Deltek

Deltek WorkBook 13.1

Release Notes

December 3, 2021

Contents

Overview

This document provides the following information:

- **[Release Notes for WorkBook Release 13.1](#)**

Additional Documentation

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

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

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

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

Installation

See the *Deltek WorkBook 13.0 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.

Internal Link

https://home.deltek.com/sites/products/Documents/DeltekProductSupportCompatibilityMatrix.pdf

External Link – Deltek Support Center

[Deltek Product Support Compatibility Matrix](#)

WorkBook Release 13.1

Version DB 13.1.127 / HTML 13.1.129

For release on December 3, 2021

Features and Enhancements Added or Changed

CRM

Set Gross Revenue as a Required Field on Pipeline

If a net revenue amount is added to the pipeline, a gross revenue amount is now also added, to equal the amount of the net revenue, unless the gross revenue amount is already set.

Finance & Administration

Creditor Invoices – Voucher Approval Log Columns Added to Creditor Invoice Subgrid

The following voucher approval log columns are added to the Approval tab of the Creditor Invoice subgrid:

- Added by – Resource, date and time of addition
- Removed by – Resource, date and time of removal

General

About WorkBook Page Redesign

The About WorkBook page is redesigned, with its layout and content revised to reflect Deltek's acquisition of WorkBook. The Deltek WorkBook banner with the correct WorkBook version number is added. The list of third-party acknowledgments is updated.

In addition, links have been added to the WorkBook Information Center, the product portal, online help, release notes, and for contacting support.

Online Release Notes

You can now access an online version of the Release Notes, presented in the same online help format that you are already familiar with. (This version is in addition to the PDF version.) You can access this online version from the following places:

- The About WorkBook page
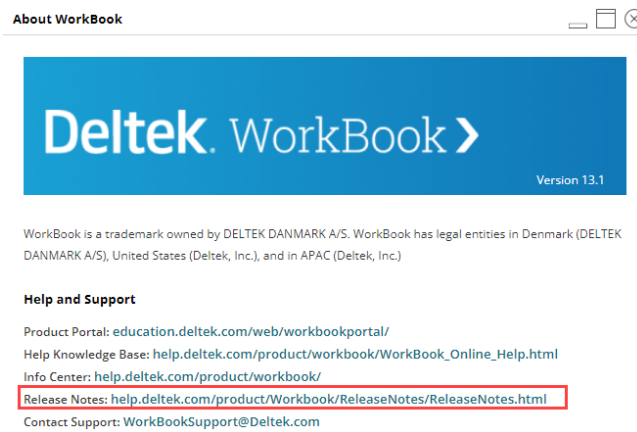
- The WorkBook Information Center
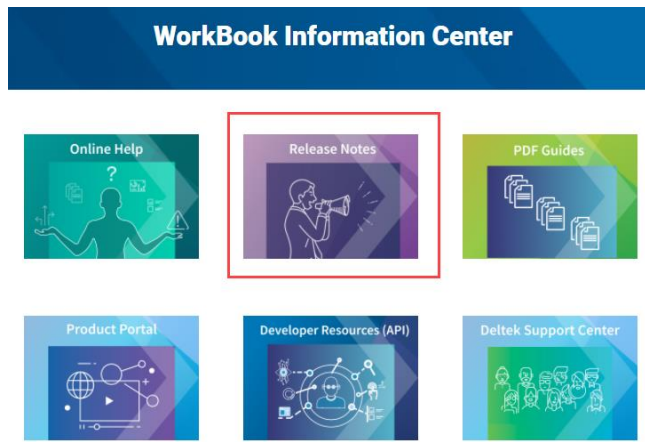
Note that there is a brief lag between the time that the software is released and the PDF version of the Release Notes is published and the time that the online version of the Release Notes is made available. This is necessary because the online version is created and published separately, in a different tool.

Obsolete Data Import Functionality is Removed

Some obsolete objects related to the data import functionality are removed: an unreleased page from the front end, some obsolete tables from the database, and some obsolete endpoints from the API. The detailed lists follow.

Unreleased Page Removed:

Settings » Import » Data Import Setup

Obsolete Tables Removed:

DataImportHistory
DataImportColumnTransform

DataImportColumn
DataImport
DataImportTarget

Obsolete Requests/Routes/Verbs Removed:

DataImportTargetsRequest
Route: /api/DataImport/Targets
Verb: GET

DataImportTargetRequest
Route: /api/DataImport/Target/{Id}
Verb: GET

DataImportTargetColumnsRequest
Route: /api/DataImport/Target/{Id}/Columns
Verb: GET

DataImportsRequest
Route: /api/DataImport
Verb: GET

DataImportPatchRequest
Route: /api/DataImport
Verb: PATCH

DataImport
Route: /api/DataImport
Verb: POST

DataImport
Route: /api/DataImport
Verb: PUT

DataImportRequest
Route: /api/DataImport/{Id}
Verb: GET

DataImportRequest
Route: /api/DataImport/{Id}
Verb: DELETE

DataImportColumnsRequest
Route: /api/DataImport/{Id}/Columns
Verb: GET

DataImportColumnRequest
Route: /api//DataImport/Column/{Id}
Verb: GET

DataImportColumnRequest
Route: /api//DataImport/Column/{Id}
Verb: DELETE

DataImportColumn
Route: /api/DataImport/Column
Verb: POST

DataImportColumn
Route: /api/DataImport/Column
Verb: PUT

DataImportColumnTransformsRequest
Route: /api/DataImport/Column/{Id}/Transform
Verb: GET

DataImportTransformsRequest
Route: /api/DataImport/{Id}/Columns/Transform
Verb: GET

DataImportTransformRequest
Route: /api/DataImport/Column/Transform/{Id}
Verb: GET

DataImportTransformRequest
Route: /api/DataImport/Column/Transform/{Id}
Verb: DELETE

DataImportColumnTransform
Route: /api/DataImport/Column/Transform
Verb: POST

DataImportColumnTransform
Route: /api/DataImport/Column/Transform
Verb: PUT

DataImportHistorysRequest
Route: /api/DataImport/{Id}/History
Verb: GET

DataImportHistoryRequest
Route: /api/DataImport/History/{Id}
Verb: GET

DataImportUpload
Route: /api/DataImport/{Id}/Upload
Verb: POST

DataImportUploadStorage
Route: /api/DataImport/{Id}/UploadStorage
Verb: POST

DataImportDataHistoryRequest
Route: /api/DataImport/Data
Verb: GET

DataImportTestRequest
Route: /api/DataImport/Test
Verb: POST

DataImportDoRequest
Route: /api/DataImport/Do
Verb: POST

Session Notifications Reliability Improvements

The way that WorkBook handles large volumes of notifications has been improved—for example, when users are notified simultaneously about data changes made by other users.

Wijmo Framework Updated

The Wijmo framework is updated from version 5.20183.598-rc to version 20212.812.

Jobs

Costing Code Column Added

A Costing Codes column has been added to the following Job List views to show the costing code assigned on jobs:

- Simplified Job List
- Job List (1)
- Status Report (2)

This column has also been added to the tasks grid.

Improved Performance of Job Key Figures Recalculations

Recalculation of Job Key Figures—time entries, material entries, and creditor entries—has been improved. These recalculations are now up to 15% faster.

Reports

Report 263 (Employee Holiday and Flex) – General Improvements on Report Generation

When you generate Report 263 it displays only resource information that is based on your cross-company access setting Access to Employee.

Resources

Employee Card – Prevent Disabling of Employees who have not Entered Time or who have their Time Entries Approved

Because open time entries made by disabled employees can cause issues, an additional barrier for disabling employees is added. To deactivate employees, they must now complete their timesheets for all past dates in open accounting periods, and all time entries must be approved, which is similar to other cost entry types such as expense and mileage.

> **Tip:** While this is only performed for employees who must enter timesheets, it can also potentially affect employees who cannot log in to WorkBook, as well as Group Scheduling Resources, if they are set to enter timesheets. To avoid this, disable the User Must Enter Timesheet option to skip the check on time entries if, in fact, these employees are not required to enter time entries.
>
> Days that have incomplete time entries are for all open accounting periods for the Company, even if they do not appear on the missing time entries page for the user.

Scheduling

Task Matrix – Allow Adding Employees to Tasks that They are already On

WorkBook provides multiple ways to add employees to tasks. One limitation was the inability to add an employee who was already on a task, which was not necessarily obvious from the dialog. When there is no particular reason to prevent an employee from being added to the task, increasing the number of hours that the employee is already booked on that task is often appropriate. When you increase the hours, a message is shown that specifies how many hours that employee was already booked on for that task, in case that is not what you wanted.

There is a limitation to this feature regarding employees who are marked as done. If the hours that are added are provided through automatic booking (just increasing the number of hours for which the employee is booked), you can add the hours, and the employee is marked as active on the task. However, if manual booking exists on that employee, or you want to add manual bookings, it is not clear how the original hours must be handled. As a result of this situation, dialogs might not allow adding hours to an employee who is marked as done. Addressing this issue is under discussion.

> **Attention:** This functionality is also added to the Calendar and Timeline Calendar views.

Tasks – Improved Performance of Task Deletion

Performance of task deletion has been improved. Deleting a task is now up to 25% faster.

Settings

System Variables – System Variable 302 has been Removed

System Variable 302 (WorkBookAutoUpdate) has been removed because automatic update of WorkBook systems is not currently supported. Applying updates requires manual actions. You should plan updates with Deltek staff (for hosted systems) or internally (for on-premises systems).

System Variables – System Variable 883 has been Removed

System Variable 883 (PaymentScheduleInvoiceNotificationOnJob) has been removed because it was not functional. The existing Agent Type 103 provides the same functionality. Agent Type 103 is documented in Knowledge Base Article (KBA) 105024, Agent Type 103 – Notification: Price Quote Payment Scheme Send Simple Reminder, in the Deltek Support Center.

Tasks

Task Card – Task Resources – Search Field Added

A search field is added to the task resources page for task resource list and matrix views. This search field works similarly to search fields on other grids elsewhere in WorkBook.

Time & Expense

Time Entry – Red Background for Invalid or Missing Costing Codes

When a costing code is invalid for a time entry, the costing code is shown with a red background. The costing code column can also be shown with a red background if a Company's setup requires that a costing code must exist on tasks and/or jobs, but there is no costing code for the time entry.

Only customers who use costing codes are affected by this enhancement.

Company Variable 73 determines the marking of time entries that do not have associated costing codes.

Timesheet upon Login Popup Window – Maximize / Restore Option

You can now use the maximize / restore window size option on the Timesheet upon Login pop-up window.

User Interface

Inbox Contents – Inbox Redesign

The inbox contents padding/spacing has been increased between header titles, drop-downs, and icons. The Classic Style and Modern Style conversation options have been merged into a cleaner, fresher style known only as the Modern Style. Within the card left navigation toolbar, the available options/icons now appear in a darker color when selected. This color is consistent with the default or the selected color recipe. This provides better visibility.

API Additions, Enhancements, and Changes

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

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

General

Disallow JSONP Requests

The WorkBook API now only adheres to the JSON callback parameter when the system has one or more web sites configured for CORS in System Variable 1061.

Additional Notes: For changes to System Variable 1061 you must restart the web site.

Known Issues

Finance & Administration

Export, Import, & Maintenance – Personal Expense Credit Card Import – You can Select Disallowed Activity for Personal Expenses

Deltek Tracking No. 511718

Description: When you edit the Activity field on the imported personal expense, you can select an activity that is not allowed for personal expense.

General

Grids – Numeral 1 Displayed Next to Sort Indicator

Deltek Tracking No. 513129

Description: When you sort columns in grids, the numeral 1 is displayed next to the sort indicator.

Jobs

Price Quote (PQ) – Line – Copy / Paste on Last Cell or Empty Cell Adds Multiple Empty Lines

Deltek Tracking No. 512652

Description: When you copy empty cell(s) then paste them back into grids, it might cause unexpected results. This is caused by an upgrade of the grid component.

Workaround before Fix: Do not copy empty cells and then paste them back into grids.

Sales Invoice – Toolbar Tabs are not Displayed when You Minimize the Page

Deltek Tracking No. 513253

Description: The toolbar can have missing tabs when the window is too small.

Workaround before Fix: Try making the window bigger, or close the job sidebar.

My Settings

Language & Formatting Options – Formatting – Drop-Down Fields Look too Narrow and have no Values

Deltek Tracking No. 513290

Description: The drop-down lists for Time and Date formats that are found in Language & Formatting Options under My Settings are not shown in their full width, and their values are missing.

Workaround before Fix: Open the drop-down list and select anything. You can then see the contents of the drop-down list.

Settings

Company Variables – Company Variable 73 – Invalid Expense Types do not Filter Costing Code Drop-Downs

Deltek Tracking No. 513006

Description: When Company Variable 73 is set to 1 or 2, the expense type setting for the costing code is not validated on both jobs and tasks. This means that jobs and tasks that contain costing codes that do not allow the expense type entry are not filtered out of drop-down lists.

Dashboards – Line Layout Settings not Applied when You Create a Dashboard

Deltek Tracking No. 513284

Description: When you add a dashboard from the Dashboard Overview Page using the Add a Dashboard button, the settings of the dashboard, such as design layout, are not saved.

Storage Provider

Attached Job Documents Disappear after Update to Release 13.0

Deltek Tracking No. 513462

Description: If System Variable 684, Job Folder Name Job Number Place, has a value of 2—Set Job Number after Job Name in the Folder Name (in Parentheses)—it causes jobs that were created before Release 13.0 to have hidden job folders.

Tasks

Time Entry Timer – Cannot Stop Timer unless Job and Task are Set Up with a Valid Costing Code when Company Variable 73 Requires It

Deltek Tracking No. 513214

Description: If Company Variable 73 requires a costing code—that is, it is set to option 2 or 3—but the job or task does not have a valid code for time entry, you cannot stop the time entry timer before the job or task setup is corrected.

Workaround before Fix: Set Company Variable to option 0 or 1. This corrects the job or task setup. However, the ability to do this might be limited to certain user types.

User Interface

Inbox – Comments – Edit Comments – Edit Comment Button not fully Displayed when using Floating Window in Safari

Deltek Tracking No. 513195

Description: When you open a conversation in a floating window, the Edit Comment button in your latest comment is not fully displayed if you are using the Safari browser.

Software Issues Resolved

CRM

Pipelines – System Error Constantly Occurring

Deltek Tracking No. 509811

Description: When as an Advanced User with restricted access you tried to access the Pipelines page, you encountered a System Issue error dialog.

Additional Information: This error now displays an appropriate information dialog.

Finance & Administration

Creditor Invoices – Cannot Preview or Download Creditor Invoice File or Expense Entry Receipt

Deltek Tracking No. 511595

Description: When you previewed a voucher attachment or downloaded a voucher attachment while the voucher number was being stamped on the attachment, you might have been unable to preview or download the file.

Customers Impacted: Customers who have set System Variable 950 to any value other than 1 might experience this issue when previewing or downloading voucher attachments.

Workaround before Fix: Set System Variable 950 to 1 temporarily; however the voucher number then disappears.

Additional Notes: If you set System Variable 950 to 3, the voucher stamp reappears.

Creditor Invoices – Costing Codes Cost Entry Validation

Deltek Tracking No. 512073

Description: Creditor invoices did not take Company Variable 73 into account when you added a job to detail lines or when you created a creditor invoice with an attached purchase order. As a result, WorkBook did not validate whether or not the job was allowed to be used on the creditor invoice.

Creditor Invoices – Intercompany Transactions Display Wrong Currency

Deltek Tracking No. 511897

Description: When you created an intercompany expense transaction between two companies that had different base currencies while System Variable 909 was enabled, the resulting creditor invoice in the owner company had the same amount in company currency as the creditor invoice in the job company, in spite of being in a different currency.

Creditor Invoices – Quick Edits in Grid Stop Edit Mode

Deltek Tracking No. 513033

Description: When you made quick edits of values in the grid, the grid left edit mode. This made it necessary for you to enter some values twice.

Debtor Invoices – Electronic Delivery – Electronic Invoice UBL has Hard-Coded Tax Category

Deltek Tracking No. 512293

Description: When a UBL electronic invoice's tax was 0%, its tax category was automatically set to standard-rated (StandardRated), rather than the correct value, zero-rated (ZeroRated).

Customers Impacted: Customers who use electronic invoicing UBL on invoices with 0% tax.

Workaround before Fix: Manually edit the generated XML file to change the tax category field value from StandardRated to ZeroRated.

Additional Notes: The value of the tax category field is now set appropriately to StandardRated or ZeroRated, depending on the VAT % on the invoice.

Debtor Invoices – Debtor Balance by Age 0-180+ Days Report (Report 550) Shows Different Invoice Date

Deltek Tracking No. 511126

Description: For at least one of the involved Companies, Report 550 showed the invoice date of an invoice that had the same number, but was in another Company.

Customers Impacted: Customers who use multiple Companies.

Revenue Forecast – EAC Calculation Includes Value in Remaining Following Years

Deltek Tracking No. 510880

Description: When you cancelled a price quote that was used in revenue forecasts, forecasting using the EAC method, and the forecast had actuals for the job, updating the forecast correctly removed the forecast and evened out the actuals using the forecast, but incorrectly added the actuals back into the remaining following years column.

Inbox

Conversations – Error when Loading Conversations with Reference Type 176

Deltek Tracking No. 512754

Description: When you opened the Inbox, and you had a conversation with reference type 176 in the Inbox list, an error popped up when you loaded the page.

Customers Impacted: Users who have conversations with reference type 176 in their Inbox lists.

Notifications – Failed Login Attempts Create One Conversation for each Failed Attempt

Deltek Tracking No. 511291

Description: When you had a failed login attempt, WorkBook created a conversation, which caused spam.

Additional Notes: WorkBook now sends a new comment, aggregating errors, instead of creating another conversation.

Jobs

Cannot Change Status for New Jobs

Deltek Tracking No. 509450

Description: When you changed a job status using the grid, an error sometimes occurred, and the System Error dialog was displayed.

Additional Notes: This error appears to primarily affect Macintosh users.

Client Group Dimension does not get Default Value when You Create a Job

Deltek Tracking No. 510159

Description: When you created a job, the Client Group dimension did not get a default value, nor was it updated, based on the client.

Create New Job – Error Occurs

Deltek Tracking No. 511752

Description: When you tried to create a job, an error occurred, and the System Error dialog was displayed.

Price – Lines – Dimension Cells are Frozen on New Lines

Deltek Tracking No. 510686

Description: When you added a new line, you could not edit dimension cells.

Price Quote (PQ) – Error when Moving Lines

Deltek Tracking No. 510797

Description: When you moved lines on a PQ with purchases, a Sentry error occurred, and changes were not applied.

Price Quote (PQ) – Billing Plan – Error when Viewing Billing Plan on Approved PQ

Deltek Tracking No. 511791

Description: When you navigated to the billing plan page of an approved PQ, the following error occurred: **The price quote is locked for changes**.

Purchase Order (PO) – Approval for Final Approver Times Out

Deltek Tracking No. 513198

Description: When the final general approver tried to approve the PO, the connection timed out. This caused the PO not to be fully approved.

Retainer – Invoicing According to Actuals can be Approved Prematurely

Deltek Tracking No. 509750

Description: When you set a project to invoice according to actuals, users could close the delivery job when it still had internally approved price quotes (PQs).

Additional Notes: WorkBook no longer allows PQ approvals for closed delivery jobs when you invoice according to actuals.

Simplified Job List – Job or Job Name Column Header does not Sort Data

Deltek Tracking No. 508811

Description: When you sorted on Job ID or Job Name, the user interface automatically sorted on both columns.

Tasks – Cannot Delete Schedule even when Deleted from Templates

Deltek Tracking No. 510887

Description: You could not delete a schedule from a job, even though you deleted it from the job template.

Tasks – Booked Resources – Approval Status Button Requires Soft Refresh

Deltek Tracking No. 509482

Description: when you clicked the Booking Approval Status button of a selected booking, the booking status did not change automatically until you did a soft refresh of the page or navigated away from the page.

Tasks – Report 94 (Allocated Hours / Used Hours) – Job Number is Cut Off

Deltek Tracking No. 513105

Description: When you generated Report 94, job numbers that have more than five digits were cut off.

Resources

Employee Card - Missing Notifications when Setting End Date

Deltek Tracking No. 511205

Description: Notifications for bookings that you removed after you applied an employee end date were missing.

Resource Card – Access Rights for Read-Only are not Respected

Deltek Tracking No. 511258

Description: When as an Admin User you set a selected specific user's resource information (field under the information) to read-only via the Extended Access tab in Access Override, that field remained editable, instead of being locked against editing.

Login History is not Displayed Correctly

Deltek Tracking No. 511099

Description: Login history—the periods during which a user was logged in—was not displayed correctly.

Scheduling

Employee Task Summary – Sub-Grid – Task Grid View – Job or Job Name Column Header does not Sort Data

Deltek Tracking No. 508811

Description: When you sorted on Job ID or Job Name, the interface automatically sorted on both columns.

Task Matrix – Bank Holidays are Displayed from Wrong Country

Deltek Tracking No. 511052

Description: Holidays were put in the task matrix from more than one calendar.

Task Matrix – Booking Approval Status Reverts to Previous Status

Deltek Tracking No. 509737

Description: After you changed a booking approval status, it reverted to its previous status.

Scheduling Pages – Grey Text for Overbooking is Difficult to Read

Deltek Tracking No. 513418

Description: The grey text color clashes with the background color for overbooking. A new, lighter text color was difficult to read on scheduling pages, where red was shown in the background. As a result, the red background color, and the text color for those places, have been adjusted to increase readability.

Additional Notes: This affects the Task Matrix, Weekly Schedule, and Time Sheet Status scheduling pages.

Settings

Agents – Agents Stopped Working after Environment Migration

Deltek Tracking No. 513364

Description: The error The SqlTransaction has completed; it is no longer usable causes the agent to stop, but the flag IsRunning is not reset. Thus it blocks the scheduled queue for the agent. Now when there is an error during agent setup or agent processing, WorkBook handles the error properly so that it does not block other agents from executing.

Agent Setup – Agent Type 94 (Email Report as PDF) – Email is not Sent

Deltek Tracking No. 511905

Description: When you ran Agent Type 94 with the correct setup, it ran successfully according to the agent log, but the email was not set to the target recipient(s); nothing happened.

Databoard – Session Log is Incorrect – Last Seen Time is Newer than Log-Out Time

Deltek Tracking No. 511201

Description: The last seen log-in time was more recent than the log-out time.

Price List and Activities – Personal Expense Types – You cannot Enable Private Withdrawals

Deltek Tracking No. 510000

Description: When you tried to enable Private Withdrawals in the main grid by selecting the check box, and then you refreshed, the check box reverted to being not selected.

Report Attachments – Uploading an Attachment Causes Error

Deltek Tracking No. 511216

Description: When as an Advanced User you tried to upload attachments, an error occurred.

Workaround before Fix: Have an Admin User upload the attachment, instead of an Advanced User.

Tasks

Price Quote Approval – Job or Job Name Column Header does not Sort Data

Deltek Tracking No. 508811

Description: When you sorted on Job ID or Job Name, the interface automatically sorted on both columns.

Time & Expense

Timesheet – Report 109 (Timesheet with Descriptions) – Error when You Generate Report for only a Selected Team

Deltek Tracking No. 513200

Description: When you generated Report 109 for only the employees of a selected team, an error occurred.

About Deltek

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