

Deltek Vision® 7.5

Release Notes: Technical Considerations

November 20, 2015

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Overview

Welcome to the *Deltek Vision 7.5 Release Notes: Technical Considerations*. These release notes contain a summary of the following:

- Installation information
- Software issues resolved
- Known issues
- Database changes



For information regarding the new features and enhancements in this release, see the *Deltek Vision 7.5 Release Notes: New Features and Enhancements*.

Important Information

Before You Upgrade from an Earlier Version of Vision



The Vision 7.5 release contains major technology and configuration changes that affect the typical upgrade scenario. Do not uninstall your previous version of Vision.

If you have any custom DLLs or reports, do not uninstall your previous version since the uninstall process may remove all files.

The installer has built-in intelligence to detect the previous installation – it automatically backs up the folder containing your previous installation files and migrates certain custom settings to the new version.

Before performing the upgrade, review the [Summary of Upgrade Installation Changes](#) to understand how these changes will affect your deployment.

If you are using a Sage Abra (formerly Best Software Abra) application stored in a FoxPro database, **do not upgrade** to Deltek Vision 7.5

Deltek Vision 7.5 is now running as a native 64-bit application and is unable to integrate with the Sage Abra database stored in a FoxPro database for the following reasons:

- Microsoft FoxPro ODBC/OLEDB drivers are only 32-bit.
- Microsoft Extended Support for Microsoft Visual FoxPro 9.0 Professional Edition ended in January 2015: <https://msdn.microsoft.com/en-us/vfoxpro/bb308952.aspx> , <http://support.microsoft.com/lifecycle/?p1=7992>



See the *Deltek Vision Advanced Technical Administration Guide* for more complex topics related to the Vision deployment, including HTTP compression, central location for weblink entries (shared databases.enc), reverse proxies, and integrated security. This document is available on the Knowledge Center tab of the Deltek Customer Care Connect site (<http://support.deltek.com>).

Revenue Generation and Gains and Losses

This applies if you are upgrading from a Vision 6.x version to 7.5 and you use all of the following in Vision:

- Revenue Generation
- Revenue categories for Revenue Generation
- Multiple currencies

Before you run Revenue Generation in 7.5, be sure that you have specified a different unbilled service account for each revenue category on the Revenue tab in **Configuration » Accounting » Company Settings**.

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

Release notes and other guides are available for this release. You can download these documents in two ways.

Deltek Software Manager

The Documents tab in Deltek Software Manager lists all of the documents associated with a release and lets you download the ones that you want.

To download documents, complete the following steps:

1. On the [Deltek Customer Care](#) site, click the Product Downloads tab, then select **Launch Deltek Software Manager**.
2. When the Deltek Software Manager opens, highlight a release in the left pane.



Do **not** enter a check next to the release name or click **Add to Download Queue**. If you do so, you will download the software as well as any documentation that you want.

3. Click the Documents tab to display a list of available documents for the release.
4. Select the documents that you want.
5. Click **View Download Queue** to see a list of documents that you selected.
6. Click **Download**.

Customer Care Site Enterprise Search

Use the search feature to find specific documents or to see a list of all documents associated with a release. Then open or download the ones that you want.

To download documents, complete the following steps:

1. On the [Deltek Customer Care](#) site, click **Enterprise Search**.
2. Select **Release Documentation** as the **Source**.
3. Perform one of the following actions:
 - To see a list of all available documentation for a release, enter the product and release number (for example, **Vision 7.5**) in the search field.
 - To find a specific document, enter a description of the document (for example, **Vision 7.5 release notes**) in the search field.
4. Click on the document, and then choose to open or save it.

Pre-Installation Information

Review the contents of this section before you install Deltek Vision 7.5.

For a complete list of the supported and non-supported platforms and other technical considerations that apply for Vision 7.5, see the following Vision documentation:

- *Deltek Product Support Compatibility Matrix*
- *Deltek Vision 7.5 Technical Installation Guide*

You can download these documents from the [Deltek Customer Care Connect site](#).

Changes to Supported Environments and Technical Considerations in Vision 7.5

The following technical changes apply to Vision, starting with version 7.5:

| Technical Consideration | Description |
|----------------------------------|---|
| 64-bit Support | <p>Vision 7.5 will now run natively as a 64-bit application on the web/application server. The Vision client side components are still 32-bit.</p> <p>Vision will now install to the \Program Files directory by default. Upgrade installations will install clean to \Program Files and will rename the \Program Files (x86) installation directly by appending OLD.</p> <p>See the <i>Deltek Vision 7.5 Installation Guide</i> for detailed instructions on important installation and upgrade notes.</p> |
| Client Operating System | Windows 10 and Microsoft Edge browser are supported with Vision 7.5. |
| Microsoft Windows Server 2008 R2 | Vision can no longer be run on Microsoft Windows Server 2008 R2. |
| Microsoft NET Framework | <p>Microsoft .NET Framework 4.5.2 is required for Vision 7.5.</p> <p>You must install it on all tiers where Vision will be installed and on the client tier.</p> <p>The following are no longer supported:</p> <ul style="list-style-type: none"> ▪ .NET Framework 4.5, 4.5.1 ▪ .NET Framework 3.5 SP1 |
| Microsoft SQL Server | <p>The following CU versions are now supported with Vision 7.5:</p> <ul style="list-style-type: none"> ▪ Microsoft SQL Server 2014 SP1 CU1 ▪ Microsoft SQL Server 2012 SP2 CU6 <p>Microsoft SQL Server 2008 R2 is no longer supported.</p> |

| Technical Consideration | Description |
|-------------------------|---|
| Tableau Server | <p>Tableau Server 9.0.4 is the required version for Vision 7.5 Performance Management.</p> <p>If you have one of the following, you must upgrade to Tableau Server 9.0.4 after you upgrade to Vision 7.5:</p> <ul style="list-style-type: none"> ▪ Tableau Server 8.0.2 installed (with Vision 7.1 or 7.2), ▪ Tableau Server 8.1.6 installed (with Vision 7.3) ▪ Tableau 8.2 installed (with Vision 7.4) <p>If you upgraded to Tableau 9.0.4 with Vision 7.4 CU11, no changes are required to your Tableau Server installation.</p> <p>See the <i>Deltek Vision 7.5 Installation and Configuration Guide for Performance Management</i> for detailed instructions on performing the upgrade.</p> |

Export Reports as Files

The new **Export Reports as Files** options allow you to save reports, including invoices, on the Vision application server or a server of your choice.

If you want to allow reports to be exported to the application server, you can choose from the following options on the Miscellaneous Tab in General System Settings (**Configuration » General » System Settings**):

- **Allow Reports to be Exported to Application Server** – Select this option to export reports to a file on the application server. The export process occurs when you select the **Export Reports as Files When Printing** option on the Print Setup dialog box. On this dialog box, you can define the format for saving the report. For example, you might want to save an invoice file on the application server when the invoice is final printed but not when the draft invoice is created.
- **Allow Reports to be Uploaded via SFTP** – Select this option to use Secure File Transfer Protocol (SFTP) to export and save invoices to an application server of your choice. When you choose to upload via SFTP, Vision enables options so that you can specify the SFTP Host Name, User Name, and Password to ensure that your files are securely transferred to the appropriate location. The export process occurs when you select the **Upload Reports via SFTP when Printing** option on the Printer dialog box. On this dialog box, you can define the format for saving the report. For example, for Billing Invoices you might want to save an invoice file on the application server when the invoice is final printed but not when the draft invoice is created.

Supported Versions and Compatible Versions

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

For a full explanation of supported versus compatible versions as well as a detailed list of Microsoft SQL Server releases (R), service packs (SP), and cumulative updates (CU) that Vision supports, see the *Deltek Product Support Compatibility Matrix*. You can download this document at the [Deltek Customer Care Connect site](#).

KB article 65226 at the Customer Care Connect site also provides a list of the currently supported versions of Microsoft SQL Server.

Summary of Upgrade Installation Changes

In previous Vision releases, when you installed an upgrade, the upgrade installed directly into the existing folder structure and used existing settings.

The Vision 7.5 release contains such major technology and configuration changes that installing into the existing folder structure is not possible. Instead, Vision 7.5 installs into a new folder structure while preserving and “remembering” settings from your previous Vision installation.

The Vision 7.5 installation:

- Detects the existing deployment model and makes recommendations and prepopulates settings based on that deployment model.
- Takes settings from your existing web.config and databases.enc files and uses them to create a script that you can apply after the installation to upgrade your database. This script is created only during the installation on the Web/Application tiers because that is where the web.config and databases.enc files are located.
- Supports upgrades from Vision 6.x and 7.x. on all tiers: Web, Application, Process Server, Report, and Database.

Future upgrades (7.6, 7.7, and so on) will use the previous model, in which the new release is installed into the previous installation location.

Do Not Uninstall Prior Version Before Installing Vision 7.5

Because the Vision 7.5 installer preserves and applies settings from your existing implementation, you should **not** uninstall Vision before installing Vision 7.5.

You should also save any custom DLLs or reports for use by Vision 7.5.

After you perform the installation and confirm that your settings migrated correctly, you can delete the old installation directories.

Migrating/Upgrading To a New Server

If your existing Vision Web/Application Server is on a version of Windows that is no longer supported, you must perform a new installation. Any custom reports, DLLs, web.config settings or other configuration changes that are on the server will not be migrated.

Review the summary of changes below. If you customized your previous version, you will have to apply the customization again to the new deployment, keeping in mind the changes listed in the tables below.

If your existing Vision Database/Report server is on a version that is no longer supported, you must restore or move your database to the new server prior to performing the installation.

Installation Location/Configurations

| Configuration | Previous | New |
|--|--|---|
| Installation Location | <drive>:\Program Files (x86)\Deltek\Vision | <ul style="list-style-type: none"> The new default folder location is <drive>:\Program Files\Deltek\Vision The previous folder (typically found in the 32-bit program files folder) is renamed. <ul style="list-style-type: none"> “OLD” is appended to the end of the folder name. For example VisionOLD. A readme.txt file is inserted into the renamed folder. It contains the text: <i>“This is a previously used Deltek Vision directory that is no longer used and can be safely removed after ensuring that all of your custom DLLs and custom reports have been copied to the new directory (<drive>:\Program Files\Deltek\Vision\)</i>” |
| Programs and Features | Deltek Vision 7.4 | The previous version (Deltek Vision 7.4) is removed from Add/Remove Programs and replaced with new Deltek Vision 7.5 product name and release GUID. |
| Registry Key Location | HKLM\Software\Wow6432\Deltek\Vision | <ul style="list-style-type: none"> HKLM\Software\Deltek\Vision The entries in the previous registry location below the Vision folder are removed. |
| Application Pool | Application Pools is not removed | <ul style="list-style-type: none"> The existing Application Pool is updated with the following: Updates the Enable32bitOnWow64 from True to False |
| Virtual Directories/ Applications | Virtual Directories/Applications remains. | The Virtual Directories/Applications physical directory changes to the new “<drive>:\Program Files\Deltek\Vision” TARGETDIR. |
| Process Server Configuration and executable | Process Server service | <ul style="list-style-type: none"> The Process Server executable uses the new “<drive>:\Program Files\Deltek\Vision” TARGETDIR location. If you changed the Process Server service identity account after installing a previous version of Vision, Vision prompts you to enter the credentials password for the account during the upgrade installation on any tier that contains the Process Server service. If you do not know the password, enter the text bypass and the installation continues without setting the password on the identity for the service. After installation, you must update the Deltek Vision Process Server service account with the correct password or the service will not start. |

Custom Web.Config Settings Migration

Some custom settings added to the web.config file on the web/application server have been migrated to the database and can be configured from within the application. Because of this change, database upgrades are only supported from any deployment option that includes the Web/Application tier installations.

During any installation using a deployment option with the web/application tier installations, setup copies the prior version's web.config file and uses it. It reads the web.config from the prior deployment and dynamically creates a v_WebConfigMigration.sql script file containing the custom settings noted below and builds the master upgrade script with those new settings so that the database is updated accordingly. You can still choose to upgrade databases post installation.

On upgrades, unused web.config values are commented out and others not being used anymore are removed.

| Original Setting | New Location in Database (Table.Field) | How to Edit: <i>Launch Application » Navigate to Configuration » General » System Settings »</i> |
|-----------------------|--|---|
| MaxEmailSize | CFGEmail.MaxEmailSize | Email Tab » Email Size Limit (Megabytes) |
| EmailChunkSize | CFGEmail.EmailChunkSize | Email Tab » Number of Emails to Send at Once |
| WebAPI.EnableWorkflow | FW_CFGSystem.WebAPIEnableWorkflow | Miscellaneous Tab » Workflow section » Allow APIs to Trigger Workflows |
| SessionTimeout | FW_CFGSystem.SessionTimeout | Miscellaneous Tab » Application Session Timeout (minutes) |
| AllowFileSave | FW_CFGSystem.AllowFileSave | Miscellaneous Tab » Export Reports as Files Section |

Custom Changes applied at Customer Sites

If you previously customized Vision:

- **Custom DLLs** – You need to test all custom workflow DLLs (and any third party DLLs) to verify that they work in 64-bit mode. If they are compiled with AnyCPU, they should work. After testing, you can copy them into the new installation folder
- **Custom Reports (not in the database)** – You need to copy all custom reports not stored in the report server database to the new installation folder and **Load Report Files** into the database.

Option to Use HTTPS for Reporting Services Server-Side Calls

A new check box, **Use HTTPS for Reporting Services server-side calls**, has been added to the Report Server tab in Weblink. It allows you to use HTTPS for server-side calls.

Running reports involves both server-side calls (from the web/application server to the SSRS server) and client-side calls (from the Vision Smart Client to the SSRS server). By default, all

server-side calls to SSRS will use HTTP and client-side calls to SSRS will use whatever protocol (HTTP or HTTPS) was used to access the Vision application.

- Select **Use HTTPS for Reporting Services server-side calls** to use HTTPS for server-side calls to the SSRS server. This will not affect client-side calls.
- If you are using HTTP to access Vision, do not select this check box. It is designed to be used only with an SSL configuration.
- If you are using HTTPS for Vision and you select this check box, HTTPS will be used for both server-side and client-side calls to SSRS.

Shared databases.enc File Path

You can now use a shared databases.enc file path. If your Vision deployment includes multiple web/application servers, or even just a dedicated process server, the shared path will eliminate the need to synchronize changes made to databases.enc across your servers.



See the *Deltek Vision Advanced Technical Administration Guide* for more information.

Changes to the Upgrade Installation Process

This section includes a list of changes affecting the tiers in all the deployment/installation models.

For example, if you are performing a Web/Application/Process Server installation for the Dual Server (Two-Tier) Configuration 1 deployment, the details listed in the Web/Application and Process Server tiers below will apply.



For an overview of the logical tiers and deployment models, see:

- [Logical Tiers](#)
- [Installation/Deployment Models](#)

Database Tier



The installer will **not** create a deltekvision75.sql database conversion script file. The database conversion script file is created only on the web/application server because the web.config file exists only on the web/application tier.

- The Installer attempts to detect previous tier installations (deployment model) and makes a recommendation about what you should select on the dialog boxes.
- A readme.txt file is inserted into the renamed folder, containing the following text:
“This is a previously used Deltek Vision directory that is no longer used and can be safely removed after ensuring that all of your custom DLLs and custom reports have been copied to the new directory (<drive>:\Program Files\Deltek\Vision\).”
- The Installer renames the previous product installation directory by appending “OLD” to the end of the folder name. For example, “C:\Program Files (x86)\Deltek\VisionOLD.”
- The Installer removes Deltek Vision 7.4 (or previous version) from Add/Remove Programs.

Report Tier

- The Installer attempts to detect previous tier installations (deployment model) and makes a recommendation about what you should select in the dialog boxes.
- A readme.txt file is inserted into the renamed folder, explaining that the original installation folder was renamed. On the report only tier, the folder may contain custom report images that must be moved to the new folder location.
- The Installer renames the previous product installation directory by appending “OLD” to the end of the folder name. For example, “C:\Program Files (x86)\Deltek\VisionOLD.”
- The installer removes Deltek Vision 7.4 (or previous version) from Add/Remove Programs.

Web / Application Tier

- The Installer attempts to detect previous tier installations (deployment model) and makes a recommendation about what you should select in the dialog boxes.
- The Installer attempts to detect a previous installation directory.
 - The Installer copies the databases.enc and web.config files from the previous installation and uses them for the new installation.
 - The Installer applies applicable web.config changes detected from your old web.config file to the new installation (depending on the previous version from which it is upgrading).
- The Installer creates the deltekvision75.sql script file for upgrading the database only on the web/application server tier because the web.config file exists only on the web/application tier.
- The Installer attempts to detect the existing DeltekVisionAppPool and detects Vision and VisionClient IIS application/virtual directories. It keeps the existing application pool and virtual directory custom configuration changes.

This step is performed because some environment configurations may use different Application Pool identities, non-standard AppPool or virtual directory settings, non-standard ports, SPNs, SharePoint, and so on.

- A readme.txt file is inserted into the renamed folder, containing the text: “This is a previously used Deltek Vision directory that is no longer used and can be safely removed after ensuring that all of your custom DLLs and custom reports have been copied to the new directory (<drive>:\Program Files\Deltek\Vision\).”
- The Installer uninstalls SQLXML 4.0 (SP2).
- The Installer uninstalls Solid Documents (COM) and replaces it with Solid Documents (.NET).
- The Installer renames the previous product installation directory by appending “OLD” to the end of the folder name. For example, “C:\Program Files (x86)\Deltek\VisionOLD.”
- The Installer removes Deltek Vision 7.4 (or previous version) from Add/Remove Programs.

Process Server Tier

- Process Server is uninstalled from the previous installation directory and then installed using the new installation directory.
- Service Identity
 - New Installations
 - Set to local DeltekVision. Uses the default password for the account created by the installer and sets start up mode to **Automatic**.
 - Upgrades
 - Identity is configured with the Deltek Vision default account. If setup cannot validate the local account, it will prompt you to enter a password for the identity. You can enter the text **bypass** as a password if validation fails or if you do not want to set the password during installation. You must set the password on the Process Server service after the installation or the service will fail to start.
 - Identity is configured with a domain account. Setup prompts you to enter a password. You can enter the text **bypass** as a password if validation fails or if you do not want to set the password during installation. You must set the password on the Process Server service after the installation or the service will fail to start.



- If the Process Server identity is configured with a domain account and, when performing the upgrade, you are logged into the server using a domain account, when you are asked for the domain password for the Process Server service identity, the account validation will be performed successfully.
- If the Process Server is configured with a domain account and, when performing the upgrade, you are logged into the server using a local (non-domain) account, when you are asked for the domain password for the Process Server service identity, the account validation will fail, even when the credentials are entered correctly. To continue with the installation you must enter the text **bypass**. Then reset the password to the domain account password in the Services application after the installation is completed.

- Identity is configured with the Windows LocalSystem account. Setup sets the identity to use the LocalSystem account after the upgrade.
- The Installer sets the service start up mode to be the same as it was before the upgrade.



If you entered the text **bypass** so that the installer could continue without validating the Process Server service identity, after the installation is complete, you must set the password on the Process Server service identity or the service will fail to start.

- A readme.txt file is inserted into the renamed folder, containing the text: “This is a previously used Deltek Vision directory that is no longer used and can be safely removed after ensuring that all of your custom DLLs and custom reports have been copied to the new directory (<drive>:\Program Files\Deltek\Vision\)
- The Installer renames the previous product installation directory by appending “OLD” to the end of the folder name. For example, “C:\Program Files (x86)\Deltek\VisionOLD.”

- The Installer removes Deltek Vision 7.4 (or previous version) from Add/Remove Programs.



If you are performing a Process Server tier upgrade and had made any edits to the `Deltek.Vision.ProcessServer.Server.exe.config` file to customize Process Server behavior, such as the number of emails being sent at a time (`EmailChunkSize`) or the maximum size of an email (`MaxEmailSize`), log in to the application after the installation is completed and follow the steps in the Custom [web.config Settings Migration section](#) to ensure that they are applied. If they are not applied, apply them as needed.

Considerations Prior to Upgrading

Known Issue with the Vision Installation

If you are upgrading from a 6.x version of Vision and you use a Microsoft SQL Server Session State that is located in a database other than your Vision database, see KB article # 72573 for additional instructions.

During the Vision upgrade process from version 6.x or earlier, the `SessionState` table is renamed. However, if the table is not located in the Vision transaction database, it will not be renamed. You must manually rename the table using the instructions in the KB article.

Upgrading from Version 5.1 or Earlier

- If you plan to upgrade your database during the installation, refer to the table in the *Converting a Database During Installation* section below.
- Vision 5.1 installations did not support the currently supported Windows Operating Systems, so all your deployment tiers will be run as a new installation.



Before uninstalling your previous version of Vision, ensure that your hardware and software meet the minimum requirements for running this current Vision release.



If you are using Vision 5.1 and have users connecting from the Internet outside of a Virtual Private Network (VPN), see the *Deltek Vision Advanced Technical Administration Guide* for advanced topics for configuring and securing connections to Vision.

Database Upgrades

- Vision database upgrades from Vision 6.x or 7.x are supported.
- You cannot upgrade any Vision database from version 5.1 or older.
- If your database is older than version 6.x, a message will display during the installation, letting you know that there are no valid databases to convert. You must manually convert those databases to a minimum of version 6.0 and then upgrade to the current release.



See *Converting a Database During Installation* below for more information.

- Web Server installations create a **deltekvision75.sql** file in the \program files\Deltek\Vision\Databases\Scripts folder that you can use to manually upgrade the database to the current version.

To convert your database manually, create a backup of your database before you run the database conversion using the **Deltekvision75.sql script file**. Do **not** run **UnicodeDeltekVision75.sql** or other script files unless your database is Unicode. If you plan to convert your Vision database to Unicode, see the Vision online help for the appropriate steps.

Converting Vision 5.x or Earlier Databases

When completing the database portion of the installation process, Vision checks to see if there are any existing 6.x databases. If so, the Database to Upgrade screen displays. If you are migrating from a version prior to Vision 6.x, follow the steps listed in the table below on how to upgrade.

Database Migration Path Table

| Database Migration Path | Steps |
|-------------------------|---|
| 5.x to 6.x | <p>Log on to the Deltek Customer Care website.</p> <p>Select KB article # 43088, titled <i>How to upgrade the Vision database</i>. Download and run either the DeltekVision61SP4_upgradescripts.zip or DeltekVision61SP2_upgradescripts.zip conversion script to convert your database to version 6.x.</p> |
| 4.x to 6.x | <p>Log on to the Deltek Customer Care website.</p> <ol style="list-style-type: none"> Select KB article # 37233, titled <i>How to Upgrade Vision from 3.0 to 5.0</i>. Download and run the DeltekVision50.sql conversion script to convert your database to version 5.x. Select KB article # 43088, titled <i>How to upgrade the Vision database</i>. Download and run either the DeltekVision61SP4_upgradescripts.zip or DeltekVision61SP2_upgradescripts.zip conversion script to convert your database to version 6.x. |
| 3.x to 6.x | <p>Log on to the Deltek Customer Care website.</p> <ol style="list-style-type: none"> Select KB article # 37233, titled <i>How to Upgrade Vision from 3.0 to 5.0</i>. <ol style="list-style-type: none"> Download and run the DeltekVision41RTM.sql conversion script to convert your database to 4.x. Download and run the DeltekVision50.sql conversion script to convert your database to version 5.x. Select KB article # 43088, titled <i>How to upgrade the Vision database</i>. Download and run either the DeltekVision61SP4_upgradescripts.zip or DeltekVision61SP2_upgradescripts.zip conversion script to convert your database to version 6.x. |

Custom Programming, Including Custom Invoices and Custom Reports

Before you upgrade to Vision 7.5:

- Review all existing custom work, including custom invoices and custom reports, at least eight weeks prior to your intended go-live date.
- Compare your custom work to the new functionality provided in this release.
- If this new version possesses the functionality contained in your custom work, these custom programs may no longer be needed. If the functionality contained in your custom work is not provided in this release, you must ensure the custom work remains intact through the upgrade process.
- Identify any hot fixes or patches that you plan to deploy with your Vision 7.5 upgrade. Ensure that, following the hot fix or patch deployment, you retain all custom functionality.
- Delttek strongly recommends that when you upgrade, you first deploy an instance of Vision 7.5 in your test environment. This allows for functional User Acceptance Testing (UAT) to ensure that all mission-critical custom features are still available to the user community. Typical deployments call for a 30–45 day test period before you upgrade Vision in your production environment.
- If you are upgrading to Vision 7.5 from a version earlier than Vision 6.0, and you have developed custom programming and/or reports in the earlier versions of Vision, all existing custom programming developed prior to the Vision 6.0 release must be rewritten in Smart Client.



Delttek's Technical Services team is available to support you as you plan for this upgrade. We offer both technical and custom services. Contact DGSCONSULTANTS-PES@Delttek.com.

Custom Database Objects

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

Vision Screen Designer

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

Important Notes about the Vision Installation

This section provides important information specific to the Vision 7.5 installation.

Setup Log File

If you encounter problems during the Vision installation and you are unable to continue with the installation on the server, contact Deltek Customer Care for assistance and include the information listed in the DeltekVisionSetupLog.txt file.

For security reasons, the temporary log file is stored in the **C:\Users\%Username%\AppData\Local** folder of the administrator performing the installation on the Vision server. To navigate to the file, an administrator can enter the environmental variable **%LocalAppData%** at a Run prompt or in the Windows Search Box on the server.

Microsoft SQL Server Express Edition

Vision 7.5 supports Microsoft SQL Server Express. If you are implementing SQL Server Express, Deltek recommends that you use the SQL Server 2014 SP1 Express edition with Advanced Services. The Express edition contains the Database Engine and Reporting Services that are required for managing the Vision database and running reports.



See "Appendix B: Microsoft SQL Server Edition and Version Information," in the *Deltek Vision 7.5 Technical Installation Guide* for details, including Microsoft links for downloading and using SQL Server Express Edition.

Microsoft SQL Server Reporting Services—Custom Reports and Custom Invoices

After you upgrade to Vision 7.5 from an earlier 7.x version, you must upgrade your existing custom reports and custom invoices to the supported RDL 2010 schema that is now required.



For instructions on how to upgrade your custom reports and invoices to the RDL 2010 schema, see the "Custom Reports Created with Microsoft SQL Server Reporting Services Versions 2005 and 2008" section in the *Deltek Vision 7.5 Custom Reports and Microsoft SQL Server Reporting Services Guide*.

For an overview of the Microsoft SSRS report-writing tools that are and are not supported in Vision 7.5, see the "Changes to Supported Environments and Technical Considerations that Are New for Vision 7.5" section on page 5 of these release notes.

Custom Report Business Objects

When you install the Vision 7.5 upgrade to your Vision server (web server tier), Vision 7.5 custom report business objects are installed into the *<Deltek Vision Installation Directory>\Support\SDK* folder. In this folder, extract the contents from the VBReporting.exe self-extracting file to access the custom report business objects.

Connect for Microsoft Outlook

This section applies if you are upgrading to Connect for Microsoft Outlook 7.5 from an earlier version. Connect for Microsoft Outlook and any updates to it are now included in the Vision 7.5 installation and Vision Cumulative updates on the web/application tier.



See the *Deltek Vision 7.5 Connect for Microsoft Outlook Installation Guide* for specific instructions for performing new and upgrade deployments.

Revenue Generation and Gains and Losses

This applies if you are upgrading from a Vision 6.x version to 7.5 and you use all of the following in Vision:

- Revenue Generation
- Revenue categories for Revenue Generation
- Multiple currencies

Before you run Revenue Generation in 7.5, be sure that you have specified a different unbilled service account for each revenue category on the Revenue tab in **Configuration » Accounting » Company Settings**.

In Vision 6.x versions, you were not required to have different unbilled service accounts, but in 7.x versions, you must have a different unbilled service account for each revenue category. If you have the same account for multiple revenue categories in Vision 7.5, gains and losses adjustments are calculated automatically whenever Revenue Generation is processed, even when exchange rates have not changed and no new transactions have been posted to a project.

After you change an unbilled service account for revenue categories, the next time that you run Revenue Generation, you will see a one-time swing in revenue gains/losses to update the new unbilled service account.

Known Issues with the Vision 7.5 Installation

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



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

Download and Install Vision 7.5



See the *Deltek Vision 7.5 Technical Installation Guide* for instructions on how to download and install or upgrade the Vision software. You can also refer to the *Deltek Product Support Compatibility Matrix* for more information about supported and non-supported environments. Download these guides from the [Deltek Customer Care Connect site](#).

Upgrade Considerations

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

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

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

After you upgrade to Vision 7.5, Deltek recommends that you run the Microsoft SQL Server Update Statistics maintenance program using the default option that uses a sample of the data. This is especially important for larger Vision databases, to help prevent performance issues.



If you are upgrading to Vision 7.5 from a version earlier than Vision 6.1, see the 6.1 release notes. You can download them from the [Deltek Customer Care Connect site](#). You can also download copies of the prior versions of the Vision documentation at the Deltek Customer Connect site.



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

Deploy Vision 7.5 on Client Workstations

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



You must manually install .NET 4.5.1 on each workstation on which Vision 7.5 will be run.

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

When you open Vision 7.5 for the first time, complete the following steps:

1. When the Deltak Vision launch page displays, click **Run** on this page to continue. Vision downloads the files required to open the Login screen.
2. On the Deltak Vision Login screen, enter your **Username** and **Password**, select a **Database**, and click **Login**.

Vision downloads a zip file to your workstation (an Application Downloader dialog box displays during this process). This zip file is extracted into the local ClickOnce cache on your workstation. This is similar to the way that temporary Internet files are stored for browser applications.

After the zip file is extracted, the Vision application opens and you can start working.

Subsequent Logins

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

Software Issues Resolved in Vision 7.5 Since the Vision 7.4 Release

This section identifies software issues that were resolved in Vision 7.4. It includes the issues that were fixed **after** the 7.4 release that were not fixed in the 7.4 cumulative updates (7.4 CUs). The issues that were resolved in the 7.4 cumulative updates are also resolved in the 7.4 release.

These resolved issues are described in “Appendix A: Software Issues Resolved and Enhancements in Vision 7.4 Cumulative Updates,” where they are organized by cumulative update number and date.

Whether you installed one or more of the 7.4 cumulative updates, or you moved directly to the latest release without installing any of the 7.4 cumulative updates, all of the issues described in this section and Appendix A have been resolved.

Accounting

Accounting » Accounts Payable » Create Voucher from PO

Defect 477421: A vendor with many purchase orders may load very slowly on the Create Voucher from PO screen.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Apply the following script to your database:

```
CREATE NONCLUSTERED INDEX POMasterVendorIDX ON POMaster(Vendor)
WITH FILLFACTOR = 90
GO
```

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 485070: This issue applies if you use the Purchasing application and you do not maintain separate balance sheets. In Create Voucher from PO, when you clicked **Cost Distribution** on the toolbar of the Open to Voucher grid for an inventory item, you received an error message that informed you that a project was not permitted with a balance sheet account. You were unable to close the Cost Distribution dialog box.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.PORoutines.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Accounting » Accounts Payable » Form 1099 Processing

Defect 546194: The Vision 1099-MISC form was printed using font size 8, when the IRS requirement is font size 12.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Submit 1099 data electronically.

Additional Notes: None.

Files Updated

aprptForm1099.rdl

aprptForm1099Custom.rdl

Other Applications Affected

Database Changes

System File Dependencies

Accounting » Accounts Receivable » Invoice Review

Defect 520299: When the **Status** was changed to **Unpaid** on the Invoice Review form in **Accounting » Accountings Receivable**, the **Project Name** column was blank for the projects that had retainage billing but not with outstanding invoices.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Accounting » Bank Reconciliation

Defect 475040: The accrual and cash basis general ledger entries were incorrect when you cleared checks on the Payments tab in Bank Statement Reconciliation in the following situation: An AP Payment Processing run or Employee Payment Processing run had a mix of EFT and non-EFT (regular) payments. On the Payments tab in Bank Statement Reconciliation, you cleared all of the EFT payments and only some of the non-EFT checks from the payment run in the same bank statement.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.BankReconciliation.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 527033: If a receipt was cleared in a future period, that receipt displayed as uncleared on the Receipts tab in Bank Reconciliation. However, the uncleared balance on the Summary tab was not updated to match. The uncleared balance on the Summary tab did not include the receipt that was cleared in a future period.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.BankReconciliation.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Accounting » Check Review

Defect 434351: In **Accounting » Payment Review**, when you selected **AP Payment/EFT** in the **Transaction Type** field on the Search Criteria tab, not all payments with an AP Payment/EFT payment type displayed in the Payments grid.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Use other search criteria.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Accounting » Credit Card » Credit Card Reconciliation

De471296: If you attempted to import a credit card file and the primary code included a dash (for example, AMEX-PC), you received the error: "Incorrect syntax near '-'. "

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Remove the dash.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 475111: If you created a new credit card statement and then immediately imported charges, the currency code field of the imported entry was blank instead of having the currency code of the credit card.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Reload the statement before importing any charges.

Additional Notes: None.

Files Updated

Deltek.Vision.CreditCardReconciliation.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 479940: This issue applies when more than one employee is authorized to use the same credit card. On the Charges tab of the Credit Card Reconciliation form, the amount in the **Posted Amount** column was incorrectly doubled when the following occurred:

1. You posted expense reports for two different employees who used the same credit card for the expenses. In Credit Card Reconciliation, these two expenses correctly displayed on two separate rows in the grid on the Charges tab.
2. You imported a charge from a credit card company, which applied for both of the expenses for the two different employees.
3. You manually tied both of the posted expense charges to the imported credit card charge amount by entering a transaction ID on the Details dialog box in Credit Card Reconciliation.
4. When you saved the credit card reconciliation statement, the two expenses now displayed incorrectly in one line in the grid on the Charges tab. The amount in the **Posted Amount** column was doubled.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.CreditCardReconciliation.Client.dll

Deltek.Vision.CreditCardReview.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 489845: If you attempted to import a credit card file when logged into Vision using a username that included a dash (for example, ADMIN-NY), you received the error: "Incorrect syntax near '-'."

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Perform the import using a username that does not include a dash.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 490002: In **Configuration » Accounting » Credit Cards » General tab**, the **Use to separate import into secondary credit cards** field identifies the value that your credit card company uses on statements to identify a secondary credit card account (for example, the secondary account number). If this value was blank in an import file, the record imported without error, but no **Secondary Account** number displayed on the Credit Card Charges grid in Credit Card Statement Reconciliation.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: You can still import a record with an empty field, but now the **Secondary Account** number displays.

Files Updated

Deltek.Vision.CreditCardReconciliation.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 498327: In a database that did not use Cash Basis reporting, an error message displayed when a new row was inserted in Credit Card Reconciliation for a credit card that did not use the Import feature.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Temporarily turn on Cash Basis Reporting when manually entering new credit card charges.

Additional Notes: None.

Files Updated

Other Applications Affected

Deltek.Vision.CreditCardReconciliation.Client.dll

Database Changes

System File Dependencies

Accounting » Gains and Losses Revaluations

Defect 545020: Vision froze when you ran **Accounting » Gains/Losses and Revaluations** on some databases.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Accounting » Project Review

Defect 466906: In Project Review, if you had a **Budget Source** of **Project Planning**, then changed the **Budget Source** to **Budget Worksheet**, the value sometimes reverted back to **Project Planning** when you logged out of Vision and logged back in.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Manually change the value to **Budget Worksheet**.

Additional Notes: None.

Files Updated

Deltek.Vision.ProjectPTDReview.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 533245: The Project Review screen was slow to display.

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

Workaround Before Fix: On the Accounts Receivable tab on the Project Review screen, select **Unpaid** in the **Status** field to help reduce the amount of data.

Additional Notes: None.

Files Updated

Deltek.Vision.ProjectPTDReview.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Accounting » Tax File Generation

Defect 542489: When you created a tax file in Tax File Generation using any of the file formats, the tax file and the backup report correctly showed any negative tax amount for an invoice. However, invoices with negative tax amounts were missing from the grid on the Review tab of the Tax File Generation form.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Billing

Defect 477493: If the **Print Total in Invoice Header** option was selected on the Totals tab of the Invoice Template Editor, an error occurred when you previewed the retainage invoice. The error message was: "SQL Reporting Error creating RetainageHeader RDL file: The Value expression for the text box 'textboxTotalColumn' refers to a non-existing report parameter 'InvoiceTotal'. Letters in the names of parameters must use the correct case."

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: Clear the **Print Total in Invoice Header** option when billing retainage.

Additional Notes: None.

Files Updated

RetainageHeader.rdl

RetainageInvoice.rdl

Other Applications Affected

Database Changes

System File Dependencies

Billing » Batch Billing

Defect 479090: If you selected the **Email invoices** option on the Batch Billing screen, then clicked **Insert Field** to insert a field in the Message section of the email, the field was not inserted.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Use the **Insert Field** button to insert a field in the Subject line, then cut and paste the field into the Message section.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 519769: When an error was encountered while printing to a server in Batch Billing, the following generic framework exception displayed: "The process cannot access the file 'BatchInvoiceReports.pdf' because it is being used by another process. "

Customers Impacted: This defect applies to Vision 7.2.

Workaround Before Fix: None.

Additional Notes: The correct printing error will now be displayed; for example, "Printer is not valid."

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 546294: If you used invoice approvals, when you accepted an invoice in Batch Billing, multiple blank lines were created in the Invoice Data Entry file.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Billing.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Billing » Interactive Billing

Defect 527889: If you had a voucher line for shipping charges that was created from a purchase order, you could not perform a partial hold, partial write off, or partial transfer of the line because you could not edit the **Amount** field for the line.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.interactiveBilling.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Billing » Invoice Approvals

Defect 524935: On the Invoice Approvals screen, if you clicked **Comments** to display the Billing Comments dialog box, you could not type directly into the **Comment Entry** field. This only happened if another user had made the prior comment.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Click **Edit** and type into the text editor.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Calendar

Activity Manager

Defect 476604: If you added an activity in Activity Manager or through the Opportunity Info Center, and the activity should have had a default **Type** of **Milestone**, the **Type** was blank instead.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: Either select the **Type** manually, or reselect or refresh the activity, which will cause the **Type** to display as **Milestone**.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Configuration

Defect 541842: If you enabled the Multicompany feature, credit cards were not correctly assigned to a company. Now they are assigned to the default company.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

sp_EnableMulticompany.SQL

Other Applications Affected

Database Changes

The EnableMulticompany stored procedure was updated.

System File Dependencies

Configuration » General » Alerts

Defect 528413: When a Timesheet Approval was configured to alert a supervisor for a project, for example, but the project in the respective timesheet did not have an assigned supervisor, an error occurred when the timesheet was submitted: "The Timesheet Approval Process failed with message: Object Reference not set to an instance of an Object".

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Click **OK** and the timesheet will submit without further issue.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Approvals

Defect: 543012 When an employee's Record Level View access rights were set to **Is Me** (on the Record Access tab of **Configuration » Security**), the Employee lookup on the Reassign dialog box in AP Invoice Approvals (available from the Progress tab of **Accounting » AP Invoice Approvals**) incorrectly limited the Employee lookup results.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 544467: An extra Past Due Notification email alert was sent for Approval Workflow items.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: Ignore the extra email.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Billing » General

Defect 519183: A new warning message has been added to **Configuration » Billing » General » Fees tab**. The warning displays if a user enters any account except a revenue account in the **Over/Under Billed Account** field. Normally, only a revenue account should be used for this purpose.

Customers Impacted: This defect applies to all users of Vision Billing.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.BillingSetup.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration » General » Code Tables

Defect 466921: When you set up codes on the Code Table Maintenance screen, you should have been able to enter Suffix codes of up to 20 characters, but you could only enter 10 characters.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.CodeTableMaint.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Security » Users and Passwords

Defect 519242: Users who did not have permission to change global saved searches were able to delete global saved searches from the Global Searches folder in any Info Center. These users had the **Favorites Organizing** field set to **Save Personal Only** in **Security » Roles » General tab**.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Lookup.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 532612: If you use Vision in a cloud environment, when you created a new user, no default printer was assigned to the user. Now <Local Printer> is assigned by default.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: Assign <local printer> to the new user.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Workflow » User Initiated Workflows

Defect 485298: If you changed the **Active** setting for an approval action on the Approvals Configuration screen, that setting was not copied over to the User Initiated Workflow screen.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: Manually update the settings.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Dashboard

Defect 551011: User-defined Info Center dashparts were lost after upgrading Vision to 7.4. This was fixed so that the old dashparts were restored if not re-configured in 7.4.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Vision Help

Defect 524072: In the online help for the Cost tab of the Project Review Form, the formula for **Net Revenue** was incorrect. The correct formula is $\text{Net Revenue} = \text{Revenue} / (\text{Direct expenses} + \text{Reimbursable Expenses})$.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Human Resources

ABRA Interface

Defect 551233: When you used the ABRA interface to import payroll data into Vision, you received the following error: "Invalid column name 'TalentUserID. No record imported. Please check".

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Info Center

Defect 370189: When the **Display Search Text** checkbox was selected on the Advanced Search Project Lookup dialog box, the scroll bar displayed but did not scroll down. This occurred when there were several items on the Search results list.

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

Workaround Before Fix: Cut and paste from the Search results list to view the full list (use Ctrl + A to select all and then Ctrl + C to copy).

Additional Notes: None.

Files Updated

Deltek.Framework.Lookup.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 460054: If you created a user-defined memo field and then applied a lock to it, a locked-out user could not copy the contents of the memo field for use elsewhere.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 474156: This problem occurred with all lookups in Info Centers, when you performed an advanced lookup using two search criteria and an OR condition (search for this OR that). The search returned only the results of the first criterion (this) and not the second (that).

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: In the second line, containing the second criterion, put a left parenthesis in the left parenthesis column and a right parenthesis in the right parenthesis column.

Additional Notes: None.

Files Updated

Deltek.Framework.Lookup.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Info Center » Employees

Defect 252614: The **License Last Renewal** field was not included on the Advanced Lookup in the Employee Info Center.

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

Workaround: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Lookup.Server.dll

Lookup_Employee.xml

Other Applications Affected

Database Changes

System File Dependencies

Info Center » Projects

Defect 263039: Two problems occurred if you used the Screen Designer to make change to the Project Info Center Contract Management tab:

- If you changed the width of grids, your change was not saved when you logged out of Vision.
- You could not hide columns.

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

Workaround Before Fix: None.

Additional Notes: These fixes only apply to the tab and not to the properties of the dialog box that displays if you select **Edit**. Dialog box issues will be addressed in a future release.

Files Updated

Deltek.Vision.ProjectInfoCenter.Client.dll

Other Applications Affected**Database Changes****System File Dependencies**

Defect 498569: When searching at the WBS2 level in the Project Lookup/ Advanced Search, the search results were not always correct.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Manually edit the where clause in SQL view to include an additional condition for WBS2.

Additional Notes: None.

Files Updated

Lookup_Project.xml

Other Applications Affected**Database Changes****System File Dependencies**

Defect 529027: When using Vision Multicurrency, if the **Project Currency** and **Billing Currency** fields were not defined in the Project Info Center and in **Configuration » General » Project Defaults**, you could still save a project record. The issue occurred when the **Project Currency** and **Billing Currency** fields were hidden in the Screen Designer. Vision continued to allow you to save the project record but an error message displayed when posting an invoice because there was no exchange rate available due to the blank currency fields.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Enter currency information in **Configuration » General » Project Defaults** so they will still default even though the currencies are hidden in the designer.

Additional Notes: None.

Files Updated

Deltek.Vision.ProjectInfoCenter.Client.dll

Other Applications Affected**Database Changes**

System File Dependencies

Defect 530155: When a phase was added to an existing project using a project template, the project and billing currencies changed to the currency of the template. This occurred at all WBS levels, which resulted in incorrect values for the transactions.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ProjectInfoCenter.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 548474: If you performed an Advanced Search in a project lookup, and you searched on both the **Contract Type** and **Contract Status** fields, you received the error message, "The multi-part identifier "CFGContractType.Description" could not be bound. "

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Framework.Lookup.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Installation

Defect 498934: When you tried to add new columns to a user-defined grid in the Contracts Info Center, the process failed with the error message: "Error: Cannot enable Audit Trail. Table 'Projects_ModificationsTemplate' does not have a primary key defined."

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Run the following script:

```
ALTER TABLE [dbo].[Projects_ModificationsTemplate]
ADD CONSTRAINT [Projects_ModificationsTemplatePK] PRIMARY KEY NONCLUSTERED
([WBS1], [WBS2], [WBS3], [Seq])
WITH FILLFACTOR = 90
GO
```

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 533465: The Vision upgrade script incorrectly removed access to Project Planning from the Navigator/iAccess tab.

Customers Impacted: This defect applies Vision 7.2.

Workaround Before Fix: None.

Additional Notes: Set access rights manually after upgrade

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Log In/Out

Defect 484586: If a user was on the login screen, entered an invalid User ID, and clicked on **Forget your password or User ID?**, the following message displayed: "The User ID XXXX does not exist in the selected database. Please contact your administrator." This message could encourage phishing for valid User IDs. Now the message reads: "Account maintenance operation failed. Please contact your administrator."

Customers Impacted: This defect applies to all Vision users.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected**Database Changes****System File Dependencies**

Defect 502182: If Vision timed out because it was left open for too long, and you tried to log back in by clicking the ENTER key, you received the prompt: "Cancel will close the application and all pending changes will be lost. Are you sure you want to close the application?" The ENTER key should have behaved the same way as clicking the **OK** button, not the **Cancel** button.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Click the **OK** button instead of using the ENTER key.

Additional Notes: None.

Files Updated**Other Applications Affected****Database Changes****System File Dependencies****Microsoft Office Desktop Integration**

Defect 460929: When you merged a PowerPoint presentation, and the merge included a memo field with bulleted items, the bullets displayed with HTML codes exposed. To address this problem, all formatting is now removed when a memo field is merged into a PowerPoint presentation, meaning that there are no bullets, bold text, italics, and so on.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated**Other Applications Affected****Database Changes****System File Dependencies**

Mobile Time

Defect 485573: In Touch CRM, if you tapped on **Tasks and Other Activities**, the list of available activities did not honor the Activity Access settings in Vision security. These security settings are in **Configuration » Security » Roles**, on the Record Access tab.

Customers Impacted: This defect applies to all Touch CRM users.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Planning

Defect 463612: When the **Copy Service Estimate into Plan** option was selected on the **New » New Plan from Existing Opportunity** dialog box, the **Planned Qty** and **Planned Cost** amounts on the Units tab displayed negative amounts. This was inconsistent with the amounts that displayed on the Service Estimates tab in the Opportunities Info Center.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Planning » Project Planning

Defect 435495: The effective date range for the Labor Rate proration was applying the Overflow period's End Date instead of the Assignment row's End Date. Applying the wrong dates to the calculation resulted in an incorrect value in the **Overflow** column.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 483769: An error occurred when using the **New » New Plan from Existing Project** menu option to create a project from a plan that was mapped to two projects.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 523971: Processing was very slow when the dragging the bar left or right to resize the Planning grids.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

k.Vision.ResourcePlanning.Client.DLL

Other Applications Affected

Database Changes

System File Dependencies

Defect 547296: In certain circumstances, performance was poor when you opened an existing project plan.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Proposals

Defect 412993: If you merged proposal data using an opportunity merge template, a problem occurred if you merged a number field from a User-Defined Info Center. Instead of retrieving the number that you entered in the Info Center, the merge process retrieved an internal ID number.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 483421: When you used InDesign to create proposals, you could not include .PSD (Adobe Photoshop) graphic files in the proposals. You can now use .PSD files, but you cannot see the .PSD images when you preview the proposal.

Customers Impacted: This defect applies to all users of Vision Proposals.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 498578: On the SF330, text displayed in Section E, Box 18, with missing formatting.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 501926: The InDesign template merge based the font size setup on Text editor and not the font size in the InDesign template.

Customers Impacted: This issue affects Vision 7.2 and later releases.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

SF254 Proposals

Defect 538081: The following error sometimes occurred when you clicked **Edit » Template Editor** on the SF254 Form: "Exception of type 'System.OutOfMemoryException' was thrown."

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

SF330 Proposals

Defect 256479: When you tried to merge SF330 Section E, Vision would crash if it encountered the character string "/P" (without quotation marks) in text that was being merged into the proposal.

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

Workaround: Remove any instance of "/P" in the text or add a space between the slash and the P (for example, change **Controls Technician/Programmer** to **Controls Technician / Programmer**).

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 447962: The footer of the SF330 Proposals form contained the label **STANDARD FORM 330 (6/2004)**. It should say **STANDARD FORM 330 (REV. 3/2013)**.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Purchasing

Defect 549073: The following applies if you enabled the **Modify Not to Exceed Values via Change Order** check box on the General tab in **Configuration » Purchasing & Inventory » Company Settings**.

When you tried to create an AP voucher from a purchase order in **Accounting » Accounts Payable » Create Voucher from PO**, you were unable to create the AP voucher if all of the following applied:

- The purchase order was a service or blanket type purchase order.
- You entered a not-to-exceed amount for the purchase order.
- You entered a change order with a not-to-exceed amount for the purchase order.
- The amount of the AP voucher exceeded the original not-to-exceed limit that you entered for the purchase order, but it did not exceed the combined total of the not-to-exceed amount entered for the purchase order and the change order.

You should have been able to create the AP voucher as long as its total did not exceed the combined total of the not-to-exceed amount entered for the purchase order and for the change order.

Customers Impacted: This defect applies if you use Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Purchase Orders

Defect 546212: The image included in a Purchase Order Template did not display correctly on the purchase order.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Receiving

Defect 478526: If a purchase order had many line items and receiving activities, it would load on the Purchase Order Receiving screen very slowly.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Reporting

Defect 445281: If you viewed a report in print layout or downloaded it to PDF or RTF format, only the first line of the report footer's contents displayed. Any subsequent lines did not display. The report footer displayed correctly in the preview view and in Word format.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Use preview view or the Word format.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 484575: If you ran a report with the **HTML Formatting** option turned off on the Layout tab in reporting options, an extra return was added after text on the report. This created blank lines on the report.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 500815: The Timesheet Audit Detail report was missing the header on page 2 and subsequent pages.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: This was the result of two different problems, one with a known Microsoft issue and one with a Vision issue. The Vision issue has been fixed but the Microsoft issue may still cause missing headers.

Files Updated

Timesheet ADT Detail.rdl
TimesheetADTPerEmployee.rdl
TimesheetADTUnitPerEmployee.rdl

Other Applications Affected

Database Changes

System File Dependencies

Defect 520671: If you ran a report with **Millimeters** as the **Unit of Measure**, the report files were much larger in size than if the same report had been run using **Inches** as the **Unit of Measure**. In some cases, the reports would not run at all.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: Use **Inches** as the **Unit of Measure**.

Additional Notes: Reports run using millimeters are now the same size as those run using inches.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 520885: Some words changed into scrambled characters when reports are downloaded or edited to RTF format.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Download the report to MS Word instead of RTF, or downgrade the version of SQL Server. For example, If you are using Cumulative Update 4 for SQL Server 2014, Cumulative Update 2 for SQL Server 2012 SP2, or

Cumulative Update 11 for SQL Server 2008 R2 SP2, downgrade to the previous cumulative update.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Accounting

Defect 499302: Two problems occurred in the Payment Register report:

- The **Amount** field was empty if the vendor name was changed after the payment was generated.
- The **Amount** field was empty if the check had an EFT detail record with a zero amount.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Check Register.rdl

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Accounts Receivable

Defect 479738: The following formatting issues occurred in the AR Statement report:

- The top of the address displayed lower on the report than the **Address Start** setting in report options indicated that it should.
- If you set the **Statement Footer** report option to have bold or italic text in the footer, these properties were not applied. Instead, the HTML tags for these properties displayed in the footer of the report.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingAccountsReceivable.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 534801: The **Description** was omitted from the Accounts Receivable Statement report.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

k.Vision.ReportingAccountsReceivable.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 538116: On the Invoice Transaction Detail report, timesheet comments displayed with HTML coding whether or not the **HTML Formatting** option was selected on the Layout tab in reporting options.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingAccountsReceivable.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Employee

Defect 476923: Many column headers and pieces of data did not display on the Employee Labor Audit report if the user's role did not have full access rights to all reports.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: Run the report using a user role that has full access to all reports.

Additional Notes: None.

Files Updated

Deltek.Vision.Report.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 503607: When you generate a Timesheet Audit Detail report on **Reporting » Employees**, projects on timesheets that never had associated hours are displayed on the report with zero hours.

Customers Impacted: This defect applies to Vision 7.2.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Opportunity

Defect 260148: When you ran the Opportunity Hit Rate List and selected two or more fields on the Sorting/Grouping tab, the hit rate displayed only for the top grouping level. Any lower levels displayed a 0% hit rate.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 544758: When you ran the Opportunity List report, Opportunity Forecast report, or Opportunity Hit Rate List report, you received a framework exception error "Report item name must be unique..." if you selected all of the following before you ran the report:

- You selected **multiple** columns to sort and group by on the Sorting/Grouping tab of the report options dialog box.
- You added Opportunity fields to the report that were new in Vision 7.4 or GovWin Capture Management 7.4. You placed these fields **after** numeric/currency columns.
 - The new Opportunity fields that were added to Vision 7.4 are: **NAICS** and **Our Role**.
 - The new Opportunity fields that were added to GovWin Capture Management 7.4 are: **Award Type**, **Competition Type**, **Contract Type**, **NAICS**, **Our Role**, and **Solicitation**.

Customers Impacted: This defect applies to Vision 7.4 and GovWin Capture Management 7.4.

Workaround Before Fix: Perform one of the following actions:

- Select only one column for sorting/grouping.
- Move the numeric/currency fields down on the Sorting/Grouping tab of the report options dialog box to ensure that they are placed after the other fields.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Project

Defect 261093: On the Project Earnings report, if you used the **Project Base Rollup** option with the **Subtotal on Base Number** option, each project's number and name displayed twice on the report.

Customers Impacted: This defect applies to Vision 7.0.

Workaround Before Fix: None.

Additional Notes: This problem occurred on the standard Project Earnings report and when the report was run as a favorite.

Files Updated

Deltek.Vision.ReportingProject.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 442568: On the Labor Detail report, the **Secondary Overtime Percentage** was incorrect for unposted labor. The regular Overtime Percentage was being applied instead of the Secondary Overtime Percentage.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingProject.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Purchasing

Defect 539918: If you had text in the **Extra Notes** field in the Items Master, the text could be truncated when it displayed in the Purchase Order Line Detail dialog box. This happened if the text was over 2000 characters long.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.POShipping.Client.dll
Deltek.Vision.PORceiving.Client.dll
Deltek.Vision.ReportingPurchasing.Server.dll
Form Purchase Order Detail.rdl
Form Request for Price Quote-Detail.rdl
Form Requisition.rdl
FormRequisition_RequiredDetail.rdl
Request for Price Quote.rdl

Other Applications Affected**Database Changes****System File Dependencies**

Defect 541893: The Purchase Order Detail report incorrectly displayed fully vouchered POs even when the **Include Unvouchered Items Only** option was selected on the General tab of the Purchase Order Detail report in **Reporting » Purchasing**.

Customers Impacted: This defect applies to Vision 5.1 through Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated**Other Applications Affected****Database Changes****System File Dependencies****Reporting » Vendor**

Defect 485715: An error occurred when you ran the Vendor List report, if you:

1. Selected **Contacts** in the **Grid Type** field of the reporting options General tab.
2. Selected one of the Contacts columns (**Contacts - Name**, **Contacts - Title**, and so on) on the reporting options Columns tab.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Text Editor

Defect 467402: An error occurred when you opened an Info Center record that had a **Memo** field that contained text that had been copied and pasted from another application.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 469953: If a **Memo** field was read-only and contained a hyperlink, such as www.deltek.com, you could not click on the hyperlink to open the web page.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: You could open the text editor window and then click the hyperlink to open the web page.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 489842: When you build a resume in Custom Proposals and view the resume with the Text Editor, the bullet lists after the 20th page are no longer formatted correctly.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 532704: An error occurred when you opened a record that included a text field containing superscripted text. You received the error message: "The 'sup' start tag on line 13 position 256 does not match the end tag of 'span'. Line 13, position 328."

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 542212: A numbered list in a **Memo** field displayed with bullets instead of numbers when it was merged to a Word Template.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 547945: If you clicked a hyperlink, such as www.deltek.com, on the Text Editor dialog box, the link did not work.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Time and Expense

Expense Report

Defect 504165: The Credit Card Expense List in the Expense Report form displayed the wrong columns.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: Reload the Expense Report application and reselect the employee record.

Additional Notes: None.

Files Updated

Deltek.Vision.Expensekeeper.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 523233: If you inserted a line on an Expense Report, the amount could be incorrect if the Expense Category rate is a negative value and the Company Expense rate is a positive value.

Customers Impacted: This defect applies to all Vision versions.

Workaround Before Fix: Manually enter the correct amount.

Additional Notes: None.

Files Updated

Deltek.Vision.Expensekeeper.Client.dll

Other Applications Affected**Database Changes****System File Dependencies**

Defect 531407: Posted tax transactions were not displayed on the Detailed Expense Report when there was no sortOrder 1 in the ekdetailtax table.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: Complete one of the following:

- Delete and re-enter the line that is missing from the detail (or script updating sortOrder in ekDetailTax from 2 to 1).
- Open the tax dialog box and click **OK** to close it.

Additional Notes: None.

Files Updated

Detailed Expense Report Landscape.rdl
Detailed Expense Report Portrait.rdl
Summarized Expense Report Landscape.rdl
Summarized Expense Report Portrait.rdl

Other Applications Affected**Database Changes****System File Dependencies****Timesheet**

Defect 389184: If a comment was required for a timesheet entry, a user could enter and save a blank space instead of a comment. When the user saved the entry, the blank space "comment" was saved in the drop-down list of comments that could be reused in future timesheet entries.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Timekeeper.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 458579: You can set up timesheets so that employees cannot charge time to labor codes that are not budgeted. However, a problem was occurring that allowed an employee to enter time to an unbudgeted labor code when the labor code was the employee's default labor code. If the labor code was entered automatically on the timesheet, as the default, the employee could save the entry without receiving an error or warning message.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Timekeeper.Client.dll

Deltek.Vision.Lookup.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 462256: If you used the Up Arrow key to move among timesheet lines, you received the error message: "Object reference not set to an instance of an object."

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Framework.Controls.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 475068: The Title of the Timesheet Detail report did not apply the default font setting.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 486470: In Timesheet, accessing the **Show-Planned Hours** option resulted in the circle continuously spinning and not displaying results.

Customers Impacted: This defect applies to Vision 7.2.

Workaround Before Fix: Apply the script that is provided.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 541766: Vision prompted a user to sign a timesheet before verifying that the timesheet was complete and could be saved without an error. Now Vision verifies the timesheet first.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 548075: When the project number was changed on a unit timesheet entry line (**Timesheet » Unit Quantities**), the Unit Table was updated but the unit number remained even when the number was not included on the new unit table.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Manually update the record.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Transaction Center

Defect 535544: If you modified an existing voucher, then changed the voucher number, then tried to reverse a voucher line, a duplicate line was created, reversing the amount of the line twice.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: Now, when you modify an existing voucher and then change the voucher number, Vision blanks out the invoice date. Likewise, if you change the invoice number or invoice date, Vision blanks out the voucher number.

This prevents the creation of duplicate vouchers.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Transaction Entry and Transaction Posting

Defect 412542: The **Delete Receipt** button in **Transaction Center » Transaction Entry » Cash Receipt** was incorrectly enabled for approved transactions.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 544513: When you unposted a voucher, orphan records were left behind, meaning that you could not re-enter the voucher using the same invoice number. If you tried, you received the message: "Invoice for XXX already exists. Additional entries will modify this voucher."

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

Workaround Before Fix: Run the following script to delete the records:

Select * From VO

Where Not Exists (Select 'X'

From LedgerAP

Where VO.Vendor = LedgerAP.Vendor and VO.Voucher = LedgerAP.Voucher)

Order By VO.Vendor, VO.Voucher

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 486923: If you clicked **Voucher Lookup** on the AP Voucher Transaction Entry screen, the **Amount** for each voucher was the actual amount multiplied by the number of documents attached to the voucher.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 519497: When the Maintain Separate Balance Sheets option in **Configuration » Organization » General Setup** was not selected, posting a voucher with Reverse Lines incorrectly posted to the default organization instead of the project organization.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Posting.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Utilities

Defect 481666: In Advanced Utilities, the Refresh Inventory utility did not reset the **Quantity Reserved** amount correctly for items that did not have item request and inventory issue transactions .

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

Workaround Before Fix: After you post an item request or inventory issue transaction, run the Refresh Inventory utility to correct the **Quantity Reserved** amount.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 489113: User Activity listed in Audit Trail could not be purged if a Log Out time stamp did not exist for it. This has been fixed so that even those listed without will a Log Out time stamp will be purged.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Apply the following script, replacing the yellow highlighted area with the proper date based on their need. `Delete from FW_UserActivity`

`Where LastAccess is null and StartTime < '2015-01-01'`

Additional Notes: None.

Files Updated

Deltek.Vision.UserActivity.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Advanced Utilities » AR Paid Update

Defect 474416: If you ran the Refresh AR Paid Period utility, the refresh process did not work for projects with project numbers over 20 characters.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Advanced Utilities » Data Import

Defect 486918: The Unit Import Utility did not require that **Cost Currency** and **Project Currency** values were provided for imported units when the Multicurrency feature was enabled.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ImportUtility.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 536219: When there was more than one employee record with the same name, the Data Import Utility ignored the Employee ID that was entered and instead updated all records with the same name.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ImportUtility.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 538109: When you imported data, the **ModDate** field was set to **1900-01-01 00:00:00** in the audit trail table, instead of the correct date. This caused the audit trail table to grow over time, because Vision did not automatically delete records with such an early date.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ImportUtility.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 544731: An error occurred when you attempted to import contacts with the **Allow Update** option selected. This option causes Vision to treat any duplicate record as an update, rather than an error.

Customers Impacted: This defect applies to Vision 7.4 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ImportUtility.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Advanced Utilities » Key Conversions

Defect 478215: When you ran a Project Key Conversion and selected the **Combine existing projects** option, you could receive a "Violation of Primary Key constraint" error. This happened if both projects were referenced in any of the following tables:

- billFeeAllocation
- billLabWriteOffDelete
- billExpWriteOffDeletePK
- billUnitWriteOffDelete

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Run a SQL script to delete one set of duplicate records before you run the conversion.

Additional Notes: None.

Files Updated

sp_KeyCvtWBS1.sql

sp_KeyCvtWBS2.sql

sp_KeyCvtWBS3.sql

Other Applications Affected

Database Changes

The KeyCconvertWBS1, KeyConvertWBS2 and KeyConvertWBS3 stored procedures were updated.

System File Dependencies

Defect 499111: When you tried to open a plan after performing a Phase/Task Key Conversion, the following error occurred: "An entry with the same key already exists."

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

sp_KeyCvtWBS2.sql

sp_KeyCvtWBS3.sql

Other Applications Affected

Database Changes

The KeyCconvertWBS1, KeyConvertWBS2 and KeyConvertWBS3 stored procedures were updated.

System File Dependencies

Advanced Utilities » Key Conversions » Employees

Defect 502982: The Employee Number in the Expense Table Tax Detail was not converted when performing a Key Conversion on an employee.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

sp_insertKeyConvertDriver.sql

Other Applications Affected

Database Changes

The InsertKeyCvtDriver stored procedure was updated.

System File Dependencies

Known Issues

Following are known issues with the Vision 7.5 release. These will be resolved in the Cumulative Updates that are scheduled for release on December 18, 2015 and January 22, 2016.

Reporting

Client

Defect 561298: The Client Employee Assignment and Activity Status report displayed with no records (blank), even though records were selected in the Selection Criteria or directly in the Client Info Center.

Customers Impacted: This defect applies to Vision 7.5 clients using the CRM application.

Workaround Before Fix: You must use the Shift key on your keyboard to select all of the records in the search results of the Client Lookup dialog before you select **Apply**. This will populate the report with the records.

Additional Notes: None.

Asset Management

Depreciation Processing

Defect 560801: When processing depreciation for an asset, the history loading of accumulated depreciation was not included in the calculation.

Customers Impacted: This defect applies to Vision 7.5.

Workaround Before Fix: None.

Additional Notes: None.

Info Center » Equipment

Defect 559832: When using Vision Multicurrency with Asset Management, assets that were created from Purchase Orders or AP Vouchers were not displaying in the correct currency in the Equipment Info Center.

Customers Impacted: This defect applies to Vision 7.5.

Workaround Before Fix: You can manually adjust the depreciation basis on the GL Cost tab prior to running depreciation.

Additional Notes: None.

Database Changes

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



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

New Tables

| Table Name |
|---------------------------------|
| AbsenceRequests |
| AbsenceRequestsHours |
| APApprovalDocuments |
| APApprovalMaster |
| APApprovalNotes |
| APApprovalPO |
| APApprovalWBS |
| APApprovalWBSTax |
| ApprovalAssignmentHierarchy |
| BankRecAssoc |
| BankRecImport |
| BankRecTransaction |
| CABGroup |
| CABGroupDetail |
| CFGAbsReqStatusData |
| CFGAbsReqStatusDescriptions |
| CFGAPApprovalStatusData |
| CFGAPApprovalStatusDescriptions |
| CFGAssetMain |

| Table Name |
|-------------------------------------|
| CFGBankEntriesCodeData |
| CFGBankEntriesCodeDescriptions |
| CFGBankImport |
| CFGBankImportDetailData |
| CFGBankImportDetailDescriptions |
| CFGBankPaymentMatchingRule |
| CFGBankReceiptMatchingRule |
| CFGBankTypeMapping |
| CFGCitizenshipData |
| CFGCitizenshipDescriptions |
| CFGEMLocationData |
| CFGEMLocationDescriptions |
| CFGEMRegistrationStatusData |
| CFGEMRegistrationStatusDescriptions |
| CFGEMRegistrationTypeData |
| CFGEMRegistrationTypeDescriptions |
| CFGEMSkillUsageData |
| CFGEMSkillUsageDescriptions |
| CFGFAAssetTypeData |
| CFGFAAssetTypeDescriptions |
| CFGFABookData |
| CFGFABookDescriptions |
| CFGFADepMethodData |
| CFGFADepMethodDescriptions |

| Table Name |
|--------------------------------|
| CFGFADepMethodSum |
| CFGFAPropertyTypeData |
| CFGFAPropertyTypeDescriptions |
| CFGFARepairTypeData |
| CFGFARepairTypeDescriptions |
| CFGFASec179Main |
| CFGIntegrationWS |
| CFGProjectTemplateData |
| CFGProjectTemplateDescriptions |
| CVDDocuments |
| CVDDocumentsDetail |
| EMCitizenship |
| EMCompany |
| EMMain |
| EQICBooks |
| EQICCost |
| EQICEMAssoc |
| EQUnit |
| IntegrationWSLog |
| IntegrationWSLogStatus |
| IQWebServiceLog |
| SavedOptionsDetail |
| SavedReportsMain |
| SavedSelectionsMain |

| Table Name |
|--------------------|
| SEApprovalWorkflow |
| TLSyncFields |
| VendorPhoto |

Removed Tables

| |
|--|
| CFGINPUTConfig (columns in this table were moved to CFGVisionSystem) |
| EM |

Renamed Tables

| |
|---|
| INPUTWebServiceLog (renamed to IQWebServiceLog) |
|---|

New Columns Added to Existing Tables

| Table Name | Column Name | Data Type |
|-------------------------|---------------------|---------------------|
| Activity | ContactIDForVendor | varchar(32) |
| Activity | Vendor | varchar(20) |
| apControl | AllowAssetEntries | varchar(1) NOT NULL |
| apDetail | AssetType | varchar(10) |
| apDetail | CreateAsset | varchar(1) NOT NULL |
| apDetail | EquipmentID | varchar(32) |
| apDetail | Item | varchar(30) |
| ApprovalConditions | WorkflowAction_UID | varchar(32) |
| ApprovalWorkflow | AssignmentSelection | smallint NOT NULL |
| ApprovalWorkflowActions | Description | varchar(250) |
| AR | RetainageDate | datetime |
| ARC | CommentType | varchar(10) |
| BIED | BookCode | varchar(10) |

| Table Name | Column Name | Data Type |
|-----------------|------------------------------|---------------------|
| BIED | EmOrg | varchar(30) |
| BIED | EquipmentID | varchar(32) |
| BTLaborCatsData | Code | varchar(10) |
| CAB | AvailableForReporting | varchar(1) NOT NULL |
| CAB | CreateDate | datetime |
| CAB | CreateUser | varchar(20) |
| CAB | ModDate | datetime |
| CAB | ModUser | varchar(20) |
| CAB | Notes | varchar(max) |
| CAB | Status | varchar(1) |
| CAB | SubmittedBy | varchar(20) |
| CAB | SubmittedDate | datetime |
| CABDetail | Notes | varchar(max) |
| CFGAPMain | ApprovalWorkflowAP | varchar(32) |
| CFGAPMain | EnableApprovalWorkflowAP | varchar(1) NOT NULL |
| CFGApprovalType | AllowReopen | varchar(1) NOT NULL |
| CFGApprovalType | AutoApprove | varchar(1) NOT NULL |
| CFGApprovalType | EmployeeReopen | varchar(max) |
| CFGApprovalType | ProcessServerMinimum | smallint NOT NULL |
| CFGApprovalType | UseProcessServer | varchar(1) NOT NULL |
| CFGBanks | DisplayGLBalanceOnSummaryTab | varchar(1) NOT NULL |
| CFGEMail | EmailChunkSize | int NOT NULL |
| CFGEMail | MaxEmailSize | int NOT NULL |
| CFGEMail | PrefixEmailSender | varchar(1) NOT NULL |
| CFGFormat | equipmentAutoNumOverride | varchar(50) |
| CFGFormat | equipmentAutoNumSeqLen | decimal(19,4) NOT |

| Table Name | Column Name | Data Type |
|-------------------|-----------------------------|----------------------|
| | | NULL |
| CFGFormat | equipmentAutoNumSeqPos | smallint NOT NULL |
| CFGFormat | equipmentAutoNumSeqStart | int NOT NULL |
| CFGFormat | equipmentAutoNumSrc | varchar(50) |
| CFGFormat | VariableOrgLevels | varchar(1) NOT NULL |
| CFGMainData | ApprovalWorkflowGLBud | varchar(32) |
| CFGMainData | EnableApprovalWorkflowGLBud | varchar(1) NOT NULL |
| CFGPYAccrualsData | ApprovalWorkflow | varchar(32) |
| CFGPYAccrualsData | EnableApprovalWorkflow | varchar(1) NOT NULL |
| CFGRMSettings | Hrdecimals | smallint NOT NULL |
| CFGRMSettings | StartingDayOfWeek | smallint NOT NULL |
| CFGTKMain | HideReverseOption | varchar(1) NOT NULL |
| CFGVisionSystem | AddRecs | varchar(1) NOT NULL |
| CFGVisionSystem | AuditUserTag | varchar(20) NOT NULL |
| CFGVisionSystem | DefaultOppStage | varchar(10) |
| CFGVisionSystem | IQAccessToken | varchar(255) |
| CFGVisionSystem | IQNotificationEmail | varchar(50) |
| CFGVisionSystem | IQPassword | varchar(50) |
| CFGVisionSystem | IQRefreshToken | varchar(255) |
| CFGVisionSystem | IQURLAdminPath | varchar(255) |
| CFGVisionSystem | IQUserName | varchar(50) |
| CFGVisionSystem | NextAPApprovalID | varchar(13) |
| CFGVisionSystem | UpdRecs | varchar(1) NOT NULL |
| CL | AjeraSync | varchar(1) NOT NULL |
| CL | TLInternalKey | varchar(40) |

| Table Name | Column Name | Data Type |
|----------------------------|-------------------|------------------------|
| ConsolidationBudgets | Notes | varchar(max) |
| ConsolidationBudgetsDetail | Notes | varchar(max) |
| Contacts | TLInternalKey | varchar(40) |
| CR | BankAmount01 | decimal(19,4) NOT NULL |
| CR | BankAmount02 | decimal(19,4) NOT NULL |
| CR | BankAmount03 | decimal(19,4) NOT NULL |
| CR | BankAmount04 | decimal(19,4) NOT NULL |
| CR | LastCreateEntries | datetime |
| ekMaster | EmployeeCompany | varchar(14) NOT NULL |
| EMAccrual | EmployeeCompany | varchar(14) NOT NULL |
| EMAccrualDetail | EmployeeCompany | varchar(14) NOT NULL |
| EMDirectDeposit | EmployeeCompany | varchar(14) NOT NULL |
| EMInitiation | EmployeeCompany | varchar(14) NOT NULL |
| EMInitiation | HomeCompany | varchar(14) NOT NULL |
| EMInitiation | Location | varchar(10) |
| EMInitiation | TalentUserID | varchar(40) |
| EMInitiation | TLInternalKey | varchar(40) |
| EMLocale | EmployeeCompany | varchar(14) NOT NULL |
| EMPayroll | EmployeeCompany | varchar(14) NOT NULL |
| EMPayrollContribution | EmployeeCompany | varchar(14) NOT |

| Table Name | Column Name | Data Type |
|---------------------------|---------------------------|------------------------|
| | | NULL |
| EMPayrollContributionWage | EmployeeCompany | varchar(14) NOT NULL |
| EMPayrollWithholding | EmployeeCompany | varchar(14) NOT NULL |
| EMPayrollWithholdingWage | EmployeeCompany | varchar(14) NOT NULL |
| EMProjectAssoc | CRMHours | decimal(19,4) NOT NULL |
| EMProjectAssocTemplate | CRMHours | decimal(19,4) NOT NULL |
| EMRegistration | RegistrationType | varchar(10) |
| EMRegistration | Status | varchar(10) |
| EMResume | DefaultInd | varchar(1) NOT NULL |
| EMSkills | SkillUsage | smallint NOT NULL |
| Equipment | AccumulatedDeprAccount | varchar(13) |
| Equipment | AcquisitionDate | datetime |
| Equipment | AdditionalCostInformation | varchar(max) |
| Equipment | AssetStatus | varchar(1) |
| Equipment | AssetType | varchar(10) |
| Equipment | BusinessUsePercent | decimal(19,4) NOT NULL |
| Equipment | Calculation | varchar(1) |
| Equipment | DepMethod | varchar(10) |
| Equipment | DepreciationExpAccount | varchar(13) |
| Equipment | DisposalDate | datetime |
| Equipment | InServiceDate | datetime |
| Equipment | LeaseContactID | varchar(32) |
| Equipment | LeaseEndDate | datetime |

| Table Name | Column Name | Data Type |
|----------------------------|------------------|------------------------|
| Equipment | LeaseStartDate | datetime |
| Equipment | LeaseVendor | varchar(20) |
| Equipment | Manufacturer | varchar(100) |
| Equipment | PropertyType | varchar(10) |
| Equipment | RepairAsset | varchar(32) |
| Equipment | RepairType | varchar(10) |
| Equipment | SalvageValue | decimal(19,4) NOT NULL |
| Equipment | UsefulLifeYr | int NOT NULL |
| FW_CFGInfoCenterFieldsData | CodeTable | varchar(125) |
| FW_CFGInfoCenterFieldsData | CodeTableCodeCol | varchar(125) |
| FW_CFGInfoCenterFieldsData | CodeTableDescCol | varchar(125) |
| FW_CFGInfoCenterFieldsData | ColLength | int NOT NULL |
| FW_CFGInfoCenterFieldsData | ColumnName | varchar(125) |
| FW_CFGInfoCenterFieldsData | Data Type | varchar(30) |
| FW_CFGInfoCenterFieldsData | Decimals | smallint NOT NULL |
| FW_CFGInfoCenterFieldsData | DefaultValue | varchar(30) |
| FW_CFGInfoCenterFieldsData | GridID | varchar(125) NOT NULL |
| FW_CFGInfoCenterFieldsData | MaxValue | varchar(30) |
| FW_CFGInfoCenterFieldsData | MinValue | varchar(30) |
| FW_CFGInfoCenterFieldsData | Required | varchar(1) NOT NULL |
| FW_CFGInfoCenterFieldsData | Tablename | varchar(125) NOT NULL |
| FW_CFGInfoCenterFieldsDesc | Tablename | varchar(125) NOT NULL |
| FW_CFGSysConfig | ClientSecret | varchar(32) |
| FW_CFGSystem | AllowFileSave | varchar(1) NOT NULL |

| Table Name | Column Name | Data Type |
|------------------------|------------------------------|---------------------|
| FW_CFGSystem | HideiAccessMenu | varchar(1) NOT NULL |
| FW_CFGSystem | HideKonaMenu | varchar(1) NOT NULL |
| FW_CFGSystem | MarketType | varchar(10) |
| FW_CFGSystem | ProductType | varchar(30) |
| FW_CFGSystem | SessionTimeout | int NOT NULL |
| FW_CFGSystem | SFTPHostName | varchar(255) |
| FW_CFGSystem | SFTPPassword | varchar(100) |
| FW_CFGSystem | SFTPUsername | varchar(100) |
| FW_CFGSystem | WebAPIEnableWorkflow | varchar(1) NOT NULL |
| FW_CFGSystem | WebAPIGenerateCustomPackages | varchar(1) NOT NULL |
| FW_CFGUserSettingsData | ColumnName | varchar(125) |
| FW_CFGUserSettingsData | TableName | varchar(125) |
| FW_CustomGridsData | PropertyBag | varchar(max) |
| ItemData | Manufacturer | varchar(100) |
| jeControl | AllowAssetEntries | varchar(1) NOT NULL |
| jeDetail | EquipmentID | varchar(32) |
| LedgerAP | BookCode | varchar(10) |
| LedgerAP | EmOrg | varchar(30) |
| LedgerAP | EquipmentID | varchar(32) |
| LedgerAR | BookCode | varchar(10) |
| LedgerAR | EmOrg | varchar(30) |
| LedgerAR | EquipmentID | varchar(32) |
| LedgerEX | BookCode | varchar(10) |
| LedgerEX | EmOrg | varchar(30) |
| LedgerEX | EquipmentID | varchar(32) |
| LedgerMisc | BookCode | varchar(10) |

| Table Name | Column Name | Data Type |
|------------|---------------------------|------------------------|
| LedgerMisc | EmOrg | varchar(30) |
| LedgerMisc | EquipmentID | varchar(32) |
| PR | AjeraBilledConsultant | decimal(19,4) NOT NULL |
| PR | AjeraBilledLabor | decimal(19,4) NOT NULL |
| PR | AjeraBilledReimbursable | decimal(19,4) NOT NULL |
| PR | AjeraCostConsultant | decimal(19,4) NOT NULL |
| PR | AjeraCostLabor | decimal(19,4) NOT NULL |
| PR | AjeraCostReimbursable | decimal(19,4) NOT NULL |
| PR | AjeraReceivedConsultant | decimal(19,4) NOT NULL |
| PR | AjeraReceivedLabor | decimal(19,4) NOT NULL |
| PR | AjeraReceivedReimbursable | decimal(19,4) NOT NULL |
| PR | AjeraSpentConsultant | decimal(19,4) NOT NULL |
| PR | AjeraSpentLabor | decimal(19,4) NOT NULL |
| PR | AjeraSpentReimbursable | decimal(19,4) NOT NULL |
| PR | AjeraWIPConsultant | decimal(19,4) NOT NULL |
| PR | AjeraWIPLabor | decimal(19,4) NOT NULL |
| PR | AjeraWIPReimbursable | decimal(19,4) NOT NULL |
| PR | ProjectTemplate | varchar(10) |

| Table Name | Column Name | Data Type |
|------------------|---------------------------|------------------------|
| PR | TLInternalKey | varchar(40) |
| PRAdditionalData | PRAdditionalDataID | varchar(32) NOT NULL |
| PRAdditionalData | TaskID | varchar(32) |
| PRDefaults | AjeraBilledConsultant | decimal(19,4) NOT NULL |
| PRDefaults | AjeraBilledLabor | decimal(19,4) NOT NULL |
| PRDefaults | AjeraBilledReimbursable | decimal(19,4) NOT NULL |
| PRDefaults | AjeraCostConsultant | decimal(19,4) NOT NULL |
| PRDefaults | AjeraCostLabor | decimal(19,4) NOT NULL |
| PRDefaults | AjeraCostReimbursable | decimal(19,4) NOT NULL |
| PRDefaults | AjeraReceivedConsultant | decimal(19,4) NOT NULL |
| PRDefaults | AjeraReceivedLabor | decimal(19,4) NOT NULL |
| PRDefaults | AjeraReceivedReimbursable | decimal(19,4) NOT NULL |
| PRDefaults | AjeraSpentConsultant | decimal(19,4) NOT NULL |
| PRDefaults | AjeraSpentLabor | decimal(19,4) NOT NULL |
| PRDefaults | AjeraSpentReimbursable | decimal(19,4) NOT NULL |
| PRDefaults | AjeraWIPConsultant | decimal(19,4) NOT NULL |
| PRDefaults | AjeraWIPLabor | decimal(19,4) NOT NULL |
| PRDefaults | AjeraWIPReimbursable | decimal(19,4) NOT NULL |

| Table Name | Column Name | Data Type |
|------------------------|---------------------------|------------------------|
| PRDefaults | ProjectTemplate | varchar(10) |
| PRDefaults | TLInternalKey | varchar(40) |
| PRDescriptions | DefaultInd | varchar(1) NOT NULL |
| PRDescriptionsTemplate | DefaultInd | varchar(1) NOT NULL |
| PRTemplate | AjeraBilledConsultant | decimal(19,4) NOT NULL |
| PRTemplate | AjeraBilledLabor | decimal(19,4) NOT NULL |
| PRTemplate | AjeraBilledReimbursable | decimal(19,4) NOT NULL |
| PRTemplate | AjeraCostConsultant | decimal(19,4) NOT NULL |
| PRTemplate | AjeraCostLabor | decimal(19,4) NOT NULL |
| PRTemplate | AjeraCostReimbursable | decimal(19,4) NOT NULL |
| PRTemplate | AjeraReceivedConsultant | decimal(19,4) NOT NULL |
| PRTemplate | AjeraReceivedLabor | decimal(19,4) NOT NULL |
| PRTemplate | AjeraReceivedReimbursable | decimal(19,4) NOT NULL |
| PRTemplate | AjeraSpentConsultant | decimal(19,4) NOT NULL |
| PRTemplate | AjeraSpentLabor | decimal(19,4) NOT NULL |
| PRTemplate | AjeraSpentReimbursable | decimal(19,4) NOT NULL |
| PRTemplate | AjeraWIPConsultant | decimal(19,4) NOT NULL |
| PRTemplate | AjeraWIPLabor | decimal(19,4) NOT NULL |
| PRTemplate | AjeraWIPReimbursable | decimal(19,4) NOT NULL |

| Table Name | Column Name | Data Type |
|------------------|----------------------------|----------------------|
| | | NULL |
| PRTemplate | ProjectTemplate | varchar(10) |
| PRTemplate | TLInternalKey | varchar(40) |
| RPTask | ChargeType | varchar(1) |
| RPTask | ClientID | varchar(32) |
| RPTask | Org | varchar(30) |
| RPTask | ProjectType | varchar(10) |
| RPTask | ProjMgr | varchar(20) |
| RPTask | Status | varchar(1) |
| SE | AllowAssetEntries | varchar(1) NOT NULL |
| SE | AllowEditPriorDepreciation | varchar(1) NOT NULL |
| SE | NavCRMWorkspace | varchar(1) NOT NULL |
| SEUser | APIRefreshToken | varchar(255) |
| SEUser | APIRefreshTokenIssued | datetime |
| SEUser | APITicket | varchar(max) |
| SEUser | ODBCEnabled | varchar(1) NOT NULL |
| SEUser | ODBCPassword | varchar(255) |
| SEUser | ODBCUsername | varchar(255) |
| TaxReporting | Diary | varchar(10) |
| TaxReporting | DiaryNo | int NOT NULL |
| tkBreakTime | EmployeeCompany | varchar(14) NOT NULL |
| tkDetail | EmployeeCompany | varchar(14) NOT NULL |
| tkMaster | EmployeeCompany | varchar(14) NOT NULL |
| tkRevisionDetail | EmployeeCompany | varchar(14) NOT NULL |

| Table Name | Column Name | Data Type |
|----------------------|--------------------|----------------------|
| tkRevisionMaster | EmployeeCompany | varchar(14) NOT NULL |
| tkUnitDetail | EmployeeCompany | varchar(14) NOT NULL |
| unDetail | EmployeeCompany | varchar(14) |
| upDetail | EmployeeCompany | varchar(14) |
| VE | AjeraSync | varchar(1) NOT NULL |
| VE | Market | varchar(10) |
| WorkflowActionEmails | AddAttachment | varchar(1) NOT NULL |
| WorkflowActivity | ContactIDForVendor | varchar(250) |
| WorkflowActivity | Vendor | varchar(250) |

Changes to Existing Columns

| Table Name | Column Name | New Data Type | Old Data Type |
|------------------------|----------------|----------------------|----------------------|
| appChecks | Org | varchar(30) | varchar(14) |
| ApprovalConditions | SQLEExpression | varchar(max) | varchar(1000) |
| ApprovalRoleAssignment | Org | varchar(30) NOT NULL | varchar(14) NOT NULL |
| BIED | AutoEntryOrg | varchar(30) | varchar(14) |
| BIED | Org | varchar(30) | varchar(14) |
| BILD | EmOrg | varchar(30) | varchar(14) |
| BILD | PrOrg | varchar(30) | varchar(14) |
| BillingTemplate | FilterOrg | varchar(30) | varchar(14) |
| BTEA | FilterOrg | varchar(30) | varchar(14) |
| BTEC | FilterOrg | varchar(30) | varchar(14) |
| BTEV | FilterOrg | varchar(30) | varchar(14) |

| Table Name | Column Name | New DataType | Old DataType |
|-----------------------------------|-------------------|--------------------------|--------------------------|
| BTRCT | FilterOrg | varchar(30) | varchar(14) |
| BTRLT | FilterOrg | varchar(30) | varchar(14) |
| BTROT | FilterOrg | varchar(30) | varchar(14) |
| BTRRT | FilterOrg | varchar(30) | varchar(14) |
| CAB | Org | varchar(30) | varchar(14) |
| CFGAPLiability | Org | varchar(30) | varchar(14) |
| CFGAutoNumCustomMethodArgs | SQLElseExpression | varchar(max) | varchar(1000) |
| CFGAutoNumCustomMethodArgs | SQLExpression | varchar(max) | varchar(1000) |
| CFGAutoNumCustomMethodArgs | SQLIfExpression | varchar(max) | varchar(1000) |
| CFGAutoNumSprocArgs | SQLElseExpression | varchar(max) | varchar(1000) |
| CFGAutoNumSprocArgs | SQLExpression | varchar(max) | varchar(1000) |
| CFGAutoNumSprocArgs | SQLIfExpression | varchar(max) | varchar(1000) |
| CFGAutoNumWebServiceArgs | SQLElseExpression | varchar(max) | varchar(1000) |
| CFGAutoNumWebServiceArgs | SQLExpression | varchar(max) | varchar(1000) |
| CFGAutoNumWebServiceArgs | SQLIfExpression | varchar(max) | varchar(1000) |
| CFGAwardTypeDescriptions | Description | varchar(255) NOT NULL | varchar(120) NOT NULL |
| CFGBanks | Org | varchar(30) | varchar(14) |
| CFGCompetitionTypeDescriptions | Description | varchar(255) NOT NULL | varchar(70) NOT NULL |
| CFGContactRelationshipData | InverseCode | varchar(10) | varchar(10) NOT NULL |
| CFGContractTypeGovConDescriptions | Description | varchar(255) NOT NULL | varchar(70) NOT NULL |
| CFGEMail | AuthPassword | varchar(200) | varchar(50) |
| CFGMasterContractDescriptions | Description | varchar(255) NOT NULL | varchar(80) NOT NULL |

| Table Name | Column Name | New DataType | Old DataType |
|---------------------------|-----------------|-------------------------|-------------------------|
| CFGOrgCodesData | Code | varchar(30) NOT NULL | varchar(14) NOT NULL |
| CFGOrgCodesDescriptions | Code | varchar(30) NOT NULL | varchar(14) NOT NULL |
| CFGOrgSetup | OrgIntercompany | varchar(30) | varchar(14) |
| CFGOrgSetup | PayrollDefOrg | varchar(30) | varchar(14) |
| CustomProposal | Org | varchar(30) | varchar(14) |
| CustomProposalEmployee | Org | varchar(30) | varchar(14) |
| CustomProposalMktCampaign | Org | varchar(30) | varchar(14) |
| CustomProposalOpportunity | Org | varchar(30) | varchar(14) |
| CustomProposalProject | Org | varchar(30) | varchar(14) |
| EmailTemplates | EmailSubject | varchar(max) | varchar(100) |
| EMInitiation | Org | varchar(30) | varchar(14) |
| exChecks | Org | varchar(30) | varchar(14) |
| FirmOrgAssociations | Org | varchar(30) NOT NULL | varchar(14) NOT NULL |
| FW_CFGSystem | DefaultOrg | varchar(30) | varchar(14) |
| GLSummary | Org | varchar(30) NOT NULL | varchar(14) NOT NULL |
| GLTable | FilterOrg | varchar(30) | varchar(14) |
| GR | Org | varchar(30) | varchar(14) |
| ICBillingWK | OriginatingOrg | varchar(30) | varchar(14) |
| ICBillingWK | TargetOrg | varchar(30) | varchar(14) |
| KeyConvertWorkPROrg | NewOrg | varchar(30) NOT NULL | varchar(14) NOT NULL |
| LD | EmOrg | varchar(30) | varchar(14) |
| LD | PrOrg | varchar(30) | varchar(14) |

| Table Name | Column Name | New DataType | Old DataType |
|----------------------|-----------------|--------------------------|-------------------------|
| LD | WBS1 | varchar(255) | varchar(30) |
| LedgerAP | AutoEntryOrg | varchar(30) | varchar(14) |
| LedgerAP | Org | varchar(30) | varchar(14) |
| LedgerAR | AutoEntryOrg | varchar(30) | varchar(14) |
| LedgerAR | Org | varchar(30) | varchar(14) |
| LedgerEX | AutoEntryOrg | varchar(30) | varchar(14) |
| LedgerEX | Org | varchar(30) | varchar(14) |
| LedgerMisc | AutoEntryOrg | varchar(30) | varchar(14) |
| LedgerMisc | Org | varchar(30) | varchar(14) |
| MktCampaign | Org | varchar(30) | varchar(14) |
| Opportunity | Org | varchar(30) | varchar(14) |
| Opportunity | Solicitation | varchar(255) | varchar(60) |
| OpportunityProposals | Org | varchar(30) | varchar(14) |
| Organization | Org | varchar(30) NOT NULL | varchar(14) NOT NULL |
| OverheadAllocation | Org | varchar(30) | varchar(14) |
| OverheadAllocation | OrgToDistribute | varchar(30) | varchar(14) |
| PNPlan | Org | varchar(30) | varchar(14) |
| PR | Org | varchar(30) | varchar(14) |
| PR | Solicitation | varchar(255) | varchar(60) |
| PRAdditionalData | WBS1 | varchar(255) NOT NULL | varchar(30) NOT NULL |
| PRDefaults | Org | varchar(30) | varchar(14) |
| PRDefaults | Solicitation | varchar(255) | varchar(60) |
| PRTemplate | Org | varchar(30) | varchar(14) |

| Table Name | Column Name | New DataType | Old DataType |
|----------------------------|-----------------------|--------------------------|--------------------------|
| PRTemplate | Solicitation | varchar(255) | varchar(60) |
| RPAssignment | WBS1 | varchar(255) | varchar(30) |
| RPConsultant | WBS1 | varchar(255) | varchar(30) |
| RPExpense | WBS1 | varchar(255) | varchar(30) |
| RPPlan | Org | varchar(30) | varchar(14) |
| RPPlan | PlanNumber | varchar(255) | varchar(30) |
| RPPlan | WBS1 | varchar(255) | varchar(30) |
| RPTask | WBS1 | varchar(255) | varchar(30) |
| RPUnit | WBS1 | varchar(255) | varchar(30) |
| UN | FilterOrg | varchar(30) | varchar(14) |
| VE | Org | varchar(30) | varchar(14) |
| WorkflowActionColumnUpdate | SQLElseExpression | varchar(max) | varchar(1000) |
| WorkflowActionColumnUpdate | SQLExpression | varchar(max) | varchar(1000) |
| WorkflowActionColumnUpdate | SQLIfExpression | varchar(max) | varchar(1000) |
| WorkflowActionDashboard | DashboardSummary | varchar(max) NOT NULL | varchar(100) NOT NULL |
| WorkflowActionDashboard | ToListRoles | varchar(max) | varchar(250) |
| WorkflowActionDashboard | ToListSpecial | varchar(max) | varchar(250) |
| WorkflowActionDashboard | ToListSpecialDisplay | varchar(max) | varchar(500) |
| WorkflowActionDashboard | ToListUsers | varchar(max) | varchar(250) |
| WorkflowActionEmails | BCCListRoles | varchar(max) | varchar(250) |
| WorkflowActionEmails | BCCListSpecial | varchar(max) | varchar(250) |
| WorkflowActionEmails | BCCListSpecialDisplay | varchar(max) | varchar(250) |
| WorkflowActionEmails | BCCListUsers | varchar(max) | varchar(250) |
| WorkflowActionEmails | CCListRoles | varchar(max) | varchar(250) |

| Table Name | Column Name | New DataType | Old DataType |
|------------------------------|----------------------|--------------|---------------|
| WorkflowActionEmails | CCListSpecial | varchar(max) | varchar(250) |
| WorkflowActionEmails | CCListSpecialDisplay | varchar(max) | varchar(250) |
| WorkflowActionEmails | CCListUsers | varchar(max) | varchar(250) |
| WorkflowActionEmails | EmailSubject | varchar(max) | varchar(100) |
| WorkflowActionEmails | ToListRoles | varchar(max) | varchar(250) |
| WorkflowActionEmails | ToListSpecial | varchar(max) | varchar(250) |
| WorkflowActionEmails | ToListSpecialDisplay | varchar(max) | varchar(250) |
| WorkflowActionEmails | ToListUsers | varchar(max) | varchar(250) |
| WorkflowActionMethodArgs | SQLElseExpression | varchar(max) | varchar(1000) |
| WorkflowActionMethodArgs | SQLExpression | varchar(max) | varchar(1000) |
| WorkflowActionMethodArgs | SQLIfExpression | varchar(max) | varchar(1000) |
| WorkflowActionSprocArgs | SQLElseExpression | varchar(max) | varchar(1000) |
| WorkflowActionSprocArgs | SQLExpression | varchar(max) | varchar(1000) |
| WorkflowActionSprocArgs | SQLIfExpression | varchar(max) | varchar(1000) |
| WorkflowActionWebServiceArgs | SQLElseExpression | varchar(max) | varchar(1000) |
| WorkflowActionWebServiceArgs | SQLExpression | varchar(max) | varchar(1000) |
| WorkflowActionWebServiceArgs | SQLIfExpression | varchar(max) | varchar(1000) |
| WorkflowConditions | SQLExpression | varchar(max) | varchar(1000) |
| XChargeWk | EmpOrg | varchar(30) | varchar(14) |
| XChargeWk | ProjOrg | varchar(30) | varchar(14) |

Removed Columns

| Table Name | Column Name | Data Type |
|------------|------------------|---------------------|
| CFGPOMain | NextEquipment | int NOT NULL |
| VE | Competitor | varchar(1) NOT NULL |
| VE | GovernmentAgency | varchar(1) NOT NULL |

Renamed Columns

| |
|------|
| None |
|------|

New Objects

| Object Name | Object Type |
|---|-------------|
| FK_Activity_ContactIDForVendor_Con | ForeignKey |
| FK_Activity_Employee_EMMain | ForeignKey |
| FK_Activity_Vendor_VE | ForeignKey |
| FK_ADPEXport_Employee_EMMain | ForeignKey |
| FK_BTRCTEmpls_Employee_EMMain | ForeignKey |
| FK_BTROTEmpls_Employee_EMMain | ForeignKey |
| FK_BTRREmpls_Employee_EMMain | ForeignKey |
| FK_CustomProposalEmployee_Employee_EMMain | ForeignKey |
| FK_CustomProposalEmployeeGraphics_Employee_EMMain | ForeignKey |
| FK_CustomProposalProjTeam_Employee_EMMain | ForeignKey |
| FK_ekDetail_Employee_EMMain | ForeignKey |
| FK_ekMaster_Employee_EMMain | ForeignKey |
| FK_EMAccrual_Employee_EMMain | ForeignKey |
| FK_EMAccrualDetail_Employee_EMMain | ForeignKey |

| Object Name | Object Type |
|--|-------------|
| FK_EMActivity_Employee_EMMain | ForeignKey |
| FK_EMClientAssoc_Employee_EMMain | ForeignKey |
| FK_EMContactAssoc_Employee_EMMain | ForeignKey |
| FK_EMDegree_Employee_EMMain | ForeignKey |
| FK_EMEKGroups_Employee_EMMain | ForeignKey |
| FK_EMMain_Vendor_VE | ForeignKey |
| FK_EmployeeCustomTabFields_Employee_EMMain | ForeignKey |
| FK_EmployeeFileLinks_Employee_EMMain | ForeignKey |
| FK_EMProjectAssoc_Employee_EMMain | ForeignKey |
| FK_EMProjectAssoc_WBS_PR | ForeignKey |
| FK_EMRegistration_Employee_EMMain | ForeignKey |
| FK_EMResume_Employee_EMMain | ForeignKey |
| FK_EMSkills_Employee_EMMain | ForeignKey |
| FK_EMTKGroups_Employee_EMMain | ForeignKey |
| FK_erDetail_Employee_EMMain | ForeignKey |
| FK_EX_Employee_EMMain | ForeignKey |
| FK_EXAdvance_Employee_EMMain | ForeignKey |
| FK_exChecks_Employee_EMMain | ForeignKey |
| FK_exMaster_Employee_EMMain | ForeignKey |
| FK_laDetail_Employee_EMMain | ForeignKey |
| FK_laMaster_Employee_EMMain | ForeignKey |
| FK_LedgerAP_Employee_EMMain | ForeignKey |
| FK_LedgerAR_Employee_EMMain | ForeignKey |

| Object Name | Object Type |
|---|-------------|
| FK_LedgerEX_Employee_EMMain | ForeignKey |
| FK_LedgerMisc_Employee_EMMain | ForeignKey |
| FK_MktCampaign_CampaignMgr_EMMain | ForeignKey |
| FK_MktCampaign_Manager3_EMMain | ForeignKey |
| FK_MktCampaign_MktgMgr_EMMain | ForeignKey |
| FK_OpportunityEMAssoc_Employee_EMMain | ForeignKey |
| FK_OpportunityProposals_Employee_EMMain | ForeignKey |
| FK_SEUser_Employee_EMMain | ForeignKey |
| FK_SF255Employees_Employee_EMMain | ForeignKey |
| FK_SF330Personnel_Employee_EMMain | ForeignKey |
| FK_tkBreakTime_Employee_EMMain | ForeignKey |
| FK_tkDetail_Employee_EMMain | ForeignKey |
| FK_tkMaster_Employee_EMMain | ForeignKey |
| FK_tkUnitDetail_Employee_EMMain | ForeignKey |
| FK_tsDetail_Employee_EMMain | ForeignKey |
| FK_tsMaster_Employee_EMMain | ForeignKey |
| FK_WorkflowEMActivity_EMMain | ForeignKey |
| FK_XChargeWk_Employee_EMMain | ForeignKey |
| getICMetadata | Function |
| GetLaborCodeDesc | Function |
| ngRP\$tabCalendarInterval | Function |
| ngRP\$tabPeriodETC | Function |
| ngRP\$tabResources | Function |

| Object Name | Object Type |
|--------------------------------------|-------------|
| CFGLCCodesDescriptions | Index |
| CLNameClientIDIDX | Index |
| EMCompanyTimeAnalysisIDX | Index |
| EQICCostEquipIDPeriodIDX | Index |
| LedgerAPEquipIDBookCodeIDX | Index |
| LedgerAREquipIDBookCodeIDX | Index |
| LedgerMiscEquipIDBookCodeIDX | Index |
| POMasterVendorIDX | Index |
| PROrgRestrictChargeCompaniesIDX | Index |
| SavedOptionsDetailParentKeyIDX | Index |
| SavedReportsMainUsernameIDX | Index |
| SavedSelectionsMainUsernameIDX | Index |
| DeleteCFGAbsReqStatusTrigger | Trigger |
| DeleteCFGAPApprovalStatusTrigger | Trigger |
| DeleteCFGBankEntriesTrigger | Trigger |
| DeleteCFGBankImportDetailTrigger | Trigger |
| DeleteCFGCitizenshipTrigger | Trigger |
| DeleteCFGEMLocationTrigger | Trigger |
| DeleteCFGEMRegistrationStatusTrigger | Trigger |
| DeleteCFGEMRegistrationTypeTrigger | Trigger |
| DeleteCFGEMSkillUsageTrigger | Trigger |
| DeleteCFGFAAssetTypeTrigger | Trigger |
| DeleteCFGFABookTrigger | Trigger |

| Object Name | Object Type |
|--------------------------------------|-------------|
| DeleteCFGADepMethodTrigger | Trigger |
| DeleteCFGAPropertyTypeTrigger | Trigger |
| DeleteCFGARepairTypeTrigger | Trigger |
| DeleteCFGProjectTemplateTrigger | Trigger |
| DeleteEMTrigger | Trigger |
| DeleteEMAILCompanyTrigger | Trigger |
| InsertCFGAbsReqStatusTrigger | Trigger |
| InsertCFGAPApprovalStatusTrigger | Trigger |
| InsertCFGBankEntriesTrigger | Trigger |
| InsertCFGBankImportDetailTrigger | Trigger |
| InsertCFGCitizenshipTrigger | Trigger |
| InsertCFGEMLocationTrigger | Trigger |
| InsertCFGEMRegistrationStatusTrigger | Trigger |
| InsertCFGEMRegistrationTypeTrigger | Trigger |
| InsertCFGEMSkillUsageTrigger | Trigger |
| InsertCFGFAAssetTypeTrigger | Trigger |
| InsertCFGFABookTrigger | Trigger |
| InsertCFGADepMethodTrigger | Trigger |
| InsertCFGAPropertyTypeTrigger | Trigger |
| InsertCFGARepairTypeTrigger | Trigger |
| InsertCFGProjectTemplateTrigger | Trigger |
| InsertEMTrigger | Trigger |
| InsertEMAILCompanyTrigger | Trigger |

| Object Name | Object Type |
|--------------------------------------|-------------|
| UpdateCFGAbsReqStatusTrigger | Trigger |
| UpdateCFGAPApprovalStatusTrigger | Trigger |
| UpdateCFGBankEntriesTrigger | Trigger |
| UpdateCFGBankImportDetailTrigger | Trigger |
| UpdateCFGCitizenshipTrigger | Trigger |
| UpdateCFGEMLocationTrigger | Trigger |
| UpdateCFGEMRegistrationStatusTrigger | Trigger |
| UpdateCFGEMRegistrationTypeTrigger | Trigger |
| UpdateCFGEMSkillUsageTrigger | Trigger |
| UpdateCFGFAAssetTypeTrigger | Trigger |
| UpdateCFGFABookTrigger | Trigger |
| UpdateCFGFADepMethodTrigger | Trigger |
| UpdateCFGFAPropertyTypeTrigger | Trigger |
| UpdateCFGFARepairTypeTrigger | Trigger |
| UpdateCFGProjectTemplateTrigger | Trigger |
| UpdateEMTrigger | Trigger |
| UpdateEMAILCompanyTrigger | Trigger |
| CFGAbsReqStatus | View |
| CFGAPApprovalStatus | View |
| CFGBankEntries | View |
| CFGBankImportDetail | View |
| CFGCitizenship | View |
| CFGEMLocation | View |

| Object Name | Object Type |
|-------------------------|-------------|
| CFGEMRegistrationStatus | View |
| CFGEMRegistrationType | View |
| CFGEMSkillUsage | View |
| CFGFAAssetType | View |
| CFGFABook | View |
| CFGFADepMethod | View |
| CFGFAPropertyType | View |
| CFGFARepairType | View |
| CFGProjectTemplate | View |
| EM | View |
| EMAILCompany | View |
| IntGLBudgetGroups | View |

Removed Objects

| Object Name | Object Type |
|---|-------------|
| FK_Activity_Employee_EM | ForeignKey |
| FK_ADPEXport_Employee_EM | ForeignKey |
| FK_BTRCTEmps_Employee_EM | ForeignKey |
| FK_BTROTEmpS_Employee_EM | ForeignKey |
| FK_BTRREmpS_Employee_EM | ForeignKey |
| FK_CustomProposalEmployee_Employee_EM | ForeignKey |
| FK_CustomProposalEmployeeGraphics_Employee_EM | ForeignKey |
| FK_CustomProposalProjTeam_Employee_EM | ForeignKey |

| Object Name | Object Type |
|--|-------------|
| FK_ekDetail_Employee_EM | ForeignKey |
| FK_ekMaster_Employee_EM | ForeignKey |
| FK_EM_Vendor_VE | ForeignKey |
| FK_EMAccrual_Employee_EM | ForeignKey |
| FK_EMAccrualDetail_Employee_EM | ForeignKey |
| FK_EMActivity_Employee_EM | ForeignKey |
| FK_EMClientAssoc_Employee_EM | ForeignKey |
| FK_EMContactAssoc_Employee_EM | ForeignKey |
| FK_EMDegree_Employee_EM | ForeignKey |
| FK_EMEKGroups_Employee_EM | ForeignKey |
| FK_EmployeeCustomTabFields_Employee_EM | ForeignKey |
| FK_EmployeeFileLinks_Employee_EM | ForeignKey |
| FK_EMProjectAssoc_Employee_EM | ForeignKey |
| FK_EMRegistration_Employee_EM | ForeignKey |
| FK_EMResume_Employee_EM | ForeignKey |
| FK_EMSkills_Employee_EM | ForeignKey |
| FK_EMTKGroups_Employee_EM | ForeignKey |
| FK_erDetail_Employee_EM | ForeignKey |
| FK_EX_Employee_EM | ForeignKey |
| FK_EXAdvance_Employee_EM | ForeignKey |
| FK_exChecks_Employee_EM | ForeignKey |
| FK_exMaster_Employee_EM | ForeignKey |
| FK_laDetail_Employee_EM | ForeignKey |

| Object Name | Object Type |
|-------------------------------------|-------------|
| FK_laMaster_Employee_EM | ForeignKey |
| FK_LedgerAP_Employee_EM | ForeignKey |
| FK_LedgerAR_Employee_EM | ForeignKey |
| FK_LedgerEX_Employee_EM | ForeignKey |
| FK_LedgerMisc_Employee_EM | ForeignKey |
| FK_MktCampaign_CampaignMgr_EM | ForeignKey |
| FK_MktCampaign_Manager3_EM | ForeignKey |
| FK_MktCampaign_MktgMgr_EM | ForeignKey |
| FK_OpportunityEMAssoc_Employee_EM | ForeignKey |
| FK_OpportunityProposals_Employee_EM | ForeignKey |
| FK_SEUser_Employee_EM | ForeignKey |
| FK_SF255Employees_Employee_EM | ForeignKey |
| FK_SF330Personnel_Employee_EM | ForeignKey |
| FK_tkBreakTime_Employee_EM | ForeignKey |
| FK_tkDetail_Employee_EM | ForeignKey |
| FK_tkMaster_Employee_EM | ForeignKey |
| FK_tkUnitDetail_Employee_EM | ForeignKey |
| FK_tsDetail_Employee_EM | ForeignKey |
| FK_tsMaster_Employee_EM | ForeignKey |
| FK_WorkflowEMActivity_EM | ForeignKey |
| FK_XChargeWk_Employee_EM | ForeignKey |
| EMTimeAnalysisIDX | Index |
| DelFW_CFGInfoCenterFields | Trigger |

| Object Name | Object Type |
|---------------------------|-------------|
| InsFW_CFGInfoCenterFields | Trigger |
| UpdFW_CFGInfoCenterFields | Trigger |

Renamed Objects

| |
|------|
| None |
|------|

Appendix A: Software Issues Resolved and Enhancements in Vision 7.4 Cumulative Updates

The following resolved software issues and enhancements in the Vision 7.4 cumulative updates (issued after the 7.4 release) are also included in the Vision 7.5 release.

Cumulative Update 11 — Released October 23, 2015

Software Enhancements

Upgrading Tableau Software

When upgrading to a version of Vision that has a new version of Tableau, the following Tableau components will also need to be updated.

- Tableau Server software. This is part of the Deltek Vision Performance Management installation.
- Tableau Worker software (distributed environments only).
- TabCmd command line utility. As of Vision 7.4 CU 11 the TabCmd utility is included as part of the Deltek Vision Web/Application tier installation and is located in the \Vision\Support\Utilities\TabCmd folder.
- Tableau Desktop software. Available via the Deltek Software Manager.



With the release of Vision 7.4 CU 11, all Tableau software components previously in use will require upgrading to Tableau 9.0.4. Additionally, Deltek is only supporting the Tableau Server 64-bit installation. If you have previously installed Tableau 8.0.2 on a 32-bit server a new 64-bit server will be required to install Tableau 9.0.4.

The Performance Management installation for Vision 7.4 CU 11 will check for previous installations of Tableau software and prompts you to uninstall that software before continuing.

Tableau software component upgrades are not typical software upgrades, in that you must uninstall the previous version before you can install the new one. However, the uninstall process does preserve all previously installed configuration settings. In the case of Tableau Server, this means that you will not lose any information (workbooks, users, or any other configuration settings).

The Tableau software for Vision Performance Management is specifically branded for Deltek, and Deltek must be your source for that software. Do not attempt to upgrade Tableau with software from a source other than Deltek (e.g. from Tableau directly).

Tableau 8.2, 8.1.6 and 8.0.2 Security Vulnerability



Tableau versions 8.2, 8.1.6 and 8.0.2 have a security vulnerability that can cause an escalation of privilege. Deltek is supporting Tableau version 9.0.4 for Vision 7.4 CU 11 and 7.5 which includes the correction to this security vulnerability. All customers currently using Tableau 8.2, 8.1.6 or 8.0.2 are encouraged to upgrade to Vision 7.4 CU 11 and upgrade Tableau to version 9.0.4. More information on this security vulnerability can be found in the link below:

<http://kb.tableau.com/articles/knowledgebase/security-advisory-users-can-be-impersonated>

System Requirements

There is also a change in the minimum system requirements to install Tableau 9.0. These requirements are a server with 4 cores and 8 GB of RAM:

- The Delltek VPM installer will check for the required Tableau minimum system requirements which are no longer a warning as in previous versions. If your system does not meet the minimum requirements you will not be able to proceed with the installation.
- Similarly, the Tableau installation (if run separately) will provide the following failure if the system does not meet the minimum specifications and you will not be able to proceed with the installation:



-- Verification result: FAILED

Setup cannot continue because the system does not meet minimum requirements. Please make sure that the system meets the minimum recommended Tableau Server requirements: <http://www.tableausoftware.com/products/server/specs>

Reason:

Processor (cores): 1 (minimum required is 4)

Memory: 2 GB (minimum required is 8 GB)

Other resources found:

Available disk space: 27.66 GB

Operating System: Microsoft Windows Server 2012 Standard

Edit Domain Nicknames With Active Directory Authentication:

If you use Active Directory with Tableau Server and you need to add user accounts from a trusted domain, the first time you attempt to add the user using the standard domain nickname (for example DOMAIN\User) Tableau server will not be able to recognize the domain nickname. In this situation, you must enter the domain using the fully qualified domain name (for example DOMAIN.COMPANY.COM\User). In addition, because of a defect in Tableau Server, it assumes that the first word before the period in the fully qualified domain name is the domain nickname (DOMAIN for the example above). This may or may not be correct for your organization. If it is not correct, users cannot to authenticate to Tableau Server until you correct the domain nickname.

To resolve this problem, complete the following steps. The editing of the domain nickname was previously available through the Tableau Administration application. As of Tableau 9.0 this must be done via the TabCmd utility:

1. Ensure that the TabCmd utility is installed on the Vision application server.
2. From an Administrative command prompt on the Vision application server, change directory to <drive>:\Program Files\Tableau\Tableau Server\9.0\extras\Command Line Utility.
3. Enter the following Tableau command:

```
tabcmd listdomains --username <Tableau administrator domain username> --server  
<Tableau server>
```

You will be prompted for the password for the Tableau administrator domain username.

4. The result of this command will be similar to the following:

```
===== Listing domains from the server...
```

```
=====
```

```
ID Nickname Name
1 local local
2 <domain1> <FQDN of domain1>.
3 <domain2> <FQDN of domain2>
```

5. Identify the domain ID where the Nickname is incorrect.
6. Enter the following Tableau command:

```
tabcmd editdomain --id 3 --nickname "<correct nickname>"
```

7. The result of this command will show the updated Domain nickname and your users from that domain should now be able to login automatically.

VisionXtend — DupeCheckFields and DupeUpdateExcludeFields

Two new attributes have been added to VisionXtend that allow you to turn inserts to tables into updates, based on a given set of fields.

The new attributes are:

DupeCheckFields — This applies only for **SendDataToDeltekVisionWithReturn** calls. This attribute is a comma-delimited list of fields that, if provided, is used as a key value for any INSERTS in the DataXML. If those values already match a record in the database, then the INSERT will become an UPDATE.

DupeUpdateExcludeFields — This attribute is checked only if the **DupeCheckFields** attribute is present and has a value. **DupeUpdateExcludeFields** is a comma-delimited list of fields that will be **excluded** from the update when a record is being converted from an INSERT to an UPDATE.

Software Issues Resolved

Accounting

Revenue » Revenue Generation

Defect 542986: When running Revenue Generation, the revenue amount doubled for certain projects. This was due to project format where project numbers were different lengths and had multiple delimiters.

Customers Impacted: This defect applies to Vision versions 7.4 and earlier.

Workaround Before Fix: Run key conversion on the number in a separate run.

Additional Notes: None.

Files Updated

Deltek.Vision.RevenueGeneration.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Tax File Generation

Defect 550983: This applies if you use the Dutch or German languages in Vision. For the VAT Declaration XML file format, a column heading in the XML Tax Declaration Detail report was translated incorrectly and has been corrected.

- For the Dutch language, the column heading was **Transfer type** or **Type Over**. Now it is **Tran Type**.
- For the German language, the column heading was **Trans.-typ** or **Tran Umb**. Now it is **Tran Typ**.

Customers Impacted: This defect applies to Vision 7.4 if you use the Dutch or German languages in Vision.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportLabels.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Billing

Batch Billing

Defect 546330: When web.config was set to **S** to save on the SFTP server, invoices were incorrectly saved to the App server. This occurred when Batch Billing was run from the Process Server.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: Invoices will save to the SFTP server from Batch Billing after updating Deltek.Vision.ProcessServer.Server.exe.config with

```
</configSections>
<appSettings>
<add key="AllowFileSave" value="S" />
</appSettings>
```

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 550022: A new web service API method ExecuteStoredProcedure has been added to support executing a stored procedure.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.WebServiceAPI.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration

General » Merge Templates

Defect 546306: This applies if you use Deltek First Vision Essentials (the SaaS version of Vision). When you merged documents using a Microsoft Word merge template, periodically the merge would fail, and you received a File not Found exception error.

This occurred when all of the following were true:

- Load balanced web/application servers are configured.
- Load balancing is configured to not use sticky sessions.
- Database session state is being used.

Customers Impacted: This defect applies to Vision First Vision Essentials versions 7.0–7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.MergeBO.Server.dll

Deltek.Vision.Merge.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Dashboard

Defect 530289: User-defined vendors, employees, and clients were not available for selection as dashparts. In addition, the only option for tab selection was "All."

Customers Impacted: This defect applies to Vision 7.4

Workaround Before Fix: None.

Additional Notes: None

Files Updated

Deltek.Vision.CustomTabs.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 550968: User-defined Info Center dashparts were lost after upgrading Vision to 7.4. This was fixed so that the old dashparts were restored if not re-configured in 7.4.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

DeltekVision74GACU011.sql

Other Applications Affected

Database Changes

Removed old Dashparts with new class name that have default columns. Also updated old Dashparts with the new class name that do not have default columns.

System File Dependencies

Human Resources

ABRA Interface

Defect 551235: When you used the ABRA interface to import payroll data into Vision, you received the following error: "Invalid column name 'TalentUserID. No record imported. Please check".

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

DeltekVision74GACU011.sql

Other Applications Affected

Database Changes

The TalentUserID column was added to the EMInitiation table.

System File Dependencies

Purchasing

Defect 547969: The following applies if you enabled the **Modify Not to Exceed Values via Change Order** check box on the General tab in **Configuration » Purchasing & Inventory » Company Settings**.

When you tried to create an AP voucher from a purchase order in **Accounting » Accounts Payable » Create Voucher from PO**, you were unable to create the AP voucher if all of the following applied:

- The purchase order was a service or blanket type purchase order.
- You entered a not-to-exceed amount for the purchase order.
- You entered a change order with a not-to-exceed amount for the purchase order.
- The amount of the AP voucher exceeded the original not-to-exceed limit that you entered for the purchase order, but it did not exceed the combined total of the not-to-exceed amount entered for the purchase order and the change order.

You should have been able to create the AP voucher as long as its total did not exceed the combined total of the not-to-exceed amount entered for the purchase order and for the change order.

Customers Impacted: This defect applies if you use Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.PORoutines.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting

Defect 550974: The **Transaction Type** field was translated incorrectly on the Account Analysis and Tax Analysis reports.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportLabels.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Accounts Receivable

Defect 547024: When **To Billing Contact** was selected as the **Email/Schedule** option for emailing the AR Statement report in **Reporting » Accounts Receivable**, the following error occurred if a large range of billing clients or contacts were included: "TranslateDBF unknown function DBF_IDX] ON

##AS_ARStatementCustom__96FCCAE53EE6466F90DF6E2D0CD1BDBF"

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Run this report with smaller batches. If the error occurs on a batch, run that individual batch again.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingAccountsReceivable.Server.dll

Deltek.Vision.Report.Server.dll

DeltekVision74GACU011.sql

Other Applications Affected

Database Changes

Rebuilt index PRWBS1IDX to include the following columns: BillingClientID and BillingContactID.

System File Dependencies

Time and Expense

Timesheet

Defect 254935: When two different users were logged into Vision at the same time, both users could post the same timesheet file. This resulted in Vision posting the file twice.

Customers Impacted: This issue applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Posting.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Utilities

Advanced Utilities » HRsmart Web Service

Defect 546155: When using a French Canadian database, the Web Service Call log message in **Utilities » Advanced Utilities » Talent Management Web Service** was not translated.

Customers Impacted: This defect applies to Vision 7.4

Workaround Before Fix: None

Additional Notes: None.

Files Updated

Deltek.Vision.TalentWebService.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Vision XTend

Defect 495346: If you used the UpdateProject API to update a project record, the process halted if the **Billing Currency** field was not in the imported data. This field should not be required.

Customers Impacted: This defect applies to Vision 7.2 and later versions.

Workaround Before Fix: Have the API re-use the **Billing Currency** data that is already in the project record.

Additional Notes: None.

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Defect 524083: This applies if you use VisionXtend to update records in Vision. You were unable to update the **Utilization Ratio** field for employee records.

Customers Impacted: This defect applies to VisionXtend if you use Vision 7.3 and later.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated**Other Applications Affected****Database Changes****System File Dependencies**

Defect 501388: This applies if you use VisionExtend. The new columns that were added in Vision 7.3 to the Contract Details table were missing from the API schema, which prevented the columns from being updated and inserted in Vision.

Customers Impacted: This defect applies to Vision 7.3 and 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated**Other Applications Affected****Database Changes****System File Dependencies**

Defect 550102: This applies when you use VisionXtend and the Deltek Costpoint Connector software. When you used an insert via the API call `SendDataToDeltekVisionWithReturn` to send an `EMProjectAssoc` record that already exists and you used the `SessionID` attribute in the `ConnXML` parameter, you received the following error: "Object reference not set to an instance of an object."

Customers Impacted: This defect applies when you use VisionXtend 7.3 or 7.4 and the Deltek Costpoint Connector software, which is used to import data into Deltek GovWin Capture Management from Deltek Costpoint.

Workaround Before Fix: Do not use the `SessionID` attribute. Use the `userName` and `userPassword` attributes instead.

Additional Notes: None.

Files Updated

Deltek.Vision.WebServiceAPI.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 548119: VisionXtend allowed you to insert data in the ProjectCustomTabFields table when no matching record was found in the PR table.

Customers Impacted: This defect applies if you use VisionXtend in Vision versions 7.4 and earlier. This also affects Costpoint to GovWin CRM Integration and any calling application that inserts records in ProjectcustomTabFields via API.

Workaround Before Fix: Use update statements instead of insert statements for changes to the ProjectCustomTabFields table. VisionXtend automatically inserts a record in ProjectCustomTabFields when a record is added into the PR table.

Additional Notes: None.

Files Updated

Deltek.Vision.WebServiceAPI.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Cumulative Update 10 — Released September 18, 2015

Regulatory Enhancements

2015 Connecticut Income Tax Withholding

The following tables are updated for Connecticut:

- Personal Exemptions (Table A) for filing status **F**
- Withholding Tax Calculation (Table B) for all filing statuses (**A, B, C, D, and F**)
- Tax Recapture (Table D) for all filing statuses (**A, B, C, D, and F**)
- Personal Tax Credits (Table E) for filing status **F**

Withholding Tax Calculation

The Department of Revenue released the updated percentage withholding tables that reflect the two new income tax rates for high earners. The tables are effective January 1, 2015. Employers should implement the tables by August 31, 2015, but do not have to adjust previous withholding during 2015.

The new income tax rates are as follows:

- Income of single taxpayers that is more than \$250,000 and less than \$500,000 and income of married individuals that is more than \$500,000 and less than \$1 million are to be taxed at **6.9%**.
- Income of single employees that is more than \$500,000 and income of married individuals that is more than \$1 million are to be taxed at **6.99%**.

Connecticut's previous top income tax rate was 6.7%.

For more information, see http://www.ct.gov/drs/lib/drs/forms/2015withholding/tpg-211_20150805.pdf.

Files Updated

Delttek.Vision.PayrollBO.Server.dll

Other Applications Affected

PRMSTI

PRMSSD

PRMSTT

Database Changes

System File Dependencies

Software Enhancements

Purchase Template Editor

A new **Print Firm Name From Configuration** check box was added to the General tab of the Purchase Template Editor form in **Purchasing » Purchase Template Editor**. This check box controls whether or not your firm's name (entered on the General tab in **Configuration » General » Company Settings**) will print in the upper left of a purchase order or request for price quote. The check box is selected by default. In previous Vision versions, your firm's name printed automatically in the upper left, and you could not remove it.

Note: The **Print Firm Name** check box in the Firm Block section on the General tab of the Purchase Template Editor form, controls whether or not your firm's name (entered on the Misc tab of the Purchase Template Editor form in **Purchasing » Purchase Template Editor**) prints in the firm block on the purchase order and request for price quote. The firm block is at the top center of a purchase order and request for price quote.

Files Updated

Deltek.Vision.ReportingPurchasing.Server.dll
Deltek.Vision.PurchaseTemplateEditor.Client.dll
Form Purchase Order.rdl
Form Request for Price Quote.rdl

Other Applications Affected

Database Changes

System File Dependencies

Tax Analysis Report

A **Tax Payable** column was added to the Tax Analysis report in **Reporting » Accounting**. The new column displays the payable portion of the input tax for a transaction.

If you are using the Multicurrency feature and you have tax auditing enabled, you have the option to have the report display net amounts, tax basis amounts, and tax amounts in any of the following types of currency: transaction currency, functional currency, or tax currency. You specify the type of currency that you want to use in the report on the General tab of the Options for Tax Analysis dialog box.

Files Updated

Deltek.Vision.ReportingAccount.Server.dll
Tax Analysis.rdl
Deltek.Vision.ReportLabels.server.dll

Other Applications Affected

Database Changes

System File Dependencies

Deltek Talent Management Integration

Overview

You can now use Deltek Talent Management (formerly named Deltek HRsmart) with Vision. This integration gives you the ability to create employee data in Vision for new hires that were recently on-boarded within Talent Management. You use Vision's new Talent Management Web Service application to complete the import/export process on demand, or you can schedule it to run at a certain time.

The following data is included in the integration from Vision to Talent Management:

| Vision | Talent Management | Notes |
|-----------------------|-------------------|--|
| Employees | Users | Provides Talent Management user records for existing employees in Vision. This will grant all users access to the Talent Management suite of products. |
| Company/Organizations | Org Levels | Provides Talent Management with both Vision Company and Organization structure. |



Based on integration options, the integration can be used to provide data initialization from Talent Management to Vision or a synchronization based on what has changed in Vision since last time it was executed.

From Talent Management to Vision, the integration currently supports only the creation of new hires in Vision.

Pre-Installation Information

Minimum System Requirements

You must have the following software installed to use the Vision and Talent Management integration:

- Vision 7.4 CU 10 and later (required)
- Talent Management version 12.2.13.1 and later (required)

Data Mapping and Troubleshooting

For information about the mapping of data between Vision and Talent Management, refer to the *Deltek Vision 7.4 Talent Management Integration Technical Guide*. This guide provides field-level data mapping information that the integration uses.

If you encounter any issues while transferring data, you can view the log files and error files created by the integration process and use the information for troubleshooting. The steps for viewing these files are discussed in the "Troubleshooting" section of the *Deltek Vision 7.4 Talent Management Integration Technical Guide*.

Enhancements in Vision 7.4 to Support the Talent Management Integration

To support the integration between Vision and Talent Management, the following changes were made in Vision:

Configuration

You enable the Talent Management Web Service by selecting the **Enable Talent Management Web Service** check box on the Configuration tab in **Utilities » Advanced Utilities » Talent Management Web Service**. Then you need to enter values for the **Talent Management Web Service URL**, **Password**, and **Number of Rows Per Call** fields. Click the **Test Connection** button to check if the settings are correct.

Talent Management Web Service

You can run the Talent Management Web Service to receive employee data from Talent Management and send it to Vision. Conversely, you can make changes to organizational data and employee data in Vision and use the Talent Management Web Service to update the records in Talent Management.

On the General Tab in **Utilities » Advanced Utilities » Talent Management Web Service**, you can select the data you want to receive or send. You can also run the service or set a schedule for when to run the web service.

Talent Management User ID

The Talent Management application automatically assigns a Talent Management user ID to employee records that were created in the system or those that were sent from Vision. In Vision, the Talent Management user ID appears as a read-only field on the General tab of the Employee Info Center form.

Alerts

When you run the Talent Management Web Service, any errors or warning conditions are displayed in the Talent Management Web Service Call log. You can view the call log on the General tab in **Utilities » Advanced Utilities » Talent Management Web Service**. You can also view alerts on the Process Queue Manager screen in **Utilities » Process Server » Queue Manager**.

You can create a user-initiated workflow in **Configuration » Workflow** to notify specific employees when Vision receives new employee records from Talent Management.

Files Updated

DeltekVision74GACU010.sql
 \Reports\Standard\DataExport\EmployeeDataSource.rdl
 \Reports\Standard\Employee\Employee List.rdl
 Deltek.Vision.EmployeeInfoCenter.Client.dll
 Deltek.Vision.EmployeeInfoCenter.Server.dll
 Deltek.Vision.GeneralCompanySetup.Client.dll
 Deltek.Vision.GeneralCompanySetup.Server.dll
 Deltek.Vision.Lookup.Server.dll
 Deltek.Vision.ReportLabels.Server.dll
 Deltek.Vision.SysLogin.Server.dll
 Deltek.Vision.TalentWebService.Client.dll

Deltek.Vision.TalentWebService.Server.dll
 Deltek.Vision.ReportingDataExport.Client.dll
 Deltek.Vision.ReportingDataExport.Server.dll
 Deltek.Vision.ReportingEmployee.Client.dll
 Deltek.Vision.ReportingEmployee.Server.dll
 \Web\Xml\Lookup_Employee.xml
 \Web\Xml\navigationMenu.xml
 \Web\Xml\TalentMapping.xml

Database Changes

Added the CFGIntegrationWS table and code to initialize.

Tax File Generation: Belgium Client Listing XML File

Two new fields have been added to the Tax File Specific Variables section of the General tab on the Tax File Generation form in **Accounting » Tax File Generation**. The two new fields are **Gross >=** and **Gross <=**. They display when you select Belgium Client Listing XML in the File Format field on the Tax File Generation form.

These fields determine which Belgian client's will be included in the tax file, based on the total gross amount of all of a client's invoices for the time period and other criteria that you enter on this tab.

- **Gross >=** — Enter the total gross invoice amount above which a client will be included in the tax file. To be included in the tax file, a client's total gross invoice amount must be greater than or equal to the amount that you enter in this field.
- **Gross <=** — Enter the total gross invoice amount below which a client will be included in the tax file. To be included in the tax file, a client's total gross invoice amount must be less than or equal to the amount that you enter in this field.

Enter a negative number with a negative sign in front of it, such as -250.00.

Files Updated

Deltek.Vision.TaxFileGeneration.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Intra EU Community XML Backup Report

The **Diary Code** and **Diary Number** columns were added to the Intra EU Community XML Backup report. The columns are available for companies that are configured to use diaries on the Diary Aut numbering tab on **Configuration » Accounting » System Settings**.

The **Diary Code** column displays the Diary Code associated with the transaction. The **Diary Number** column displays the Diary Number associated with the transaction.

Files Updated

Deltek.Vision.TaxFileGeneration.Client.dll

Deltek.Vision.ReportLabels.Server.dll

TaxXML.rdl

TaxXMLClient.rdl

DeltekVision74GACU010.sql

Other Applications Affected**Database Changes**

Added a Diary and DiaryNo column to the TaxReporting table.

System File Dependencies**Xml****Declaration XML Backup Report**

The **Diary Code** and **Diary Number** columns were added to the VAT Declaration XML Backup report. The columns are available for companies that are configured to use diaries on the Diary Autonumbering tab on **Configuration » Accounting » System Settings**.

The **Diary Code** column displays the Diary Code associated with the transaction. The **Diary Number** column displays the Diary Number associated with the transaction.

Files Updated

Deltek.Vision.TaxFileGeneration.Client.dll

Other Applications Affected**Database Changes****System File Dependencies****Additional Database Changes**

The following changes were made to the Vision database for internal purposes:

A new IntegrationWS and IntegrationWSLogStatus table were added.

The following columns were added to the FW_CFGSystem table:

- SFTPHostName varchar(255)
- SFTPUsername varchar(100)
- SFTPPassword varchar(100)

Software Issues Resolved

Accounting » Tax File Generation

Defect 488876: When you created a tax file in Tax File Generation using any of the file formats, the tax file and the backup report correctly showed any negative tax amount for an invoice. However, invoices with negative tax amounts were missing in the grid on the Review tab of the Tax File Generation form.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.TaxFileGeneration.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Approvals

Defect 536731: When an employee's Record Level View access rights were set to Is Me (Record Access tab of **Configuration » Security**), the Employee lookup on the Reassign dialog box in AP Invoice Approvals (Progress tab of **Accounting » AP Invoice Approvals**) incorrectly limited the Employee lookup results.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.Approvals.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Navigator

Defect 544545: When using the **Copy Another Timesheet into this One** option in the Employee Workspace, the drop-down list of available timesheet periods for **Copy a Timesheet** took a long time to load.

Customers Impacted: This defect applies to Vision 7.4 and iAccess clients.

Workaround Before Fix: Wait for the list of timesheet periods to display or manually add the necessary projects.

Additional Notes: None.

Files Updated

Deltek.vision.visionservices.server

Other Applications Affected

Database Changes

System File Dependencies

Proposals » Custom Proposals

Defect 541913: When you merged custom proposals, extra hard returns were inconsistently added between paragraphs.

Customers Impacted: This defect affects Vision 7.3 and 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.MergeBO.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Purchasing » Purchase Orders

Defect 545687: If you added items to a purchase order that would automatically create items for the Equipment Info Center (equipment items or capital items), when you final printed the purchase order, it would hang and not complete.

Customers Impacted: This defect applies for Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.PORoutines.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting

Defect 500526: The **Tax Account** column on the Tax File Generation's Backup Report for VAT Declaration now displays the tax account entered in the **Account** fields in the Tax Codes tab of **Configuration » Accounting » Taxes** instead of the expense account at the time of posting.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.TaxFileGeneration.server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Accounting

Defect 526008: The **Tax Account** column on the Tax Analysis report now displays the tax account entered in the **Account** fields in the Tax Codes tab of **Configuration » Accounting » Taxes** instead of the expense account at the time of posting.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingAccounting.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Marketing Campaign

Defect 539658: This issue applies if you do **not** have organization levels configured in **Configuration » Organizations**. When you added seven or more columns to the Marketing

Campaign List report, the report omitted the column that was in the seventh position on the report.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Marketing Campaign List.rdl

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Opportunity

Defect 544755: When you ran the Opportunity List report, Opportunity Forecast report, or Opportunity Hit Rate List report, you received a framework exception error "Report item name must be unique..." if you selected all of the following before you ran the report:

- You selected **multiple** columns to sort and group by on the Sorting/Grouping tab of the report options dialog box.
- You added Opportunity fields to the report that were new in Vision 7.4 or GovWin Capture Management 7.4. You placed these fields **after** numeric/currency columns.

The new Opportunity fields that were added to Vision 7.4 are: **NAICS** and **Our Role**.

The new Opportunity fields that were added to GovWin Capture Management 7.4 are: **Award Type**, **Competition Type**, **Contract Type**, **NAICS**, **Our Role**, and **Solicitation**.

Customers Impacted: This defect applies to Vision 7.4 and GovWin Capture Management 7.4.

Workaround Before Fix: Perform one of the following:

- Select only one column for sorting/grouping.
- Move the numeric/currency fields downward on the Sorting/Grouping tab of the report options dialog box to ensure that they are placed after the other fields.

Additional Notes: None.

Files Updated

Opportunity List.rdl

Opportunity Forecast.rdl

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Purchasing

Defect 503920: The Purchase Order Detail report incorrectly included fully vouchered purchase orders even when the **Include Unvouchered Items Only** option was selected on the General tab of the options dialog box for the report.

Customers Impacted: This defect applies to Vision 5.1 through Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingPurchasing.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Text Editor

Defect 541911: The text editor was not inserting spacing between paragraphs when you typed text directly in a memo (text box) field in Vision and pressed the ENTER key.

Customers Impacted: This defect applies to Vision 7.3 and 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Framework.ExternalReferences.Client.dll

Deltek.Framework.ControlDialogs.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Time and Expense » Expense Report

Defect 538263: When you changed the expense category in the **Category** field, the expense report did not calculate associated mileage correctly.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: After changing the category, open the Detail dialog box so the Miles field will update. Click **OK** without making any changes, and then save the expense report one more time. This will synchronize the **Miles** fields.

Additional Notes: None.

Files Updated

Deltek.Vision.Expensekeeper.Client.dll

Other Applications Affected**Database Changes****System File Dependencies****Utilities » Advanced Utilities » Data Import**

Defect 541786: An error message displayed when you used the Data Import utility in **Utilities » Advanced » Data Import** to validate the import of Project - Contacts.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ImportUtility.Server.dll

Other Applications Affected**Database Changes****System File Dependencies****Vision Performance Management**

Defect 536744: The KPIs in Vision Performance Management were not created properly because the Resource Kit did not honor the language for the selected data cube.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

DeltekVisionHelper.dll

Other Applications Affected**Database Changes**

System File Dependencies

Cumulative Update 09 — Released August 14, 2015

Regulatory Enhancements

2015 Ohio Income Tax Withholding

The annual withholding table of Ohio is updated with changes effective August 1, 2015.

For more information, see:

http://www.tax.ohio.gov/Portals/0/employer_withholding/August2015Rates/WTH_PercentageMethod_FS_2015_073015.pdf.

Files Updated

Deltek.Vision.PayrollBO.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

2015 Idaho Income Tax Withholding

Percentage-method withholding tables, effective retroactively to January 1, 2015, were released August 3 by the state tax commission. Employers are not required to retroactively adjust withholding for the months before the withholding tables were released. The annual withholding allowance increased from \$3,950 to \$4,000, while the supplemental withholding rate is unchanged.

For more information, see http://tax.idaho.gov/pubs/EPB00006_07-30-2015.pdf.

Files Updated

Deltek.Vision.PayrollBO.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Software Issues Resolved

Accounting » Project Review

Defect 533240: The Project Review screen was slow to display.

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

Workaround Before Fix: On the Accounts Receivable tab on the Project Review screen, select **Unpaid** in the **Status** field to help reduce the amount of data.

Additional Notes: None.

Files Updated

Deltek.Vision.ProjectPTDReview.Client.dll

Deltek.Vision.ARReviewDialogs.Client.dll

Deltek.Vision.interactiveBilling.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

API

Defect 528375: If you used a VisionXtend API to update a user-defined field that has a data type of client, employee, or lead, you received an error if you did not enter a value for the field. Now you can leave the value blank, and you will not receive an error.

Customers Impacted: This applies to VisionXtend in Vision 7.2, 7.3, and 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.WebServiceAPI.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 532099: When you used a VisionXtend API to update custom date fields, you received an error if you left the date field blank, even if you were not required to enter a date in the custom field. The error you received was: "String was not recognized as a valid DateTime."

Customers Impacted: This defect applies to VisionXtend for Vision 7.3 and 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.WebServiceAPI.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 532561: If you used a VisionXtend API to update an Info Center record, the update failed if the fields being updated triggered a Vision workflow to start. The workflow was set up in Vision Workflow Configuration.

Customers Impacted: This defect applies to VisionXtend for Vision 7.1 through 7.4.

Workaround Before Fix: Turn off the workflow in Vision **Configuration » Workflow**.

Additional Notes: None.

Files Updated

Deltek.Vision.WebServiceAPI.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Purchasing and Inventory » Items Master

Defect 530341: You received the following error when you opened the Vendor lookup in the **Vendor** field on the Vendors tab of the Items Mater form: "Ambiguous column name 'status'."

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.POItem.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Workflow » Approval Workflows

Defect 537113: Conditions added to approval workflows for change orders that used Total Amount were not evaluated and processed correctly. For example, if you had a condition for step 1 where Total Amount for the change order is greater than \$1,000 and a change order for \$2,000 was processed, the workflow incorrectly ignored step 1 (as if the condition was not met) and moved on to step 2.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ApprovalsEngine.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Info Center » Opportunities

Defect 535558: The length of the **Solicitation Number** field on the IQ Info tab in the Opportunity Info Center was increased to support additional characters when importing data.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

DeltekVision74GACU009.sql

Deltek.Vision.OpportunityInfoCenter.Client.dll

Opportunities_Schema.xsd

Other Applications Affected

Database Changes

The following database changes were made:

- Increase Opportunity.Solicitation field to varchar(255)
- Truncate data value when the converted data exceeds the max field length for the other standard CRM fields added in 7.4 :
- Our Role
- Award Type (Formally named Contract Vehicle)
- Contract Type
- Competition Type (Formally named Procurement Type)

System File Dependencies

Purchasing » Purchase Requisitions

Defect 532830: In the Purchasing application, you received an error when you copied a purchase order, purchase requisition, or request for quote if it had a document attached to it.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Create a new purchase order, purchase requisition, or request for quote without copying from an existing record.

Additional Notes: None.

Files Updated

Deltek.Vision.PriceQuoteRequest.Client.dll

Deltek.Vision.PurchaseOrder.Client.dll

Deltek.Vision.PurchaseRequest.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Accounts Receivable

Defect 346928: The AR Statement by Project report was incorrectly sent to contacts that were not set up as Billing Contacts on the Accounting Tab of the Project Info Center.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Print the AR Statement report by project and send manually to the appropriate contacts.

Additional Notes: None.

Files Updated

Deltek.Vision.Report.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Time and Expense » Timesheet

Defect 534692: The SQL query for the Project Lookup in iAccess Timesheets did not use the proper index when the join to WBS2 level was missing. This resulted in a performance issue when searching for a project.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.VisionServices.Services.DLL

DeltekVision74GACU009.sql

Other Applications Affected

Database Changes

Indexes were added to the PR and CL tables in the database to improve the performance of the iAccess Project Search in Timesheets.

System File Dependencies

Transaction Center » Transaction Entry and Transaction Posting

Defect 535935: There was a performance issue where Transaction Posting took exceptionally long to load.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.TransSelect.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Cumulative Update 08 — Released July 17, 2015

Regulatory Enhancements

2015 Federal Electronic Filing

Record Change

The **Location Address** field (positions 274-295) of the RA Submitter Record is no longer a required field.

Files Updated

Deltek.Vision.W2Form.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

2015 State Electronic Filing

Record Change

The **Location Address** field (positions 274-295) of the RA Submitter Record is no longer a required field.

The following are the states that use the standard EFW2 format:

- Arkansas
- Arizona
- Colorado
- Connecticut
- District of Columbia
- Delaware
- Georgia
- Idaho
- Illinois
- Indiana
- Kansas
- Kentucky
- Louisiana
- Maryland

- Maine
- Massachusetts
- Michigan
- Minnesota
- Missouri
- Mississippi
- Montana
- North Carolina
- North Dakota
- Nebraska
- New Jersey
- New Mexico
- Ohio
- Oregon
- Pennsylvania
- Puerto Rico
- Rhode Island
- South Carolina
- Utah
- Virginia
- Vermont
- Wisconsin
- West Virginia

Files Updated

Deltek.Vision.W2Form.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

2015 Louisiana SUTA Electronic Filing

The Louisiana Workforce Commission is requiring the following information effective January 1, 2016:

- Nominal Hourly Rate of Pay
- Job title or Standard Occupational Classification (SOC) code

To accommodate this change, Vision updated the Quarterly Processing Editor screen to include the following fields for Louisiana:

- **Hourly Rate** — Use this field to enter the hourly wage amount for the employee.
- **SOC Code/Job Title** — Use this field to enter the employee's six-digit SOC code or job title description. The SOC code must not contain any dash or dot.

Vision also updated the RS record to include the new fields for reporting beginning July 1, 2015 and will become mandatory for the Q4 2015 filing.

- **July 1, 2015 (2015 2nd Quarter Filing)** — Start of optional reporting of new fields.
- **January 1, 2016 (2015 4th Quarter Filing)** — Mandatory reporting of new fields.

The following table identifies the electronic file changes.

Electronic File Changes

| Before | As of May 29, 2015 |
|---|---|
| <p>RS 360-366 Field Name: HOURLY WAGES Length: 7</p> <p>OPTIONAL – ENTER ONLY NUMERIC CHARACTERS. ENTER THE AMOUNT OF WAGES (DOLLARS & CENTS) WHICH ARE THE HOURLY WAGE AMOUNT. RIGHT JUSTIFY AND ZERO FILL.</p> | <p>RS 360-366 Field Name: HOURLY RATE Length: 7</p> <p>OPTIONAL – (BECOMES MANDATORY JANUARY 1, 2016) ENTER ONLY NUMERIC CHARACTERS. ENTER THE AMOUNT OF WAGES (DOLLARS & CENTS) WHICH ARE THE HOURLY WAGE AMOUNT. ZERO FILL. FORMAT: 3 DIGITS DOLLARS AND 4 DIGITS CENTS AND FRACTIONS OF CENTS. I.E. \$21.56 SHOULD BE “0215600” IF HOURLY RATE IS OVER \$999.9999 THEN ENTER ALL NINES. I.E. “9999999”</p> |
| <p>RS 367-372 Field Name: OES CODE Length: 6</p> <p>OPTIONAL – SEE: OCCUPATIONAL CODES DICTIONARY (OES/SOC) ON WWW.LAWORKS.NET</p> | <p>RS 367-446 Field Name: SOC CODE/JOB TITLE Length: 80</p> <p>OPTIONAL – (BECOMES MANDATORY JANUARY 1, 2016) ENTER EITHER 6 DIGITS STANDARD OCCUPATIONAL CLASSIFICATION (SOC) OR ENTER JOB TITLE DESCRIPTION. NO DASH OR DOT</p> |

| Before | As of May 29, 2015 |
|---|---|
| | ALLOWED IN SOC. |
| RS 373-487 Field Name: FILLER Length: 115 FILL WITH BLANKS. | RS 447-487 Field Name: FILLER Length: 41 FILL WITH BLANKS. |
| RA 003-011 Field Name: SECURED FILE TRANSFER PROTOCOL Length: 9 REQUIRED – SUBMITTER’S FEIN NUMBER | RA 003-216 Field Name: FILLER Length: 214 FILL WITH BLANKS. |

For more information, see <http://www.laworks.net/Downloads/UI/WageUploadInstructions.pdf>.

Files Updated

- Deltek.Vision.pyFormQuarterly.Client.dll
- Deltek.Vision.QTRMagMedia.Server.dll
- Deltek.Vision.ReportLabels.Server.dll
- pyrptFormQuarterlyFL.rdl

Other Applications Affected

Database Changes

System File Dependencies

2015 North Dakota Income Tax and Supplemental Tax Withholding

These are the updates for North Dakota:

- The withholding tables are updated.
- The supplemental tax rate decreases from 2.28% to **2.05%**.
- The amount of one withholding allowance increases from \$3,950 to **\$4,000**.

Files Updated

- Deltek.Vision.PayrollBO.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Software Issues Resolved

Accounting » Credit Card » Credit Card Reconciliation

Defect 521718: This issue applies if you use Deltek First Vision Essentials (Vision cloud-based product). You received an “Invalid column name ‘SecondaryAccountNumber.’” error message when you imported charges from the Credit Card Statement Reconciliation form.

Customers Impacted: This defect applies to Deltek First Vision Essentials 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.CreditCardReconciliation.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Billing » Invoice Template Editor

Defect 484578: The **Section Order** that was defined on the Sections tab of **Billing » Invoice Template Editor** did not display correctly on the actual invoice.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Select the Enable Pre-Invoices option on the Miscellaneous tab of **Configuration » Billing » General**.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingInvoice.Server.dll

Deltek.Vision.Report.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Connect for Microsoft Outlook

Defect 526072: This applies if you use Connect for Microsoft Outlook. You received an internal error and Connect for Microsoft Outlook would not synchronize if you configured Connect for Microsoft to use Contact email or Vendor email as a duplicate record check in **Configuration » General » Connect for Microsoft Outlook**. (You inserted **[Contacts.Email]** in the Contacts grid or **[Vendor.Email]** in the Vendors grid on the Connect for Microsoft Outlook Configuration form.)

Customers Impacted: This defect applies for Connect for Microsoft and Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

DelttekVision74GACU008.sql

Other Applications Affected

Database Changes

Updated an incorrect value in the FW_CFGInfoCenterFieldsData table that was causing the Connect for Microsoft Outlook error.

System File Dependencies

Configuration » General » Alerts

Defect 486123: When a Timesheet Approval was configured to alert a supervisor for a project, for example, but the project in the respective timesheet did not have an assigned supervisor, an error occurred when the timesheet was submitted: "The Timesheet Approval Process failed with message: Object Reference not set to an instance of an Object".

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Click **OK** and the timesheet will submit without further issue.

Additional Notes: None.

Files Updated

Delttek.Vision.Alerts.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Human Resources » Payroll

Defect 496985: When the **Print pay rates for hourly Employees** option was enabled on the Checks tab in **Configuration » Payroll**, the YTD Hours and YTD Amounts were not correct on payroll remittance stubs that were emailed to employees.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

EarningsHourly_Three.rdl

EarningsHourly_Two.rdl

Other Applications Affected

Database Changes

System File Dependencies

Proposals » Custom Proposals

Defect 502735: The following issue applies for a resume section of a custom proposal. On the Resume tab in Custom Proposals, when you selected an employee in the grid, clicked **Build Resume » Resume By Query w/Project Restriction**, and selected projects in the Project Lookup dialog box for the employee, this same set of projects displayed in the Project Lookup dialog box for the next employee for whom you selected projects. The Project Lookup dialog box returned the incorrect set of project records for subsequent employees added to the resume section.

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

Workaround Before Fix: On the Project Lookup dialog box, click **Search** again, and it will refresh the lookup list.

Additional Notes: None.

Files Updated

Deltek.Framework.Lookup.Client.dll

Deltek.Vision.Lookup.Client.dll

Deltek.Vision.CustomProposal.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting

Defect 520878: Due to an issue with rounding, the Project Planning Analysis, Office Earnings, and Rev Gen reports did not pick up correct ETC amount.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

DeltekVision74GACU008.sql

Deltek.Vision.RevenueGeneration.Server.dll

Deltek.Vision.ReportingResourcePlanning.Server.dll

Other Applications Affected

Database Changes

Updated the following database objects:

- PM\$tabTaskETC function
- RP\$rptTaskETC function
- rpCalcTPD stored procedure
- rpRptSummary stored procedure
- rpRptAnalysis stored procedure

System File Dependencies

Defect 530484: This applies if Deltek has provided you with custom programming and the installation package to install the custom programming. During the installation of custom programming, you received an error when custom reports were loaded.

Customers Impacted: This defect applies to Vision 7.3 and 7.4 and applies only if you use a custom installation package to install custom programming in Vision.

Workaround Before Fix: Reload the custom reports in Vision **Utilities » Reports Administration**.

Additional Notes: None.

Files Updated

Deltek.Framework.Report.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Text Editor

Defect 522049: When text was centered in the **Text Editor Description** field in Billing Terms, the text did not display as centered on the invoice.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

FrameworkReportSystemCode.xml

Other Applications Affected

Database Changes

System File Dependencies

Defect 522777: Double spaces were changed to single spaces when you closed the Text Editor or when you saved the contents of a memo field.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Framework.ControlDialogs.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Utilities » Advanced Utilities » Data Import

Defect 522113: When importing a file that included the **State** field, an error displayed if the file contained the State Description instead of the State Code. This impacted Clients, Vendors, Employees, Opportunities, Projects, Leads, PO Master Information, and Billing Terms Projects files.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Use the State Code instead of the State Description.

Additional Notes: None.

Files Updated

Deltek.Vision.ImportUtility.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Cumulative Update 07 — Released June 26, 2015

Software Enhancements

Project Management Workspace in iAccess

The Project Management Workspace in iAccess now requires an active Project Control or Accounting license in Vision. When one or both of these modules are in use, you can select the **Project Management Workspace** option on the iAccess tab of **Configuration» Security » Roles** to enable this workspace.

Files Updated

Deltek.vision.visionservices.server.dll

Deltek.vision.secroles.client.dll

Other Applications Affected

Database Changes

System File Dependencies

Software Issues Resolved

Time and Expense » Timesheet

Defect 525539: When timesheet special categories were not in use, opening a new timesheet and then attempting to open a previously saved timesheet resulted in the following error: "Object reference not set to an instance of an object."

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Open the saved timesheet prior to opening a new timesheet.

Additional Notes: None.

Files Updated

Deltek.Vision.Timekeeper.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

iAccess

Defect 527284: When there were user-defined drop-down fields or lookups with the same name in multiple grids, opening the Business Development Workspace in iAccess resulted in an error.

Customers Impacted: This defect applies to iAccess users with Vision 7.4.

Workaround Before Fix: None.

Additional Notes: To use the Business Development Workspace in the current version of iAccess, you must remove any grids that contain user-defined drop-down fields or lookups with the same name. This issue will be resolved in an upcoming release.

Files Updated

Deltek.Vision.VisionServices.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Cumulative Update 06 — Released June 12, 2015

Software Enhancements

Calendar/Activities

Activity Manager » Activities Grid

The following new columns were added to the Activities grid on the Activity Manager.

- **Vendor** — This column displays the vendor that is associated with the activity. Click the name to open the record in the current browser window or right-click the name and then click the **Open in new window** option to open the record in a separate browser window.
- **Vendor Contact** — This column displays the primary contact from the vendor that is associated with the activity. Click the name to open the record in the current browser window or right-click the name and then click the **Open in new window** option to open the record in a separate browser window.
- **Vendor Contact Bus. Phone** — This column displays the vendor contact's business phone number that is entered in the Contact Info Center. The **Contact** field was updated to **Client Contact** field and the **Contact Bus. Phone** field was updated to **Client Contact Bus. Phone**.

Files Updated

Delttek.Vision.InfoCenters.Client.dll

Delttek.Vision.VendorInfoCenter.Client.dll

globalTabSetup.xml

Other Applications Affected

Database Changes

System File Dependencies

Activity Manager » Activities Dialog Box

The Activities dialog box on the **Calendar/Activities » Activity Manager** application was renamed to Activity dialog box. On the Detail tab of the Activity dialog box, the following fields were added:

- **Vendor** — Use this field to enter a vendor that is associated with the activity. A lookup is available on this field that can be used to search for a vendor.
- **Vendor Contact** — Use this field to enter the contact person from the vendor. A lookup is available on this field that can be used to search for the vendor contact.
- **Bus. # (Vendor)** — This field displays the vendor contact's business phone number.

The **Primary Contact** field was also changed to the **Client Contact** field and the fields were organized more intuitively by grouping related fields. The new fields that were added and modified on the Activity dialog box are also available on the Activities grid on the Activity Manager form. With the new fields and field updates, the lookup function was also updated accordingly.

The client related search fields were appended with "client" to differentiate the client and vendor related search fields. New search fields were also added to the following lookup fields:

- All advanced lookup fields
- Vendor City
- Vendor Name
- Vendor Number
- Vendor State/Province
- Vendor Market
- Vendor Zip/Post Code
- Vendor Contact Bus. City
- Vendor Contact Bus. State
- Vendor Contact Bus. Zip/Post Code
- Vendor Contact First Name
- Vendor Contact Last Name
- Vendor Contact Middle Name
- Vendor Contact Preferred Name
- Vendor Contact Source
- Vendor Contact Status
- Vendor Contact Title
- Vendor advanced lookup field :
- Activity Completion Ind.
- Activity Notes
- Activity Owner Number
- Activity Start Date
- Activity Subject
- Activity Type

The View by Association grid of the Activities Filter dialog box on the **Calendar/Activities » Activity Manager** application was also updated to include Vendor and Vendor Contact under the Type of Association column. In addition, the Contact association type was changed to Client Contact.

Files Updated

Deltek.Vision.InfoCenters.Client.dll

Deltek.Vision.Lookup.Server.dll

Lookup_Activity.xml

Lookup_Vendor.xml

Other Applications Affected

Database Changes

The following updates were made:

- The Vendor and ContactIDForVendor columns were added to Activity and the Audit Trail triggers were updated for the Activity table.
- The Vendor and ContactIDForVendor to WorkflowActivity columns were added.

System File Dependencies

Deltek Toolbar in Microsoft Word

The following changes have been made to the Deltek add-in toolbar in Microsoft Word that you use to create merge templates for producing Vision custom proposals and merged documents. You access the Deltek toolbar by clicking the Add-Ins tab on the Word toolbar (if you have downloaded the Deltek merge macro (DeltekWordMacro.dot) to your workstation from Vision **Utilities » Download Merge Macro**).

New Fields and Renamed Fields

The following fields (merge codes) were added or renamed. To access these fields, click the **Insert Fields** icon on the Deltek toolbar, select an Info Center or **Activity Manager** in the Select Info Center dialog box, and select the new/renamed field on the Select <Info Center/Activity Manager> Merge Codes dialog box.

Activity Manager

- **Vendor** and **Vendor Contact** were added.
- **Contact** was renamed to **Client Contact**.

Opportunity Info Center

The following new fields were added:

- **Duration** — This field applies only for GovWin Capture Management and not Vision (even though it displays in Vision).
- **Master Contract**

Client Info Center

The following new fields were added:

- **HUB Zone**
- **8a**
- **Annual Revenue**
- **Employee Count**
- **Competitor**
- **Government Agency**

Vendor Info Center

The following new fields were added:

- **HUB Zone**
- **8a**

- **Market**
- **Annual Revenue**
- **Employee Count**

New Vendor Group Codes

The following group codes were added for vendors. To access these new fields, click the **Insert Fields** icon on the Deltek toolbar, select **Vendors** in the Select Info Center dialog box, and in the Select Vendors Merge Codes dialog box, open the **Group Codes** drop-down list.

New vendor group codes:

- **Activity Attendees Codes**
- **Activities Codes**
- **Activity Leads Codes**
- **Activity Contacts Codes**

New Activity Fields for the Activities Code Group Codes for Info Centers

The following activity fields were added to the Activities Code group code for Info Centers that have activities. To access these new fields, click the **Insert Field** button on the Deltek toolbar, select any Info Center in the Select Info Center dialog box that has activities, and select **Activities Codes** from the **Group Codes** drop-down list in the Select Merge Codes dialog box. The new fields display in the pane below the **Group Codes** field:

- **Activity Vendor: Name**
- **Activity Vendor Contact: First Name**
- **Activity Vendor Contact: Last Name**
- **Activity Vendor Contact: Middle Name**
- **Activity Vendor Contact: Suffix**

Files Updated

DeltekVisionMacro.dot

MergeCodes.xml

Other Applications Affected

Database Changes

System File Dependencies

Client, Lead, Marketing Campaign, Opportunity, Contact, and Project Info Centers

The following new fields were added to the Activities tab for the Client, Lead, Marketing Campaign, Opportunity, Contact, and Project Info Centers:

- **Vendor** — This column displays the vendor that is associated with the activity. Click the name to open the record in the current browser window or right-click the name and then click the **Open in new window** option to open the record in a separate browser window.

- **Vendor Contact**— This column displays the primary contact from the vendor that is associated with the activity. Click the name to open the record in the current browser window or right-click the name and then click the **Open in new window** option to open the record in a separate browser window.
- **Vendor Contact Bus. Phone** — This column displays the vendor contact's business phone number that is entered in the Contact Info Center. The **Contact** field was updated to **Client Contact** field and the **Contact Bus. Phone** field was updated to **Client Contact Bus. Phone**.

Files Updated

Deltek.Vision.Lookup.Server.dll

Deltek.Vision.CodeTableMaint.Client.dll

Deltek.Vision.VendorInfoCenter.Client.dll

Lookup_Vendor.xml

Other Applications Affected

Database Changes

System File Dependencies

Client Info Center

General Tab

The following fields were added to the General tab of the Client Info Center:

- **Competitor** — Select this option to indicate that this client acts as a competitor to your own firm.
- **Government Agency** — Select this option to indicate that this client is a government agency.
- **Annual Revenue** — This field displays the annual revenue of the client.
- **Employee Count** — This field displays the number of employees the client has.

Additional Info Tab

The following fields were added to the Additional Info Tab of the Client Info Center:

- **HUB Zone** — Select this option to indicate that the client qualifies for a Historically Underutilized Business (HUB) Zone.
- **8 (a)** — Select this option to indicate that the client qualifies for the small business status of 8 (a).

The lookups were also updated to make the new fields available as search criteria for applicable lookup fields.

Files Updated

Deltek.Vision.Lookup.Server.dll

Deltek.Vision.ClientInfoCenter.Client.dll

Lookup_Client.xml

Other Applications Affected

Database Changes

System File Dependencies

Opportunity Info Center

General Tab

The **Master Contract** field was added to the General tab of the Opportunity Info Center. Use the **Master Contract** field to select the master contract if the opportunity is work that your firm is competing for under an indefinite delivery/indefinite quantity contract (IDIQ) or similar "master" contract.

Files Updated

Deltek.Vision.Lookup.Server.dll

Deltek.Vision.OpportunityInfoCenter.Client.dll

Lookup_Opportunity.xml

Other Applications Affected

Database Changes

The following updates were made:

- The size of the CFGMasterContract.Description column was increased to 255.
- The CFGProjectTemplateData and CFGProjectTemplateDescriptions and the CFGProjectTemplateDescriptions view tables were added.

System File Dependencies

Vendor Info Center

Activities Tab

The new Activities tab was added to the Vendor Info Center. Use the Activities tab to schedule activities directly from vendor records that you are viewing.

General Tab

The following fields were added to the General tab of the Vendor Info Center:

- **Annual Revenue** — This field displays the annual revenue of the vendor.
- **Employee Count** — This field displays the number of employees the vendor has.
- **Market** — Select a market (type) for the vendor (for example, Commercial, Government, or Non-Profit).

Additional Info Tab

The following fields were added to the Additional Info Tab of the Vendor Info Center:

- **HUB Zone** — Select this option to indicate that the client qualifies for a Historically Underutilized Business (HUB) Zone.
- **8 (a)** — Select this option to indicate that the client qualifies for the small business status of 8 (a).

The lookups were also updated to make the new fields available as search criteria for applicable lookup fields.

Files Updated

Delttek.Vision.Lookup.Server.dll

Delttek.Vision.CodeTableMaint.Client.dll

Delttek.Vision.VendorInfoCenter.Client.dll

Lookup_Vendor.xml

Other Applications Affected

Database Changes

The Market column was added to the VE table.

System File Dependencies

Reporting

Calendar/Activity » Activity Manager Updates

Because vendor information is now included in the Activity Manager and on the Activities grids within the Info Centers, there were several new fields added to the Activity and Info Center reports. In addition, field labels within the reports were updated to differentiate between client and vendor information. Refer to the following sections for Activity and Info Center report updates.

Activity List Report

Updated Fields:

- **Client Name**
- **Client**
- **Contact**
- **Client Contact**
- **Phone**
- **Client Contact Bus. Phone**
- **Contact Title**
- **Client Contact Title**
- **Contact Email**
- **Client Contact Email**

- **Lead**
- **Primary Lead**

New Fields:

- **Primary Lead Bus. Phone**
- **Vendor**
- **Vendor Contact**
- **Vendor Contact Bus. Phone**

Activity Summary Report**Updated Fields:**

- **Old Field Name**
- **New Field Name**
- **Contact Name**
- **Client Contact Name**
- **Contact Title**
- **Client Contact Title**
- **Contact Phone**
- **Client Contact Phone**
- **Contact Fax**
- **Client Contact Fax**
- **Contact Mobile**
- **Client Contact Mobile**
- **Contact Home Page**
- **Client Contact Home Page**
- **Contact Pager**
- **Client Contact Pager**
- **Contact Email**
- **Client Contact Email**

New Fields:

- **Vendor**
- **Vendor Contact**
- **Vendor Contact Bus. Phone**

Info Center Reports with Activity Manager Updates

The following info center reports were updated with Activity Manager information: Client List, Client Summary, Contact List, Contact Summary, Employee List, CRM Employee Summary, Lead List, Lead Summary, Marketing Campaign List, Marketing Campaign Summary, Opportunity Forecast, Opportunity Hit Rate List, Opportunity List, Opportunity Summary, CRM Project Summary, Project List, and User-Defined Info Center.

Updated Fields:

- **Activities - Contact**
- **Activities - Client Contact**
- **Activities - Contact Bus. Phone**
- **Activities - Client Contact Bus. Phone**
- **Activities – Date** (Client Summary, Contact Summary, CRM Employee Summary, CRM Project Summary, and Project List reports only)
- **Activities - Start Date** (Client Summary, Contact Summary, CRM Employee Summary, CRM Project Summary, and Project List reports only)
- **Old Field Name** (Client List report only)
- **New Field Name** (Client List report only)

New Fields:

- **Activities - Vendor**
- **Activities - Vendor Contact**
- **Activities - Vendor Contact Bus. Phone**

Files Updated

Activity List.rdl

Client List.rdl

Contact List.rdl

Employee List.rdl

Lead List.rdl

Marketing Campaign List.rdl

Opportunity Forecast.rdl

Opportunity List.rdl

Project List.rdl

UDIC List.rdl

Deltek.Vision.Report.Server.dll

Deltek.Vision.ReportLabels.Server.dll

Deltek.Vision.ReportingUDIC.Client.dll

ReportGroup_Client.xml

ReportGroup_Contact.xml

ReportGroup_Employee.xml

ReportGroup_Leads.xml

ReportGroup_MarketingCampaign.xml

ReportGroup_Opportunity.xml

ReportGroup_Project.xml

ReportGroup_UDIC.xml

Other Applications Affected

Database Changes

System File Dependencies

Opportunity, Client, and Vendor Reports

The following fields have been added to opportunity, clients and vendor reports as follows:

- **HUB Zone** — This column contains Y or N (Yes or No) to indicate whether or not the vendor or client is part of the HUB Zone program for small businesses.
- **8 (a)** — This column contains Y or N (Yes or No) to indicate whether or not the vendor or client is part of the 8 (a) business development program for small and disadvantaged businesses.
- **Annual Revenue** — This column displays the annual revenue of the vendor or client.
- **Employee Count** — This column displays the number of employees of the vendor or client.
- **Market** — This column displays the general market in which the vendor or client participates.
- **Competitor** — This column contains Y or N (Yes or No) to indicate whether or not the client is a competitor.
- **Government Agency** — This column contains Y or N (Yes or No) to indicate whether or not the client is a government agency.

These fields, except the **Market**, **Competitor** and **Government Agency** fields, were added on the Grouping/Sorting tab of following Opportunity reports:

- Vendor List
- CRM Vendor Summary
- Vendor Audit
- Vendor Audit Detail
- Vendor Mailing Label
- Cash Requirements
- Vendor Summary
- Voucher Ledger
- Voucher Schedule

These fields, except the **Competitor** and **Government Agency** fields, were added on the Columns tab of following Opportunity reports:

- Vendor List
- CRM Vendor Summary

Client Reports

Only the **Annual Revenue** and **Employee Count** fields were added on the Grouping/Sorting tab of following Client reports:

- Client List

- Client Summary
- Client Audit
- Client Audit Detail
- Client Mailing Label
- Client Employee Assignment and Activity

These fields, except the **Market** field, are added on the Columns tab of following Client reports:

- Client List
- Client Summary

Files Updated

ReportGroup_Vendor.xml

ReportGroup_AccountsPayable.xml

Deltek.Vision.ReportingVendor.Server.dll

Deltek.Vision.ReportLabels.Server.dll

Vendor List.RDL

Deltek.Vision.Report.Server.dll

Deltek.Vision.Lookup.Server.dll

Deltek.Vision.ReportingClient.Server.dll

Client List.rdl

ReportGroup_Client.xml

Other Applications Affected

Database Changes

System File Dependencies

Opportunity Reports

The **Master Contract** and **Duration** fields are now available on the Grouping/Sorting and Columns tabs of following Opportunity reports:

- Opportunity List
- Opportunity Summary
- Opportunity Audit
- Opportunity Audit Detail
- Opportunity Hit Rate
- Opportunity Forecast
- Opportunity Service Estimate
- Opportunity Fee Estimate

Files Updated

ReportGroup_Opportunity.xml
Deltek.Vision.ReportingOpportunity.Server.dll
Deltek.Vision.ReportLabels.Server.dll
Opportunity List.rdl
Opportunity Forecast.rdl
Deltek.Vision.Report.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Utilities

Advanced » Search and Replace

In **Utilities » Advanced Utilities » Search and Replace**, the following fields have been added to the drop-down list in the **Columns to Update** field:

Opportunities Info Center:

- **Opportunity.Duration**— This field applies only for GovWin Capture Management and not Vision (even though it displays in Vision).
- **Opportunity.MasterContract**

Clients Info Center:

- **CL.AnnualRevenue**
- **CL.Competitor**
- **CL.EightA**
- **CL.Employees (for Employee Count)**
- **CL.Hubzone**
- **CL.GovernmentAgency**

Vendors Info Center:

- **VE.AnnualRevenue**
- **VE.EightA**
- **VE.Employees (Employee Count)**
- **VE.Hubzone**
- **VE.Market**

Files Updated

Other Applications Affected

Database Changes

System File Dependencies

Advanced » Key Formats and Key Conversions

When you use the Key Formats and Key Conversions utilities for vendor or contact records, all activities that are associated with the vendor or contact remain associated with the record through the format change or conversion.

Files Updated

sp_insertKeyConvertDriver.sql

Other Applications Affected

Database Changes

The insertKeyConvertDriver procedure was updated.

System File Dependencies

VisionXtend

The following new fields in Vision have been added to the schema in VisionXtend:

Opportunity Info Center:

- **Duration** — This applies for GovWin Capture Management only.
- **MasterContract**

Client Info Center:

- **Hubzone**
- **EightA** (for 8(a))
- **AnnualRevenue**
- **Employees** (for Employee Count)
- **Competitor**
- **GovernmentAgency**

Vendor Info Center:

- **Hubzone**
- **EightA** (for 8 (a))
- **Market**
- **AnnualRevenue**
- **Employees** (for Employee Count)

Project Info Center: This applies only for Ajera CRM, not Vision or GovWin CM.

ProjectTemplate (for Ajera Project Template)

Files Updated

ValidationInfo.xml

Clients_Schema.xsd

Opportunities_Schema.xsd

Vendors_Schema.xsd

Other Applications Affected**Database Changes****System File Dependencies****iAccess for Vision (Navigator)**

The “Navigator” product name was changed to “iAccess for Vision.” To support this change, all labels and buttons within the Vision application that referenced “Navigator” were changed to “iAccess.”

Files Updated

deltek.framework.images.client.dll

deltek.vision.DlgCreateProjectFromPlan.client.dll

deltek.vision.FrameUI.client.dll

deltek.vision.GeneralSystemSetup.client.dll

deltek.vision.keyCvt.client.dll

deltek.Vision.reportLabels.server.dll

deltek.vision.ResourceManagement.client.dll

deltek.vision.ResourcePlanning.client.dll

deltek.vision.RPCFGUtil.client.dll

deltek.vision..rpSreadVar.client.dll

deltek.vision.secRoles.client.dll

deltek.vision.setupCustomTabs.client.dll

deltek.vision..ReportingConfiguration.client.dll

deltek.vision.VisionServices.server.dll

Other Applications Affected**Database Changes****System File Dependencies**

Security

iAccess for Vision includes a new Business Development Workspace. Access rights for this workspace are set up in **Configuration » Security » Roles** as follows:

- **iAccess tab** — Select the Business Development Workspace checkbox to allow the role to access the Business Development Workspace in the iAccess for Vision application. This option is automatically selected when CRM is the defined Type of Role on the General tab of Role Security. When Business Development Workspace is selected, the option is also included on the Role Summary Report.
- **Record Access tab** — Select the Allow access to records in iAccess checkbox to allow the role to access records in the iAccess application. This option is available if you own the Vision CRM module.

In addition, the Role Summary report now includes the new Business Development Workspace option when it is in use.

Files Updated

delttek.vision.secroles.client.dll

Role Summary.rdl

RoleNavigatorSection.rdl

Delttek.Vision.ReportLabels.Server.dll

Delttek.Vision.ReportingConfiguration.Client.dll

Other Applications Affected

Database Changes

The NavCRMWorkspace column was added to the SE Table.

System File Dependencies

User Defined Components

Vision **Configuration » User Defined Components** now supports the Business Development Workspace in iAccess. When you select the **Clients, Opportunities, Vendors, or Contacts** options from the **Applications** drop-down, the Tabs tab displays a new iAccess Business Development Space grid, and the Custom Fields and Custom Grids tabs display new fields that allow you to customize the tabs and fields that will display within the Business Development Workspace.

Files Updated

Delttek.Framework.SetupCustomTabs.Client.dll

Delttek.Vision.SetupCustomTabs.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Software Issues Resolved

Configuration

Approvals » Approvals Configuration

Defect 495833: This issue applies if you use approval workflows for approving records in the Purchasing or Inventory applications. You received an “Assignment for approval step x could not be created” error message via a workflow error email when you assigned an approval step to a buyer’s supervisor or requestor’s supervisor in either of the follow situations:

- For approval workflows for purchase orders: In **Configuration » Approvals » Approvals Configuration**, you entered **Buyer’s Supervisor** in the **Assigned To** field in the Approval Steps grid on the Workflow tab.
- For approval workflows for purchase requisitions, request for price quotes, and inventory item requests: In **Configuration » Approvals » Approvals Configuration**, you entered **Requestor’s Supervisor** in the **Assigned To** field in the Approval Steps grid on the Workflow tab.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Framework.ApprovalItems.Common.dll

Deltek.Framework.Workflow.Server.dll

Deltek.Vision.Approvals.Common.dll

Deltek.Vision.Approvals.Server.dll

Deltek.Vision.ApprovalsConfig.Common.dll

Deltek.Vision.ApprovalsEngine.Server.dll

Deltek.Vision.ApprovalWriteHistory.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 518906: When you tried to save an approval workflow in **Configuration » Approvals » Approvals Configuration**, you received the following error: "Invalid object name 'ApprovalAssignmentHierarchy'."

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Framework.Workflow.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 520111: When you tried to submit a request for price quote in **Purchasing » Request for Price Quote** or an item request in **Inventory » Item Requests**, you received the following error: "The multi-part identifier 'POPRMASTER.REQUESTEDBY' could not be bound." This occurred only if the approval workflow for requests for price quote or item requests (set up in **Configuration » Approvals » Approvals Configuration**) had an approval step that was assigned to the requester's supervisor (**Requester's Supervisor** is selected in the **Assigned To** field in the Approvals Steps grid on the Workflow tab on the Approvals Configuration form).

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Workflow.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

General » User Defined Tabs

Defect 499392: This issue applies if you use Vision and iAccess (formerly Navigator) or Touch CRM. After you created a user-defined tab in Vision (**Configuration » General » User Defined Components**) that was currently in use in iAccess or Touch CRM, you were allowed to delete the user-defined tab. You should not have been able to delete it.

Customers Impacted: This defect applies for Vision 7.4 if you use iAccess (formerly Navigator) or Touch CRM for Vision.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.SetupCustomtabs.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 502143: In **Configuration » General » User Defined Components**, when you added user defined tabs that can be accessed in iAccess (formerly Navigator) or Touch CRM, you received an error.

Customers Impacted: This defect applies to Vision 7.4 if you use iAccess or Touch CRM for Vision.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.SetupCustomTabs.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Dashboard

Defect 520147: This applies if you use Vision Performance Management, Tableau Server 8.2, and Vision 7.4. When Tableau Server is configured using local authentication and SSL, you received a “cannot generate trusted ticket” error when you viewed Vision Performance Management dashparts. This was due to the recent change made in Tableau Server 8.2. When you used SSL in Tableau Server versions earlier than 8.2, the request to Tableau Server to generate the trusted ticket that was made over an HTTP connection was redirected to HTTPS. In Tableau Server 8.2, the redirect no longer occurs, which caused the error. Previously Vision sent everything as HTTP regardless of HTTP/HTTPS configuration. Now Vision sends HTTP for HTTP and HTTPS for HTTPS.

Customers Impacted: This defect applies if you use Vision Performance Management, Tableau Server 8.2, and Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.Dashboard.Server.dll

Delttek.Framework.PerformanceDashboard.Server.dll

Delttek.Framework.PerformanceDashboard.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 520458: When a field from a User-Defined Info Center was hidden or locked in the Screen Designer, the Vision Dashboard would not load.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Dashboard.Client.dll

Deltek.Vision.UDIC.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

iAccess (Navigator)

Defect 484324: When a Resource Planning condition generated an email or dashboard alert that included an iAccess hyperlink, clicking the hyperlink resulted in an error.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Alerts.Server.DLL

Deltek.Vision.Globals.Server.DLL

Other Applications Affected

Database Changes

System File Dependencies

Defect 486553: When a picture was uploaded and saved in the Project Info Center and Opportunity Info Center, the Modification Date was not updated. This resulted in an old image displaying in iAccess.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.EmployeeInfoCenter.Server.dll

Deltek.Vision.OpportunityInfoCenter.Server.dll

Deltek.Vision.ProjectInfoCenter.Server.dll

Other Applications Affected

Database Changes

The VendorPhoto table was added.

System File Dependencies

Installation

Defect 518973: After upgrading Vision, you received the error: "Parameter 'PreInvoice' does not exist on this report." when you previewed Billing invoices.

Customers Impacted: This applies to Vision 7.4 and Deltek First Vision Essentials 7.4.

Workaround Before Fix: Reload the reports to your Vision report server using Vision **Utilities » Report Administration**.

Additional Notes: None.

Files Updated

DeltekVisionCMD.exe

Deltek.Framework.Report.Server.dll

Deltek.Vision.Report.Server.dll

Other Applications Affected

Changes

System File Dependencies

Planning

Defect 503957: When a plan did not have any expense resource rows, the **Actual Direct Expense** fields displayed a zero amount on the Cost Analysis and Billing Analysis tabs.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ResourcePlanning.Client.dll

DeltekVision74GACU006.sql

Other Applications Affected

Database Changes

The following procedure was updated:

pmGetRPPlan

System File Dependencies

Reporting

Defect 502209: When the **Only List Activities that Match Selections** option was selected on the General tab of the **Employee List Options** dialog box in **Reporting » Employee » Employee List**, the Employee List report was blank when it was generated.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Do not select the **Only List Activities that Match Selections** option to filter the results.

Additional Notes: None.

Files Updated

Deltek.Vision.Report.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Transaction Center

Defect 503036: If you use multiple currencies in Vision and you tried to post an Invoice transaction file that had gain or loss entries in it (due to currency exchange rate differences), the posting process hung and would not complete. This applies only for invoice transaction files created in Transaction Entry, not for invoice files created in Interactive Billing or Batch Billing.

Customers Impacted: This defect applies to Vision 7.2, 7.3, and 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Posting.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Transaction Entry and Transaction Posting

Defect 479344: When the **Unit Table** field on the Accounting tab of the Project Info Center was set to <DEFAULT>, the Unit Table in Unit Transaction Entry did not automatically populate with<DEFAULT>.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: You must manually select the <DEFAULT> unit table in Unit Transaction Entry.

Additional Notes: None.

Files Updated

Deltek.Vision.DataEntryGlobals.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Utilities

Advanced Utilities » Data Import

Defect 521781: When importing contacts linked to clients, if validation indicated an error for a duplicate record, the error report displayed the Client ID/Number. The error report now displays the Client Name.

Customers Impacted: This defect applies to clients using Deltek CRM 2.1 with Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ImportUtility.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 521782: An error message displayed when contacts where a State description was used instead of the State Code.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Use the State Code in the file instead of the Description.

Additional Notes: None.

Files Updated

Deltek.Vision.ImportUtility.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Cumulative Update 05 — Released May 15, 2015

Software Issues Resolved

Accounting » Accounts Receivable » Invoice Review

Defect 485464: When you entered a client on the Invoice Review form, you had to click **Refresh** for the client's information to populate in the grid.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ARReview.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Billing

Defect 501243: This issue applies if your Vision report server is located in a different time zone than some or all of your Vision users' machines. The time stamp on the Billing Backup report displayed the time based on the time zone of the Vision report server instead the time zone of a user's client machine.

Customers Impacted: This applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingInvoice.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Info Center » Opportunities

Defect 499294: In Screen Designer for the Opportunity Info Center, when you moved fields from one standard tab to the Competition tab, the fields were now missing from the Opportunity Info Center. In **Configuration » User Defined Components**, the tab that was now referenced for the missing fields was "ultratabpagecontrol1."

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.OpportunityInfoCenter.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Planning

Defect 500559: When a plan had multiple mapped projects, the overhead cost calculation was incorrect because the overhead was not combined for all mapped projects.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ResourcePlanning.client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 502224: When a Plan with a Task Dependency relationship had a parent row that was a predecessor or successor to any other row, the invalid relationship would result in an error. This has been fixed so the plan is now loaded on the Schedule tab of Project Planning but does not include the invalid dependency relationships.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ResourcePlanning.Client.DLL

Other Applications Affected

Database Changes

System File Dependencies

Planning » Project Planning

Defect 264697: When shifting dates on the Labor tab of Project Planning for a plan that had assigned resources, the **Comp.** amount did not move to accommodate the change in dates.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ResourcePlanning.Client.DLL

Deltek.Vision.ResourcePlanning.Data.Client.DLL

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Project Planning

Defect 489600: When a calculated field was created for the Labor Resource Forecast report using the **[Total Monthly Plan Hours]** field, the following error occurred:
Invalid field '[Plan Hours Beyond]' type for calculation. Text [fields] can only be used in conditions. They cannot be used in calculations.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Include the fields in the calculation as report columns and then export to Excel to create the calculated field.

Additional Notes: None.

Files Updated

Resource Planning Forecast.rdl

Other Applications Affected

Database Changes

System File Dependencies

Text Editor

Defect 500834: When you right-clicked a misspelled word that was similar to a word that was added to the dictionary, you received an error.

Customers Impacted: This defect applies to Vision 7.3 and 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

tx21_bmp.flr

tx21_css.dll

tx21_doc.dll

tx21_dox.dll

tx21_gif.flr

tx21_htm.dll

tx21_ic.ini

tx21_jpg.flr

tx21_pdf.dll

tx21_png.flr

tx21_rtf.dll

tx21_tif.flr

tx21_xml.dll

TXDocumentServer.dll

TXDocumentServer.Windows.Forms.dll

txic.dll

txkernel.dll

txpdf.dll

TXSpell.dll

TXSpell.Windows.Forms.dll

TXTextControl.dll
TXTextControl.Server.dll
TXTextControl.Windows.Forms.dll
txttools.dll
TXSpell.resources.dll
TXTextControl.resources.dll

Other Applications Affected**Database Changes****System File Dependencies**

Defect 500837: The font and size that are specified in configuration are not honored when you insert a new line in the Text Editor dialog box.

Customers Impacted: This defect applies to Vision 7.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

FrameworkReportSystemCode.Xml
Deltek.Framework.ExternalReferences.Client.dll
Deltek.Framework.ControlDialogs.Client.dll

Other Applications Affected**Database Changes****System File Dependencies****Time and Expense » Timesheet**

Defect 501241: This issue applies if your Vision report server is located in a different time zone than some or all of your Vision users' machines. The time stamp on the Detailed Timesheet report displayed the time based on the time zone of the Vision report server instead the time zone of a user's client machine.

Customers Impacted: This applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Timesheet.rdl

Other Applications Affected

Database Changes

System File Dependencies

VisionXtend

Defect 484322: This applies if you use VisionXtend. The new columns that were added in Vision 7.3 to the Contract Details table were missing from the API schema, which prevented the columns from being updated and inserted in Vision.

Customers Impacted: This defect applies to Vision 7.3 and 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Projects_Schema.xsd

Other Applications Affected

Database Changes

System File Dependencies

Cumulative Update 04 — Released April 17, 2015

Software Enhancements

Upgrading Custom Reports in Your Vision Database to the Latest RDL Schema

On the Custom Reports tab in **Utilities » Report Administration**, a new **Upgrade** option has been added to the toolbar of the Load Custom Reports grid. Use this option to upgrade custom reports to the Microsoft SQL Server Reporting Services RDL 2010 schema that is the only schema that Vision 7.4 supports. This option applies only if your custom reports are already saved in your Vision 7.4 database and only for custom reports that have an RDL 2008 schema. The upgrade process opens the report, upgrades the report schema, resaves the report in the Vision database, and uploads the report to the Vision report server.

The new **Upgrade** option is different from the **Apply Schema Update to Customer Report File** section on the Custom Reports tab in the Report Administration utility. The **Apply Schema Update to Customer Report File** section allows you to upgrade the RDL schema from RDL 2008 to RDL 2010 for custom reports that are stored on a local machine and they are **not** yet saved in your Vision database.

To upgrade custom reports that are saved in your Vision 7.4 database with an RDL 2008 schema to the RDL 2010 schema, complete the following steps:

1. From the Vision Navigation menu, click **Utilities » Report Administration**.
2. On the Report Administration form, click the Custom Reports tab.
3. On the Custom Reports tab, click the **Upgrade** option on the toolbar of the Load Custom Reports grid.
 - The **Upgrade** option displays on the toolbar only if you have a saved custom report in the Vision database.
 - If all your existing custom reports already use the latest RDL 2010 schema, you receive the following message: "All existing custom reports stored in your database are already using the latest schema."
4. Click **Yes** on the dialog box that says: "This will upgrade all existing custom reports currently stored in your database to the latest schema. Would you like to continue?" This starts the upgrade.
 - During the upgrade, Vision backs up the custom reports that are saved in the Vision application server's Report\Backup folder.
 - When the upgrade finishes, you receive the following message: "All custom reports have been successfully upgraded to the latest schema."
 - A log file—**RDLProcessing.log**—is saved in the Vision application server's Report\Backup\<database name> folder. Check the log file for any errors.

For more information, see the *Delttek Vision 7.4 Custom Reports and Microsoft SQL Server Reporting Services* guide.

Files Updated

Deltek.Framework.ReportAdministration.Client.dll

Deltek.Framework.Report.Server.dll

DeltekVisionCMD.exe

Performance Management

The Configuration tab in **Configuration » General » Performance Management** was enabled for users of the Deltek First Vision Essentials cloud version of Vision. The Configuration tab is now disabled for users of the Deltek First Vision Essentials cloud version of Vision.

Files Updated

Deltek.Framework.PerformanceDashboard.Client.dll

Software Issues Resolved

Accounting » Accounts Payable » Create Voucher from PO

Defect 489193: When you posted a voucher in Create Voucher from PO, you received an error message and the voucher did not post if a line item entered for a purchase order had its cost distribution split between more than one project.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Set the cost distribution to only one project per line item/row. Create multiple item rows for the same item so 100% of that row is for one project.

Additional Notes: None.

Files Updated

Deltek.Vision.Posting.Server.dll

Deltek.Vision.PORoutines.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Billing

Defect 485652: This issue applies if you **do not** have invoice approvals enabled and you have percent complete or cumulative units fee type billing for a project. The **Prior Fee Billing** field on the Fees tab in Billing Terms was not updated after invoices were accepted.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Enable invoice approvals using the default approval process that is provided by Vision. You do not have to assign the default approval process to any project's billing terms. You only need to enable the feature.

Additional Notes: None.

Files Updated

Deltek.Vision.Billing.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 486067: When the **Hide Detail** check box was selected on the Billing Phase Grouping dialog box on the Fees tab of **Billing » Billing Terms**, the current fee billing of each phase group was copied from the previous fee billing.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Edit the fee directly in Microsoft Word.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingInvoice.Server.dll

InvoiceFee.rdl

Other Applications Affected

Database Changes

System File Dependencies

Defect 478691: When a project's expense or consultant terms (on the Exp/Con/Unit tab in Billing Terms) had a multiplier and the terms also had the **Show Purchase Order Line Item Detail** check box selected, but did **not** have the **Show Multiplier** check box selected, Billing invoices displayed the correct billed amount, but the unit rate on the invoice was not updated to reflect the multiplied amount.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Billing.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Billing » Invoice Approvals

Defect 485196: The contact and client names were not showing on a billing invoice if you updated fees for the invoice in the Invoice Approvals application.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Make any change to billing terms in Interactive Billing and the invoice will correct itself. Or, use Interactive Approvals to update fees.

Additional Notes: None.

Files Updated

Deltek.Vision.InvoiceApprovalSummary.Client.dll

Deltek.Vision.Billing.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Billing » Interactive Billing

Defect 478692: For purchase order line items in **Billing » Interactive Billing**, you could modify the quantity of an item but not the unit price. This was changed to allow modification of quantity and unit price, both of which will then display on the invoice.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.interactiveBilling.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Approvals » Approvals Configuration

Defect 474661: Some scheduled alerts (email and dashboard) were not sent for approval workflow steps if you entered a language for an alert (in the **Language** field in the Step Actions grid on the Workflow tab in Approvals Configuration). None of the French Canadian scheduled alerts were sent for purchase orders. None of the Spanish scheduled alerts were sent for inventory item request. No past due notification were sent for any of the applications for any language, except for purchase orders in the French European language.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Framework.Workflow.Server.dll

Deltek.Vision.ApprovalsEngine.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Organization » Individual

Defect 484818: You could enter not duplicate approval roles on the General tab of **Configuration » Organization » Individual**. This restriction has been removed. However, if you have duplicate approval roles for an organization, Vision will not allow you to use the same employee for the role.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.OrgIndividual.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration » Workflow » Scheduled Workflows

Defect 496083: Conditions for a scheduled workflow for approval workflows were removed in the Scheduled Workflows grid on the Scheduled Workflow form in **Configuration » Workflow » Scheduled Workflows** if an approval workflow had more than one reminder notification entered for it on the Workflow tab in **Configuration » Approvals » Approvals Configuration**. Conditions were also removed in Scheduled Workflows Configuration if an existing approval workflow with only one reminder notification was edited by adding additional reminder notifications.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Add only one reminder notification for an approval workflow. If you have existing approval workflows with more than one reminder notification, delete all scheduled notification and save the change. Then add back the scheduled notifications, but add only one reminder notification.

Additional Notes: None.

Files Updated

Deltek.Framework.ApprovalItems.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Installation

Defect 484822: You could only configure the credit card **Status** field as **Active** in **Configuration » Accounting » Credit Cards**. The **Dormant** option was not available.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

DeltekVision74GACU004.sql

Other Applications Affected

Database Changes

If Vision detects incorrect data in the CFGCreditCardStatusData and CFGCreditCardStatusDescriptions tables, the default data is automatically reloaded.

System File Dependencies

Login/Off

Defect 487356: When you opened Vision 7.4 for the first time, you were unable to enter your user ID and password in the Vision login screen if the **Automatically Check Windows Authentication Check Box in Vision Login Screen** check box was selected in the Vision Weblink utility. The **User ID** and **Password** fields were empty and not enabled.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Clear and then reselect the **Windows Authentication** check box in Vision login screen. The **User ID** field will populate, and you can enter your password.

Additional Notes: None.

Files Updated

Deltek.Framework.Frame.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Mobile Time

Defect 488252: In Touch Time and Expense, you received the following error message "There was no response from the server. Need to refresh the application." under the following conditions:

- You opened a period timesheet in Time and clicked the + button to add a second project to the timesheet.
- The project had few phases (work breakdown structure level 2) and many tasks (work breakdown structure 3).

Customers Impacted: This defect applies to Deltek Touch version 1.3.3.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.VisionServices.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Planning

Defect 486408: When shifting dates on the Labor tab of Project Planning for a plan that had no assigned resources, the compensation related amounts did not move to accommodate the change in dates.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ResourceGlobals.Client.dll

Deltek.Vision.ResourcePlanning.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 485233: When trying to budget resources on the Labor tab of Project Planning, the plan did not automatically calculate the planned cost and/or planned bill. The issue occurred with both generic and named resources.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Click the **Refresh Rates** option for Labor Cost and Labor Billing on the Rates tab of Project Planning.

Additional Notes: None.

Files Updated

Deltek.Vision.ResourcePlanning.Data.Client.DLL

Other Applications Affected

Database Changes

System File Dependencies

Proposals » Custom Proposals

Defect 482304: When attempting to merge a custom proposal template with very long text (for example, a 70+ page document), the following errors occurred:

- The record you are trying to save has been updated by another user since you first selected it. In order to save your changes, you must re-select the record and make your changes again.
- The underlying connection was closed: A connection that was expected to be kept alive was closed by the server.
- Object reference not set to an instance of an object.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.MergeBO.Common.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 483765: When merging data with custom proposals, carriage returns and hard returns displayed.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.MergeBO.Common.dll

Other Applications Affected

Database Changes

System File Dependencies

Purchasing

Defect 474169: Alerts and notifications for approval workflows could be sent a day earlier or later than expected, or some users could receive them on different days. This was possible if users accessed Vision from a workstation that was in a different time zone than the Vision application server.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Framework.Workflow.Server.dll

Deltek.Vision.Approvals.Server.dll

Deltek.Vision.ApprovalsEngine.Server.dll

Deltek.Vision.Workflow.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Purchasing » Purchase Orders

Defect 485327: This issue applies if you:

- Set up approval workflows in **Configuration » Approvals » Approvals Configuration** to approve records in the Purchasing application.
- Set up conditions for approval workflow steps that require Vision to skip to the next step when a step's condition is not met.

During the approval process for a Purchasing record, if the conditions for approval steps one and two were not met, Vision should have skipped to step 3, but it did not. The approval process remained in step 2, and the step 2 approver was assigned to approve the record.

IMPORTANT CU INSTALLATION INSTRUCTIONS: After you install the CU 04 software: In **Configuration » Approvals » Approvals Configuration**, you must edit and save any approval

workflows with steps that have conditions that required Vision to skip to the next step when a step's conditions are not met. Make any small change to the approval workflow, such as changing the entry in the **Default Due Date (Number of Days after Creation Date)** field on the General tab of the Approvals Configuration form. After you save the change, any erroneous entries for the approval process in **Configuration » Workflows » User Initiated Workflows** are fixed. Then edit and save the approval workflows again to reverse the small change you made.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: In **Configuration » Approvals » Approvals Configuration**, edit any approval workflows that have steps with conditions that skip to the next step when the conditions are not met. In the Approval Steps grid on the Workflow tab, change the entry in the **Action if Conditions Not Met** field from **Skip to Next Step** to **Approve Step**. For approvals that begin after you make these changes, Vision will automatically approve the steps for which the conditions are not met and move past these steps. However, any alerts that you set up for the approval steps with the conditions will be sent, even though you want those steps skipped completely (with no alerts sent).

Additional Notes: None.

Files Updated

Deltek.Framework.ApprovalItems.Client.dll

Deltek.Framework.Workflow.Server.dll

Deltek.Vision.ApprovalsEngine.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Purchasing » Purchase Requisitions

Defect 485295: This issue applies if you have an approval workflow for purchase requisitions whose final step has a condition that is configured to approve the step if the condition is not met. When the last step of the approval process for a purchase requisition was not met, the state correctly changed to Approved, but the status remained Submitted. The approval process could not complete.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: In Approvals Configuration, for the final step of the purchase requisitions approval workflow, select **Mark as Final Approved** in the **Action if Condition Not Met** field in the Approval Steps grid on the Workflow tab. An approval alert will not be triggered for this step if the condition is not met, so you must insert a Completed Notification action in the Step Actions grid for the final step of the workflow and make the notification look like an approval alert.

Additional Notes: None.

Files Updated

Deltek.Vision.Approvals.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting

Defect 487103: After you upgraded to Vision 7.3, some reports that you had saved as favorites displayed HTML tags for memo fields.

The reports are:

- Client List
- Contact List
- Contract Management
- Employee List
- Lead List
- Marketing Campaign List
- Opportunity Forecast
- Opportunity List
- Project Earnings
- Project List
- Vendor List

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Recreate the saved favorite reports.

Additional Notes: None.

Files Updated

Deltek.Vision.Globals.Common.dll

Other Applications Affected

Database Changes

System File Dependencies

Text Editor

Defect 486060: When using **Time & Expense » Timesheet**, an error was encountered when the window size of Vision is too small to display the **Comment** memo field. Because the **Comment** memo field automatically resizes to a width that is too narrow while trying to fit in the Vision window.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Before using **Time & Expense » Timesheet**, resize the Vision window wider so that the **Comment** memo field has enough space to be displayed with a wider size.

Additional Notes: None.

Files Updated

Deltek.Framework.ExternalReferences.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Time and Expense » Timesheet

Defect 495401: This applies if you use the French (Canada) language in Vision. Project, client, and labor code information in the section in the lower left corner of a timesheet was truncated and not completely visible due to narrow field widths.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Timekeeper.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Cumulative Update 03 — Released March 13, 2015

Software Enhancements

Info Center List Reports

A new **Only List <xxxxx> That Match Selections** check box was added to the General tab of the options dialog box for the following Info Center list reports:

- Account List
- Client List
- Contact List
- Employee List
- Leads List
- Marketing Campaign List
- Opportunity List
- Opportunity Hit Rate List
- Project List
- Text Library List
- Vendor List
- UDIC List

This check box applies for the grid that you select in the **Grid Type** field to the left of the check box. The name of the check box matches the grid that you select in the **Grid Type** field. For example, for the Employee List report, when you select **Licenses** in the **Grid Type** field, the name of the check box is **Only List Licenses That Match Selections**.

When you select this check box, the report will include only the records that match the advanced search criteria that you enter in the record lookup dialog box for the grid field. In addition, the grid columns in the report will display only the grid field data that matches the advanced search criteria, instead of displaying all the different entries in the grid field for a record.

For example, if you want a list of all the employees who have one specific type of professional license and you want to see only that one type of license listed on the report, you must select the new check box. If you do not select the check box, the report will list only the employees who have the one type of license, but the report will list all the different licenses that each employee has.

Example:

You want to see a list of all active employees that have a Registered Architect license and you want to see only **Registered Architect** in the **License** column of the report. (You enter an employee's licenses in the License grid on the Experience tab in the Employee Info Center.)

1. From the Navigation menu, click **Reporting » Employee**.
2. On the Employee Reporting form, click in the **Options** field for the Employee List report.
3. On the General tab of the Employee List Options dialog box, enter **Licenses** in the **Grid Type** field, and select the **Only List Licenses That Match Selections** check box.

If you do not select the check box, the report will include only the employees with a Registered Architect license type. However the report will list all the license types an employee has.

4. On the Columns tab of the Employee List Options dialog box, select the **Licenses - License** column, and click **Apply**.
5. On the Employee Reporting form, click the Search icon in the **Selection** field for the Employee List report.
6. In the Employee Lookup dialog box, select **Advanced** in the **Display Type** field.
7. In the Search Criteria grid, enter a row for each of the following criteria and click **Apply**:
 - **Search Field** = Status, **Operator** = Equals, and **Search List** = Active
 - **Search Field** = License, **Operator** = Equals, and **Search List** = Registered Architect
8. Preview or print the report.

Only employees who have a Registered Architect license are included on the report. Only **Registered Architect** displays in the **License** column in the report.

Files Updated

Deltek.Framework.Lookup.Client.dll
 Deltek.Framework.Report.Client.dll
 Deltek.Vision.Report.Client.dll
 Account List.rdl
 Client List.rdl
 Contact List.rdl
 Employee List.rdl
 Lead List.rdl
 Marketing Campaign List.rdl
 Opportunity List.rdl
 Project List.rdl
 Text Library List.rdl
 UDIC List.rdl
 Vendor List.rdl
 Deltek.Vision.ReportingClient.Server.dll
 Deltek.Vision.ReportingLead.Server.dll
 Deltek.Vision.ReportingMarketingCampaign.Server.dll
 Deltek.Vision.ReportingOpportunity.Server.dll
 Deltek.Vision.ReportingVendor.Server.dll

Software Issues Resolved

Language Translations

This applies if you use languages other than English in Vision. A number of language translations that were missing were fixed. This includes the specific defects listed below as well as other unlisted language translation fixes.

Reload all Vision Reports

You must reload all Vision reports for each non-English language that you have enabled in Vision. Use the Report Administration utility to reload reports.

Some of the Language Issues Resolved

Defect 481329: On the Billing Backup tab in **Billing » Billing Terms**, the **A/P Voucher Description** check box label was not translated to both of the French languages, Spanish, and Dutch. Also, the drop-down list in the **Include Labor for** field was not wide enough to display complete text for options in the list.

Customers Impacted: This issue applies if you use languages other than English in Vision 7.2 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.BillingTerms.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 481331: This defect applies if you log onto Vision using the French (Canadian) language link. On the Fees tab in **Billing » Billing Terms**, the **Prior Fee Billing** field was not completely visible. It was covered by the field label.

Customers Impacted: This applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.BillingTerms.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 472753: The text for the **Print Invoices without Current Activity** field label in **Billing » Billing Terms** was changed to **Print Invoices with Zero Amount Due** but the translation was not updated accordingly.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportLabels.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 473760: When viewing **Prior Invoices** as the Section Order on the Sections tab in **Billing » Invoice Template**, the following labels were not translated: **Total Prior Invoices**, **Subtotal**, **Fee Amount**, and **Other Amount**.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.BillingTemplateEditor.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 472737: The **Enable Pre Invoices**, **Pre Invoice Offset Account**, and **Overtime Indicator** fields were added to the Miscellaneous tab of **Configuration » Billing » General** but were not translated.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportLabels.Server.dll

Other Applications Affected**Database Changes****System File Dependencies**

Defect 474345: The **Help** button on the Edit Cost Group dialog box (**Info Center » Opportunities » Fee Estimate Tab » Functional Groups Grid » Create Phases Grid button**) was not translated.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.dlgFESelectPhases.Client.dll

Deltek.Vision.OpportunityInfoCenter.Client.dll

Other Applications Affected**Database Changes****System File Dependencies**

Defect 481332: This applies if you use the Dutch or French language in Vision. For the Contract Management, Project List, or CRM Project Summary reports in **Reporting » Projects**, the **Charge Type** label on the Columns tab in the Report Options dialog box was not translated to the correct language.

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

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportLabels.Server.dll

Other Applications Affected**Database Changes****System File Dependencies**

Defect 481717: If you use languages other than English in Vision, the Timesheet report heading was not translated to other languages.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportLabels.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 473243: In User Options, the **Allow field selection for Info Center dashparts** check box label was not translated into languages other than English.

Customers Impacted: This issue applies if you use languages in Vision other than English in Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.dlgUserPreferences.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Accounting » Bank Reconciliation

Defect 482284: The amount of the in-process account for employee expense payment checks that had tax amounts was different on the posting log than it was on the Bank Reconciliation screen.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.BankReconciliation.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Configuration

Defect 482341: In Workflow Configuration, when you used a hard return (Enter key on your keyboard) to add a space between lines in an email alert, the character Â displayed instead of a blank line.

Customers Impacted: None.

Workaround Before Fix: Use a soft return (Shift + Enter).

Additional Notes: None.

Files Updated

Deltek.Framework.SysEmail.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Human Resources » Payroll

Defect 483102: The pay stub amounts for hourly employees were inaccurate when the **Print pay rates for hourly employees** option was selected after upgrading to Vision 7.4.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

EarningsHourly_Three.rdl

EarningsHourly_Two.rdl

Other Applications Affected

Database Changes

System File Dependencies

Defect 482098: Running the Draft Payroll Journal multiple times without exiting the payroll processing screen resulted in the following error message: “Not enough storage space is available to process this command.”

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Exit and re-open payroll.

Additional Notes: None.

Files Updated

Deltek.Framework.Report.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Info Center » Clients

Defect 479755: On the Contacts tab of the Client Info Center, you could select more than five contacts per client to synchronize with the Ajera application. Vision should have provided an error message when more than five were selected.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ClientInfoCenter.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Info Center » Projects

Defect 479756: On the Contacts tab of the Project Info Center, you could select more than five contacts per project to synchronize with the Ajera application. Vision should have provided an error message when more than five were selected.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ProjectInfoCenter.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Planning

Defect 484801: You could not use the **Actions » Import Plan from MS Project** or **Export Plan to MS Project** toolbar options in Planning when running Microsoft Project versions 2010 or 2013.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Microsoft.Office.Interop.MSProject.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting

Defect 480656: After you upgraded to Vision 7.3, some reports that you had saved as favorites displayed HTML tags for memo fields.

This applies for the following reports:

- Client List
- Contact List
- Contract Management

- Employee List
- Lead List
- Marketing Campaign List
- Opportunity Forecast
- Opportunity List
- Project Earnings
- Project List
- Vendor List

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: Recreate the saved favorite reports.

Additional Notes: None.

Files Updated

Deltek.Vision.Globals.Common.dll

Other Applications Affected

Database Changes

System File Dependencies

Transaction Center

Defect 479350: When you voided an A/P disbursement check in **Accounting » Void Check**, this caused an out-of-balance posting. The difference was the tax amount.

Customers Impacted: This defect applies to Vision 7.2 and later releases if you use taxes.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Posting.Server.dll

Deltek.Vision.VoidCheck.Server.dll

DeltekVision74GACU002.sql

Other Applications Affected

Database Changes

Code was added to insert the PP C tax records into the LedgerAPTax table.

System File Dependencies

Transaction Center » Transaction Entry and Transaction Posting

Defect 471813: This issue applies if you use multiple companies, pre-invoices, and taxes in Vision. You were unable to enter cash receipts for pre-invoices that had taxes if the tax code account that was associated with the tax amount on the pre-invoice was mapped on the A/R Mapping Accounts tab in **Configuration » Accounting » Accounts Receivable**. You received the following error: "An Invoice Number is required with this AR Account."

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.DataEntry.Client.dll

Deltek.Vision.DataEntryGlobals.Client.dll

Deltek.Vision.DataEntryGlobals.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Touch CRM

Defect 484930: In Touch CRM, you received the following error when you clicked **Opportunities** on the slideout menu and then clicked the **Mine** tab: "There was no response from the server. Need to refresh the application."

Customers Impacted: This applies to Touch CRM and Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.VisionServices.Server.DLL

Other Applications Affected

Database Changes

System File Dependencies

Cumulative Update 02 — Released February 13, 2015

Regulatory Enhancements

2015 District of Columbia Income Tax Withholding

The percentage withholding method, effective Jan. 1, 2015, was revised by the Office of Tax and Revenue. This supersedes the withholding method that was finalized Jan. 6.

The new method reflects a cost of living adjustment. The standard deduction should continue to be excluded in withholding calculations, and the personal exemption increases from \$1,725 to **\$1,775**.

For more information, refer to:

http://otr.cfo.dc.gov/sites/default/files/dc/sites/otr/publication/attachments/FR-230_012215_v4.pdf.

Files Updated

Delttek.Vision.PayrollBO.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

2015 Louisiana SUTA Electronic Filing

Louisiana specifications have been modified in accordance with the Social Security Administration's guidelines in an effort to minimize required data.

See <http://www.laworks.net/Downloads/UI/WageUploadInstructions.pdf> for more information.

To accommodate this change, Vision added the following to the Miscellaneous tab of the Quarterly Processing screen:

- **Multiple County Industry** — Enter **1** in this field if your company has employees in more than one county/industry included in Form BLS 3020 (Multiple Worksite Report); otherwise, leave the field blank.
- **Multi-State Employers** — Select this check box if your company has employees reporting wages to Louisiana and to other states.

RA, RE, and RS records have also been modified, with the following details:

RA Record

- **Secured File Transfer Protocol** — POS 3–11. Required — Submitter's FEIN number.
- **Filler** — POS 12–216. Fill with blanks.

- **State Abbreviation** — POS 340–341. Optional — Enter the state for the organization to whom the notification of unprocessable data should be sent. Use a postal abbreviation as shown in Appendix A. For a foreign address, leave blank.
- **Contact Telephone** — POS 423–437. Optional – Enter the telephone number for the contact name. Left justify and fill with blanks.
- **Filler** — POS 443-445. Fill with blanks.
- **Secured File Transfer Protocol** — POS 446–485. Required – Submitter’s email address for SFTP.
- **Filler** — POS 486-488. Fill with blanks.

RE Record

- **Agent Indicator** — POS 7. Optional — Fill with blanks.
- **Agent for EIN** — POS 17–25. Fill with blanks.
- **Establishment Number** — POS 27–30. Fill with blanks.
- **Other EIN** — POS 31-39. Fill with blanks.
- **Employer State Abbreviation** — POS 163–164. Optional — Enter the employer state. Use postal abbreviation.
- **Foreign State/Province** — POS 179–201. Fill with blanks.
- **Foreign Postal Code** — POS 202–216. Fill with blanks.
- **Country Code** — POS 217–218. Fill with blanks.
- **Tax Jurisdiction Code** — POS 220. Fill with blanks.
- **Multiple County Industry** — POS 250. Required — If employing entity is currently a multiple worksite reporter and has chosen to submit Form BLS 3020 (multiple worksite report) as a fixed file format via electronic upload. Enter “1” if this firm has employees in more than one county/industry included in this report; otherwise, enter “0.”
- **Multi-state Employers Indicator** — POS 254. Required — If any of your employees report wages to Louisiana and to other states; enter a “Y” if yes; enter a “N.”
- **Blank** — POS 255–512. Leave blank.

RS Record

- **Social Security Number (SSN)** — POS 10–18. Required — Enter the employee’s social security number. If an employee has not received a SSN, do not include a wage record for him/her on the report with a fictitious number. Have him/her call 1-800-772-1213 or visit the local social security office to obtain a SSN. Once a valid SSN is issued, file an amended wage and tax report. Duplicate SSNs will not be accepted within the same employer’s record.
- **Suffix** — POS 69-72. Fill with blanks.
- **Location Address** — POS 73–94. Fill with blanks.
- **Delivery Address** — POS 95–116. Fill with blanks.
- **City** — POS 117-138. Fill with blanks.
- **State Abbreviation** — POS 139–140. Fill with blanks.
- **Zip Code** — POS 141–145. Fill with blanks.
- **Zip Code Extension** — POS 146–149. Fill with blanks.

- **Foreign State/Province** — POS 155–177. Fill with blanks.
- **Foreign Postal Code** — POS 178–192. Fill with blanks.
- **State Quarterly Taxable Wage** — POS 214–224. Right justify and zero fill or fill with blanks.
- **Number of Weeks** — POS 225–226. Fill with blanks.
- **State Employer Account Number** — POS 248–267. Fill with blanks.

Files Updated

Deltek.Vision.pyFormQuarterly.Client.dll

Deltek.Vision.QTRMagMedia.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Software Issues Resolved

Accounting » Project Review

Defect 479981: Purchase requisitions and purchase orders did not display on the Purchasing tab in **Accounting » Project Review** as they should have in any of the following situations:

- Purchase requisitions and purchase orders that were entered and approved in versions earlier than Vision 7.4 did not display.
- Purchase orders did not display if an approval workflow was not enabled for purchase orders.
- Purchase requisitions did not display if an approval workflow was not enabled for purchase requisitions.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Billing

Defect 474537: When you selected **Totals and Section Totals** in the **Currency Display** field on the Misc tab of the Invoice Template Editor form for a credit memo template, the totals and section totals did not display with a currency symbol or currency code.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.ReportingInvoice.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 474538: Billing credit memos incorrectly displayed **0.00** in the invoice total header when you selected the **Print Total in Invoice Header** check box on the Totals tab in **Billing » Invoice Template Editor** for a credit memo template.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

CreditInvoice.rdl

Other Applications Affected

Database Changes

System File Dependencies

Billing » Billing Terms

Defect 474350: Phase groups that you entered in the grid on the Billing Phase Grouping dialog box (that opens when you click the **Phase Grouping** button on the Fees tab in Billing Terms for a phase) were deleted from the grid even though you used these phase groups to make entries in the Billing Phases grid on the Fees tab.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.BillingTerms.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Info Center

Defect 475554: Text that you entered in memo fields in the Info Center (such as in the **Notes** field in the Contacts Info Center) was not wrapping correctly.

Customers Impacted: This defect applies to Vision 7.3 and later releases.

Workaround Before Fix: Use the bottom scroll bar, or open the Text Editor dialog box.

Additional Notes: None.

Files Updated

Delttek.Framework.Controls.Client.dll

Delttek.Framework.ExternalReferences.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Info Center » Employees

Defect 475671: The drop-down list in the **Cost Table** and **Pay Table** fields in the Cost and Pay Rates section of the Time tab in the Employee Info Center included tables with a currency that did not match the functional currency of the employee's home company. Only tables that match the functional currency of an employee's home company should display in the list.

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

Workaround Before Fix: Log in to the employee's home company to select a cost rate table.

Additional Notes: None.

Files Updated

Delttek.Vision.EmployeeInfoCenter.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Kona

Defect 479762: Kona was sometimes not launching within Vision when you used Internet Explorer 11. WAAD Authentication (Windows Azure Active Directory) was sometimes not working when you signed timesheets in Vision.

Customers Impacted: This defect applies if you use Internet Explorer 11 or WAAD Authentication in Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Framework.Globals.Server.dll

Deltek.Framework.SysLogin.Server.dll

Deltek.Vision.VisionServices.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Defect 481123: Kona attempted to launch, even when no credentials were supplied on the Misc. tab of User Options. It appears as if you can log into Kona, but you cannot.

Customers Impacted: This defect applies if you use Vision 7.4 and Kona.

Workaround Before Fix: Enter your Kona credentials in User Options.

Additional Notes: None.

Files Updated

Deltek.Vision.FrameUI.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Microsoft Office Desktop Integration

Defect 477731: If the MODI add-in for Microsoft Word was enabled and you tried to use the Adobe “Word to PDF” add-in feature, the Adobe add-in caused Word to stop working. However, the PDF was still created.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

DeltekMicrosoftOfficeAndDesktopIntegration.msi

Other Applications Affected

Database Changes

System File Dependencies

Navigator

Defect 479766: If you had a certain combination of access rights, you received a system error when you displayed a Navigator plan, opened the Project Settings menu, and clicked **Plan Settings**.

Customers Impacted: This defect applies to Navigator 1.9 and later versions.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.VisionServices.Services.DLL

Other Applications Affected

Database Changes

System File Dependencies

Proposals

Defect 475586: When you used the merge feature, additional spaces were inserted between the text and the bullets.

Customers Impacted: This defect applies to Vision 7.3 and later versions.

Workaround Before Fix: You can manually fix the spacing after the merge.

Additional Notes: None.

Files Updated

Deltek.Vision.MergeBO.Common.dll

Deltek.Vision.MergeBO.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Purchasing

Defect 477273: This applies if you use approval workflows for Purchasing applications.

The status of a purchase requisition (on the General tab of the Purchase Requisitions form) changed after you made an entry on the Vendors tab on the Purchase Requisitions form. The status should not have changed.

The purchase requisitions, purchase orders, and request for price quotes that were approved before you installed Vision 7.4 incorrectly displayed **Start** in the **State** field on the General tab of the entry form. It should have been blank.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Delttek.Vision.PriceQuoteRequest.Client.dll

Delttek.Vision.PurchaseOrder.Client.dll

Delttek.Vision.PurchaseRequest.Client.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting

Defect 474999: Previously, user-defined fields always displayed in the Reporting application as options on the Sorting/Grouping tab and the Columns tab in the report options dialog box for a report. Now, in Roles Security, you can select to hide user-defined fields, so they do not display on the Sorting/Grouping and Columns tabs for report options.

In **Configuration » Security » Roles**, user-defined fields now display in the list of available fields to hide in the List Columns dialog box and the Group Fields dialog box.

To access these dialog boxes for a report, complete the following steps:

1. In **Configuration » Security » Roles**, open the Access Rights tab.
2. In the **Functional Area** field, select **Reports**.
3. In the **Report Type** field, select a report type.
4. Clear the **Full access to all reports** check box.
5. Click the **Set Group/Column Access** button.
6. On the Report Group and Column Fields dialog box:
 - Click the **Set Group Security Set** option. In the group fields dialog box, the Available Group Fields list includes user-defined fields.

- Click the **Set Column Security** option. In the list columns dialog box, the Available Columns list includes user-defined fields.

After You Install the CU 02 Release

After you install the CU 02 release and you hide any user-defined fields on reports for security roles, users must save any favorite reports that included the user-defined fields that are now hidden. If the reports are not re-saved after you change access rights to the user-defined fields, these fields will continue to display in the Sorting/Grouping tab and the Columns tab in the report options dialog box.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.dlgSecReportingColumns.client.dll

Deltek.Vision.dlgSecReportingGroups.client.dll

Deltek.Vision.Report.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Project

Defect 474998: The **Billing Amount** column on the Project Detail report showed the currency code and currency symbol of the billing currency instead of the project currency.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: None.

Additional Notes: The report does not look at the **Use Billing Currency not Project Currency** check box for the **Reporting at Billing Rates** setting on the Reporting tab in **Configuration » Accounting » System Settings** when displaying currency code.

Files Updated

Deltek.Vision.ReportingProject.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Reporting » Project Planning

Defect 479180: The calculations in the **Detail Lines Sum Up Calc Amt**s column of the Project Planning Analysis report were incorrect for the **Expense**, **Consultant**, and **Unit Lines** rows if no labor assignments were assigned to the planning rows.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Add a labor assignment for the affected planning row.

Additional Notes: None.

Files Updated

Resource Planning Analysis.rdl

Deltek.Vision.ReportingResourcePlanning.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Transaction Center

Defect 478282: When you posted an expense report with intercompany transactions, the debit that was posted to the project's company was also posted to the intercompany suspense account. This created an unbalanced transaction for the project's company.

Customers Impacted: This defect applies to Vision 7.3 and later releases.

Workaround Before Fix: None.

Additional Notes: None.

Files Updated

Deltek.Vision.Posting.Server.dll

Other Applications Affected

Database Changes

System File Dependencies

Utilities » Key Conversions » Phases

Defect 477372: When you used the Key Conversion utility to change a phase number, the phase was then unmapped from the plan in Project Planning.

Customers Impacted: This defect applies to Vision 7.4.

Workaround Before Fix: Manually remap the plan.

Additional Notes: None.

Files Updated

DeltekVision74GACU002.sql

Other Applications Affected

Database Changes

The following stored procedures were updated:

- KeyConvertWBS2
- KeyConvertWBS3

System File Dependencies



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