Cards

Deltek Vision Quick Reference Cards	Quick reference cards provide snapshots of specific business processes or Vision forms, with tips for entering data and using application toolbars. The following quick reference cards are available:
	▪ Accounts Payable (Create a Voucher from a Purchase Order)
	▪ Create Client from Vendor Utility
	▪ Dashboard
	▪ Expense Report
	▪ Navigation Tree Designer
	▪ Project Planning
	▪ Purchasing (Create a Standard Purchase Order)
	▪ Resource Management (Generic Resource Assignments and Resource Utilization)
	▪ Screen Designer
	▪ SF330 Proposals
	▪ Template Based E-mails
	▪ Timesheet
	▪ User Options
	▪ Visualization

Deltek Vision Document Management Guide*

Deltek Vision Document Management Installation Guide*	This guide contains detailed information on the necessary prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.

Deltek Vision Interface to Microsoft Project Guide*

Deltek Vision Interface to Microsoft Project 2010*	This guide describes how the manual scheduling feature in Microsoft Project 2010 impacts the two-way interface between Deltek Vision and Microsoft Project 2010.

Deltek Vision Performance Management Guides (Analysis Cubes and Performance Dashboards)*

Deltek Vision Installation Guide for Performance Management (Analysis Cubes and Performance Dashboards)*	This guide provides instructions on how to install and configure the following components of the Deltek Vision Performance Management module:
	▪ Analysis Cubes
	▪ Performance Management Dashboards

Vision 7.3 Documentation	
*Any document that is not relevant to Deltek Vision Essentials cloud customers is marked with an asterisk.	
Deltek Vision Performance Management Content and Functionality Overview*	This guide provides an overview of Vision Performance Management functionality and the pre-built visualizations that are included with it.
Tableau Server 8.1 Administrator Guide*	This administrator guide, produced by Tableau Software, Inc., is a complete reference for handling administrative tasks in Tableau Server. Use Tableau Server and Tableau Desktop, along with Vision Analysis Cubes and Microsoft SQL Server Analysis Services components, to create role-based graphical performance dashboards.
Deltek Vision Reporting Guides*	
Deltek Vision Custom Reports and Microsoft® SQL Server Reporting Services*	This guide provides instructions to create, deliver, and generate Vision custom reports with Microsoft SQL Server Reporting Services and its report writing tools.
Deltek Vision Microsoft SQL Server Reporting Services Licensing FAQ*	This guide explains the Microsoft SQL Server Reporting Services licensing implications for Vision.
Deltek Vision Connect for Microsoft Outlook Guides	
Deltek Vision Connect for Microsoft Outlook Installation Guide	This guide contains an overview of Vision Connect for Microsoft Outlook, as well as technical installation, setup, and maintenance information.
Deltek Vision Customizing Configuration Settings for Connect for Microsoft Outlook	The guide is intended for system administrators, IT staff, or custom developers. It provides instructions on how to create presets to: configure default behavior for converting Microsoft Outlook contacts; control the display of the Synchronization Control Panel when issues occur during synchronization; and implement default and custom synchronization filters.
Deltek Vision Connect for Microsoft Outlook Frequently Asked Questions	This document contains frequently asked questions (FAQs) on topics regarding deployment, customization, environment, usage, and functionality.
Deltek VisionXtend Guides	
Deltek VisionXtend Web Services and APIs for Deltek Vision	This guide explains how to use the Deltek VisionXtend platform to integrate Vision with other applications, access web services, implement data validation routines, and establish workflow procedures using the Microsoft .NET Framework.
Deletk VisionXtend Testing the Vision Web APIs / Web Services	This guide provides basic information about testing Vision APIs using soapUI.

Vision 7.3 Documentation

Deltek Vision Project Connect Guides*

Deltek Vision Project Connect Installation and Administration Guide*	This guide contains detailed information on installing and administering Project Connect for integrating Microsoft Project with Deltek Vision.
Deltek Vision Project Connect User's Guide for Microsoft Project 2010*	This guide contains information for integrating Microsoft Project 2010 with Deltek Vision.
Deltek Vision Project Connect User's Guide for Microsoft Project 2007*	This guide contains information for integrating Microsoft Project 2007 with Deltek Vision.

Deltek Vision Navigator Guides

Deltek Vision Navigator 1.9 Release Notes: New Features and Enhancements	These release notes contain a summary of the enhancements introduced in Navigator 1.9.
Deltek Vision Navigator Version 1.9 Release Notes: Technical Considerations	These release notes describe the installation requirements, software issues resolved, known issues, and database changes in Navigator 1.9.
Deltek Vision Navigator Version 1.9 Installation Guide	This document describes the server prerequisites, client requirements, and installation information for Deltek Vision Navigator.
Deltek Vision Navigator Version 1.9 Integration Guide	This guide contains details on how the Vision application integrates with Deltek Vision Navigator and provides descriptions of the various changes to the Navigator help. Refer to the topics in this guide for the most current information.
Deltek Vision Navigator Version 1.9 Frequently Asked Questions	This document contains frequently asked questions about general product details on the use and configuration of the Deltek Vision Navigator product.

New Features and Enhancements

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

Compensation Breakout Enhancements

Compensation is defined as the contractual amount that you expect to receive for a given project or engagement. In Vision 7.2, the total compensation was represented by the compensation (labor and direct expense fee), consultant fee (direct consultant fee), and reimbursable allowance amounts.

In Vision 7.3, total compensation is further broken down into labor, direct expense, direct consultant, reimbursable expense, and reimbursable consultants:

- **Compensation** — The project's compensation is automatically calculated by summing the **Direct Expense** and **Direct Labor** fields on the Budget & Revenue tab in the Project Info Center. You cannot edit the **Compensation** field; it is display-only and is updated when changes are made to the direct expense and direct labor amounts for the project.

- **Reimbursable Allowance** — The project's reimbursable allowance is automatically calculated by summing the **Reimbursable Expense** and **Reimbursable Consultants** fields on the Budget & Revenue tab in the Project Info Center. You cannot edit the **Reimbursable Allowance** field; it is display-only and is updated when changes are made to the reimbursable expense and reimbursable consultant amounts for the project.

- The sum of the amounts in the Compensation (**Direct Labor plus Direct Expense**), **Direct Consultant**, and **Reimbursable Allowance** (**Reimbursable Expense plus Reimbursable Consultant**) fields on the Budget & Revenue tab in the Project Info Center represent the total amount of fee that you expect to receive over the life of the project.

> Because the **Compensation**, **Consultant Fee** (**Direct Consultant Fee**), and **Reimbursable Allowance** fields in Vision 7.2 also exist in Vision 7.3, any existing reports or custom items using these fields will continue to function as they did prior to Vision 7.3.

Field Conversion Information

The following table identifies the new fields and field conversions for compensation that occur automatically when you upgrade from an earlier version of Vision to Vision 7.3.

Fields in 7.3	Field Description
Compensation	In Vision 7.3, this field is the sum of the values in the **Direct Labor** and **Direct Expense** fields (both new fields in 7.3). In Vision 7.2 and earlier, you manually entered a value in the **Compensation** field.
Direct Labor	This new field in Vision 7.3 displays the value from the Vision 7.2 or earlier **Compensation** field.
Direct Expense	This new field in Vision 7.3 is set to 0.

Fields in 7.3	Field Description
Direct Consultant	This new field in Vision 7.3 displays the value from the Vision 7.2 and earlier **Consultant Fee** field.
Reimbursable Allowance	In Vision 7.3, this field is the sum of the values in the **Reimbursable Expense** and **Reimbursable Consultant** fields (both new fields in 7.3). In Vision 7.2 and earlier, you manually entered a value in the **Reimbursable Allowance** field.
Reimbursable Expense	This new field in Vision 7.3 displays the value from the Vision 7.2 or earlier **Reimbursable Allowance** field.
Reimbursable Consultant	This new field in Vision 7.3 is set to 0.

Configuration

The following Vision configuration settings affect how you see compensation values in the Project Info Center (Budget & Revenue tab and Contract Management tab) and in Project Planning (Cost Analysis tab and Billing Analysis tab):

Software Path	Settings/Options
Configuration » Accounting » System Settings » General tab	▪ **Project Fee Entering Method** settings ▪ **Synchronize Fees from Contract to Plan** check box
Configuration » Planning » Plan Settings » General tab	▪ **Synchronize Fees from Contract to Plan** check box ▪ **Limit Plan Fees from Contract Totals** check box ▪ **Plan Compensation Values by Row & Period** check box
Configuration » Security » Roles » Planning tab	▪ **Allow Changes to Direct Labor Fee** check box ▪ **Allow Changes to Direct Expense Fee** check box ▪ **Allow Changes to Direct Consultant Fee** check box ▪ **Allow Changes to Reimbursable Expense Fee** check box ▪ **Allow Changes to Reimbursable Consultant Fee** check box

Compensation Breakout Changes Throughout the Software

The compensation breakout changes impact the tabs, fields, calculations, and labels in several areas of Vision. Many of these updates are summarized in the following sections.

Info Center » Projects » Budget and Revenue Tab

- The **Compensation** field now accommodates the change in calculation where it is display-only and is based on amounts entered in **Direct Labor** and **Direct Expense** fields.
- These fields were added under each Currency type: **Direct Labor**, **Direct Expense**, **Reimbursable Labor**, **Reimbursable Expense**.
- The **Consultant Fee** field label was changed to **Direct Consultant**.
- The **Reimbursable Allowance** field now accommodates the change in calculation where it is display-only and updates based on amounts entered in **Reimbursable Labor** and **Reimbursable Expense** fields.
- The **Total** fields were added.

Info Center » Project » Contract Management Tab

- The **Compensation** field now accommodates the change in calculation where it is display-only and is based on amounts entered in **Direct Labor** and **Direct Expense** fields.
- The following fields were added: **Direct Labor**, **Direct Expense**, **Reimbursable Labor**, **Reimbursable Expense**.
- The **Consultant Fee** field label was changed to **Direct Consultant**.
- The **Reimbursable Allowance** field now accommodates the change in calculation where it is display-only and is based on amounts entered in **Reimbursable Labor** and **Reimbursable Expense** fields.
- The **Total** fields were added.

Accounting » Project Review

The General tab in Project Review was removed and replaced with the following new tabs to accommodate the new compensation breakout fields:

- Billing
- Cost

> In Vision 7.3, the default entry in the **Budget Source** field is **Planning** instead of **Budget Worksheet**, which disables the **Update %** toolbar button in Project Review. You must change the **Budget Source** to **Budget Worksheet** to update the percent complete for the selected projects.

Planning » Project Planning » Analysis Tab

Project Planning was updated to support the compensation breakout changes as well. The Analysis tab of Project Planning was removed and replaced with the following new tabs:

- Cost Analysis
- Billing Analysis

Planning » Project Planning » Summary Tab

The Compensation grid was removed and two new grids were added: Cost Summary grid and Billing Summary grid.

Planning » Project Planning » Budget Calculator

This calculator now includes compensation breakout fields.

Configuration » General » Project Templates and Configuration » General » Project Defaults

The Project Templates and Project Defaults features were updated to support the compensation breakout fields.

Configuration » Security » Roles » Planning Tab

The Planning tab of Role Security includes a new Analysis section and associated fields.

Reporting » Project Reports

You can now add columns to the following Project reports to display the new compensation fields:

- Contract Management
- CRM Project Summary
- Office Earnings
- Project Earnings
- Project List
- Project Summary

Reporting » Data Export

You can now add columns to the following Data Export reports to display the new compensation fields:

- Project List Export
- Project Expense Export
- Project Labor Export
- Project Summary Export

Reporting » Project Planning

You can now add columns to the Project Planning Analysis report to display the new compensation fields.

The new compensation fields are also available on the Project Planning Schedule report. The Options tab on the Options dialog box for the report has additional check boxes that you can use to include or exclude those fields.

Reporting — Advanced Search

If you add a column for one of the new fields to a report, you can use that as part of your search criteria. To do so, preview the report and do an advanced search.

Accounting » Budgeting » Project Budgeting

The Cost Summary tab and Billing Summary tab of the Budget Summary dialog box have been redesigned to incorporate the new compensation fields. In addition, calculated amounts and percentages on the tabs are now updated automatically as you enter values. The **Calculate** buttons, previously used to recalculate values based on your entries, have been removed.

Billing » Interactive Approvals

The new compensation fields now display in the Project Fees section on the General tab of Interactive Approvals.

Utilities » Data Import

The table formats for the following imports now include the new compensation fields:

- Projects
- Projects – Contract Details

Utilities » Search and Replace

The new compensation fields are **not** included among the fields you can update using the Search and Replace utility. In addition, the compensation fields that were included previously in the Search and Replace utility have been removed.

Credit Card Feature

The new Credit Card feature in Vision allows you to reconcile the credit card charges from your credit card company with the expenses entered in Vision that were paid with the company-issued credit cards.

After you enable and configure the Credit Card feature:

- The employees who are responsible for reconciling credit card statements create the statements in Vision. They import the credit card charges from a credit card company into the statements.

- On expense reports, employees (the cardholders) add a charge that they made with a company-issued credit card by selecting the charge from a list of imported charges on the Expense Report form. Only the charges that they made are included in the list.

- You can set up alerts to notify employees that imported credit card charges that apply to them are ready to add to an expense report.

- When you enter an A/P disbursement, you can specify that the vendor invoice was paid with a credit card rather than a check or electronic payment.

- The employees who are responsible for reconciling credit card statements: clear the imported charges that have a matching posted expense report or A/P disbursement transaction in Vision; identify and follow up on missing credit card charges; and close the statement after all charges are reconciled.

Configuration

You enable the Credit Card feature by company for each appropriate company in your enterprise. You must select the **Allow entry of company paid items** check box on the Setup tab in **Configuration » Time & Expense » Company Expense**. Then you turn on the Credit Card feature on the General tab in **Configuration » Accounting » Company Settings**.

You set up primary credit cards and their associated secondary credit cards that are issued to employees in **Configuration » Accounting » Credit Card**. You also specify the content and formatting information for the credit card charges import file.

Alerts

The following alerts in the Expense folder in **Configuration » General » Company Alerts** can be set up to notify employee about the imported charges:

- **New Credit Card Transactions Available** — This alert notifies the appropriate employees when a new credit card charge that they made has been imported into Vision, and is ready to add to an expense report.

- **Past Due Credit Card Transactions** — This alert is sent to employees and, optionally, their supervisors after a certain number of days has passed without the imported expense being posted on an expense report.

Credit Card Reconciliation

In **Accounting » Credit Cards » Credit Card Reconciliation**:

- You create credit card statements and import charges from your credit card company into the statement.

  You can create a credit card statement in Vision before the actual credit card statement is finalized by your credit card company. This allows you to import credit card charges into Vision on an ongoing, regular basis throughout the month as your credit card company posts the charges and makes the information available to you through their website. This allows employees to add imported charges to their expense reports in a timelier manner.

  You import charges for a primary credit card, which includes the charges for all the associated secondary credit cards that are issued to employees.

- The imported credit card charges are matched automatically with the credit card charges that are posted on employee expense reports and A/P disbursements.

- The charges that have a matching imported charge and posted Vision expense report or A/P disbursement charge can be cleared automatically by Vision, or you can clear them manually.

- You identify the credit card charges that have not yet been entered in Vision, and when all charges are reconciled and cleared, you close the statement.

- If you use cash-basis accounting, you can create a cash-basis journal entry for all the cleared company-paid charges on a statement that is completely reconciled.

Processing Credit Card Expenses in Vision

You record expenses that are paid with company-issued credit cards in the following places in Vision:

- On an expense report in **Time & Expense » Expense Report** — If you import credit card charges into Vision for a credit card, the charges made by an employee that have been imported into Vision display in a list on the Expense Report form. Employees add the imported charges from this list to an expense report. After an imported charge is added to an expense report, it displays on the Charges tab in Credit Card Reconciliation.

  If you do not import credit card charges into Vision for a credit card, employees enter expenses that they pay with company-issued credit cards as they normally would on an expense report by specifying that the expense is company paid and which credit card it is associated with.

- As an A/P disbursement in **Transaction Center » Transaction Entry** — You enter an A/P disbursement and specify that it was paid with a company-issued credit card (rather than a check or electronic payment). After the disbursement is posted, it displays on the Charges tab in Credit Card Reconciliation.

Credit Card Review

In **Accounting » Credit Cards » Credit Card Review** you can enter criteria to search for and view the credit card charges that were imported into Vision from your credit card company and the charges that were entered on expense reports and as A/P disbursements.

Using the Credit Card Reconciliation Application Without Using the Import Feature

It is possible to use the Credit Card feature without importing credit card charges into Vision. In this scenario, the posted expense report and A/P disbursement credit card transactions display automatically in the Credit Card Reconciliation application. You manually compare and reconcile these with your paper credit card statement.

You choose whether or not to import charges on a credit card by credit card basis.

Transaction Auto Numbering by Company for Accounts Payable Vouchers

If you have multiple companies in Vision, you can now maintain a separate sequence of automatically assigned numbers for A/P vouchers for each of your companies. To support this feature, a new **Starting Voucher** field and **Ending Voucher** field have been added to the Transaction Entry Auto Numbering grid on the Transaction Auto Numbering tab in **Configuration » Accounting » System Settings**. The voucher numbers are automatically assigned when you post A/P vouchers, A/P disbursements, and vouchers that you create from purchase orders.

> If you currently use transaction auto numbering for A/P vouchers and you are upgrading to Vision 7.3: After Vision 7.3 has been installed, you must enter the starting and ending voucher numbers in Accounting System Settings before you can post A/P vouchers, A/P disbursements, and A/P vouchers created from purchase orders. The posting routine will not proceed until the range of numbers has been set up for all your companies.

AR Invoice Review Dashpart

A new dashpart type—AR Invoice Review—has been added to Vision. You select this type in the **Dash Part Type** field when you add a system dashpart in Vision. (Click **Dashboard** on the toolbar of the main Vision screen, and then click **Configure** on the toolbar of the Dashboard form.)

The system dashpart must be made available to a role on the Access Rights tab in Roles Security Configuration before it can be used.

When you configure a AR Invoice Review dashpart, you select the projects whose invoices you want to include in the dashpart.

When the dashpart displays in the Dashboard, click the drop-down arrow beside the title in the dashpart heading bar, and select **Aging** to choose an aging date for the invoices that display in the dashpart.

The fields at the top of the AR Invoice Review dashpart allow you to filter the invoices and choose which invoices display in the Aged Accounts Receivable grid, based on invoice status (all, paid in full, or unpaid) and time frame (period, period range, date range, job-to-date, or year-to-date).

The **View Detail** option on the Aged Accounts Receivable grid of the dashpart allows you to:

- View more detail for an invoice. If an invoice was created in Interactive Billing, you can view the invoice itself.

- View information for the last cash receipt received for an invoice.

- Enter comments for an invoice.

Dashboard Column Selection for System Dashparts

You can now select the columns that display for the following system dashpart types:

- Clients

- Contacts

- Employees

- Leads

- Marketing Campaigns

- Opportunities

- Projects

- Vendors

- User-defined Info Centers

For a system dashpart that displays on your dashboard, click the drop-down next to the dashpart name. From the shortcut menu, select **Select Fields** to add or remove columns for a dashpart.

WBS 2 and WBS 3 for Project Dashparts

For project type system dashparts, **Phase Number**, **Phase Short Name**, **Task Number**, and **Task Short Name** have been added to the drop-down list in the **Search Field**, in the grid on the Advanced Project Lookup dialog box. You access this dialog box when you click **Add** in the Dashpart Configuration dialog box. These new fields allow you to search by phases and tasks (WBS 2 and WBS 3) when you add project records to be displayed on a project dashpart.

View Supporting Documents in Project Review

In **Accounting » Project Review**, you can now view supporting documents that have been attached to expenses on employee expense reports and A/P vouchers.

- You upload and attach the documents to employee expense reports in Time & Expense and on the Expenses tab in Interactive Billing.

- You upload and attach the documents to A/P vouchers in A/P Vouchers Transaction Entry and on the Expenses tab in Interactive Billing.

To view supporting documents in Project Review, complete the following steps:

1. On the Project Review form, click either the Cost tab or Billing tab.

2. Click the blue, underlined amount in one of the following fields—**Direct Consultant**, **Direct Expense**, **Reimbursable Consultant**, **Other Reimbursable**.

3. On the drill-down dialog box that opens, click the blue, underlined amount in the **Amount** field in the grid for the employee or vendor whose supporting documents you want to view.

4. On the next drill-down dialog box, click the icon with the green check mark in the **Document** field in the grid for the specific expense item whose supporting document you want to view.

5. On the Supporting Document dialog box, select the document to view, and click **View** to open and view the document.

Default Currencies for Projects Created from Opportunities

If you use the Multicurrency feature, when you create a new project from an opportunity, Vision determines the default project and billing currencies as follows:

- **Project currency** — This is the cost currency from the Service Estimate tab of the Opportunity Info Center or, if service estimates are not enabled, the currency from the General tab of the Opportunity Info Center (if one was specified) or the company's functional currency.

- **Billing currency** — If service estimates are enabled, this is the billing currency from the Service Estimate tab of the Opportunity Info Center (if specified) or the cost currency from the Service Estimate tab of the Opportunity Info Center (if specified) or the company's functional currency. If service estimates are not enabled, the default currency is the currency from the General tab of the Opportunity Info Center (if specified) or the company's functional currency.

When you create a new project from an opportunity and a project template, Vision determines the default project and billing currencies as follows:

- **Project currency** — This is the project currency from the template, if one was specified. Otherwise, the defaulting behavior is the same as described above for creating a project from an opportunity.

- **Billing currency** — This is the billing currency from the template, if one was specified. Otherwise, the defaulting behavior is the same as described above for creating a project from an opportunity.

Closed Reason and Closed Notes Fields in the Opportunity Info Center

A new **Closed Reason** field and **Closed Notes** field have been added to the General tab of the Opportunity Info Center. This new information is also displayed as columns for the following reports:

- Opportunity Forecast
- Opportunity Summary
- Opportunity List
- Opportunity Hit Rate List

The drop-down list in the **Closed Reason** field includes pre-defined reasons that you can select that best categorize why the opportunity is closed. The options in the list are defined for the Opportunity Closed Reason table in **Configuration » General » Code Tables**.

The **Closed Notes** field is a memo field that you can use to enter any description that relates to the closing of the opportunity.

Look Up an Account Based on Company in the Account Info Center

In **Info Center » Accounts » Chart of Accounts**, you can now search for an account based on the company, in the advanced search of the account lookup. This applies if you have multiple companies in Vision. When you use the **Advanced** display type on the Account Lookup, you can now select the **Company** option in the **Search Field** drop-down list in the Search Criteria grid to conduct a search based on a company.

Activity Grid in Activity Manager and Info Centers Now Editable

You can now edit the fields directly in the Activities grid that is located on the Activity Manager form in **Calendar/Activities » Activity Manager** and on the Activities tab in the various Info Centers. Previously, the fields in the grid were display-only. You could edit them only on the Activities dialog box, by clicking the 🖊 **Edit** option on the grid toolbar.

The **Start Date** and **End Date** fields in the grid remain display-only. You can edit them only on the Activities dialog box.

Text Editor with New Spell Checker

All memo (text-box) fields in Vision now use a new text editor with features such as spell check as you type and custom dictionaries. The icons for the formatting options also changed but their function remains the same. The process for creating tables also changed with the new Insert Table dialog box.

Known Issue: In Vision 7.3, when you open the text editor in any memo field in which indented text was entered in the field in versions earlier than Vision 7.3, the text is no longer indented. You can reapply the indenting using the text editor. This issue will be fixed in a future release. (Deltek Defect 412726)

Enhanced Support for Custom Invoices in Invoice Template Editor

Previously, edited invoices and invoices generated by Batch Billing always used the standard .DLL file, so even if you developed a custom .DLL for invoicing and referenced it in the .RDL file, it was not used for those invoices. That restriction has been removed.

Use an Image as a Signature in Purchase Template Editor

On the Signature tab in **Purchasing » Purchase Template Editor**, you can now select an image that was uploaded to Vision as a signature on the **Electronic Signature File Name** drop-down field. Click the **Electronic Signature File Name** drop-down to select an image from the list that will be used as the signature for the invoice.

HTML Formatting for the Detailed Timesheet Reports

On the Setup tab in **Configuration » Time & Expense » Company Timesheet**, a new **HTML Formatting** check box was added under the **Include comments** check box in the Detailed Timesheet Report Options section. The **HTML Formatting** check box is enabled if you select the **Include comments** check box. By default, the **HTML Formatting** check box is selected. Clear the **HTML Formatting** check box to disable HTML formatting on the detailed timesheet report.

Timesheet Audit Label Change in Company Timesheet Configuration

On the Timesheet Audit tab in **Configuration » Time & Expense » Company Timesheet**, the label for the **Require after initial save** option under the **Enable revision explanation** check box was changed to **Require for updates prior to current day** to more accurately indicate the purpose of the option.

There is no change in what this option does. As in Vision 7.2, select this option to require that, after saving a timesheet for the first time, employees and timesheet administrators enter an explanation each time that they make revisions to a timesheet for a date that is earlier than the current date.

Work Week Number in Company Timesheet Configuration

A common practice in European countries is to have weekly timesheets and refer to them by the week number within the year rather than by period start and end dates. Vision now provides the option to display a work week number with timesheet information. (Although it is expected that most companies that use this feature will use it for work weeks, you also have the option to use it to number timesheet periods other than weekly periods.)

To implement this feature, select the **Enable timesheet period number** check box on the Calendar tab in **Configuration » Time & Expense » Company Timesheet**. In the **Label** field, choose whether you want the label for the period number to be **Week Number** or **Timesheet Period Number**, and assign numbers to timesheet periods in the grid on that tab.

When you enter or review timesheet information, the work week number displays, along with other period information on the Timesheet Hours tab of the Timesheet form, on related dialog boxes, and on the Detailed Timesheet report, Summarized Timesheet report, and Timesheet Audit Detail report. You can also sort the Timesheet Audit Detail report by work week.

Print Supporting Documents in Expense Report

In **Time & Expense » Expense Report**, when you print or display an expense report using either the Detailed Expense Report or the Summarized Expense Report, you now have the option to view or print supporting documents with the report.

On the Expense Report form, click **Print** on the toolbar and select **Print Supporting Documents** on the menu before you select the report that you want to print. You can also do this on the Select Expense Report dialog box to print multiple expense reports with their supporting documents.

Supporting documents display in the order of the expense rows they are linked to. (If the same document is linked to more than one expense row, only one copy of it is included with the report.) If the report includes any supporting documents, the report displays in the application that you use to view .PDF files rather than in the standard report Preview window.

> You can print supporting documents only if the **Enable FILESTREAM** option is selected on the General tab of the Weblink utility. If **Enable FILESTREAM** is not selected, the **Supporting Documents** option is not available on the Print menu.

Remove Orphaned Documents on Submit for Expense Reports

Previously, if you uploaded a document into Vision for an expense report and later cleared the **Select** check box on the Supporting Documents dialog box for that document for all expense report rows, the "orphaned" document was removed from Vision as soon as you saved the expense report.

In Vision 7.3, orphaned documents are instead retained until you submit the expense report. At that point, Vision displays a message that lists all "orphaned" documents and notifies you that they will be deleted from Vision when you submit the expense report. You then have the option either to submit the report and delete the documents or to postpone the submission so you can review the documents to determine if they should be associated with the expense report.

Status Report Option Moved on the Select Expense Report Dialog Box

In **Time & Expense » Expense Report**, the Select Expense Report dialog box opens when you click **Employees » Select Employees** on the Expense Report form toolbar. The Select Expense Report dialog box grid toolbar was streamlined by moving the **Status Report** option to the **Print** drop-down list as an option.

Additional Sorting Options for AR Aged and AR Ledger Reports

The **Client info to Display** field on the AR Aged and AR Ledger reports can now sort by **Billing Contact** or **Primary Contact**. For example, if you chose **Billing Client** and then **Project Number** in your sorting/grouping, the contact information for all the project's contacts will show with the client. If you choose **Billing Client**, **Project Number** and then **Billing Contact**, the contact information will show with each project.

New Posting Date Column on the Account Analysis Report

On the Account Analysis report in **Reporting » General Ledger**, you can now include a **Posting Date** column to display the dates on which the transactions were posted.

Opportunity Forecast Report Based on Fiscal Year

The **Fiscal Year** and **Year Determined by** fields have been added to the General tab of Opportunity Forecast Report options. Use these fields to create an Opportunity Forecast report based on a fiscal year. These fields are enabled if you select **Yearly** or **Quarterly** in the **Display Period** field.

- Use the **Fiscal Year** field to identify the start and end month of your fiscal year.
- Use the **Year Determined by** field to select whether the year of the start month or the year of the end month is used as the year for the **Fiscal Year**.

User Account Report Column Updates

The **Windows Authentication**, **Domain**, and **Reset Password at Next Login** columns were added to the User Account Report. The **Reset Password at Next Login** column header was shortened from the **Force User to Reset Password at Next Login** header to maximize the header space.

Custom Report Administration: Uploading, Downloading, Synchronizing, and Report Status

The following enhancements have been made on the Custom Reports tab in the Report Administration utility (**Utilities » Report Administration**):

- The **Upload** option has been enhanced to upload a custom report to your Vision database as well as to your report server. The copy of the report on the report server is used when users access the report in Vision. The copy of the report in the Vision database serves as a backup copy that you can download in the event that you need a copy and you cannot find the original file on your workstation.

- In the Load Custom Reports grid on the Custom Reports tab, a new **Status** column displays the status for each custom report. The column can display the following statuses:

  - **Synchronized** — This status displays after you successfully upload a custom report using the **Upload** option on the Load Custom reports grid toolbar. It signifies that the custom report was uploaded successfully to your report server and the Vision database.

  - **Missing in report server** — This status signifies that the custom report is uploaded to the Vision database (as a backup copy), but it no longer exists on the report server. This could happen if you manually deleted the report on the report server or if you migrated to a new report server. Because there is a backup copy saved in the Vision database, you can click the **Synchronize** option on the Load Custom Reports grid menu to re-upload a copy of the backup report in the Vision database to your report server.

  - **Missing in database** — This status signifies that a custom report is uploaded to the report server, but it does not have a backup copy saved in the Vision database. This can occur if you are upgrading to Vision 7.3 and you have already uploaded custom reports to the report server in earlier Vision versions—before the custom report status was implemented in the software. In this scenario, to upload a copy of the report to the Vision database and change the status of the report to **Synchronized**, you must delete the report from your report server and upload it again using the **Upload** option on the Load Custom reports grid toolbar.

- The toolbar on the Load Custom Reports grid on the Custom Reports tab has the following new options:

  - **Download** – Use this option to download a copy of a custom report that is saved in the Vision database.

  - **Synchronize** – Use this option to reload a custom report that is missing from the report server and there is a copy in the Vision database (the report has a status of **Missing in report server**). The backup copy in Vision will be reloaded to your report server.

Change an Event Sequence in Workflow Configuration

When you create a workflow (**Configuration » Workflow » User Initiated Workflow**), you can click **Move Up** or **Move Down** on the toolbar of the User Initiated Workflows grid to move the event to where you want it in the event sequence. Events are executed based on the order in the grid.

User Initiated Workflows that Fire when You Create a Project from a Plan

User initiated workflows that are configured for the Project application with a workflow type of Insert/Associate now fire whenever you create a project from a plan in the Project Info Center (you click **New » Create Project from Plan** on the toolbar of the Projects form).

Open and Close Periods by Company

If you use the Multicompany feature, opening or closing an accounting period in previous versions affected all of your companies, whether or not those companies all operated under the same external requirements or internal policies. For example, some European countries require companies to close an accounting period immediately after the period end date, while US companies do not have that restriction.

In version 7.3, however, you have the option in the Open New Period utility to open a new accounting period for the currently active company only or to open it for all companies, as before. If you only open the period for the active company, you can later use the Period Setup utility to open it for the others. You can also use the Period Setup utility to close an accounting period for individual companies or for all companies.

Track User Login Activity

On the Audit Trail tab in **Configuration » General » System Settings**, a new **Log User Activity** check box added to the Info Center/User Activity Audit Trail section allows you to enable user login activity tracking. Select this check box to track user log in and log out times in the User Activity utility, in the Utilities application.

When you select this check box:

- The User Activity grid in the User Activity utility displays the **Log In** and **Log Out** columns in place of the **Application** and **Last Activity** columns.
- The **Last Activity** field below the User Activity grid is replaced with the **Logout Time** field.
- All existing application activity logs are cleared from the system.

User Activity Utility

In **Utilities » User Activity**, the **Email Users** option in the **Actions** drop-down list on the toolbar of the User Activity form was changed to **Email Logged In Users**. When you select **Email Logged In Users**, an email message is sent only to users who are currently logged into Vision. The email addresses of the logged in users will be entered in the **BCC** field of the Send Email dialog box.

In the User Activity utility, you can now delete activity logs based on a date range by clicking the **Purge** button on the User Activity grid toolbar.

Web Service Timeout Value Is Now Configurable

On the Miscellaneous tab in **Configuration » General » System Settings**, a new **Web Service Timeout (seconds)** field was added to the Workflow section so that you can prolong or shorten the duration before web service timeout.

Performance Management Configuration

You can now configure the settings of the Tableau workbooks, apply KPIs, modify workbook settings, upload, and reload workbooks in Vision. With this addition, functionality from the Performance Management tab of the Vision Resource Kit is now available from within Vision.

Configuration » General » Performance Management » Configuration Tab

On the Configuration tab, you can specify settings related to the Tableau workbooks that contain the Vision performance dashboards.

Configuration » General » Performance Management » Workbooks Tab

Organization levels can now also be configured by using the **Organization Level to Use** settings.

On the Workbooks tab, you can use the new **Upload** button on the Workbooks grid toolbar to upload custom workbooks. When you upload a custom workbook, it is published to the Tableau server and is made available on the Vision dashboard.

After you upload a custom report, verify role security settings to ensure that the appropriate users have access to the newly uploaded reports. Contact your Vision administrator to verify and update the role security settings for the custom report.

You can also find new **Reload** and **Reload All** buttons on the Workbooks grid toolbar. Use these buttons to reload one workbook or all workbooks respectively to publish the latest version of your workbook in Vision. It is recommended that you reload a workbook if changes were made to it. Examples of changes are: changes made to the KPIs, selecting the **Show Sheets as Tab** check box in the Workbooks grid, or changing the **Organization Level to Use** settings.

If a required measure is not properly configured in the Analysis Cubes configuration when the workbooks reload process is initiated, a corresponding message will display. You must properly configure the Analysis Cubes measures before you can successfully reload the workbooks.

Configuration » General » Performance Management » Apply KPIs Tab

Use the Apply KPIs tab to select a workbook file and apply system labels and key performance indicators (KPIs) to it.

Configuration Enhancements that Support the Navigator Application

The following enhancements were made to Vision Configuration to support the Navigator application.

Configuration » Security » Roles

The Navigator Access section on the Navigator tab in Roles Security has a new **Invoices Tab** check box. Select this check box to grant a role access to the Invoices tab in Vision Navigator.

This tab also includes **Additional Planning Security** options that display when the Resource Planning module is not licensed in Vision. Use the **Allow Changes to Budget Type** and **Allow**

Changes to Overhead % options to enable a role to change the Navigator plan's budget type and overhead percent in Navigator's Plan Settings.

The Vision Role Summary Report displays the new **Invoices Tab** setting for a role in the Navigator section of the report. For applications where the Resource Planning module is not installed, the **Allow Changes to Budget Type** and **Allow Changes to Overhead %** options are also displayed on the report.

Configuration » Planning » Plan Settings

The existing **Budget Type** field in Vision Plan Settings Configuration now also serves as the default for the billing and cost amounts in Navigator projects.

- If you are using the Vision Resource Planning module, the **Budget Type** field is on the Rates tab of Project Planning form.

- If you are not using the Vision Resource Planning module, the **Budget Type** field is on the Plan Settings form.

When you create a new plan in Navigator, the **Budget Type** setting in Vision is applied as the budget type in Navigator. If you have multiple companies in Vision, the default budget type for the project's company applies in Navigator.

When you access the plan in Navigator, you can use Navigator Plan Settings to change the plan's budget type. If you have the appropriate access rights, the **Budget Type** setting in Navigator Plan Settings will override the Vision **Budget Type** default settings.

Navigator and Invoice Approval Process Alerts

If invoice approval process alerts are configured in Vision (**Configuration » Billing » Invoice Approval Process**), and you are the approver of a project's invoices, you will receive an email or dashboard alert when an invoice is ready to approve. When a URL is entered in the **Navigator URL** field on the Email tab in **Configuration » General » System Settings**, the email or dashboard alert will now contain links to both Vision and Navigator, so you can quickly access the approval process in either application.

New Kona Log In and Log Out Procedure

The Misc tab on the User Options dialog box now has a different procedure for connecting your Kona account to Vision. To open the User Options dialog box, click **Options** on the Vision toolbar.

To connect to Kona, click the **Connect** button on the Misc tab of the User Options dialog box to open the new Kona dialog box and enter your Kona credentials. After you are connected to Kona, the **Connect** button on the Misc tab changes to the **Connected** button.

To log out of Kona, click the **Connected** button to open the Kona dialog box. Click **OK** on the Kona dialog box to disconnect.

GovWin IQ: Enhanced Integration with Vision

Integration of GovWin IQ with Vision has been enhanced in the following ways:

- To facilitate communication about the opportunities that your firm pursues, a new **Added by** grid on the IQ Info tab of the Opportunity Info Center displays all employees who initiated the downloading of the opportunity from GovWin IQ to Vision. The employee

name serves as a link to the employee's record in the Employee Info Center so, for example, you have quick access to their contact information.

- The Web Service Calls – Log grid on the General tab of the GovWin IQ Web Service utility now includes a **Message** column. If any errors or warning conditions occur during the data transfer, they display in that column. If the transfer finishes without errors or warnings, that column displays **Import completed successfully**.

Diary Auto Numbering Tab in Accounting System Settings

All the diary auto numbering-related fields and grids that were previously located on the Transaction Auto Numbering tab in **Configuration » Accounting » System Settings** were moved to the new Diary Auto Numbering tab in Accounting System Settings.

New Posting Date Column on the Diary Report

On the Diary report in **Reporting » General Ledger**, you can now include a **Posting Date** column to display the dates that the transactions were posted.

Bank Account Number Fields Expanded in the Employee and Vendor Info Centers

On the Accounting tab of the Employee Info Center, the **Account Number** column in the Direct Deposit grid now allows up to 32 characters. This change is to accommodate non-US bank account numbers, which frequently exceed the 17-character maximum in prior versions.

For the same reason, the **Account Number** field in the **EFT** group box on the Accounting tab of the Vendor Info Center has also been changed to allow 32 characters.

Transaction Date Validation

For companies operating in some countries, transaction dates must fall within the currently active accounting period. In Vision 7.3, you can set up Vision to enforce this type of date validation. If you implement this feature, you can require that transaction dates be in the currently active period, or you can just require them to be in the current fiscal year. In addition to controlling the dates that users can enter for transactions, Vision also ensures that posting and other batch processes enforce your transaction date requirements.

Companies not subject to regulatory requirements like those mentioned above may nevertheless want to implement transaction date validation as a transaction entry control measure.

What Happens in Transaction Entry

If you do not implement transaction date validation, Vision displays a warning message for a date not in the current accounting period, but you can save the transaction without changing the date. This is the standard behavior for versions prior to 7.3.

If you implement transaction date validation for the fiscal year but not for the accounting period, Vision displays an error message for a transaction date outside the current fiscal year, and the transaction cannot be saved unless either the date or the fiscal year is changed. For a date in the current fiscal year but not in the current period, Vision displays a warning message, but you can save the transaction without changing the date.

If you implement transaction date validation for the accounting period, Vision displays an error message for a transaction date outside the current accounting period, and the transaction cannot be saved unless either the date or the period is changed.

Transaction Dates Not Affected

For some types of transactions, some dates associated with the transactions are not affected by transaction date validation. Two examples are all dates on timesheets and expense dates on employee expense reports.

Prerequisite

Deltek strongly recommends that you post all open transaction files and payment processing runs before you enable transaction date validation. If you do not, you may find that you cannot open a transaction file in the current period and you cannot change the transaction dates when you open the file in a prior period.

Implement Transaction Date Validation

To implement transaction date validation, do one of the following on the General tab of Accounting Company Settings:

- To require that transaction dates be within the currently active fiscal year, select **Require Transaction Dates to be Within the Active Fiscal Year**.

- To require that transaction dates be within the currently active accounting period, select both **Require Transaction Dates to be Within the Active Fiscal Year** and **Require Transaction Dates to be Within the Active Accounting Period**.

Related Form and Dialog Box Changes

A **Transaction Date** field was added to the following forms, tabs, and dialog boxes so you can enter transaction dates for the journal entries they generate:

- Consultant Accruals form

- Intercompany Billing: Posting Information tab

- Revenue Generation form

- Labor Cross Charge form

- Bank Reconciliation: Post Cleared Items dialog box

- **Key Conversion utility » Projects' Organization**: Convert Projects' Organization form

- Transaction Posting: Timesheets tab

These fields are only available if you implement transaction date validation.

FEC File Generation

Periodically, companies doing business in France must submit their accounting entries in Fichier d'Ecritures Comptables (FEC) files to the taxing authorities. The FEC files have precise structure and format requirements. Starting with Vision 7.3, you can use the FEC File Generation form (**Accounting » FEC File Generation**) to generate the two FEC files: a description file and a data file containing the accounting entries.

Prerequisite: A valid FEC Data file requires that all transactions have diary numbers. The FEC file entries are numbered sequentially by diary. Therefore, if you generate an FEC Data file that

contains transactions posted prior to implementing diaries, those transactions will have incomplete data. The FEC Data file will only contain complete entries for transactions that are posted after you implement diaries.

About Dialog Box

The Vision About dialog box that displays when you click **Help » About** on the toolbar for the main Vision screen was updated. It now provides a more organized layout of the Vision application, client, database, and system information, installed components, and terms.

Learning Portal

Click **Help » Learning Portal** on the toolbar for the main Vision screen to open the Vision Essentials Plus learning portal where you can access video resources on using Vision.

This new option is available only if the **SaaS/Hosted Instance** check box on the General tab of the Weblink is selected.

Closed Setting for Opportunity Stages in Code Tables Configuration

The Opportunity Stage code table (**Configuration » General » Code Tables » Opportunity Stage**) now includes a **Closed Stage** check box. Although you can select and clear this check box, it is non-functional in Vision 7.3. It is reserved for possible future use.

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