

**Deltek**

**Deltek WorkBook® 13.6 CU02**

**Release Notes**

**February 4, 2025**

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**Version DB:** 13.6.67 / **HTML:** 13.6.67.0

**Release Date:** February 4, 2025

Welcome to the WorkBook 13.6 CU02 Release Notes, which describe the features and enhancements and issues resolved in this release.

## Overview

This document provides the following information:

- [WorkBook Release 13.6 CU02](#)
- [WorkBook Release 13.6 CU01](#)
- [WorkBook Release 13.6](#)

## WorkBook Documentation

### Key Features

WorkBook 13.6 includes the following new and updated documentation:

- **Release Notes** in updated user-centric format for ease of use. Contains a summary of new and updated features and enhancements (and links to supporting documentation, where applicable), resolved software issues, known issues, and descriptions of new reports.
- New Admin Guide: **Deltek WorkBook API Databoard Setup and Best Practices**.
- **Installation Guide** with updated installation information for 13.6.
- **Online help** with new and updated topics.

### Additional Documentation

You can perform a Deltek Support Center search for link: [https://deltek.custhelp.com/app/answers/detail/a\\_id/79936](https://deltek.custhelp.com/app/answers/detail/a_id/79936)

## Feedback

If you have comments or questions about this document, you can submit them to [DeltekDocumentationFeedback@deltek.com](mailto:DeltekDocumentationFeedback@deltek.com).

## Technical Considerations

### Installation

See the [Deltek WorkBook 13.6 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](#)

## Cross-Site Scripting Request Forgery (CSRF/XSRF)

Starting from WorkBook 13.8, CSRF prevention will be enabled by default.

- Integrations using API keys are not affected by CSRF prevention and do not require CSRF tokens.
- Integrations that use handshake must address CSRF prevention. For instructions on handling CSRF Tokens, see the [Deltek WorkBook API Databoard Setup and Best Practices](#).

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## Upcoming Deprecation

**Note:** Dates communicated in this section are subject to change.

### HTTPS Mandatory Connection Protocol

As of 13.6, a Hypertext Transfer Protocol Secure (HTTPS) connection is mandatory for WebDav storage systems installed in the IIS. HTTPS is a security standard and is required over the HTTP connection, which is no longer accepted.

**Note:** Any installations still using HTTP must be updated to HTTPS prior to upgrading to 13.6 or above.

To enable HTTPS on your IIS WebDav server, use this guide:

<https://learn.microsoft.com/en-us/system-center/scom/configure-https-binding-windows-server-ca?view=sc-om-2025>.

### To update the connection inside WorkBook:

1. Go to **Settings » Folders, Reports & Documents » Storage and folders » Storage provider**.
2. Select the WebDav provider from the list.
3. Update the ServerRootPath in the bottom portion of the screen.
4. Click **Test Storage Provider** to confirm (optional).

## Basic Authentication Deprecation for Integrations

Basic Authentication for integrations will be removed starting with WorkBook 13.8. Integrations should be reconfigured to newer authentication methods before this version.

For more information, see the [Delttek WorkBook API Databoard Setup and Best Practices](#).

## End of Support for Microsoft SQL Server 2019

Starting with WorkBook 13.8, scheduled for release in the second quarter of 2025, support for Microsoft SQL Server version 15.0 will be discontinued. Users must upgrade to a newer supported version of SQL Server prior to this release to ensure continued compatibility.

## Database Changes

### Column Removals

As part of planned database optimization and cleanup, the following columns are scheduled for removal in future releases:

- Table **Ress**: Column **DisableTwoFactorAuthenticationOnPrivateNetwork**
- Table **Ress**: Column **SysSetting**

## API Updates

In WorkBook 13.8 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 13.6. However, you must begin using the migrated API calls beginning with WorkBook 13.8. Failure to migrate these API calls before using Release 13.8 might negatively affect your integration with WorkBook.

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

### New API Guide

[Deltek WorkBook API Databoard Setup and Best Practices](#)

## Security Enhancements

This section includes a summary of the security enhancements in this release.

**Deltek Tracking: 2304624**

**Security Enhancements to Single Sign-On (SSO)**

This update includes important security enhancements regarding SSO.

## WorkBook Release 13.6 CU02

### Software Issues Resolved

This section includes all fixes in this release. Some descriptions might contain extra information, including ways to work around the defects.

### Finance & Administration

**Deltek Tracking: 2316115**

**Creditors - Creditor Invoices - Imported Pagero Credit Notes have Positive Amounts**

**Description:** When you imported a Pagero credit note, the resulting creditor invoice in WorkBook had a positive amount, when it should have had a negative amount.

## WorkBook Release 13.6 CU01

### Software Issues Resolved

This section includes all fixes in this release. Some descriptions might contain extra information, including ways to work around the defects.

### WorkBook Mobile

**Deltek Tracking: 2304647**

**WorkBook Mobile - Cannot Run after Update to Version 13.6**

**Description:** When you tried to log in to WorkBook Mobile version 13.6, it lost connection and could not reestablish a connection.

# WorkBook Release 13.6

## Features and Enhancements

This section provides a summary of all the features and enhancements included in this release.

### Agents

#### New Voucher IMAP Agent with OAuth 2.0 Support

**Delttek Tracking Number: 2293754**

A new agent, **Voucher hot IMAP agent (OAuth 2.0)**, has been added. It retains the same features as the existing **Voucher hot IMAP agent** but now supports **OAuth 2.0 authentication** for secure integration with email providers such as Google and other OAuth 2.0-compatible services.

#### Voucher IMAP Agent (OAuth 2.0) Setup

The **Voucher hot IMAP agent (OAuth 2.0)** requires OAuth 2.0 authentication to connect with supported email providers, such as Google.

**Important:** The WorkBook Administrator must log into Google using the same account specified in the agent's **IMAP Username** parameter.

**To configure the agent with Google:**

1. In the upper-left corner of the screen, click **Personal Preferences** (your WorkBook initials or profile thumbnail) » **My Settings** » **Email Import Settings**.
2. On the Email Import Settings page, click **Sign in to Google** and follow the prompts to complete the sign-in process.

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## Finance & Administration

### Extend Intercompany Agreed Rates to Apply Cap on Revenue of Delivery Company

**Delttek Tracking Number: 2032007**

When you used the Maximum Settlement Value in the context of intercompany settlements, it effectively worked as a maximum cap of cost settlement, where any cost beyond that ceiling was not settled between the two Companies. In some cases, the cost that exceeded the maximum was still settled, but it was managed differently within the settlement. This enhancement supports an additional method of settlement, designed to accommodate specific intercompany processes. As an Admin User, you can set up an intercompany settlement type that manages the overrun cost as a cost to the job-owning Company and transfer that cost, posting it to specifically defined GL accounts, so that overruns costs are reflected in the job-owning Company, not overlooked per the previous behavior. A single, binary setting enables you to indicate that the settlement must use this new method. This new intercompany (IC) setting manages the Company-level setting for this new functionality. Inheritance of the setting is only on the job creation. If the settings are populated on the client, they are taken from the client. If the client settings are empty, WorkBook takes them from the Company intercompany settings. You can still manually change the value of the setting; however, once IC entries are posted to the General Ledger, the job-level setting is locked, to avoid mismatching General Ledger entries.

As an Admin User, you can handle overrun costs within the intercompany settlement process, posting them to the job-owning Company such that the costs are handled in that Company. The new calculation transfers all of the cost, regardless of the existence of the cap. Where costs exceed the cap, the excess is offset against the revenue accounts. WorkBook continues to manage costs in this manner, even if the cap is exceeded. A notification informs you when the first settlement is posted to the job through project posting using this setting, thus warning Finance Users that after the posting is made, the settings cannot be changed. This notification is only displayed for the first settlement posting for the job.

### Utilize Intercompany (IC) Rates for Calculation of Cost of Time Entry

**Delttek Tracking Number: 2021757**

Previously, there was a potential mismatch between the accumulated cost on the job and the intercompany settlement value, since the calculation of the cost of a time entry never referenced the intercompany cost rates that are on the Resource and Activity settings. We have updated the system to now provide the option for determining the nature of the cost to facilitate the correct calculation of intercompany values.

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## Jobs

### New Shortcut Navigation Between Job Schedule and Task Matrix

**Deltek Tracking Number: 2153780**

Previously, you needed to navigate back and forth between the Job Schedule and the Task Matrix to review resource availability and task assignments. This update simplifies the process by introducing a  **View in Task Matrix** button in both the List view and Matrix view.

When you click the button, the Task Matrix opens as a card, pre-populated with the selected resource and the relevant date range. You can see whether the resource is booked on other tasks within that period without manually applying filters or re-entering data.

This update includes the following changes:

- The  **View in Task Matrix** button is located on the right-most side of the **Resource** column.
- Clicking the button opens the Task Matrix, pre-filtered by the resource and date range of the task.
- You can adjust the filter settings within the Task Matrix, but changes will reset upon reopening.
- This update applies only to the List view and Matrix view, with no impact on the Calendar view or Timeline view.

### Modernized Jobs Module Navigation, Update Now Button Restyling, and Icon Updates for Opening Tabs

**Deltek Tracking Number: 2153779**

The navigation within the Jobs module has been updated to improve clarity and efficiency. The sidebar menu has been transitioned to a horizontal layout at the top of the job page, with text labels replacing icons. Key updates include:  
Navigation Changes:

- The layout has been changed from vertical to horizontal.
- The menu is scrollable in the Job view when space is limited.
- The **Settings** option has been removed from the menu.

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### Job Stepper Updates:

- The 'Go to previous job' and 'Go to next job' buttons have been moved to the right corner and are now labeled 'Previous' and 'Next.'
- A new 'Back to jobs list' button appears when a job is in view.
- The 'Job properties sidebar' button has been removed.

### Toolbar Enhancements:

A new 'Open Job' button is added to the left side of the toolbar, used to view the job. Upon clicking, the default landing page is the one relevant to the current job list selection. This applies to any job list where a job can appear more than once:

- Job list 7 — Price Quotes Overview
- Job list 11 — Invoice Overview
- Job list 12 — Purchase Order Overview

The last visited page is remembered and auto-selected based on the session.

- A new toggle button for job settings has been added to the right side of the toolbar.

### Grid/Gantt Changes:

- A new button in the **Job Name** column allows users to view the job, with visibility restricted by access. Clicking the button opens the page corresponding to the current job list selection. The last visited page is remembered and automatically selected based on the session.

## Restyled Update Now Button

The **Update Now** button that appears on the Job List views when System Variable 1188 is set to a value greater than **0**, has been restyled.

## Icon Updates for Opening Tabs

The icons for opening tabs have been updated across the WorkBook system:

- A new icon is also used for the 'Open in current window/tab' action: 
- A new icon is now used for the 'Open in new tab' action: 

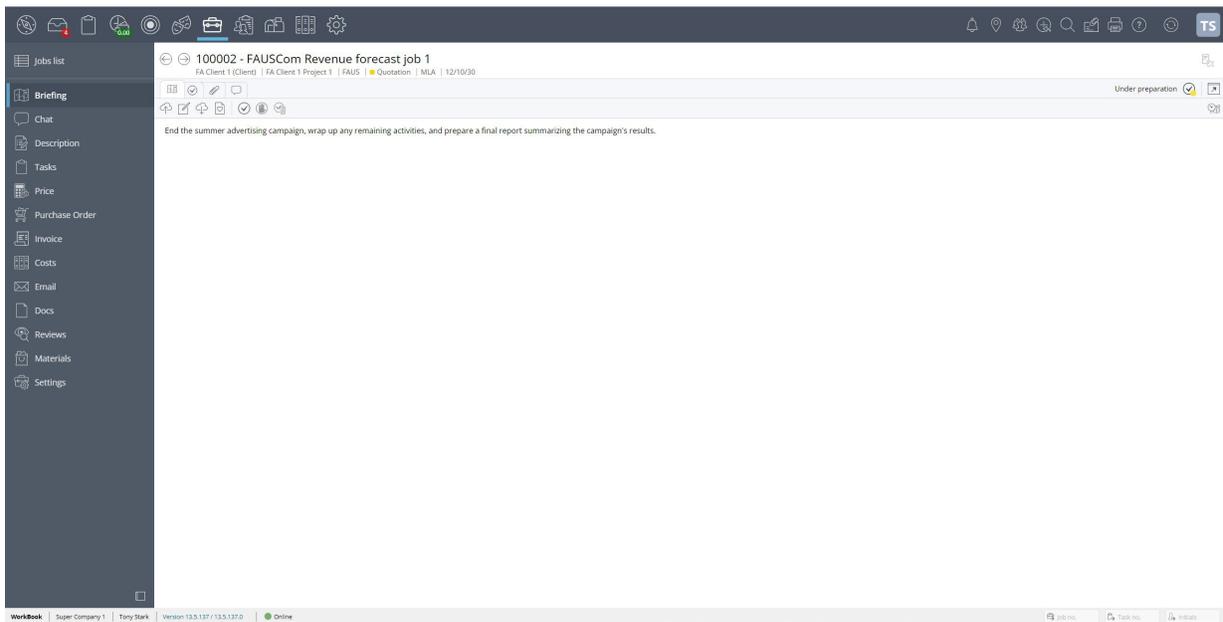
## Jobs List: Previous Layout

Client	Job no.	Job name	Job status	Project	Type	Account Manager	Project Manager	Start date	End date	Production status	Tags
FA Client 1 (Client) @FACL1	100000	FAUSCom Job 1	0 - Quotation	FA Client 1 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	05/28/2023	12/10/2030		
FA Client 1 (Client) @FACL1	100001	FAUSCom Job 2	0 - Quotation	FA Client 1 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	05/28/2023	12/10/2030		
FA Client 1 (Client) @FACL1	100002	FAUSCom Revenue forecast...	0 - Quotation	FA Client 1 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	05/28/2023	12/10/2030		
FA Client 5 (Holiday) @FACL5	100003	FAUSCom Holiday job	0 - Quotation	FA Client 5 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	05/28/2023	12/10/2030		
FA Client 6 (Illness & absence...	100004	FAUSCom Leave job	0 - Quotation	FA Client 6 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	05/28/2023	12/10/2030		

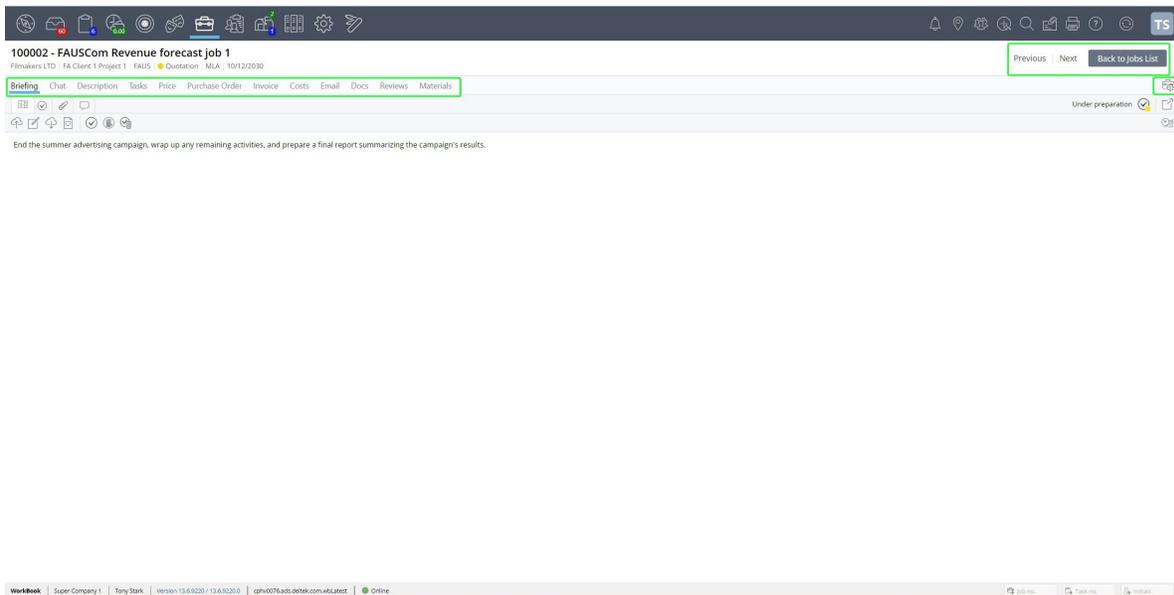
## Jobs List: Updated Layout

Client	Job no.	Job name	Job status	Project	Type	Account Manager	Project Manager	Start date	End date	Production status	Tags	Billable	Department
Filmakers LTD @FACL1	100000	FAUSCom Job 1	0 - Quotation	FA Client 1 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	28/05/2023	10/12/2030			<input type="checkbox"/>	FA Department
Filmakers LTD @FACL1	100001	FAUSCom Job 2	0 - Quotation	FA Client 1 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	28/05/2023	10/12/2030			<input type="checkbox"/>	FA Department
Filmakers LTD @FACL1	100002	FAUSCom Revenue forecast...	0 - Quotation	FA Client 1 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	28/05/2023	10/12/2030			<input type="checkbox"/>	FA Department
FA Client 5 (Holiday) @FACL5	100003	FAUSCom Holiday job	0 - Quotation	FA Client 5 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	28/05/2023	10/12/2030			<input type="checkbox"/>	FA Department
FA Client 6 (Illness & absence...	100004	FAUSCom Leave job	0 - Quotation	FA Client 6 Project 1	Website	Matt LeBlanc @MLA	Matt LeBlanc @MLA	28/05/2023	10/12/2030			<input type="checkbox"/>	FA Department

## Job View: Previous Layout



## Job View: Updated Layout



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## Batch Invoices

### Deltak Tracking Number: 2103415

You can now generate batches of invoices. Previously, WorkBook's sales invoice generation process occurred at the job level, which was inefficient for agencies generating a high level of sales invoices. As a result, billing took longer than it should. With this feature, you can invoice multiple jobs, clients, and a single Company at a time, and reduce the time spent on creating sales invoices individually.

You can limit the scope of the invoices you want to generate based on the data source. **Billing Plan** and **Time & Material** are options that you can select as data sources when setting up the fields. After limiting the scope of the invoices, you can immediately generate the batch of invoices or schedule it for later. Batch invoices scheduled for later can be canceled if they have not yet been processed.

You can generate batches of invoices from the **Jobs**, **Tasks**, or **Finance & Administration** modules. The **Batch Billing** submodule of the **Tasks** and **Finance & Administration** modules contains the batch invoices that have been previously generated.

For details and procedures, see the following online help topics:

- [Create Batch Invoices \(Jobs\)](#)
- [Create Batch Invoices \(Tasks\)](#)
- [Cancel Batch Invoices \(Tasks\)](#)
- [Create Batch Invoices \(Finance & Administration\)](#)
- [Cancel Batch Invoices \(Finance & Administration\)](#)
- [Create Batch Invoices \(Debtor Invoices\)](#)
- [Agent Type 183 - Batch Invoice Creation](#)
- [Open Invoice Card from the Billing Plan Tab](#)
- [Grant Users Access to New Pages](#)

## Batch Billing Setup

Batch Billing is not enabled by default and must be enabled by the Administrator.

### To enable batch billing:

1. Go to Settings » **Advanced Tools** » **User Access Rights** » **User Access Setup** tab.
2. In the dropdown menu, select any applicable access role.
3. Click the **Access** tab, then under **Main** » **Finance & Administration** » **Debtors**, select **Batch Billing** and **Batch Create Invoices**.
4. Under **Tasks** » **Follow-up**, select **Batch Billing** and **Batch Create Invoices**.

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To automatically grant users access to new pages in future releases:

1. Go to **Settings » Advanced Tools » User Access Rights » User Access Setup** tab.
2. In the dropdown menu, select any applicable access role.
3. On the toolbar, click **Edit Access Role** .
4. In the Edit Access Role dialog box, select the **Automatically Grant Access to New Pages** checkbox, then click **OK**.

## Time of Supply on Sales Invoices

### Delttek Tracking Number: 1856232

You can enable the **Time of Supply Lines** setting in **Jobs » Invoice » Header** tab to specify the period when goods or services were supplied, in compliance with EU VAT regulations. This setting allows you to record a Supply Date, which may differ from the invoice or sales dates. Specifically:

- When the **Time of Supply Lines** checkbox is selected, a **Supply Date** column appears in the Lines tab. This column is pre-populated with either the **Sales Date** (if **System Variable 682** is enabled) or the **Invoice Date** from the header.
- You can manually edit the Supply Date for each line item, or leave it blank if necessary.
- If the **Time of Supply Lines** checkbox is cleared, any previously entered supply dates in the line items are removed.

The **Supply Date** impacts VAT-related reporting, specifically Report 351. The **Supply Date** field is included in the report data, but it is not automatically displayed on the printed invoice. You must manually adjust your invoice layout to display this field if needed. If the Supply Date is removed or left blank for any line item, the field will be displayed as blank in printed invoices, reports, or customized layouts that include it.

**System Variable 682** controls whether the Sales Date or Invoice Date populates the **Supply Date** field when a new line is added. If enabled, the **Supply Date** defaults to the Sales Date. If disabled, it defaults to the Invoice Date.

For more information, see the following online help procedures:

- [Enable the Time of Supply Lines Setting](#)
- [Enable the Time of Supply Lines Setting \(Job Card\)](#)
- [Edit the Supply Date for Individual Line Items](#)
- [Edit the Supply Date for Individual Line Items \(Job Card\)](#)

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## Scheduling

### Predict: Suggest Optimal Resource on Task Booking and Replacement

#### Delttek Tracking Numbers: 1898430, 2092038

The Suggest tab is now available in **Jobs » Tasks » Booked resources subgrid »**

 **Add resource.** Users are presented with employees who can be assigned to the task, and the top 3 employees are shown based on the following criteria:

- **Activity match:** The employee's Default Activity matches the Task Activity.
- **Job team match:** The employee is part of the Job Team.
- **Capacity match:** Employees with the highest available capacity, but not already listed in another category, are shown.

When a group is full (for instance, if there are 4 employees with the same capacity, the Job team is considered full), the remaining employees are added to the **Capacity group**.

Categories that have no matching resources are not shown in the dropdown. The **Optimal category** displays the top result from each grouping.

#### Notes:

- If **System Variable 1028** is disabled, resources outside the Job team are not shown in the **Suggest** dropdown. If enabled, resources outside the Job team are shown if they have the most available capacity.
- If **System Variable 1059** is set to the following settings and System Variable 1028 is enabled:
  - **0 (No limitation):** Anyone with access to the Suggest Resource can add resources outside the Job team.
  - **1 (Only admin):** Only users with the Administrator role can add resources outside the Job team.
  - **2 (Admin and project manager only):** Only users with the Administrator role and the Project Manager can add resources outside the Job team.
- If **System Variable 1172** is disabled and the Task Booking date is in the past, the Suggest dropdown will yield no results.

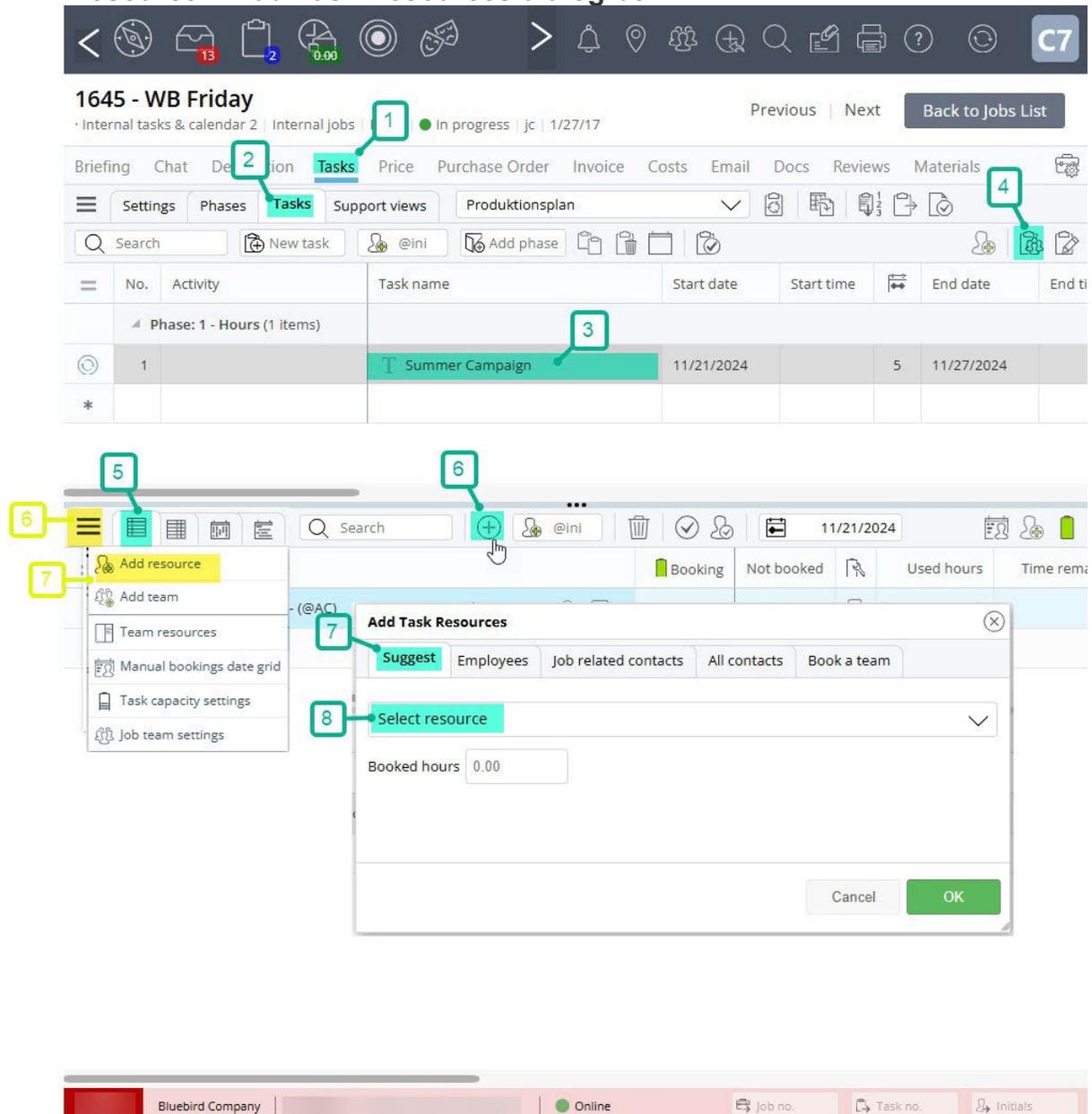
**Additional Note:** The “Suggest an Employee” label in the “Copy Price Quote to Schedule” dialog has been renamed to “Populate Resources.”

For more information, see [Add a Resource to a Task Using the Suggest Feature](#).

## Accessing the Suggest Optimal Resource Option

You can access the Suggest Optimal Resource option in any of the following ways:

- **Jobs » Tasks » Booked Resources subgrid » List View / Matrix View »  Add resource » Add Task Resources dialog box**
- **Jobs » Tasks » Booked Resources subgrid »  Context Menu » Add resource » Add Task Resources dialog box**



The screenshot displays the Delttek software interface for a task named '1645 - WB Friday'. The interface includes a top navigation bar with various icons and a 'C7' label. Below this, there are tabs for 'Briefing', 'Chat', 'De...', 'ion', 'Tasks', 'Price', 'Purchase Order', 'Invoice', 'Costs', 'Email', 'Docs', 'Reviews', and 'Materials'. The 'Tasks' tab is active, showing a table with columns for 'No.', 'Activity', 'Task name', 'Start date', 'Start time', 'End date', and 'End ti'. A task named 'Summer Campaign' is highlighted in green, with a callout '3' pointing to it. The interface also shows a 'Settings' menu with options like 'Add resource', 'Add team', 'Team resources', 'Manual bookings date grid', 'Task capacity settings', and 'Job team settings'. A callout '6' points to the 'Add resource' option. The 'Add Task Resources' dialog box is open, showing a 'Suggest' button (callout '7'), a 'Select resource' dropdown (callout '8'), and a 'Booked hours' field with a value of '0.00'. The dialog box also has 'Cancel' and 'OK' buttons. The bottom of the screen shows a status bar with 'Bluebird Company', 'Online', 'Job no.', 'Task no.', and 'Initials'.

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## Suggest Optimal Replacement

For replacing a booked resource, the **Suggest Resource** option is available on several pages within Jobs and Scheduling. This feature recommends the most suitable replacement resources based on:

- **Position match:** Resources whose role or position matches the task's requirements.
- **Capacity match:** Resources with the highest available capacity.
- **Skill match:** Resources whose skills align with the task's skill requirements.
- **Activity match:** Resources whose default activity or assigned activity matches the task activity.
- **Job team match:** Resources who are part of the Job team assigned to the task.

For Activity match, if the Task Activity differs from the Resource's Default Activity, the match is split into two categories:

- **By Resource Default Activity match:** Displays resources whose default activity matches their current assignment.
- **By Task Activity match:** Displays resources whose default activity matches the task activity.

If the Task Activity and Resource's Default Activity are the same, these categories are merged. The Optimal category shows the top result from each matching group.

For more information, see [Replace a Booked Resource Using the Suggest Optimal Replacement Option](#).

## Accessing the Suggest Optimal Replacement Option

You can access the Suggest Optimal Replacement option on the following pages:

- **Jobs » Tasks » Booked Resources subgrid » List View / Matrix View » Select Task Resource dialog box**
- **Scheduling » Weekly Schedule » Weekly Schedule subpage » Change Resource on Task dialog box**
- **Scheduling » Task Resource Booking Approval » Traffic Manager Transfer Resource Hours dialog box**

The following screenshot illustrates how to access this option within Jobs:

The screenshot displays the Deltek software interface for job management. At the top, a navigation bar includes icons for navigation, notifications, and user profile, with a 'C7' badge on the right. Below this, the job title '1645 - WB Friday' is shown, along with 'Internal tasks & calendar 2 | Internal jobs' and 'In progress | jc | 1/27/17'. A 'Back to Jobs List' button is present.

The main interface features a menu bar with options like 'Briefing', 'Chat', 'Definition', 'Tasks', 'Price', 'Purchase Order', 'Invoice', 'Costs', 'Email', 'Docs', 'Reviews', and 'Materials'. The 'Tasks' tab is active. Below the menu, there are search and action buttons: 'Search', 'New task', '@ini', 'Add phase', and icons for document management.

A table lists tasks under the heading 'Phase: 1 - Hours (1 items)'. The table has columns for 'No.', 'Activity', 'Task name', 'Start date', 'Start time', 'End date', and 'End ti'. One task is listed: '1 Summer Campaign' with a start date of '11/21/2024' and an end date of '11/27/2024'.

Below the task table, a resource table is visible. It has columns for 'Resource', 'Booking', 'Not booked', 'Used hours', and 'Time rema'. One resource is listed: 'AC Alice Cooper - (@AC)' with a booking of '16.00' and '0.00' used hours.

A 'Select task resource' dialog box is open, showing a search bar with 'Select resource' and a checkmark. Below the search bar, there is a checked checkbox labeled 'Suggest resource'. The dialog has 'Cancel' and 'OK' buttons at the bottom.

At the bottom of the screen, a status bar shows 'Bluebird Company', 'Online' status, and fields for 'Job no.', 'Task no.', and 'Initials'.

## Settings

### Add the Ability to Delete Unused Tags

**Delttek Tracking Number: 1564536**

You can now completely delete unused tags without being forced to select a replacement tag.

Specifically:

- If the selected tag or tags are not in use, a confirmation dialog prompts you to confirm the deletion.
- If a tag is in use, an information dialog notifies you that the tag cannot be deleted.
- When attempting to delete multiple tags, if some tags are in use, the dialog specifies the tags that cannot be deleted and advises you to select only unused tags for deletion.

For instructions, see [Delete Tags](#).

**Note:** For consistency, the Merge icon has also been updated on the **Settings » Projects & Jobs » Tags** page.

## Software Issues Resolved

This section includes all fixes in this release. Some descriptions might contain extra information, including ways to work around the defects.

### API

**Delttek Tracking: 2249588**

**API Calls Using User Display Currency Fail When Called via an API Key**

**Description:** When you used direct API calls to access endpoints that utilized display currency, you encountered an error.

When you viewed reports containing subreports to which you did not have access, you encountered an error.

**Deltek Tracking: 2239670**

**Error When Generating API Key**

**Description:** When no API users were configured and you tried to generate an API key, a System Error (red error) was displayed.

**Note:** A red error can still occur if a user is no longer an API user (reassign the user to a non-API user role on the User access setup tab), and then you immediately navigate to the API key setup without performing a soft refresh, and you generate a new API key.

**Deltek Tracking: 2222716**

**API – Error Messages Not Added to ErrorMessage Header When Containing Special Characters**

**Description:** The ErrorMessage included in the response when the Workbook API returns a 400 Bad Request due to a WorkbookMessageException is now properly URI-encoded. If this message is used, it will need to be decoded.

**Additional Note:** It is recommended to parse the response body as JSON, rather than parsing the response header.

## CRM

**Deltek Tracking: 2255660**

**System Error When You View Charts with Currency Symbol Present**

When you opened the pages CRM/12 month summary forecast and Jobs/Cost/Accumulated aging chart view, a System Issue error (red error) occurred if the set currency did not have a currency symbol present.

## Finance & Administration

**Deltek Tracking: 2259174**

**CSS Styling Issues in Open Time Sheet Entries Filter Dialog**

**Description:** When you opened the filter dialog on the Open time sheet entries page, there were some styling issues when toggling status 20 on and off. This occurred in both Chrome and Safari, with additional issues in Safari.

**Deltek Tracking: 2257450**

**Administrative Follow-Up – Approve Selected Entries Button Not Displayed on Mac Safari v18.0.1**

**Description:** When you opened the Open time sheet entries page in the **Finance & Administration** module on Safari version 18.0.1, the **Approve Selected Entries** button was not displayed.

**Deltek Tracking: 2224066**

**HMRC VAT Authentication Error**

**Description:** HMRC VAT authentication would sometimes fail consistently for users who had an '@' in their WorkBook login name.

**Deltek Tracking: 2212741**

**Error When Previewing Creditor Invoices with .PDF Extension**

**Description:** When you previewed a creditor invoice file with the file extension PDF (in uppercase), the following error message was displayed: 'Input data is not recognized as a valid pdf'.

**Deltek Tracking: 2195792**

**Purchase Order Export Uses Resource ID, not Resource Name**

**Description:** When you exported the grid data from the grid in **Finance & Administration » Creditors » Purchase Orders**, the **Responsible Resource** column showed the resource ID, instead of the resource name and initials.

**Deltek Tracking: 2152914**

**Bank Reconciliation Does Not Work with Long Voucher Numbers (50 Characters)**

**Description:** When you tried to enter the Reconciliation tab of a Bank Reconciliation account that had a voucher number with more than 50 characters, an error message was displayed explaining that the voucher number contained too many characters.

**Additional Notes:** The voucher number size has been increased to 255 characters.

## Framework

**Deltek Tracking: 2251103**

**Error Reports and Connection Pool Exhaustion Occurred When Sending Multiple Notifications**

**Description:** A concurrency limit has been added to enhance the stability and performance of notifications and webhooks. This setting is disabled by default.

**Note:** Do not change the defaults unless advised otherwise.

**Deltek Tracking: 2125987**

**Rich Text Editor Component – Paste Plain Text Buttons Do Not Work in Firefox**

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

**Additional Notes:** This was added as a known issue to the R13.5 Release Notes.

**Deltek Tracking: 1937219**

**SSO Login Redirects to Login Screen When No Username Is Configured**

**Description:** When you attempted to sign in using SSO without a configured username, the system redirected you to the login screen. A message was then displayed stating that you could not log in due to the missing username. A message is now displayed stating that you cannot log in due to a missing username.

## General

**Deltek Tracking: 2112454**

**Closing a Dialog Box Quickly Can Cause Error**

**Description:** If you opened a dialog box and then closed it very quickly, in some unusual cases, an error could occur, and an error message was displayed.

**Additional Notes:** This was added as a known issue to the R13.5 Release Notes.

## Inbox

**Deltek Tracking: 2159558**

**Unsubscribing from the Documents Approval Results in System Error**

**Description:** In **Inbox » Tasks**, when you attempted to unsubscribe from the Document Approval conversation, a red error stating 'Conversion failed when converting the nvarchar value ResourceId to data type int' was displayed.

**Deltek Tracking: 2127814**

**Conversation Link Cannot Be Accessed from Notification Email**

**Description:** When a user using SSO for login authentication clicked on a conversation link from a notification email, a "Page not found or you have insufficient permission to view it" message is displayed.

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## Jobs

**Deltek Tracking: 2269896****Renaming a Job Requires Soft Refresh for Job Name to Update**

**Description:** When you renamed a job, a soft refresh was needed before the job name was updated.

**Deltek Tracking: 2263526****Invoice – Header – Address Field Not Updated Instantly When Either Accounts Receivable Field or Invoice Att. Person Field Is Changed**

**Description:** When you changed the debtor or attention person on an invoice, it did not update until a soft refresh was performed.

**Deltek Tracking: 2168004****Price List Lookup – Date Periods Overlap in Some Conditions**

**Description:** When you did not add the price list setup in chronological order, the **ICRatePerHour** column (Inter-Company Rate per Hour) was displayed incorrectly in the time entries data export.

**Workaround before Fix:** Add the price list setup in chronological order.

**Deltek Tracking: 2115100****Pressing DELETE on Any Cell Deletes All Line Values when Not Editing**

**Description:** When you used the **DELETE** key on Invoice lines, all line data was deleted instead of just the highlighted cell. This was inconsistent with the functionality on Price Quote Lines and disrupted standard user patterns.

**Workaround before Fix:** Double-click the cell to enter edit mode, select all content, and then press the **Delete** key.

**Deltek Tracking: 2115058****Advanced User Cannot Add Job Custom Codes When You Do Not Have Access to Settings**

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

**Deltek Tracking: 1569513****Price – Billing Plan – Grid Quick Search not Working**

**Description:** When you used the **Search** field in the PQ billing plan, the search did not filter anything.

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## Resources

**Deltek Tracking: 2144785****Integration Fails with a 'System Busy' Error**

**Description:** Simultaneous operations using `NewUserLicenseAvailable` queries were causing deadlocks on the database.

**Deltek Tracking: 2119923****Resources – Resource Card – Cannot Read Properties of Undefined (Reading 'Replace')**

**Description:** When you initially accessed a resource card in the Resource Module, a system error was displayed. This issue typically occurred only on the first attempt to access the resource cards.

**Customers Impacted:** Petrol Advertising, Inc.

**Workaround Before Fix:** After closing the error, you could continue as expected.

**Deltek Tracking: 2117416****ICRatePerHour Column – Data Export #1 – Time Entries Does not Follow the Correct Rate**

**Description:** When you recorded Inter-Company hours, WorkBook did not record the hours with the correct rate from the Valid From column in Price List Setup. Instead, it used the newest rate.

**Deltek Tracking: 2115797****Approval Record Remains Unapproved on Resource Required Fields when Substitute Approver Approves on Behalf of Pool Approver**

**Description:** On most approval flows, the approval record was not approved when the substitute approver approved the record on behalf of pool approvers.

**Additional Notes:** This was added as a known issue to the R13.5 Release Notes.

## Scheduling

**Deltek Tracking: 2134235****Unable to Allocate/Book Hours on a Blank Resource**

**Description:** When you tried to add booking hours without a resource in **Task » Booked Resources**, WorkBook did not save the information.

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## Settings

**Deltek Tracking: 2182949****Company Status Not Indicated as Inactive in Personal Expense Types Setup**

**Description:** When you viewed the Personal Expense Types setup grid, inactive companies were not visually indicated as inactive because they were not enclosed in parentheses.

**Deltek Tracking: 1953395****Resources Can Change "Access to Job" Cross-Company Access Even Without Access to All the Companies**

**Description:** When a user without access to set up employees in a company used functionality to grant everyone access to their own Companies' jobs, all Companies' jobs, or deny access to Companies' jobs other than their own Company, the employees from the Company that the user does not have access to would also be updated.

**Deltek Tracking: 1910754****SSO Issue: Object Reference Not Set to an Instance of an Object Error**

**Description:** When users configured to use Single Sign-On (SSO) with a set Domain login had their license type changed to 'Employee without access' and attempted to log in with SSO, WorkBook displayed the following error message: Object reference not set to an instance of an object.

## Storage

**Deltek Tracking: 2270993****Uploading a File with Invalid Characters – Pop-Up Does Not Specify Invalid Characters**

**Description:** When you uploaded a file to WorkBook from a Mac containing characters that are invalid on Windows, a message appeared attempting, but failing, to specify the illegal characters in the file name.

## Storage Provider

**Deltek Tracking: 2249607****Google Drive Storage Provider Does Not Display Sub-Folder Documents in Jobs**

**Description:** When you created a job using the Google Drive Storage provider and immediately clicked the documents link, the documents in the sub-folder structure configuration did not display in future jobs due to duplicate files in the new job folder.

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## Tasks

**Deltek Tracking: 2177845**

### **Tasks – Tasks – Fixed Dimensions Not Showing as a Column in Grid View Even When the Dimension's 'Show on User Task List' Is Toggled On**

**Description:** When you wanted to display dimensions that are not custom-defined on the Task grid, they were not available because they were not shown on the Modify Current Grid (grid setup) dialog box. Because of this you could not select them so that you could show the columns with those dimensions.

**Additional Notes:** Custom-defined dimensions are those with dimension number 1-10.

## Time & Expense

**Deltek Tracking: 2264411**

### **'Add Active Tasks from This Week With Allocated Hours' Does Not Add Task When Booked Only on Job End Date**

**Description:** When you attempted to add tasks to the timesheet using either the **Auto add tasks to timesheet** agent or the timesheet context menu option, tasks were not added if an employee was only booked on the job end date and the Company time entry rule for **Allow time entry after job end date** was set to **0**.

## Known Issues

This section includes a summary of known issues in this release.

## Finance & Administration

**Deltek Tracking Number: 2224002**

### **Accounting Year Validation Is Missing and Allows for Overlapping Accounting Years**

**Description:** It is possible to create overlapping accounting years via API.

**Deltek Tracking Number: 2222722**

### **Unable to Add Back Accounting Period for Default/Current Year**

**Description:** When a new Company is set up with the incorrect period and the year was deleted during setup, it becomes impossible to create the finance year with the correct period because it is locked to the next year.

## Storage Provider

**Deltek Tracking Number: 2273062**

**Azure Storage – Subfolder Root Path Fails When Folder Name Starts with a Capital Letter**

**Description:** When WorkBook System Administrators configure an Azure Storage provider with a root folder path that starts with a capital letter, they are unable to browse the subfolder.

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## 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.delttek.com](http://www.delttek.com)