




Deltek

Deltek WorkBook 13.5 CU05

Release Notes

August 28, 2024



While Deltek has attempted to verify that the information in this document is accurate and complete, some typographical or technical errors may exist. The recipient of this document is solely responsible for all decisions relating to or use of the information provided herein.

The information contained in this publication is effective as of the publication date below and is subject to change without notice.

This publication contains proprietary information that is protected by copyright. All rights are reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, or translated into another language, without the prior written consent of Deltek, Inc.

This edition published August 2024.

© Deltek, Inc.

Deltek's software is also protected by copyright law and constitutes valuable confidential and proprietary information of Deltek, Inc. and its licensors. The Deltek software, and all related documentation, is provided for use only in accordance with the terms of the license agreement. Unauthorized reproduction or distribution of the program or any portion thereof could result in severe civil or criminal penalties.

All trademarks are the property of their respective owners.

Contents

Overview	1
Documentation	1
Key Features of Documentation for WorkBook 13.5	1
Additional Documentation.....	1
Feedback	1
Installation	2
Supported Products.....	2
Compatibility Matrix.....	2
WorkBook Release 13.5 CU05	3
Software Issues Resolved	3
Settings	3
WorkBook Release 13.5 CU04	4
WorkBook Release 13.5 CU03	5
Software Issues Resolved	5
Jobs.....	5
Settings	5
WorkBook Release 13.5 CU02	6
Software Issues Resolved	6
Inbox	6
WorkBook Release 13.5 CU01	7
Known Issues	7
Resources.....	7
Storage Provider	7
WorkBook Mobile.....	7
Software Issues Resolved	8
Agents.....	8
Finance & Administration	8
Framework	8
General	9
Jobs.....	9
Scheduling	9
Settings	9
Second Revision to WorkBook 13.5 Release Notes.....	10

Functionality to be Retained	10
API	10
Revision to WorkBook 13.5 Release Notes	11
Features and Enhancements Added or Changed	11
General	11
WorkBook Release 13.5	12
Important Notice: If Updating to a New Version of WorkBook Fails	12
Functionality to be Removed	12
API	12
Functionality Removed	13
API	13
Framework	13
Jobs.....	13
Features and Enhancements Added or Changed	14
New WorkBook Resource Center	14
Agents.....	14
API	16
Databoard	16
Finance & Administration	17
Framework	19
General	20
Jobs.....	20
Pagero Integration	21
Settings	21
Time & Expense.....	21
Known Issues	22
Finance & Administration	22
Email	22
Framework	22
General	23
Jobs.....	23
Settings	24
Software Issues Resolved	24
ConceptShare Integration	24
Dashboards.....	24
Finance & Administration	25

Framework	28
General	28
Inbox	29
Jobs.....	29
My Settings	32
Resources	32
Reports	33
Scheduling	33
Settings	35
Storage	36
Tasks.....	36
Time & Expense.....	37
User Interface	39

Overview

This document provides the following information:

- [Release Notes for WorkBook Release 13.5 CU05](#)
- [Release Notes for WorkBook Release 13.5 CU04](#)
- [Release Notes for WorkBook Release 13.5 CU03](#)
- [Release Notes for WorkBook Release 13.5 CU02](#)
- [Release Notes for WorkBook Release 13.5 CU01](#)
- [Second Revision to WorkBook 13.5 Release Notes](#)
- [Revision to WorkBook 13.5 Release Notes](#)
- [Release Notes for WorkBook Release 13.5](#)

Documentation

Key Features of Documentation for WorkBook 13.5

WorkBook 13.5 includes the following new and updated documentation:

- **Release Notes** includes a summary of new and updated features and enhancements (and links to supporting documentation, where applicable), functionality that has been removed or that will be removed in an upcoming release, and descriptions of known issues and resolved software issues.
- **Online help** with updated topics.
- **Reconfiguring WorkBook to Use MS Exchange OAuth** with updated content.
- **Pagero Integration Guide** with updated content.
- **Webhooks Guide** with updated content.

Additional Documentation

You can access all of the WorkBook documentation via the WorkBook Resource Center. The top menu bar provides links to videos, training, and more. Scroll down to find Release Notes, Online Help, Coffee Breaks, the Ideas Portal, and popular learning assets:

<https://enablement.deltek.com/resource-center/workbook>

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

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

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

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

Feedback

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

Installation

See the [Deltek WorkBook 13.4 Installation Guide](#) for requirements and instructions for installing the WorkBook software.

Supported Products

Compatibility Matrix

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

[Deltek Product Support Compatibility Matrix](#)

WorkBook Release 13.5 CU05

Version DB 13.5.137 / HTML 13.5.137.0

For Release on August 28, 2024

Software Issues Resolved

Settings

Databoards – Previous Scripts are Deleted after Adding New Lines in Script Tab

Deltek Tracking Number: 2167529

Description: When you made changes to the SQL script for a databoard, WorkBook deleted all of the previous SQL and only kept the SQL that you just added.

System Variable 484 – Overly Restrictive Behavior

Deltek Tracking Number: 2196992

Description: System Variable 484—Allow Manual Bookings on System Accounts in General Ledger (Not Recommended)—had the following overly restrictive behaviors:

- When you tried to approve a mileage voucher with an automatic account in mileage types, and System Variable 484 was disabled, the following message was displayed: Automatic account cannot be used on Creditor Invoice lines while System Variable 484 is disabled.
 - When you tried to approve a Purchase Order with an automatic account in activity settings, and System Variable 484 was disabled, the following message was displayed: Automatic account cannot be used on Creditor Invoice lines while System Variable 484 is disabled.
 - When you created Creditor Invoices, the default Finance account for an activity was not used if that account was marked as automatic.
-

WorkBook Release 13.5 CU04

Version DB 13.5.133 / HTML 13.5.133.0

Released on August 1, 2024

WorkBook Release 13.5 CU03

Version DB 13.5.132 / HTML 13.5.132.0

Released on July 25, 2024

Software Issues Resolved

Jobs

Advanced User Cannot Add Job Custom Codes when You do not have Access to Settings

Deltek Tracking Number: 2170241

Description: If you are an Advanced User and did not have access to Settings in any of the Companies, you could not add Custom Codes to a job.

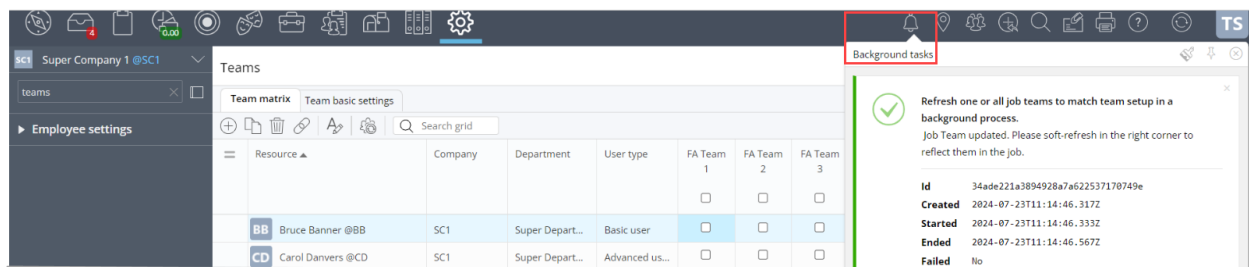
Settings

Teams – Updating Jobs Teams does not Work for Large Volumes of Data

Deltek Tracking Number: 2170248

Description: When you tried to update the Jobs Teams in Settings, a 500 Internal Server Error for a large volume of data occurred.

Additional Notes: A jobs teams update is now triggered as a background task, which means that you can continue to use WorkBook while teams are being updated. You can view the start of the process and its completion via the Quick menu » Background tasks, as shown in the following figure.



WorkBook Release 13.5 CU02

Version DB 13.5.130 / HTML 13.5.130.0

Released on July 27, 2024

Software Issues Resolved

Inbox

Posting a Task Message or Conversation Causes Error Message

Deltek Tracking Number: 2177169

Description: When you posted comments on task conversations, WorkBook displayed one of the following messages in the Inbox:

```
User received the following message  
Patch dictionary must contain an Id entry
```

Or

```
User received the following message  
###63918$$$ The record does not exist.  
Ticket status id 0
```

Additional Notes: When the ticket author posted comments on ticket conversations, WorkBook changed the ticket status to Closed, if both System Variables 815 (Set New Ticket Status when the Author Replies) and 818 (Set New Ticket Status when a Ticket is Closed. Also Works as Actual Done Status.) had been configured.

WorkBook Release 13.5 CU01

Version DB 13.5.128 / HTML 13.5.128.0

Released on June 27, 2024

Known Issues

Resources

Approval Record Remains Unapproved on Resource Required Fields when Substitute Approver Approves on Behalf of Pool Approvers

Deltek Tracking Number: 2164436

Description: Pool approvers who are on leave and are substituted are not approved as part of the pool, for resource required fields approval.

Additional Notes: This issue has been fixed for other approval flows.

Storage Provider

Google Storage Provider does not Generate Files on Jobs from Sub-Folder Structure

Deltek Tracking Number: 2117494

Description: When you create a job, and the job setup uses the Google Drive Storage provider, when you quickly click on Docs after you create the job, files from the sub-folder structure are not generated.

WorkBook Mobile

Credit Card Import – Expense Entry – Creditor Field is Blank and You can Edit It

Deltek Tracking Number: 2159597

Description: When using WorkBook Mobile you view an expense entry that comes from a credit card import, the Creditor field is empty. In addition, it is supposed to be locked against editing, but you can edit it.

Software Issues Resolved

Agents

General System Maintenance Agent Fails

Delttek Tracking Number: 2142222

Description: When you ran the General System Maintenance agent (Agent 6), it sometimes failed with deadlock errors.

Finance & Administration

Creditor Invoices – iPhone Files do not Work as Voucher Attachments

Delttek Tracking Number: 2149037

Description: WorkBook was unable to generate a preview for iPhone files when they were attached to vouchers.

Additional Notes: High efficiency image (HEIC) files are now supported for voucher and expense attachments through the web interface. Note that voucher stamping—configured in System Variable 950, Voucher Attachment Stamps—is not supported on HEIC files.

General Ledger – Journals – Journal Entry Data Import Error

Delttek Tracking Number: 2149075

Description: When you imported journal entry data with a currency rate, the following error message was displayed: Error in import file field: Currency Rate.

Month-End – Error when You Close and Reopen Pages

Delttek Tracking Number: 2144598

Description: When you opened some pop-up dialog pages, then quickly closed them and reopened them, an error could occur.

Framework

Rich Text Editor Component – Paste Plain Text Buttons do not Work in Firefox

Delttek Tracking Number: 2154988

Description: When you used Firefox, in the rich text editor, the Paste and Paste Plain Text buttons did not work; an error occurred.

General

Approvals – Approval Record Remains Unapproved when Substitute Approver Approves on Behalf of Pool Approvers

Delttek Tracking Number: 2149040

Description: Pool approvers who are on leave and are substituted were not approved as part of the pool, on certain approval flows.

Jobs

Job Invoice – Invoice Print Layout, Payment Terms, and Method Revert to Initial Values

Delttek Tracking Number: 2149036

Description: When you selected a different invoice print layout, payment terms, and/or payment method on a job invoice and made changes to the invoice details, such as headline and GLN Location No., the changes that you made to the invoice print layout, payment terms, and payment method reverted to their initial values.

Workaround before Fix: Soft refresh WorkBook after you make changes to the invoice print layout, payment terms, and/or payment methods to prevent them from reverting.

Scheduling

Schedule Overview – Weekly Schedule – Applying Filter Causes Error

Delttek Tracking Number: 1914661

Description: When you added an extremely large number of employees—for example, 130 or more—in the filter on the Weekly Schedule, when you applied the filter, an error occurred.

Additional Notes: This description is revised to correct the path that was provided in the description in the Release 13.5 Release Notes.

Settings

Task Color Page – Error when You Press Delete on the Keyboard

Delttek Tracking Number: 2149051

Description: When you were on the Task Color page, and you pressed the Delete key, an error occurred.

Ticket Quick Create Page – Error when You Press Delete on the Keyboard

Delttek Tracking Number: 2149041

Description: When you were on the Ticket Quick Create page, and you pressed the Delete key, an error occurred.

Second Revision to WorkBook 13.5 Release Notes

Version DB 13.5.113 / HTML 13.5.113.0 (unchanged)

Released on August 12, 2024

Functionality to be Retained

API

APIs No Longer to be Deprecated from Main API

Previously, it was reported that the following API calls would be deprecated from the main API and transferred to a new report endpoint in Release 13.6.

This is no longer the case. The APIs listed in the following table remain in the main API.

APIs Remaining in the Main API
/api/json/reply/DataboardDataRequest
/api/Databoard/{DataboardId}/Data
/api/json/reply/DataboardExportRequest
/api/Databoard/{DataboardId}/Export
/api/json/reply/DataExportPrintRequest
/api/Dataexport/{Id}/Export

Revision to WorkBook 13.5 Release Notes

Version DB 13.5.113 / HTML 13.5.113.0 (unchanged)

Released on June 20, 2024

Features and Enhancements Added or Changed

General

Automatic URL Update Based on Page View

Deltek Tracking Number: 2165256

Description: Beginning with WorkBook 13.5, the URL automatically updates to reflect the page that you are currently viewing.

Additional Notes: This feature was optional in WorkBook 13.4. It is now enabled by default. If you want to have it changed to disabled, contact Deltek Customer Support.

WorkBook Release 13.5

Version DB 13.5.113 / HTML 13.5.113.0

Released on May 30, 2024

Important Notice: If Updating to a New Version of WorkBook Fails

For some customers trying to update to a newer version of WorkBook, the update might fail with the following message:

One or more employee records in the Capacity table contains invalid date entries. Contact Deltek Customer Support to have this corrected.

Although the update fails, your WorkBook system continues to function normally.

This failure occurs when records in the Capacity database table contain incorrect data—dates that include timestamps and/or multiple records for a single day. This situation might occur if the hire dates for some employees include timestamps. This only occurs if the dates were modified through a custom integration.

If this happens, contact Deltek Customer Support, who can run a script to correct this issue so that you can complete the update.

Functionality to be Removed

API

APIs to be Deprecated from Main API in Release 13.6

In WorkBook 13.6 the following API calls will be deprecated from the main API and transferred to a new report endpoint.

APIs Migrating from Main API	Migrating to Report API
/api/json/reply/DataboardDataRequest	/report/api/json/DataboardDataRequest
/api/Databoard/{DataboardId}/Data	/report/api/Databoard/{DataboardId}/Data
/api/json/reply/DataboardExportRequest	/report/api/json/reply/DataboardExportRequest
/api/Databoard/{DataboardId}/Export	/report/api/Databoard/{DataboardId}/Export
/api/json/reply/DataExportPrintRequest	/report/api/json//reply/DataExportPrintRequest
/api/Dataexport/{Id}/Export	/report/api/Dataexport/{Id}/Export

Attention: The existing main API calls remain active in WorkBook 13.5. However, you must begin using the migrated API calls **beginning with WorkBook 13.6**. Failure to migrate these API calls before using Release 13.6 might negatively affect your integration with WorkBook.

Tip: For more information about the API, you can access the Deltek WorkBook API Guide at <https://workbookapi.deltek.com/?version=latest>

Functionality Removed

API

Obsolete Endpoint Removed: PUT ErrorReportRequest

Deltek Tracking Number: 2072715

Description: The obsolete endpoint PUT ErrorReportRequest has been removed.

Tip: For more information about the API, you can access the Deltek WorkBook API Guide at <https://workbookapi.deltek.com/?version=latest>

Framework

Google Analytics Removed from WorkBook Application

Deltek Tracking Number: 2007828

Description: Google Analytics has been removed from the WorkBook application, and is no longer used for analytic data collection.

Jobs

Briefings –Internal Links (Anchors) in Existing Briefings are no longer Supported

Deltek Tracking Number: 2056308

Description: Internal links (anchors) in existing briefing documents are no longer supported. When you edit a briefing file, existing links continue to be displayed; however, they no longer work correctly. When WorkBook encounters such a link, WorkBook is reloaded, and then the following message is displayed: Link not found or you have insufficient permission to open it.

Features and Enhancements Added or Changed

New WorkBook Resource Center

The new **WorkBook Resource Center** is a central hub that enables you to access all of the WorkBook information that you need. The top menu bar provides links to videos, training, and more. Scroll down to find Release Notes, Online Help, Coffee Breaks, the Ideas Portal, and popular learning assets. Bookmark the following link:

<https://enablement.deltek.com/resource-center/workbook>

Agents

You Might Need to Change Agent Parameters to Enhance Access Control on File Upload for Azure Blob Storage Provider

Attention: This information applies only to customer sites that use Azure Blob Storage Provider.

Deltek Tracking Number: 2081607

Description: As a result of changes in the **AzureStorageProvider** and **SASAzureStorageProvider**, you might need to adjust the parameters of the General Import Agent and the General Export Agent.

For the General Import Agent:

- If the **Import Storage Provider Id** parameter is set to an **AzureStorageProvider** (or **SASAzureStorageProvider**), the **Import file path** must not start with the storage provider's **RootPath** (or **CustomerContainerName**, respectively).
- If the **Archive Storage Provider Id** parameter is set to an **AzureStorageProvider** (or **SASAzureStorageProvider**), the **Archive path** must not start with the storage provider's **RootPath** (or **CustomerContainerName**, respectively).

For the General Export Agent:

- If the **Export Storage Provider** parameter is set to an **AzureStorageProvider** (or **SASAzureStorageProvider**), the **Export folder** must not start with the storage provider's **RootPath** (or **CustomerContainerName**, respectively).

See the following figures for more information.

For example, with the following configuration:

Azure Blob Storage Provider (2081607)

AzureStorageProvider

...

My settings

Type

Required

Value

Account name

String

☒

blobstorageaccountexample

Key

String

☒

<secret>

RootPath

String

☐

my-wb-container

Use HTTPS

Boolean

☐

True

You must change the following parameters for the General Import Agent:

Agent family: Import (1 items)			
61	General Import Agent	None	no-reply@deltek.com
Agent family: Export (1 items)			
62	General Export Agent	None	no-reply@deltek.com

Scheduling

Parameter

General Import Agent

127 Import Storage Provider Id
(32) Azure Blob Storage Provider (2081607)

128 Import file path
my-wb-container/ImportFiles/importfile

129 Import file extension

130 Archive Storage Provider Id
(32) Azure Blob Storage Provider (2081607)

131 Archive path
my-wb-container/ImportArchive

To the following:

Agent family: Import (1 items)			
61	General Import Agent	None	no-reply@deltek.com
Agent family: Export (1 items)			
62	General Export Agent	None	no-reply@deltek.com

Scheduling

Parameter

General Import Agent

127 Import Storage Provider Id
(32) Azure Blob Storage Provider (2081607)

128 Import file path
ImportFiles/importfile

129 Import file extension

130 Archive Storage Provider Id
(32) Azure Blob Storage Provider (2081607)

131 Archive path
ImportArchive

API

Exceptions from PatchObject Return HTTP 440 Instead of 500 Internal Server Error

Deltek Tracking Number: 1994789

Description: PATCH endpoints now return **400 Bad Request** instead of **500 Internal Server Error** when a patch payload that is sent through the API is not valid.

Tip: For more information about the API, you can access the Deltek WorkBook API Guide at <https://workbookapi.deltek.com/?version=latest>

Databoard

Upgrade of WorkBook Databoard Module to Microsoft .NET 6 – ExportDataRequest Endpoint Removed

Deltek Tracking Number: 1994318

Description: As part of the upgrade to .NET 6, the **ExportDataRequest** Databoard endpoint has been removed from RestService as of Release 13.5. This endpoint was accessible through both of the following:

- POST /api/Export/Data
- POST /api/json/reply/ExportDataRequest

The ExportFormRequest endpoint, which provides exactly the same functionality, is still available. It is accessible through POST /api/Export/Form and POST /api/json/reply/ExportDataRequest.

Tip: Deltek strongly discourages calling the ExportFormRequest endpoint because it will likely be removed in a future release.

Instead, use the report server API, which provides both of the following endpoints:

- **ExportDataRequest** – POST /report/api/Export/Data or POST /report/api/json/reply/ExportDataRequest
- **ExportFormRequest** – POST /report/api/Export/Form or POST /report/api/json/reply/ExportDataRequest

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

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

Finance & Administration

Creditors – Creditor Invoices – Download and View e-Invoice Lines and Attachments from Pagero

Deltek Tracking Number: 1975169

Description: You can now download and view Creditor Invoice lines from e-invoices created in Pagero. The information that is extracted from the Articles section of Pagero is generated as lines within the Creditor Invoices Lines grid in the Creditor Invoices sub-module. You can view the documents that are added as attachments to the invoice and download them when you click Preview Creditor Invoice File or Invoice Conversation in the bottom grid of the Creditor Invoices sub-module.

Previously, you could only download and view e-invoice headers from Pagero.


See the [Deltek WorkBook Integration Guide for Pagero](#) for more information.

Creditors – Creditor Invoices – Send Response to Pagero

Deltek Tracking Number: 1975158


Description: You can now send a response to Pagero to communicate the invoice status or provide updates about the downloaded invoice. New buttons and an Imported From column have been added to support this enhancement.

The Imported From column has been added in the top grid of the Creditor Invoices sub-module. This column provides details about the source of each downloaded invoice.

The Send Response to Pagero  button has been added to the following pages. Use it specifically for invoices downloaded from Pagero.

- Finance & Administration » Creditors » Creditor Invoices
- Finance & Administration » Administrative Follow-Up » Vouchers On Hold

When you click the Send Response to Pagero button in the top grid of the Creditor Invoices sub-module, the Send Response to Pagero dialog box opens so that you can select a response and provide additional information related to your response in the Status Reason field. WorkBook generates a response based on the information that you provide and transmits it to Pagero.

The Pagero Log Response  button has been added to the following pages:

- Finance & Administration » Creditors » Creditor Invoices
- Finance & Administration » Administrative Follow-Up » Vouchers On Hold
- Task » Approval » Creditor Invoice Approval

When you click the Pagero Response Log button, WorkBook displays the Pagero Response Log tab. This tab contains a list of responses sent for an invoice. You can also view the Pagero Response Log tab when you click a Creditor Invoice's Voucher card.

Journal Posting Performance Improvements

Deltek Tracking Number: 2056116

Description: Incremental performance improvements when performing journal postings have been implemented by Release 13.5.

Payment Proposals – GDFF Payment Proposal Type Added

Deltek Tracking Number: 2069268

Description: You can now use the new Global Delimited Flat File (GDFF) payment method in India.

New SKAT Integration Enables Danish Companies to Comply with the Danish Bookkeeping Act

Deltek Tracking Number: 1761074

Description: WorkBook enables Danish Companies who are required to submit VAT returns to submit them directly to DK SKAT using their VAT API.

New Danish VAT Returns Page

The Danish VAT Returns page has been added to the Finance & Administration module, Month-End sub-module, to enable Danish Companies to enter, submit, view, and resubmit the required VAT returns information. Navigate to Finance & Administration » Month-End » Danish VAT Returns.

You can only see and access this page if all of the following are true:

- You have access to Finance in the Company that is required to file Danish VAT returns.
- A new Company Variable 80 (Enable Communication Between SKAT and WorkBook) is enabled.
- The Company's country is set to Denmark.
- The Company's CVR contains a valid CVR. (The CVR is the unique identifier for a business in Denmark's Central Business Register, the official database of Danish businesses.)

If the Company's country is set to something *other than Denmark* and the Company CVR *is blank*, WorkBook displays an overlay that explains that you cannot access the Danish VAT Returns page.

Note: WorkBook validates the CVR when you submit a VAT return, not when you enter a CVR on the Danish VAT Returns page.

VAT Returns Process Overview

To begin the VAT returns process, you must first load the VAT calendar on the Danish VAT Returns page. When you click the Load Calendar button, WorkBook generates periods from half a year before the current date to one year after the current date, with the frequency of periods based on the Company's CVR number.

For example, if today's date is July 1, 2023, half a year before the current date would be January 1, 2023. A full year after today's date would be July 1, 2024. Thus, if you click the Load Calendar button on July 1, 2023, periods from January 1, 2023 to July 1, 2024 are generated. You can edit period dates if the frequency is **not** monthly, quarterly, or half-yearly. Based on the frequency, WorkBook populates the lines on the Danish VAT Returns page.

You click the Create Return button on the Danish VAT Returns page to display the VAT Return page so that you can enter the information that SKAT requires for VAT returns. If you already have a VAT return that you have not yet submitted and approved, a dialog box tells you that creating a return overwrites the current version and asks you to confirm before it displays the VAT Return page.

After you enter the required information—or update it, if you are working with an existing VAT return—WorkBook displays a confirmation page so that you can verify that the information that you are going to submit is correct and complete, including the total.

You can click the Send to SKAT.dk button when you are ready to submit your VAT return.

Submit the VAT Return Overview

When you submit a VAT return, its status changes to 40 – Submitted, and the following occur:

- The page footer displays the figures that you submitted, along with their total.
- A status message from SKAT is displayed in the Message from SKAT pane.
- The following buttons are displayed:
 - Approve Return on SKAT.dk – Click to log in to the SKAT web site to approve the VAT return. This is required.
 - Download Receipt – Click to download the receipt for a VAT return.

If the VAT return was not approved on the SKAT website, or if it expired, SKAT sends an appropriate error message.

If you successfully downloaded the VAT return from SKAT, its status changes to Status-50 – Approved. The receipt is always available to you when it is in Status-50, and it is returned to you directly from WorkBook.

Sometimes you might need to resubmit a VAT return. When you start to resubmit a VAT return the following message is displayed:

Creating a new return will overwrite the current return. Continue?

After you confirm, the VAT Returns page is displayed so that you can enter or update any information as needed. You can then submit and approve it as you did the initial VAT return.

Resubmitting a VAT return retains its status as resubmitted, and the footer displays the resubmitted figures.

When you resubmit a return, in the main grid:

- The Submitted by column displays the user who resubmitted the VAT return.
- The Transaction Timestamp column displays the date on which the VAT return was resubmitted.

Framework

Rich Text Editor Update and Enhancement

Delttek Tracking Number: 1897012

Description: The Rich Text Editor component, which is used throughout the WorkBook application, has been upgraded to enhance the user experience with a more modern, streamlined, more consistent functionality and look and feel. These updates include the following:

- Contact User » Create New Job » Briefing
- Documents » Document Editor page
- Settings » Global System Settings » Login Customization – Edit the text field at the bottom
- Settings » Advanced Tools » Notification Mail Text Setup Vue – New page, to replace the previous Notification Email Text page

Webhooks – New Webhook Subscription

Deltek Tracking Number: 2131442

Description: This release adds a new webhook subscription, FinanceJournalPosted.

Webhooks – Use Event Aggregation to Limit the Number of Events Delivered to a Webhook Subscription

Deltek Tracking Number: 2131418

Description: Almost every change in WorkBook triggers a new event. Some webhook events might be triggered more often than they were previously. This can result in many events being delivered to a subscription. You can use event aggregation to reduce the number of calls to a webhook, which in turn reduces the number of events that are delivered to a subscription.

You can use event aggregation with only the following events:

- Events that are related to updates
- Events that have the same types
- Events that are associated with the same entity
- Events that have been retried the same number of times.

For more detailed information about using event aggregation, see [Deltek WorkBook Webhooks Guide](#).

General

DevExpress Upgrade

Deltek Tracking Number: 2037288

Description: DevExpress has been upgraded to Version 23.1. This updates PDF and image processing algorithms. This means that in some cases, document previews may be improved.

ImageMagick Component Updated

Deltek Tracking Number: 2063290

Description: Deltek upgraded the third-party component ImageMagick that WorkBook uses to version 13.6.0.

Jobs

Price Quote (PQ) – Confirmation before Canceling

Deltek Tracking Number: 1565641

Description: A dialog box has been added for you to confirm the cancellation of a PQ before it is canceled. This reduces the risk of accidentally canceling a valid PQ.

Pagero Integration

Pagero Integration Guide Updated for On-Premises WorkBook Deployment Instructions

Deltek Tracking Number: 2110203

Description: Instructions for configuring the integration between WorkBook and Pagero for customer sites that have on-premises WorkBook deployments have been added to the [Deltek WorkBook Pagero Integration Guide](#).

Settings

Settings – Finance – Import and Export Basic Company Information in SAF-T File Format

Deltek Tracking Number: 1761071

Description: In compliance with the Danish Bookkeeping Act's requirements for bookkeeping systems to import and export Danish Company data in Standard Audit File for Tax (SAF-T) format, the **SAF-T Import/Export** sub-module has been added in **Settings » Finance**. In this submodule, Administrators can generate a SAF-T file in XML format, export a Danish Company's basic information in SAF-T file format, and import a SAF-T file from other bookkeeping systems to WorkBook.

Time & Expense

Additional Information Field for Personal Expense Added

Deltek Tracking Number: 2040474

Description: A new checkbox has been added on the Activity Settings page, enabling System Administrators to specify which Activities require additional information for regulatory reporting. By default, this checkbox is disabled; you must enable it manually for the appropriate Activities. System Administrators can also set default text via the Standard Texts page to guide users in providing the required information using their preferred language.

For users who enter job-based expense entries that are associated with those Activities, a new Information field is now displayed on the Expense Entry Details sidebar. The Information field is a read-only text field, limited to 255 alphanumeric characters. This field helps to ensure compliance with regulatory reporting standards. If you need to add or modify this information, click the edit icon to access a separate text entry dialog box.

For more information, see [Enable the Information Field in Personal Expense](#) and [Add Additional Information to Your Expense Entry](#).

Known Issues

Finance & Administration

Creditor Invoices – Voucher Number is not Displayed on Creditor Invoice even when Configured Correctly

Deltek Tracking Number: 2112596

Description: When you correctly set up the voucher number tag in System Variable 953 (*Voucher Document Information Box: Add Voucher Information Dynamically. Supported Files pdf, png, gif, and jpeg.*) using **<Vouchernumber>**, and you upload a voucher in the Creditor Invoice, the voucher number is not displayed on the document.

Additional Notes: The correct tag to use is **VoucherNumber**. Be sure to use the uppercase **N** because it is case-sensitive.

Email

HTML in Email Signature

Deltek Tracking Number: 2075493

Description: The email signature editor no longer provides the option to upload a signature in HTML format. The solution to this is pending changes that must be implemented by a third-party vendor to their product.

Framework

Quickly Opening, Closing, and Reopening Some Pop-Up Dialog Pages Can Cause an Error

Deltek Tracking Number: 2144515

Description: When you open some pop-up dialog pages, then quickly close them and reopen them, an error can occur.

Rich Text Editor Component – Paste Plain Text Buttons do not Work in Firefox

Deltek Tracking Number: 2125987

Description: When you use Firefox, in the rich text editor, the Paste and Paste Plain Text buttons do not work; an error occurs.

Rich Text Editor Component – You Cannot Copy Images Using the Copy Button

Deltek Tracking Number: 2105188

Description: When you copy or cut an image in the rich text editor using the Copy button in the editor's toolbar, the image is not copied.

Additional Notes: The rich text editor is used for job and task briefings, email signatures, email composition, and document templates.

Rich Text Editor Component – You Must Click on Text to Use Undo/Redo Buttons after Resizing Dialog Boxes/Windows

Deltek Tracking Number: 2105224

Description: To use the Undo/Redo buttons in the rich text editor after you resize a dialog box or browser window, you must first click on the text.

Additional Notes: The rich text editor is used for job and task briefings, email signatures, email composition, and document templates.

General

Approvals – Approval Record Remains Unapproved when Substitute Approver Approves on Behalf of Pool Approvers

Deltek Tracking Number: 2115797

Description: Pool approvers that are on leave and are substituted are not approved as part of the pool, on certain approval flows.

Closing a Dialog Box Quickly Can Cause Error

Deltek Tracking Number: 2112454

Description: If you open a dialog box and then close it very quickly, in some unusual cases an error can occur, and an error message is displayed.

Jobs

Briefings – Format and Tool Changed since Upgrade

Deltek Tracking Number: 2069554

Description: When you use the rich text editor (to edit a job or task briefing, for example), and you paste some text using either CTRL+SHIFT+V or the Paste Plain Text button, the default system format is applied, rather than the format of the surrounding text.

Briefings – Job Briefing Templates

Deltek Tracking Number: 2123713

Description: Some users might find that editing of certain HTML briefings is less intuitive than on earlier versions.

Job Invoice – Invoice Print Layout, Payment Terms, and Method Revert to Initial Values

Deltek Tracking Number: 2114271

Description: When you select a different invoice print layout, payment terms, and/or payment method on a job invoice and make changes to the invoice details, such as headline and GLN Location No., the changes that you make to the invoice print layout, payment terms, and payment method revert to their initial values.

Workaround before Fix: Soft refresh WorkBook after you make changes to the invoice print layout, payment terms, and/or payment methods to prevent them from reverting.

Settings

Task Color Page – Error when You Press Delete on the Keyboard

Deltek Tracking Number: 2115102

Description: When you are on the Task Color page, and you press the Delete key, an error occurs.

Ticket Quick Create Page – Error when you Press Delete on the Keyboard

Deltek Tracking Number: 2117290

Description: When you are on the Ticket Quick Create page, and you press the Delete key, an error occurs.

Software Issues Resolved

ConceptShare Integration

ConceptShare Settings – URL Text Field does not Trim Trailing Space, which Causes Login Error

Deltek Tracking Number: 1618621

Description: If during the setup of the WorkBook / ConceptShare integration, the URL for the ConceptShare account was accidentally entered with a trailing space, when users tried to log in to ConceptShare via Jobs » Job List » Reviews, the following error message was displayed: Log-in failed. Invalid URI: The hostname could not be parsed.

Dashboards

Newly Created Dashboard Stuck on Loading

Deltek Tracking Number: 2029895

Description: If you created a dashboard immediately after logging in to WorkBook, the newly created dashboard could get stuck loading.

Workaround before Fix: Click **Refresh**, and the dashboard that you created is available in the list of dashboards.

Dashboards with Multiple Databoards Switch Output

Deltek Tracking Number: 2046557

Description: When you accessed a dashboard that includes two or more databoards, each databoard widget showed the output and parameters of a databoard selected on another widget.

Sentry Error Triggered when You Hard Refresh Dashboards Page

Delttek Tracking Number: 2046609

Description: When you accessed a dashboard that includes two or more databoards, a crash error could occur.

Finance & Administration

Administrative Follow-Up – Vouchers on Hold – Cancelling Parking for a Parked Creditor Invoice Results in System Error

Delttek Tracking Number: 2002511

Description: When you attempted to cancel parking for a parked Creditor Invoice, a System Error (red error) was displayed, depending on your WorkBook system configuration.

Arithmetic Overflow System Error if Total Exceeds Nine Digits in Financial Budgets

Delttek Tracking Number: 1988373

Description: On the Account Budget tab in Finance & Administration » General Ledger » Financial Budget, when you entered amounts into multiple accounts within the month, and the sum of those amounts resulted in a total of at least ten digits, a System Error (red error) occurred.

On the Dimension Budget tab, when you entered amounts into multiple dimensions within the month, and the sum of those amounts resulted in a total of at least ten digits, and then you transferred those amounts to the Account Budget tab using the Transfer Amounts to Account Budget button, a System Error (red error) occurred.

Bank Reconciliation – Error Message with Long Voucher Numbers

Delttek Tracking Number: 2152977

Description: When you navigated to the Reconciliation tab of a bank reconciliation account that had a voucher number of more than 50 characters, an error message was displayed to indicate that there were too many characters in the voucher number.

Additional Information: The voucher number character length here has been increased to 255, which is the same as the voucher number size limit.

Cash Flow – Cannot Create Cash Flow Forecast

Delttek Tracking Number: 2134079

Description: When you have just created a cash flow, and you try to create another one with different values, either of the following errors appears intermittently, preventing you from creating a cash flow forecast:

- The input provided was too long, please remove some characters.
- Company does not exist.

Creditors – Creditor Invoices – Creating a Creditor Invoice with an Existing Invoice Number and Creating It Again with a New Invoice Number Results in System Error

Delttek Tracking Number: 1999847

Description: When you tried to create a Creditor Invoice using a Creditor and invoice number combination that already exists, and then you tried to create it again with a new invoice number, a System Error (red error) occurred.

Workaround before Fix: Before creating a Creditor Invoice, check whether the Creditor and invoice number combination already exists.

Creditors – Creditor Invoices – No Invoice Number Duplicate Check when Using Special Characters

Deltek Tracking Number: 2090835

Description: When you tried to create a Creditor Invoice when there was already an invoice number that contains a special character, the Invoice Number field was not highlighted in red, and no tooltip was displayed to say Creditor/Invoice Number Combination Already Exists.

Creditors – Creditor Invoices – Validations Set for Creditor Invoice Created through Third-Party Integration (Pleo)

Deltek Tracking Number: 1996647

Description: When you approved a Creditor Invoice with an invalid Finance account, the invoice status was changed to either Approved or Ready for Booking.

Additional Notes: Information messages were implemented to appear when you performed these actions:

Action	Validation
When you change an Account type to Header or Sum From for a Finance account used in a Creditor Invoice	The account can only be of type Operating or Balance Sheet because it is used in the Creditor Invoice.
When you approve an invoice or add a line on an invoice with an invalid Finance account	<ul style="list-style-type: none"> The Finance account belongs to another Company. The selected Finance account cannot be set. Only Operating or Balance Sheet accounts can be used on the invoice lines. Finance account is not allowed on voucher.
When you try to create an invoice or update an invoice with a job that has an Expenditure Account set to Fixed and an invalid Finance account	The associated job has an expenditure account set to <i>fixed</i> , but the selected account is invalid. Check the job or Finance account settings.
When you approve an invoice in Status-40 or change an invoice from Status-40 to -50 with an invalid Finance account	To resolve the issue, you can set the voucher back to Status-10 or update the Finance account settings.
When you approve an invoice or add a line on an invoice with an invalid Finance account	<ul style="list-style-type: none"> Finance account blocked. Automatic account cannot be used on Creditor Invoice lines when System Variable 484 (Allow Manual Bookings on System Accounts

Action	Validation
	in General Ledger (Not Recommended)) is disabled.

Creditors – Creditor Invoices – When You Upload File to Voucher in Status-50 System Error Occurs

Deltek Tracking Number: 1997275

Description: When you tried to upload a file to a Creditor Invoice that was in Status-50, a System Error (red error) occurred.

Creditors – Creditor List – Rotating Attached Creditor Invoice File Causes Error

Deltek Tracking Number: 2052549

Description: When you opened a Creditor Invoice card that has an attached file, rotating the file produced an error if you were on the Creditor Invoice page and navigated to another page.

Debtors – Debtor Invoices – Customer Address is not Shown in the Same Way on Debtor Invoices and Credit Notes

Deltek Tracking Number: 2099126

Description: Customer address information was shown differently on Debtor Invoices and Credit Notes.

Additional Notes: Electronic invoices now show proper address information for contacts.

General Ledger – Journals – Copying Journal Lines that have Attachments Causes System Error

Deltek Tracking Number: 2036613

Description: When you copied a journal entry line, including its attachments, and then duplicated the resulting new line along with its attachments, a System Error (red error) occurred.

General Ledger – Journals – Employee Department Overrides the Department Set in Voucher Line Details for Expense Entries

Deltek Tracking Number: 1841312

Description: When you set a Department in the voucher line details for an expense entry and then posted the voucher, the Department that was displayed in the journal was the employee Department instead of the Department that you had set in the Voucher line details.

General Ledger – Journals – Selecting an Account with an Inactive Tax Code on Journal Entry Tab Causes System Error

Deltek Tracking Number: 2037256

Description: When you selected an account that has an inactive tax code from the Account drop-down list on the Journal Entry tab, a System Error (red error) occurred. This error was usually displayed for an American or Canadian Company that uses tax codes.

Monthly WIP Adjustments – Deadlock when You Add a Comment

Deltek Tracking Number: 2136662

Description: When you made a comment in a WIP adjustment, in the main grid or in the sub-grid, and then left the field or line, the following deadlock error occurred:

The system is busy, and your changes may have been reversed. Please try again.
 JobAdjustmentDetails
 POST /json/reply/JobAdjustmentDetails

Framework

Absence Type was Gender-Based

Deltek Tracking Number: 2053331

Description: The absence type Maternity Leave was gender-based.

Additional Notes: This absence type has been renamed Parental Leave.

Custom Translations do not Work for Main Reports that have Sub-Reports

Deltek Tracking Number: 1961498

Description: Custom translations did not work for main reports that have sub-reports.

General

Exceeding Session Notifications Table Maximum Capacity Causes Downtime

Deltek Tracking Number: 2080305

Description: If your WorkBook system was used over a long time by many users, without specific maintenance being performed, significant system downtime could occur in rare cases.

Additional Notes: This could be caused by the session notifications table exceeding its maximum capacity.

Grids – Cannot Right-Click on WorkBook Grids when Using a Macintosh Browser

Deltek Tracking Number: 1651962

Description: When you accessed any WorkBook module with grids when using any browser running on MacOS or iOS, right-clicking a cell in the grid displayed the right-click options for the browser, rather than the right-click options for the WorkBook page.

Wijmo – Date Field Entries – First Keystroke is not Registered

Deltek Tracking Number: 1572802

Description: When you tried to enter a date into a date field manually, the date selector did not open, and as a result the first keystroke was not registered. This could cause inaccurate data because you could end up entering incorrect dates without realizing it.

Inbox

Conversations – Notification of New Comments not Sent – Other Message Sent Instead

Deltek Tracking Number: 2120745

Description: Sometimes when you created comments on conversations, no email notifications were sent, but another conversation appeared in your inbox with the following message: The transaction is either not associated with the current connection or has been completed.

Conversations – Comments with Special Characters Displayed instead of Content

Deltek Tracking Number: 1967755

Description: When you selected a conversation from the inbox and added a new comment with special characters—for example \$\$, \$&, \$`, \$', \$n, and \$(Name)—the new comment was posted as a result of a command or displayed as an odd-looking character combination, instead of the actual text.

Conversations – Email Notifications Sent about Wrong Comment when Multiple Comments Added in Close Succession

Deltek Tracking Number: 2070606

Description: Email notifications that are sent for new comments on conversations could be sent about the wrong comment when multiple comments were added in close succession.

Creditor Invoice Conversations – Contact Users Mentioned See Error when Opening the Inbox

Deltek Tracking Number: 1982994

Description: When a Contact User opened the inbox after having been mentioned on a Creditor Invoice conversation, a System Error (red error) occurred because Contact Users cannot access Creditor Invoices and should not be able to see the conversation.

Email – Line Spacing is Larger than Previous Versions when Composing Emails

Deltek Tracking Number: 2077841

Description: When you opened the email composer, the default line spacing was larger than in previous versions of WorkBook.

Jobs

Briefings – Error when You Upload an HTML File

Deltek Tracking Number: 2055367

Description: When you tried to upload an HTML file as a briefing, a System Error (red error) occurred.

Briefings – WorkBook Adds Extra Characters to URL when You Click a Hyperlink

Deltek Tracking Number: 1570132

Description: When you configured a valid URL in Jobs » Briefing, and then you clicked on the hyperlink, extra characters were added to the URL. This caused an error message that said that it was an invalid page or no web site was found.

Costs – Purchases – Move Job Voucher – WorkBook does not Block Move to Job where Needed

Deltek Tracking Number: 1608477

Description: When you moved a voucher that did not have a Finance account to a job whose Expenditure account is set to Needed, WorkBook did not block the move.

Costs – Simple View – Purchase Cost Total Amount Missing

Deltek Tracking Number: 1958982

Description: On the Summary tab at Jobs » Costs, when you navigated to the Simple View – Activity Based on Cost view, the Purchase Cost column did not display a total amount.

Costs – Summary – Long Line Items not Completely Visible

Deltek Tracking Number: 1569155

Description: On the Summary tab at Jobs » Costs, you could not see the full text of line items that had a lot of characters. In addition, you could not adjust the column width.

Creating and then Deleting Material Calculation then Returning to Jobs » Price Quote » Materials Causes an Error

Deltek Tracking Number: 2057126

Description: When you created a material calculation at Jobs » Price Quote » Materials, then navigated to Jobs » Materials and deleted the Material calculation, and then navigated back to Jobs » Price Quote Materials, an error occurred.

Inactive Departments are Displayed in Parentheses on Invoices in Status-40 and Higher

Deltek Tracking Number: 1745991

Description: When you viewed invoice lines that contain inactive Departments; and the invoice is in status Approved Internally, Approved Externally, Invoiced, Invoiced and Booked, or Cancelled; the Departments were displayed in parentheses.

Inactive Departments are Displayed in Parentheses on Price Quotes (PQs) in Status-40, -50, -90

Deltek Tracking Number: 1745245

Description: When you viewed PQ lines that contain inactive Departments; and the PQ was in status Approved Internally, Approved Externally, or Cancelled; the Departments were displayed in parentheses.

Job Invoice – Headline Field is Reset or Cleared when you Edit Invoice Headline

Deltek Tracking Number: 2018080

Description: When you edited the Headline field and edited the Invoice title, the Invoice title reverted to its original or previous value.

Job Invoice – Using New Currency Rate with the Company of Your Job and Adding a Line on the Invoice Causes System Error

Deltek Tracking Number: 2062001

Description: When you created a Currency rate, and the Company of your job uses that Currency rate, when you tried to add a line on the Invoice, a System Error (red error) occurred.

Jobs List with Dimensions Settings (13) – Inactive Departments in Dimension Column are Displayed in Parentheses for Invoiced or Cancelled Jobs

Deltek Tracking Number: 1750472

Description: When you viewed jobs that have inactive departments, and their job status is Invoiced or Cancelled, the departments were displayed in parentheses in the Dimension column.

Job Type does not Default in Job Creation Despite being Enabled and Set on Client

Deltek Tracking Number: 2077923

Description: When a client has a default value set on a job type, and you tried to create a job under that client, WorkBook did not auto-populate the Job Type field with that default value.

Price Quote (PQ) – Entering Large Value in VAT/Tax Input Field in Footer Causes System Error

Deltek Tracking Number: 2008493

Description: When you entered an extremely large value in the VAT or Tax Input field in the PQ footer at Jobs » Price, a System Error (red error) occurred.

Price Quote (PQ) – Missing Confirmation Dialog Box when You Cancel a PQ

Deltek Tracking Number: 1565661

Description: When you changed a PQ status to Canceled, the confirmation dialog box was missing.

Additional Notes: The missing dialog box has been added.

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

Deltek Tracking Number: 1815209

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

Purchase Orders (PO) – Entering an Extremely Large Value for VAT or Tax Causes System Error

Deltek Tracking Number: 1996102

Description: When you entered an extremely large value in the VAT or Tax entry field on the Purchase Order footer in Jobs » Purchase Order, a System Error (red error) occurred.

Workaround before Fix: Do not enter an unrealistic VAT or Tax percentage.

Purchase Orders (PO) – Edited PO Title Reverts when You Edit Other Field(s)

Deltek Tracking Number: 1976360

Description: When you created a PO, edited its title, and then edited or updated any field on the PO, the PO's title reverted to its original or previous value.

Reports – Jobs List View (11) – Invoice Overview – Invoice Type is Displayed Incorrectly

Deltek Tracking Number: 2092796

Description: When you navigated to the Job List View (Report 11) – Invoice Overview, the Invoice Type column was displayed as an ID reference, rather than as text.

Sales Hours Hidden in Jobs Lists

Deltek Tracking Number: 2006726

Description: In the Jobs List (1) and Jobs List with Dimensions Settings (13) views of Jobs » Jobs List, when System Variable 119—Disallow Access to Resource Sale when Related to Resources—is set to 1 (Disallow Access to Resource Sale from Advanced and Basic Users) or 2 (Disallow Access to Resource Sale from Basic Users), the Actual Sale Hours column was hidden.

My Settings

Opening My Settings » Information Tab with LastPass: Free Password Manager Browser Extension Can Cause System Error

Deltek Tracking Number: 1988238

Description: When you had the LastPass: Free Password Manager browser extension installed and enabled, you might have encountered a System Error (red error) when you opened My Settings » Information tab.

Resources

Employee Card – System Error when You Add Spaces to the End of a Resource Name

Deltek Tracking Number: 2016699

Description: On the Employee card, if you added spaces at the end of the user name in the Name field, an error occurred.

Grid is not Updated when you Assign and Remove Resources on Tasks

Deltek Tracking Number: 1837410

Description: When you added or removed resources that were booked on tasks, the grid was not automatically updated to reflect the changes on other subscribed pages.

Resource Card – Client Access Settings – Copy Client / Job Access from Another Employee Unavailable

Deltek Tracking Number: 2053150

Description: When you navigated to Employee card » Settings » Client Access Settings and selected Copy Client/Job Access from Another Employee, the drop-down lists were not available because the toolbar was missing.

Reports

Grouping by Practice Area (Dimension Type 33) does not Work on Report 264 (Financial Bookings)

Deltek Tracking Number: 2064194

Description: Grouping by Practice Area (Dimension Type 33) in Report 264 did not display the practice area that is used on jobs. Instead, the Practice Area was blank.

Scheduling

Briefings in Task Card not Saved

Deltek Tracking Number: 2114453

Description: When you updated a briefing for a task under a job, and you minimized the task card and then reopened it, your changes disappeared.

Calendar Sync Can Fail

Deltek Tracking Number: 2053375

Description: If the Calendar Worker agent parameter had more than hundreds of weeks between the start and end, that could cause the agent to fail.

Calendar Views – Wrong Access Rights on New Task Pop-Up Page Causes Access Error

Deltek Tracking Number: 1927555

Description: Incorrect access rights were applied to the new task pop-up page in the Calendar views, which caused an access error when you opened that page.

Employee Task Summary – Scheduling Resources not Hidden when Filtering

Deltek Tracking Number: 1977204

Description: Scheduling resources were not hidden in the grid when you filtered them in Scheduling » Employee Task Summary.

Missing Warning Message about Recalculating Bookings

Deltek Tracking Number: 2053295

Description: When you navigated to Jobs » Tasks » Tasks, clicked on Booked Resources on the toolbar, and then clicked on Task Start Date or Task End Date, no warning message was displayed to tell you that changing a start/end date can cause recalculation of bookings.

Project Manager Set on Job is Assigned Responsible when Creating Task with System Variable 1030 Set to 0

Deltek Tracking Number: 2053321

Description: When you created a task when System Variable 1030 (Create Ticket/Task: Define Resource on Job to be Task Responsible by Default) is set to 0, the Project Manager that was set on the job was assigned to the Responsible field.

Additional Notes: For System Variable 1030, the value 0 means Do Nothing.

Resource Planning On-Hover Information Missing

Deltek Tracking Number: 1969091

Description: When you hovered over bookings on calendar pages, tooltips were not displayed.

Additional Notes: Tooltips on tasks on the Jobs » Tasks » Timeline view page were simplified.

Scheduling Views – Weekly Schedule – Incorrect Capacity Calculations

Deltek Tracking Number: 2120492

Description: The total hours capacity calculations were incorrect in the Weekly Schedule.

Task Matrix – Incorrect Name of Extended Access Item

Deltek Tracking Number: 1569123

Description: The display name of an extended access item that was used for input fields under the Task Matrix was incorrect.

Additional Notes: It is now called Input Field, instead.

Timeline Calendar – Booking Hours Value is Doubled

Deltek Tracking Number: 1642835

Description: When you moved a newly created booking to another date or user, the booking hours value was doubled.

Timeline Calendar – Cells Show Multiple HTML Symbols Instead of the Correct Sign

Deltek Tracking Number: 2009238

Description: Multiple HTML symbols were displayed in Timeline Calendar cells instead of the correct sign/value; for example, & was replaced by &.

Timesheet – Weekly Tab – Applying Filter Causes Error

Deltek Tracking Number: 1914661

Description: When you added multiple employees on the Timesheet » Weekly tab » filter, when you applied the filter, an error occurred.

Use of Period or Comma in Decimal Format in Mass Entry in Task Matrix Grid is not Supported

Deltek Tracking Number: 2053310

Description: When you tried to do mass entry by multi-selecting cells on the Task Matrix grid and entering a period (.) or comma (,) depending on your decimal format, the entry dialog box was not displayed.

Settings

Dimension Setup – Soft Refresh Required to Deselect Checkboxes

Deltek Tracking Number: 1569045

Description: In the grid at Settings » Dimension Setup, when you deselected checkboxes, you had to perform a manual soft refresh before they appeared as deselected.

Holidays and Absence – Renaming a Holiday Calendar Causes System Error

Deltek Tracking Number: 2090808

Description: When you renamed a holiday calendar in Settings » Holidays and Absence, a System Error (red error) occurred.

Missing Scrollbar in Parameter Grid in Databoards Settings

Deltek Tracking Number: 2054753

Description: The scrollbar was missing from the Parameter grid at Settings » Databoards » Settings when you set the screen resolution to 1920x1080; the mouse wheel and arrow keys did not function.

Price List – UpdateDate is not Updated when You Change Rate Card

Deltek Tracking Number: 2072677

Description: When you changed any rule on a Price List, the UpdateDate and UpdateResourceID values were not updated in the Database (PriceListData table).

System Variables – Description of System Variable 768 Refers to Material, rather than Mileage

Deltek Tracking Number: 2084777

Description: When you navigated to Settings » Global System Settings » System Variables and searched for System Variable 768 (Automatically Block Mileage Entry on Finalized Jobs (Status-4 and -5), the description referred to material entries, instead of mileage.

System Variables – Searching for System Variable 772 with Large Number of Employees Slows Performance

Deltek Tracking Number: 1726405

Description: When your WorkBook system has a large number of employees, and you searched in Settings » Global System Settings » System Variables for System Variable 772 (Follow-Up Notification Send by), system response time became very slow.

Storage

Job Folder Setup – Unable to Delete Files in a Folder that is Assigned as Sub-Folder Structure

Deltek Tracking Number: 1709086

Description: When you tried to delete a file that belongs to a folder that is assigned as a sub-folder structure, an error message was displayed, and the file was not deleted.

Workaround before Fix: Change the sub-folder structure, either use the root folder or change the sub-folder, and then go back to the Documents browser and delete the file.

Timeout Occurs when SharePoint Library is Large and You Try to Rename Client

Deltek Tracking Number: 1869325

Description: When you tried to rename a Client, and the SharePoint Document Library contains large files, a timeout occurred.

Uploading an Empty Document on a SharePoint Folder Causes a System Error

Deltek Tracking Number: 2052109

Description: When you browsed a SharePoint Storage Provider and tried to upload an empty document (0kb size document), a System Error (red error) occurred.

Uploading an Empty Document to the Root Folder Causes a System Error

Deltek Tracking Number: 2026632

Description: When you tried to upload an empty document to a Storage Provider's SharePoint root folder and sub-folders, a System Error (red error) occurred.

Tasks

Calendar View Page – Cannot Access View Options Settings

Deltek Tracking Number: 2027814

Description: When you navigated to the Tasks » Calendar View page, you did not have access to the view options settings page by default, and an error was displayed.

Personal Expense Entry Approval Causes Error Message

Deltek Tracking Number: 1969718

Description: When you approved an inter-company Personal Expense at Tasks » Approval » Personal Expense Approval, an error message was displayed.

Task Conversation – Adding a Comment in Task Card Causes Error

Deltek Tracking Number: 1998917

Description: When you added a comment to a task conversation in a task card, and System Variable 815—Set New Ticket Status when the Author Replies—was not set, a server exception error occurred.

Time & Expense

Add All Active Tasks Pulls from Inactive Schedules

Deltek Tracking Number: 1569641

Description: When you added tasks from the current week using the hamburger menu, tasks that were under inactive schedules were also added.

Databoard Export – Time Entries – Summarized by Employee and Job – System Error Occurs

Deltek Tracking Number: 2005346

Description: When you exported databoards using Time Entries – Summarized by Employee and Job, a System Error (red error) occurred.

Description is Reset or Cleared when You Edit Timesheet

Deltek Tracking Number: 2018032

Description: When you made changes to the description fields in the Timesheet Daily view, the text was sometimes reset or cleared. The Finance & Administration » Cost Entry » Time Entry page incorrectly showed the week navigation on the toolbar in the daily view. When you navigated to the Timesheet Status daily view for the first time, the selected date was sometimes incorrect.

Error when You Click Export Grid Data

Deltek Tracking Number: 2032884

Description: When you navigated to Finance & Administration » Administrative Follow-Up » Time Entry Statistics and clicked Export Grid Data, an error occurred.

Error when Deleting Task from Daily/Weekly View: Invalid Time Entry ID Specified

Deltek Tracking Number: 2019205

Description: Deleting multiple tasks from the Daily/Weekly view of a timesheet caused the following error: Invalid Time Entry ID Specified.

Expense – Sidebar – Details – Entering an Invalid Purchase Order (PO) Number Causes System Error

Deltek Tracking Number: 2143178

Description: When you entered a non-numeric value in the Purchase Order field, a System Error (red error) occurred.

Expense Entries Message Displayed when You Change Creditors with Different Companies when Task is Set

Deltek Tracking Number: 1591074

Description: When you tried to change the selected creditor for an expense entry to a creditor of another Company, WorkBook displayed an incorrect error message that the Company does not exist or is not active, if you already added a job and task to the respective fields of the expense entry.

Workaround before Fix: Clear the expense entry's Task field. You can then change the creditor.

Secondary Approvers not always Added as Intended

Deltek Tracking Number: 2021799

Description: When users submitted time entries for approval, the author/entry user was added inconsistently, depending on whether the record owner submitted the time, an Admin User submitted the time, or the WorkBook system submitted the time. As a result, secondary approvers were sometimes not added as intended.

Time – Weekly/Daily – Tasks not Added after Agent Type 48 Runs

Deltek Tracking Number: 1978084

Description: After Agent Type 48—Auto Add Task to Timesheet—ran successfully with the scope parameter set to 2—Add Active Tasks from this Week with Allocated Hours—when you navigated to Timesheet » Weekly/Daily, tasks were not added on the current week.

Time Entry – When You Change a User's Employee Department then User Creates Time Entry in Existing Sequence, Updated Department is not Recorded

Deltek Tracking Number: 2100967

Description: When you changed a user's employee department, and then that user created a time entry in an existing time entry sequence, that updated employee department was not recorded for that time entry sequence.

Time Entry Approval – Secondary Approver is Added even when Others are Marked as Approvers

Deltek Tracking Number: 1569942

Description: Time entries that were marked with a secondary approver were added, even when others were marked as approvers.

Additional Notes:

Attention: The resolution to this issue modifies the rules regarding the approval of time entries. When author approval is disabled, time entry approval now adds an author who is now marked as approved, even when approved automatically or through Finance & Administration. When approving on behalf of others, it now also approves if the time entry owner is marked as another type of approver.

Time Entry Approval – Time Entry Owners in Combination with Pool and Substitute Approvers Must not be Able to Bypass Approval by Others

Deltek Tracking Number: 2021805

Description: During time entry approval, the author could in some circumstances bypass the approval flow of their own records if they were the substitute approver or a pool approver.

Additional Notes: A time entry author no longer approves others on their own behalf if they are an approver as part of a pool or are marked as a substitute for another approver. This includes when others approve on behalf of the time entry owner, including automatic time entry approval.

For substitution approval, this means that there will not be a valid replacement for the resource until the original resource has returned from absence. Administrative approval can be used to override the approval status in this scenario.

Timesheet – Daily View – Error on Accessing Daily View

Deltek Tracking Number: 2126911

Description: When you navigated to Time & Expense » Time & Expense » Timesheet » Daily view, if daily time entry was corrupted, an error occurred.

Timesheet – Time Entry – Text not Vertically Centered in Enter Description Field

Deltek Tracking Number: 2007787

Description: When you added an External/Internal Description to a time entry at Time & Expense » Timesheet, the text that you entered in the Enter Description field was not vertically centered.

User Interface

Tasks – Billable Jobs with Open Price Quotes – Open Price Quotes – Invoices Approved and Ready to be Finalized – White Space between Header and Grid

Deltek Tracking Number: 2010022

Description: When you navigated to Tasks » Billable Jobs with Open Price Quotes » Invoices Approved and Ready to be Finalized, there was a white space between the page header and the grid.

Tasks – Follow-Up – Project Posting – White Space between Header and Grid

Deltek Tracking Number: 2012641

Description: When you navigated to Tasks » Project Posting, there was a white space between the page header and the grid.

Time & Expense – Timesheet Page – Weekly Tab – Text is not Vertically Centered

Deltek Tracking Number: 2038360

Description: When you navigated to Time & Expense » Timesheet page » Weekly tab » External Description dialog box to enter text for a job/task in the External Description field, the text that you entered was not vertically centered.

User Menu Options – Whereabout Status – Reset Status and Back Elements are not Translatable

Deltek Tracking Number: 2029164

Description: On the User menu » Change Whereabout dialog box, the Reset Status and Back elements were not translatable.

Whereabout – Entries Spanning More than One Day – Hours Calculation is Off when End User Must Track Time

Deltek Tracking Number: 1814879

Description: When Time Tracking using Whereabout was required, and you viewed whereabout entries that span multiple days and were created when time tracking was *not* required, the number of hours that WorkBook calculated and displayed in the Hours column could have seemed to be inaccurate.

Additional Notes: As of Release 13.5, whereabouts are properly split over multiple days, and WorkBook calculates the value in the Hours column correctly.



About Deltek

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