Deltek Vision® 7.1

New Features & Enhancements

October 1, 2013

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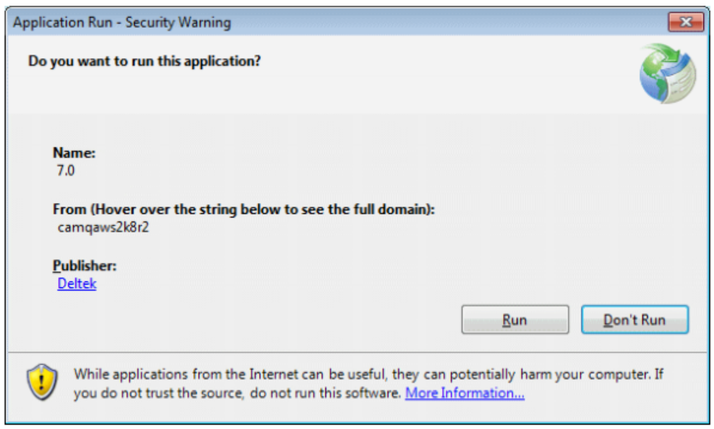
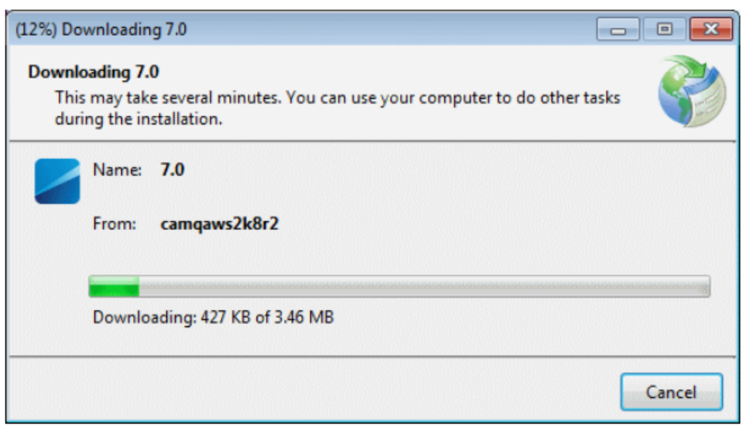
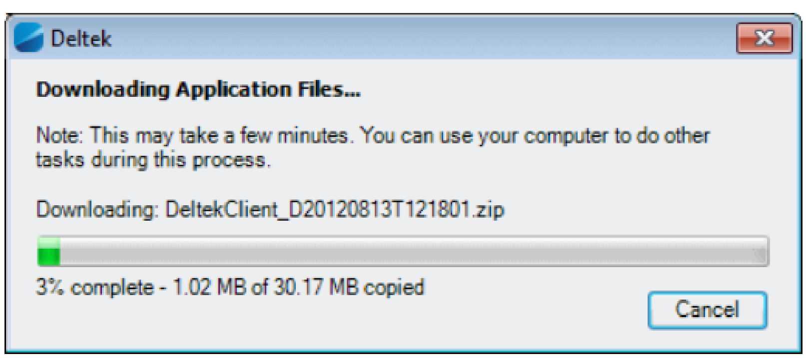
Contents

First Login After Upgrade

With any major upgrade to Vision, the files required to run Vision locally need to updated. Therefore, when users login for the first time after an upgrade, a sequence of dialog boxes similar to what is shown below will be encountered. Users should be informed ahead of the upgrade to expect this when they log in for the first time. Users can simply click ***Run*** in the first dialog box and then let the downloads complete and Vision will then launch normally.







New Features & Enhancements

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

Adobe InDesign Merge Templates

You can now create Vision merge templates with Adobe InDesign as an alternative to creating merge templates with Microsoft Word. Merge templates are used to create merged documents in the Vision Info Centers and in Custom Proposals. Merge templates created with InDesign give you more flexibility with formatting and structuring a merged document.

Prerequisites

The following are required before you can use Adobe InDesign to create Vision merge templates and generate merged documents:

- You must have InDesign installed on your workstation.
- InDesign versions CS5.5 (7.5) and later are supported for Vision. InDesign via the Creative Cloud solution in not yet supported.

  If you use InDesign CS6, you must install InDesign on the same drive as your Windows Users directory on your workstation. If they are not located in the same directory, you cannot create or edit Vision InDesign templates. You will receive a message that InDesign has never been run as an administrator, and InDesign will not open. This issue does not occur with InDesign CS5.5.
- InDesign must be included in the Windows registry on your workstation in order for it to work with Vision. For more information, see the “Create the Adobe InDesign Registry Entry” help topic in the **DeltekVision7.1Enhancements-OnlineHelp.pdf** file.

  You can link to this PDF from the first page of the online help, in either of two ways:

  - Click **Help » Contents** from the top of the Vision screen.
  - If you are already in the help system, navigate to the first page, “Welcome to the Deltek Vision Help System.”

  The PDF is also available on the Deltek Customer Care site from DSM (Download Software Manager) or in Knowledge Base article 74449.

Creating Merge Templates

Configuration » General » Merge Templates

You create merge templates with InDesign when InDesign is launched automatically from within Vision Merge Templates Configuration (**Configuration » General » Merge Templates**). In the same step that you add the merge template to the Vision database, you also create the merge template (an InDesign .indt file). This allows the Vision database tables and fields to be available within InDesign.

Importing InDesign Merge Templates

You can also import InDesign merge templates into Vision that were created outside of Vision using the **Import Adobe InDesign Template** option when you click **Add** on the **Merge Templates grid** on the Merge Templates form in Merge Templates Configuration.

Sample InDesign Merge Templates

You can download sample InDesign merge templates from the Deltek Customer Care Connect site. See Knowledge Base article # 73879. Use these samples to see what InDesign templates look like as you learn how to create InDesign merge templates. You can also import sample merge templates in **Configuration » General » Merge Templates**, and then use them to create other merge templates.

Using InDesign Merge Templates to Generate a Merged Document

Info Centers

On an Info Center form, when you click the **Merge** icon on the toolbar to create a merged document, the **Merge Templates** grid in the Merging dialog box form now displays a **Type** column that indicates whether a merge template was created with Word or InDesign.

Custom Proposals

In Custom Proposals, when you click the **Sections** icon on the toolbar to set up sections and their merge templates, the Templates Lookup dialog box that opens when you click the lookup icon in the **Merge Templates** column in the Configure Sections dialog box now includes both Word .rtf files and InDesign .indt files.

Billing Invoice Approvals

Invoice Approvals is a new optional feature that requires Billing invoices to be approved before they are accepted and posted.

This feature allows you to efficiently move draft invoices through the submittal, rejection, approval, and acceptance stages to produce final invoices. Electronic alerts are sent automatically to the appropriate employees to notify them that the next action in the approval process is ready for them to complete. You can enter approval comments for invoices that can be shared easily with others.

Configuration

You turn on the Invoice Approvals feature on the Miscellaneous tab in **Configuration » Billing » General**. If you have multiple companies in Vision, you must turn on and set up the Invoice Approvals feature for each company.

After you turn on the feature, you complete the following configuration:

- Set up invoice approval processes in **Configuration » Billing » Invoice Approval Process**.

  You specify:

  - Who, within a project (project manager, principal, and so on), can approve and reject submitted invoices.
  - Who will receive alerts when invoices are submitted, approved, rejected, and unsubmitted.
  - How and when alerts are delivered, and the message in the alerts.
- Specify in a project's billing terms (on the Misc tab) whether or not a project will use invoice approvals and which invoice approval process it will use.

- On the General tab of the Project Info Center, enter the person who is responsible for creating the Billing invoices for a project in the new **Biller** field.

  If you currently use the Vision Screen Designer, you may need to adjust the location of the **Biller** field to fit the screen that you designed.

- As needed, you can specify on the General tab in User Options a delegate to approve invoices in your absence if you are an invoice approver.

You can use the Search and Replace utility (in **Utilities » Advanced Utilities**) to easily enable invoice approvals, update the invoice approval process, and enter the biller for a group of projects.

Processing

The following menu items have been added to the Billing menu to support the Invoice Approvals feature:

- **Invoice Approvals** – Use this program to review multiple invoices at a time and approve or reject them.
- **Interactive Approvals** – Use this program to review and approve or reject individual invoices, one at a time.

To move invoices through the approval process, you:

- Submit invoices for approval in Interactive Billing or Batch Billing.
- Preview invoices, review comments, review transaction detail that is associated with submitted invoices, and update percent completes in Interactive Approvals or Invoice Approvals.
- Approve or reject invoices in Interactive Approvals or Invoice Approvals.
- Final accept invoices in Interactive Billing or Batch Billing after they are approved.

Reports

The Invoice Approval Report provides an audit trail of comments and the current approval status of invoices that go through an approval process.

Configuration

General Tab of Plan Settings

If you use Vision Navigator, the General tab of Plan Settings was updated to allow you to set the defaults for various plan settings in Navigator when the Resource Planning module is in use. Refer to the *Navigator* section of these release notes for further information.

Dashboard Formatting—Use Flat Dashboard Styling

The General tab of User Options has a new **Use flat dashboard styling** check box that allows you to switch the Dashboard format to a flat style. This style includes a different style of graphics and color selections for the header bar, but you must log out and back into to Vision for your changes to take effect.

Exchange Rates

Exchange rate fields in Vision now have 10 decimal places instead of 6.

Export to Text Feature Supports SEPA XML File Formats

The Vision Export to Text feature, which allows you to create text (.txt) files for Accounts Payable and Employee Expenses payments, now supports the Single Euro Payments Area (SEPA) .xml file format that is commonly used in the Netherlands.

The following new items have been added to Vision to support the new SEPA feature:

Area of the Software	New Items
Banks Configuration	• On the Bank Codes tab, **SEPA** has been added to the drop-down list in the **Export to Text Format** field. • A new SEPA File Format tab has been added to the Bank Codes form.
Employee Info Center	The Accounting tab has a new **SEPA** section with two new fields—**IBAN** and **BIC**—for the employee's bank account.
Vendor Info Center	The Accounting tab has a new **SEPA** section with two new fields—**IBAN** and **BIC**—for the vendor's bank account.
Accounts Payable Payment Processing and Employee Expense Payment Processing	On the Check Printing and Numbering form in Accounts Payable Payment Processing and Employee Expense Payment Processing, when you click the **Export to Text** button for a bank making the SEPA payments, a dialog box displays to allow you to create the SEPA export file. You can save or open the file, which is an .xml file.

Grid Export to Microsoft Excel in .XLSX Format

In previous versions, when you exported the contents of grids to Excel, the export process created an .XLS file. However, that file format had an upper limit of 65,000 grid rows. To avoid that limitation, the export process now creates the Excel file in the .XLSX format.

As a result of this change, you cannot open the export file with older versions of Excel that are not compatible with the .XLSX format. You must have Excel 2007 or Excel 2010. (Though Vision no longer supports Microsoft Office 2003, you may also be able to open .XLSX files with Excel 2003 if you have installed the Microsoft Office Compatibility Pack.)

Kona

If you are using the Deltek Kona application, the following features are available within Vision.

User Options

The Misc tab of Vision User Options includes **Kona Username** and **Kona Password** fields. Use these fields to record your Kona username and password. This allows you to open Kona directly from within the Vision application.

If your Kona credentials are not entered in User Options, you must enter your Kona credentials when you launch the Vision application using the Kona global icon and the Info Center functionality described below.

Kona Global Icon

A Kona icon Kona displays on the toolbar of Vision's main screen. Click this icon to open the Kona application directly from within Vision. If the current project is associated with a Kona space, the associated Kona space opens automatically.

Info Centers

The General tabs of the Project and Opportunities Info Centers now include a **Kona Space** option. Use this option to associate a Kona space with the selected project or opportunity. The Kona space's image displays. You can select the space to open Kona directly from within Vision.

Navigator

If you use Vision Navigator, the following updates apply to your Vision application.

Toolbar

The Navigator icon Navigator displays on the toolbar of Vision's main screen. Click this icon to open the Vision Navigator application from within Vision. If the current project is associated with a Navigator plan, the plan opens automatically in Navigator. If Navigator is not installed or configured, an error message displays.

Configuration

The General tab of Plan Settings has been updated to allow you to set the defaults for various plan settings for Consultant Planning in Navigator when the Resource Planning module is in use. These consultant settings are **Enable Planning tabs/Consultants** and **Consultant Plan Level**. **Consultant Plan Level** is a new field and is only used by Navigator.

On the Rates tab of Plan Settings, the **Calculate Consultant Billing Amounts**, **Consultant Rate Method**, **Rate Table**, and **Multiplier** options are now also the defaults for Navigator. With the exception of **Consultant Plan Level**, all of these default settings for Consultants are used by both Project Planning and Navigator. **Consultant Plan Level** is only used by Navigator.

When the Resource Planning module is not in use, new fields were added to Plan Settings for Consultant Planning in Navigator. These new fields include **Enable Consultants Planning**, **Consultants Plan Level**, **Consultant Rates: Calculate Consultant Billing Amounts**, **Rate Method**, **Rate Table**, and **Multiplier**.

Security

A new Navigator tab was added to Security Roles Configuration (**Configuration » Security » Roles**). This tab allows a system administrator to configure a role's access rights to the Vision

Navigator application. This includes the ability to log in to Navigator and to access the Project Management and Employee workspaces and their various features.

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

When you install Vision 7.1, this tab is automatically configured to grant each role the same access rights to Navigator that the role had before the installation.

Photo Upload

The Project Info Center toolbar and the Opportunity Info Center toolbar now include a **Photo** button. Click this button to access the Photo Upload dialog box, and add a photo to a project or opportunity record.

Project Info Center List View—Populated with Phase and Task Records

The following additions have been implemented in Vision to allow you to populate the List View in the Project Info Center with phase and task records (work breakdown structure (WBS) level 2 and 3).

Advanced Project Lookup Dialog Box in the Project Info Center

This applies for the Advanced Project Lookup dialog box only in the Project Info Center.

On the Advanced Project Lookup dialog box use the **Display** field to select whether to populate the List View or Detail View of the Project Info Center with project, phase, task, or all records.

The search results list at the bottom of the dialog box now displays phases or phases and tasks depending what you selected in the **Display** field before you clicked the **Search** button.

When you click the **Select All** button or select some of the records in the search results list and then click the **Select** button, the List View or Detailed View is populated with the records that you selected.

List View in the Project Info Center

The **Projects** grid in the List View of the Project Info Center now includes the following additional columns by default: **Phase Name** and **Task Name**. You can removed these using the **Select Fields** option on the **Projects** grid toolbar.

You can manually add the **Phase** (phase number) and **Task** (task number) columns to the **Projects** grid using the **Select Fields** option on the **Projects** grid toolbar.

Report Administration: Option to Delete Archived Reports

Vision automatically deletes archived reports based on the number of archive hours specified when each archived report is generated. Now, however, you can also use the Report Administration utility (**Utilities » Report Administration**) to delete archived reports.

The grid under **Report Archives** on the Database Cleanup tab lists all archived reports that currently exist in Vision. Displayed for each report are

- Username of the person who created the archived report
- Type of report
- Report name
- Date the archived report was created
- Date and time that Vision will automatically remove the archived report

You can use the **Report Archives That Are Older Than This Number of Days** field to restrict the list to the older archived reports. To delete an archived report, select the grid row for the report and click **Delete**.

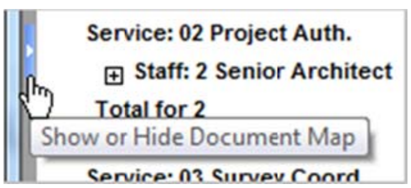
This addition to the Report Administration utility is also useful as a way to monitor, in one location, the system-wide accumulation of archived reports. Before, you had to display the list of archived reports for each report type individually in Vision Reporting.

Reporting

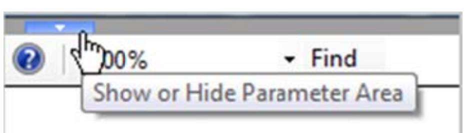
Preview Window Updated

Deltek upgraded the software underlying the report preview window. For the most part, the new version functions exactly the same as the prior one, but a few differences exist:

- This upgrade resolves some HTML display defects in the earlier version.
- How you display the document map has changed. Now you click the bar on the left edge of the Preview window to display the document map.

  Click the similar bar on the right edge of the document map pane to hide the document map.
- How you display the parameter area has changed. Now you click the bar on the top edge of the Preview window toolbar to display the parameter area.

  Click the similar bar at the bottom edge of the parameter area to hide the parameter area.

Roles Summary Report

For Vision Navigator users, the Roles Summary report now includes a **Navigator** option in the **Report Sections to Include** group box.

Turn HTML Formatting On or Off for Report Memo Fields

If you include a column for a memo field on a report and you do not want to apply HTML formatting (bold, underlining, colors, and so on) to the contents of the column based on the formatting applied when the text was originally entered in each memo field, you can turn off the HTML formatting for that report column using the **HTML** grid column on the Columns tab of the report's Options dialog box. If you clear the check box in that grid column, the report displays the text without any special formatting. You may want to do this if, for example, the formatting was applied inconsistently during data entry or the formatting is unsatisfactory for some other reason.

For reports that do not have the option to select report columns, you can use the new **HTML Formatting** check box on the Layout tab of the report's Options dialog box to turn off or on HTML formatting for all memo fields on the report.

Tax Analysis

The Tax Analysis report was updated to support the ability to run on Vendor Selection criteria.

Web Dashpart

The Web dashpart includes a new **Hide Toolbar** option to hide the Reporting toolbar on the web dashpart. This is useful for providing extra space on reports that contain graphs. You must reload the Dashboard for the change to take effect.

Security Configuration

Password Policies

The Password Policies feature is now separate from the Users application. Use Password Policies Security to establish policies that dictate the criteria for acceptable Vision passwords. These policies apply when users change their own passwords, which they can do after the initial log in. These policies do not apply to the **Password** field on the Users tab.

Roles

The Roles application of Vision Security Configuration was updated as follows:

General Tab

The General tab includes a **Force User to Reset Password at Next Login** option that forces the user to reset their password the next time they log in. When this option is selected, the following occurs:

- The Vision Welcome screen displays with an active Change Password dialog box.
- The **Cancel** and **Exit** buttons are disabled.

The user must complete the fields on the Change Password dialog box and click **OK**. The password is reset and the **Force User to Reset Password at Next Login** option is no longer selected upon logging in.

Navigator Tab

A new Navigator tab was added to Vision Roles in Vision 7.1. When you install Vision 7.1, this tab is automatically configured to grant each role the same access rights to Navigator that the role had before the installation.

Record Access Tab

The Record Access tab includes the following new options:

- **Allow modification of Disable Login user setting in Users when read-only access —** Select this option to give users in this role access to modify the enable/disable login user setting when they only have read-only access to the Users application.
- **Allow modification of Passwords in Users when read-only access —** Select this option to give users in this role access to modify user passwords even if they only have read-only access to the Users application.

Users

Vision Security Configuration now includes a Users application. This feature functions like an Info Center, and allows you to create, update, and manage user information in one location. The feature includes the following tabs:

- General tab — Use this tab to create a username for an employee, assign the user to a security role, force a user to change their password at a specific time, and set up default report settings for the user. You cannot exceed the number of users that you are licensed to set up.
- Generate Users tab — Use this tab to create Vision users from employee records in the Employee Info Center. This is helpful when you need to create many users at one time. You cannot exceed the number of users that your firm is licensed to set up.

Transaction Auto Numbering

The new Transaction Auto Numbering tab in **Configuration » Accounting » System Settings** allows you to set up auto numbering for your Vision transactions. When auto numbering is enabled, Vision automatically generates a reference number for each transaction. These reference numbers can be sequential as you add transactions to your database, and you can define the structure of these identification numbers to match your firm's business requirements.

Auto numbers can be set up by company and/or by bank. When autonumbers are in use and you create a new record, **[**AUTONUMBER**]** displays in the following field types for the record: **Reference** or **Check.**

Transaction Document Management (TDM)

Transaction Document Management (TDM) is a new feature that allows you to attach documents in support of accounts payable vouchers and employee expense reports. You can select individual documents for each transaction or choose to have a document apply to all lines in an accounts payable voucher or employee expense report. Supported file types include image files, .pdfs, Microsoft Word documents, and Microsoft Excel spreadsheets. These supporting documents are then integrated with the Vision billing system and are exposed and available as a part of the invoicing process.

TDM Configuration

TDM uses FILESTREAM functionality, a native Microsoft SQL Server feature, to store supporting documents. TDM is configured through the Microsoft SQL Server configuration and is enabled in the Vision Weblink Utility by selecting the **Enable Transactional Document Management** option. See the Advanced Technical Installation Guide for instructions on enabling FILESTREAM.

Vision also includes a new Files Administration utility where you can search for and view the supporting documents that were uploaded for transactions and confirm that the files between the Vision and FILESTREAM databases are synchronized.

Utilities

The Search and Replace Advanced Utility was updated to remove the CA.Type field from the Available Change list.

Vision Login Password/User ID Reminder

The Vision login dialog box includes a Password and User ID reminder option. Select this option to reset your Vision password or receive a reminder of your User ID in the event that they are forgotten.