




**Deltek**

# Deltek WorkBook 13.5 CU04

Release Notes

**August 1, 2024**



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## Overview

This document provides the following information:

- [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](#)
- [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](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](mailto: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 CU04

Version DB 13.5.133 / HTML 13.5.133.0

For Release on August 1, 2024

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# 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.

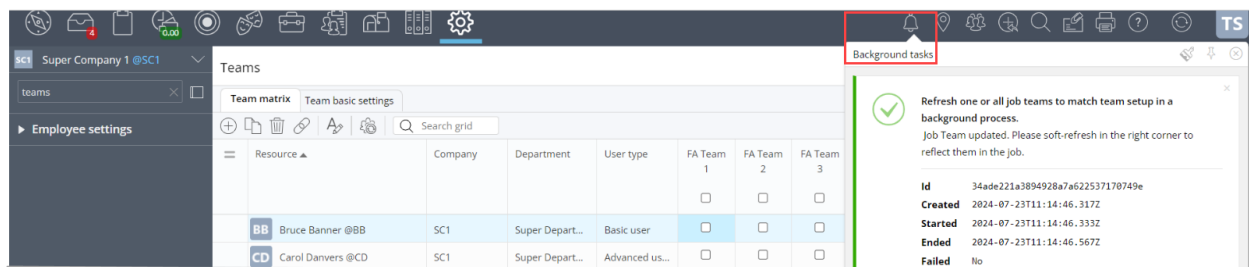
### Settings

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.

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## 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.

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### 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.

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### 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.

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## 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.

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## 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.

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## 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.

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# 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	<input checked="" type="checkbox"/>	blobstorageaccountexample
Key	String	<input checked="" type="checkbox"/>	<secret>
RootPath	String	<input type="checkbox"/>	my-wb-container
Use HTTPS	Boolean	<input type="checkbox"/>	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>

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## 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>

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## 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.

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## 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](#).

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## 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.

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## 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.

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## 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](#).

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## 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](#).

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## 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.

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**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.

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## 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.

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## 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.

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## 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"> <li>The Finance account belongs to another Company.</li> <li>The selected Finance account cannot be set. Only Operating or Balance Sheet accounts can be used on the invoice lines.</li> <li>Finance account is not allowed on voucher.</li> </ul>
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"> <li>Finance account blocked.</li> <li>Automatic account cannot be used on Creditor Invoice lines when System Variable 484 (Allow Manual Bookings on System Accounts</li> </ul>

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

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## 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.

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## 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.

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## 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.

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## 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.

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## 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.

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## 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.

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## 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 &amp;.

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

**Delte**tek 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

**Delte**tek 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

**Delte**tek 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

**Delte**tek 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.

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## Tasks

Calendar View Page – Cannot Access View Options Settings

**Delte**tek 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

**Delte**tek 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.

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## 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.

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## About Deltek

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