Deltek Vantagepoint 2.0.5 (Build 2.0.5.5295) Release Notes

Last Updated: June 24, 2019

Welcome to the **Deltek Vantagepoint 2.0.5 Release Notes**, which describe the new features and enhancements introduced in this release.

Important Notes

Contents of Release Notes

These release notes address all of the modules associated with Deltek Vantagepoint 2.0, some of which your firm may not use. Skip the sections that do not apply to your implementation of Deltek Vantagepoint.

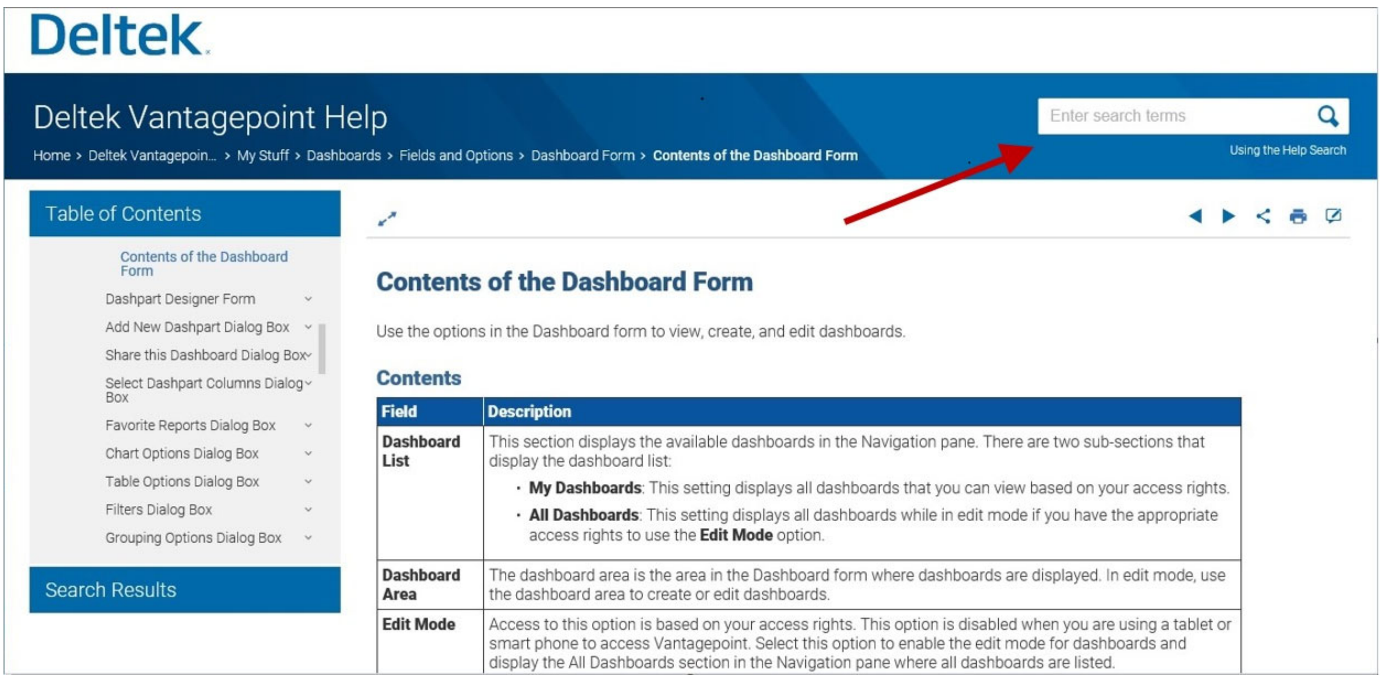
Online Help Improvements

Online Help Search

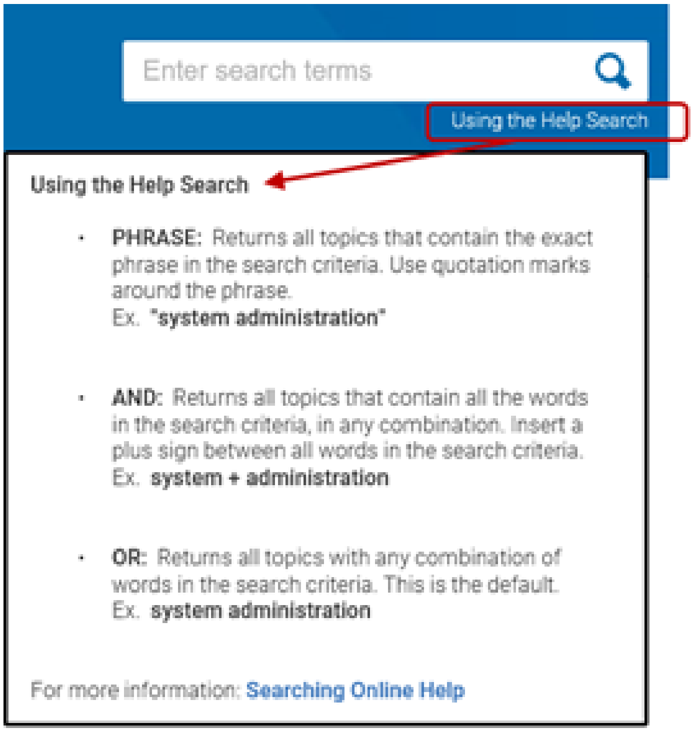
The search functionality in the online help has been improved. You can now search for complete phrases in topics and use an AND word search.

To access the search field in help: Click **?** in the upper right corner of any Vantagepoint screen and select **Online Help**.

The search field is in the upper right corner of the help page:



Click **Using the Help Search** below the search field for more information on how to use the search:



The folllowing information and examples are from the "Searching Online Help" topic:

Searching for Phrases in Topics

Enter phrases in quotation marks in the help search field to return a list of only the topics that contain the complete phrase.

Example:

What you want to search for	Entry in the help search field
All topics that mention the Tax Analysis report	“tax analysis report”

Searching for Multiple Words in Topics (AND Search)

To search for topics that include all the words that you enter in the search field, enter a plus sign (+) between each word. Each topic returned includes all the words that you entered in the search field, regardless of the order of the words or whether the words are adjacent to each other in each topic.

Example:

What you want to search for	Entry in the help search field
All topics that contain both the words “approve” and “invoice”	approve + invoice

Searching for Multiple Words in Topics (OR Search)

When you enter words in the help search field without quotes or plus signs, the search assumes an OR between each word. All the topics that have any or all of the words are returned in the search.

An OR search is helpful when you’re looking for something, but you are not sure of the name or term used in the help.

Example:

What you want to search for	Entry in the help search field
All the topics that contain the word “check” or “payment” or both	check payment

Scope of the Help Search

The search field in online help searches only the help topics. It does not search for content from the Deltek Learning Zone or the Deltek Support Center website.

An Easy Way to Send Feedback to Deltek About Any Help Topic

Open any help topic and click the new Send Feedback icon in the toolbar above the topic to send feedback about the topic to Deltek.

In the email that opens automatically, enter comments and suggestions for the topic by answering the questions in the body of the email. Then click **Send**. The **To** and **Subject** fields in the email are prefilled automatically. We appreciate your constructive feedback to help us continuously improve the online help.

Note: The first time you click , you must select your email application in the How Do You Want to Open This Dialog Box dialog box. Also, select the **Always use this app** check box, so that this dialog box does not display each time you click .

Regulatory Enhancements

Federal >> W-2 Form Updates 2019

The Verification code pilot program has ended, and Box 9 is no longer in use. Vantagepoint has been updated to remove the value in Box 9 (FormW2Data.AdvanceEIC) in the W-2 Form.

Enhancements

Access the Release Notes from the Online Help

The Vantagepoint online help now includes a link to the Vantagepoint Release Notes. From the Online Help menu, click **What's New/Release Notes** to open the release notes directly from the help: https://help.deltek.com/Product/Vantagepoint/2.0/ReleaseNotes/

Additional Project Data Added to the Planning Data Export

When you use the Planning Data Export form (**Utilities » Imports & Exports » Planning Data Export**) to export data, each exported row now includes the work breakdown structure numbers and names for which that plan information was entered.

These fields are included automatically. You do not need to select them as you do the other exported fields.

Hey Deltek!: Support for International English

Hey Deltek! can recognize International English words (like colour or favourite) and handle them accordingly. In line with this enhancement, Hey Deltek! can only be enabled if you select either **English (United States)** or **English (International)** as your language when you log in.

For more information, see Hey Deltek! in the online help.

Improved Security of the Payroll Remittance Advice Report

To enhance the security of confidential payroll information, you are now required to log in to Vantagepoint to view the Payroll Remittance Advice Report.
You now receive an email message with a link that opens Vantagepoint to the report, instead of receiving the report as an email attachment.

This also eases the validation requirement for the Social Security Number and Hire Date information in the Employees hub, as they are no longer required to open the Payroll Remittance Advice Report.

Multiple Languages and Login

When you access the Vantagepoint URL for the first time on a device, or after you clear your cache, Vantagepoint attempts to match the language used in your browser settings to a language supported by Vantagepoint, and displays your login screen in that language. If your browser setting language is not found in the supported list, Vantagepoint defaults to US English. You can select another language from the language list. If you do so, the screen refreshes in that language.

For subsequent logins, Vantagepoint will always use the language most recently used when logging in on that device.

Reporting Quick Search

The Reporting tab in My Preferences now includes a **Reporting Quick Search** option. Use this option to specify the type of search filter that you want to use as the default when you conduct a search in the Reporting application. Select one of two settings:

- **Saved Search:** Select this setting to have the Reporting application display the Saved Search filter. When you are working in Reporting and enter data for this filter, only the saved searches that match the filter are displayed in the drop-down list.
- **Records:** Select this setting to have the Reporting application display the Record filter. When you are working in Reporting and enter data for this filter, only the individual records that match the filter are displayed in the drop-down list.

Whichever setting you choose, you can always select a saved search or a record.

Screen Designer: Changing Access Rights for Security Roles

To change the access rights for security roles in the **Field Security** field in the Field Properties section of the Screen Designer form for multiple fields that you select on the Screen Designer form, the following apply:

- If all of the selected fields have the same access rights currently entered in the **Field Security** field, you can change the access rights in the **Field Security** field. The upated access rights are applied to all the selected fields on the Screen Designer form.
- If all of the selected fields do **not** have the same access rights currently entered in the **Field Security** field, the **Field Security** field is **not** enabled. You must select one field at a time and update its access rights individually in the **Field Security** field.

The same thing applies for the **Locked** and **Required** fields in the Field Properties section of the Screen Designer form. If all of the selected fields on the Screen Designer form do **not** currently have the same settings entered in the **Locked** and **Required** property fields, the **Locked** and **Required** fields are disabled. You must select each field individually on the Screen Designer form to change the access rights in the **Locked** and **Required** fields.

Search and Download Report Option for Reports

When you run a Vantagepoint report, you can use the new **Search and Download** option to open a Search Criteria grid that provides options to view and edit search criteria, filter results, and export report data. For quick results, the Search Criteria grid will remember your prior selection each time that you access the grid.

Touch Time and Expense: Paging on the Time Approvals Screen

To help you navigate your approval list on the **Time Approvals** screen more conveniently, the mobile application now applies paging to the screen. You can set the maximum number of records that it displays in the **Search result display by** field on the **Settings** screen. By default, it displays 25 records. If the available records exceed the maximum number that you set, the **Load More** option becomes available at the bottom of the screen, allowing you to display the next page of results.

In addition, if you are on the individual **Time Approval** screen, the **Back** and **Next** buttons are available in the header, allowing you to go to the previous or next page. A "+" sign after the number of timesheets indicates there is another page of results, for example, "Timesheet 43 of 50+".

Touch Time and Expense: Support for Reverse Charge Tax Codes

You can now use Reverse Charge Tax Code for expense reports in the mobile application, provided that the tax code is set up and enabled in Deltek Vantagepoint. A Reverse Charge Tax Code calculates the Tax Amount and sums into the Total Tax Amount. The Reverse Charge Tax amount, however, does not decrease the Net Amount and Payment Amount. Only the regular tax code amount should affect the Net Amount.

For example, you have a Reverse Charge Tax Code with 10% tax and an expense sheet line with the amount of £100. The tax is calculated at £10, the net amount is £100, and the payment amount is £100.

Touch Time and Expense: User Defined Fields for Timesheets

Any active user-defined fields set up in Vantagepoint become available in the mobile application. They display in a separate section below the **Labor Category** field on the **Add Project** or **Edit Line** screen. The UDF names that display in the mobile application are based on the names specified in Vantagepoint settings. The UDFs may be required and can have drop-down lists, depending on how they are set up. The order of the options in the drop-down list depends on the sequence specified in settings.

Touch: Updated Apache Cordova Version

The Cordova client version of the Deltek VantagePoint mobile application has been upgraded from 6.5.0 to 7.1.0.

Touch: Updated PHP Version

The Touch Server for this version of the Deltek VantagePoint mobile application has been upgraded to support PHP 7.3.5.

Software Issues Resolved

Activation >> Activate Organizations

Defect 1129017: When you attempted to set up more than one value for each organization level during initial activation, you were unable to add rows in the Regions Name & Code and Locations Name & Code grids.

Billing

Defect 1076509: In Billing Terms for a project, if you entered information in the Fee Billing Phases grid on the Fees tab, you did not save the entries, and then you turned on **Enable Postings by Billing Phase** in the Fee Billing Phases grid, you received the following error: "The record you are trying to save has been updated by another user since you first selected it."

Billing Terms

Defect 1112425: In the Fees grid on the Fees tab in Billing Terms, after you entered a percentage in the **Percent Complete** column and an amount in the **Fee** column for a fee, if you changed the amount in the **Fee** column, the amounts in the **Fee to Date** and **Current Fee** columns did not match as they should. You also saw this discrepancy between these fields on the Fees tab in Interactive Billing.

Billing >> Interactive Billing

Defect 1118667: This issue applies for invoices for projects with three work breakdown structure levels that have fees assigned for WBS1 up to WBS3. In Interactive Billing, when you assigned an invoice number for an invoice for a project in this situation, the fee details no longer displayed at the WBS3 level.

Defect 1133330: When you did not use the **Invoice Approval** option on the project and you selected the **Name of the Billing Contact/Client** option as the invoice addressee, the name of the contact and client were displayed in the draft billing invoice, but they were not included in the final billing invoice. The Billing Session Options setting did not override the selected default setting (not specific to the Invoice Approval option being enabled or disabled).

Defect 1133100: When you set your global billing options to not use retainage, and you tried to create a credit memo without using original invoice amounts, you were unable to update the **Amount** field on more than one row in the Project Detail grid of the Invoice Credit dialog box.

Hubs

Defect 1109879: The hubs list view query included all columns, regardless of what was selected in the Selected Columns list. This resulted in slowed performance.

Hubs >> Employee >> Employees

Defect 1119898: When you added a new labor category in **Settings » Label and Lists » Lists** and used that labor category in creating a new employee record, you received the following error message: "The Labor Category does not exist."

Defect 1132028: When you created a new employee entry in a multicompany database, the letter "A" was listed as the home company instead of the actual company name.

Hubs >> Employees

Defect 1117856: On the **Labor** tab of **Hubs » Projects » Plan**, when you added a new employee resource, the name of the supervisor shown in the employee bubble was incorrect.

Defect 1117456: When you tried to create a new employee record and started to search for an organization in the **Organization** field, you were unable to select a new organization on the Select Organization dialog box. You had to resize the dialog box before you could select a new organization.

Hubs >> Firms

Defect 1083691: If you used the Screen Designer to hide the Our Team grid on the Our Team tab in the Firms hub, an error message occurred when a new Firm record was created and saved with the **Owner** field defined.

Defect 930629: After saving, you could not delete the value in the **Firm Number** field from the Summary pane in the Firms hub.

Defect 1120491: When you copied an existing record with a **Vendor** firm type and saved it with a new record name, the **Save** button was disabled.

Hubs >> Firms >> Voucher Review

Defect 1129090: On the Vouchers tab of the Voucher Review form, the details displayed in the **Last Payment** and **Payment Date** columns in the Vouchers grid were incorrect; and when you voided a payment, the columns retained the payment details when they should have been blank. Then, when you made a new payment using an earlier date, the **Last Payment** and **Payment Date** columns displayed the details from the prior payment posting instead of the current posting. In addition, when you reposted the payment using a payment date that was earlier than the first payment (after the voided payment), the **Last Payment**, **Payment Date**, and **Last Payment Amount** columns did not display the reposted payment details correctly.

Hubs >> Projects

Defect 1119829: When you created a new project in the Projects hub and you set the **How To Create Project** field to **From GovWin IQ** on the New Projects form, an error occurred when you tried to save changes to the new project that was imported from GovWin IQ.

Defect 1102294: This bug occurred if both of the following applied:

- In **Settings » Accounting » Transactions**, **Yes** is selected for **Update Project Vendor Association when Posting Vouchers**.
- In **Transaction Center » Transaction Entry » AP Vouchers**, when you created a voucher, you entered a vendor that was **not** already added to the Firms grid on the Team tab in the Projects hub for the voucher's project. You posted the voucher.

On the Team tab in the Projects hub, the vendor was automatically added to the Firms grid, but the vendor type did not display as it should have in the **Type** field in the grid. You were unable to update any other information for the project in the Projects hub until you added a vendor type in the Firms grid on the Team tab in the Projects hub.

Hubs >> Projects >> Contract Management

Defect 1119948: If Vantagepoint was set up to synchronize amounts automatically on the Compensation tab of the Contract Management form, based on contract amounts that you entered on the Contract tab of that form, you should not be able to enter any compensation amounts directly. That was enforced when you worked in Detail View. However, if you worked with the Contract Management form in List View, you were incorrectly allowed to enter compensation amounts directly and save them. The corresponding contract amounts were not updated in that case, so the two sets of amounts were no longer in sync.

Hubs >> Projects >> Plan

Defect 1132300: When you set your contract options to synchronize contract values to project compensation, and you tried to make changes to the entries on the Contract tab of the Contract Management form for a project, the updates that you made were not reflected on the Contract tab of the Plan form for the project unless you tabbed out of the Projects hub.

Hubs >> User Defined

Defect 1077293: When users were assigned to a security role that had Add/Modify access to a user-defined hub, the option to delete records from within that hub was not hidden.

Human Resources >> Payroll >> Quarterly Processing

Defect 1115286: When you edited an Indiana quarterly processing work file, the **Occupational Code** field was not populated with the value of the **Standard Occupational Classification Code** field from the Employee Hub.

Login and Windows Authentication

Defect 1115844: When you used Windows authentication with Vantagepoint, you might have been repeatedly prompted to log in to Vantagepoint with your Windows authentication credentials in various areas of the application, depending on the browser that you used.

My Preferences

Defect 1129281: On the General tab of the My Preferences dialog box, the **Save** option was available even when the **Delegate Approvals To:** field was selected without an identified employee. This sometimes caused invoices submitted for approval to display a blank value in the **Approver** column in the Invoices grid of the Invoice Approvals form (**Billing » Invoice Approvals**).

My Stuff >> Approval Center

Defect 1099894: This issue applies if you use a language other than English (US) in Vantagepoint. On the Approval Center form, when you opened and closed the Grid Settings dialog box (using the gear icon in the upper right corner of the grid), selected the **Show All Pending and Complete** check box on the Approval Center form, and then opened the Grid Settings dialog box again, **Text Not Translated** displayed in place of the column names on the dialog box.

My Stuff >> Dashboard

Defect 1127921: When you tried to create a dashpart with a Favorite Report dashpart base, the **Save** option on the Dashpart Designer form did not work when you tried to save the dashpart.

My Stuff >> Expense Report

Defect 1129372: When you added new lines to the expense report and exceeded the number of lines shown on the screen, a scroll bar became visible on the right side of the Expense report page, but did not function.

Defect 1113304: In Expense Report, the **Employee** field was missing in custom searches for an expense report when the following settings were entered for an employee on the Time & Expense tab in the Employees hub:

- The **Expense Administration Level** field was set to **System**.
- The **Edit** check box was cleared (not selected).

Defect 1117361: In an expense validation web service, the warning message displayed in the title bar of the Alert dialog box.

My Stuff >> Reporting

Defect 1130602: The **Organization** drop-down list on the Options tab of the Income Statement report was not working properly. When you generated two reports with different organization types, they both had the same data.

Defect 1119357: When you tried to generate a Labor Resource Forecast report, errors were displayed. These errors differed, depending on the type of user who generated the report.

Defect 1133421: When you generated the Unbilled Detail and Aging report using **At Billing** or **At Cost** for the **Final Totals and Aging Report Basis** option, the results were reversed. The aged amount displayed the cost amount when you selected **At Billing**, and conversely displayed the billing amount when you selected **At Cost**.

Defect 1133051: When you generated the Top Bottom Performers report, the report used summary tables even when the **Use Summary Tables** check box was cleared (not selected).

My Stuff >> Timesheet

Defect 1111048: When you copied planned hours for a timesheet, the **Copy To Timesheet** and **Cancel** buttons remained hovered over the Planned Hours dialog box.

Defect 1110930: When an approver performed a timesheet floor check, employees with a hire date later than the selected timesheet period displayed in the results.

Defect 1120602: When you changed the URL of Vantagepoint after saving a timesheet, and then logged in again, the most recently saved timesheet did not display. Instead, you were asked to select a new one.

Defect 1064427: Non-budgeted labor codes populated timesheets when you copied timesheets from planning with the **Budgeted Source** field set to **Budget Worksheet** on the Accounting tab in **Hubs » Projects » Project**.

My Stuff >> Timesheet and My Stuff >> Expense Report

Defect 1084552: Rejected did not display as an option in the **Timesheet Status** field or **Report Status** field on the Custom Search dialog box.

Reporting

Defect 1096985: The Voucher Ledger report was changed to landscape orientation because columns that contained large numeric balances were wrapped.

Defect 919258: When previewing an Income Statement report that included both a custom amount and a calculated field column with an organization level as part of the condition, you received an SQL reporting error.

Defect 1080831: When a user-defined section was entered on the Options tab in a report, hovering over the items in the section when it was not expanded did not display the full contents of the section.

Defect 1078693: When you generated the Resource Utilization by Organization report, the error 'startIndex cannot be larger than length of string' displayed. This happened if the **Resource Assignment** column was removed in the Columns section on the Columns & Groups tab of the Resource Utilization by Organization form.

To avoid this error, set the **Lowest Level of Detail Shown** field to **Resource** on the Grouping & Sorting section of the Columns & Groups tab.

Screen Designer

Defect 1120606: This issue applies if you created a user-defined grid in the Projects hub. When you added records to the grid on all levels of a project (project, phase, and task), and later logged in to Vantagepoint using a different security role than the one that you used when adding records to the grid, the items in the user-defined grid were duplicated on the phase and task.

Search

Defect 1109875: A CRM Only user role in an Accounting database did not have access to searches for **Active Clients** and **Active Vendors** in the Firms hub.

Settings >> Cash Management >> Banks

Defect 1130604: On the User Defined File Format tab, when you selected another value in the **Line Type** drop-down list and saved the changes, the updated line type value reverted to the default value of "Header 1."

Defect 1117481: When you opted to include the **Receipt Amount** or **Payment Amount** field name in the Import Details grid for a bank code, you were erroneously required to provide a Label entry for the field name before you could save your modification.

Settings >> Currency|Daily Exchange Rates

Defect 1127504: If you entered an exchange rate with an effective date, and then tried to specify an exchange rate with a blank **Effective Date** field, you received an error message.

Settings >> CurrOptions

Defect 1127162: When you added and then tried to save a new currency symbol in the **Currency Symbol** field, the new currency symbol was not saved and the field remained blank.

Settings >> Labels and Lists >> Labels

Defect 1111056: When special characters (**&**, **#**, **<**, or **>**) were saved in a custom label in **Settings » Labels and Lists » Labels**, an error occurred at login.

Settings >> Workflow >> User Initiated Workflows

Defect 1134283: When the **Approval Workflow** area was selected and an expression was already defined in the **New Value SQL Expression** field of the Column Change Configuration dialog box, Vantagepoint stopped responding and displayed a loading animation when you clicked the ellipses (**...**) button. You display the Column Change Configuration dialog box by clicking the link under the Action column of the Actions grid of the User Initiated Workflows form.

Defect 1119201: On the User Initiated Workflows form, when you set the **Area** field to **Project**, and copied a workflow using the **Copy - Create Change Workflow** option, some actions from other workflows with the Insert/Associate workflow type were also copied to the new workflow.

Transaction Center >> AP Invoice Approvals

Defect 1080047: If you use AP invoice approvals and you created an AP voucher from a purchase order that had multiple lines of cost distribution, the amounts on the voucher were not being distributed correctly among the multiple distribution lines. This caused the voucher amount to be more than the received amount.

Transaction Entry >> AP Invoice Approval

Defect 1126572: A previously submitted invoice on the AP Invoice Approvals form (**Transaction Center » AP Invoice Approvals**) that was already posted on the AP Vouchers form (**Transaction Center » Transaction Entry » AP Vouchers**) was incorrectly submitted again for posting in AP Vouchers when the following sequence happened:

1. You submitted an invoice on the AP Invoice Approval form and did not close the internet browser window after submitting the invoice.
2. In a new internet browser window, you logged in to Vantagepoint again and opened the AP Vouchers form.
3. You posted the submitted invoice on the AP Vouchers form.
4. You created and submitted a new invoice on the AP Invoice Approval form in the same internet browser window that you used to create the previous invoice.

Utilities >> Imports & Exports >> Imports

Defect 1084583: When you imported a data file to update an employee record, if that data file did not contain a labor category, the existing information in the **Labor Category** field was removed from the record after the data import.

Utilities >> Integration and Imports

Defect 1112507: Tasks (WBS3 level) were not available for use in the Plan form of **Hubs » Projects » Plan** after migrating task records to Vantagepoint.

Utilities >> Updates >> Refresh Paid Status

Defect 1115746: When you attempted to run the Refresh Paid Status utility to update the accounts receivable (AR), voucher (VO), and employee expenses (EX) tables with thousands of records, you encountered a timeout error due to an inefficient table update process.

Utilities >> Updates >> Search and Replace

Defect 1130802: When you tried to update the value for a standard field in the Employees application area, you received the following error message: “Incorrect syntax near the keyword ‘WHERE’.”

Defect 1131155: When you tried to replace an existing employee's email address, you received the following error message: "Incorrect syntax near the keyword 'WHERE'."

Database Changes

Database Changes (Vision/Ajera CRM/GovWin Capture Management 7.6 to Deltek for Professional Services 1.1)

Other Links

[Online Help]

[Developer Guide]