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Progressus Advanced Projects

Release Notes

Build 9.7.0.2, US 9.6.0.0 and CA 9.6.0.0

Requires minimum of BC 21.1.0.0

Application Enhancements

Journals

- **Enhancement Request 56804**: Excel file imports fail in Business Central 20.

  New Feature: Updating to Business Central 21.1 solves the problem.

Project

- **Enhancement Request 51879**: Unable to add tasks to a project created for a contact.

  New Feature: Changes to code were made to allow the creation of a project for a contact with no bill-to or sell-to customer information.

- **Enhancement Request 57390:** Hide 'Switch task page' in the Project Plan.

  New Feature: 'Switch Task Page' will no longer be available under the Tasks menu at the top of the Project Plan page.

- **Enhancement Request 56772:** When selecting "Approved", "Hide in Specification" or "Close line" on Invoice Suggestion lines, an error is triggered "You cannot change the value for the closed job ledger entry".

  New Feature: Issue is resolved, and this error is no longer given when selecting "Approved", "Hide in Specification" or "Close line" on Invoice Suggestion lines.

Resource

- **Enhancement Request 58761**:Add the option to load resource planning with the Resource Group collapsed by default.

  New Feature: The View Template Card "Initial State" field on the Resource Board has been modified to add a new option "Group Collapsed". Selecting this option will load the Resource Planning Board with the Resource Group collapsed.

WIP

- **Enhancement Request 56329:** An error for blocked tasks is received when calculating WIP, even though there is no WIP to post for the task.

  Resolution: An error for blocked tasks when calculating WIP should only be shown if there is an amount calculated for WIP for the task.

Bug Fixes

Billing

- **Issue 46068**: The sum of grouped expenses/resources/items quantity is zero, the amount is not zero, but the amount is not being displayed on the sales invoice.

  Resolution: Changes have been made so that the PM Lines net amount is shown on the sales invoice with a quantity of 1.

- **Issue 53164**: Get error "The Customer Posting Group does not exist". Identification fields and values for Code are blank if the Project No. is entered first on a Sales Invoice, and then the Customer is entered.

  Resolution: User is now able to enter Project No. first as this defaults in the Customer, which brings in the Customer Posting Group.

- **Issue 54014**: When using the grouping in **Invoice Setup** on Resource Group, the description on the sales line displays the Resource Name instead of the Resource Group Name.

  Resolution: The description on the grouped lines is the name of the Resource Group.

- **Issue 52571**: Unable to create one invoice for a customer with several projects and Project Setup > Management FastTab > Price/Cost Not Found Action is set to 'Warning'.

  Resolution: Ruleset changes were made to correct the problem. One invoice can be created for a customer with more than one project.

- **Issue 59367:** VAT setup/information was coming from sell-to customer instead of bill-to customer when invoicing a contract with different sell-to and bill-to customers.

  Resolution: Changes were made to assure the correct customer is being used for the VAT Setup information.

Budget

- **Issue 57280**: Project Actual to Budget Cost Chart shows incorrect budget total cost.

  Resolution: The Project Actual to Budget Cost Chart now shows the correct amount for the budget total cost.

Contracts

- **Issue 58367**: When invoicing a contract with different sell-to and bill-to Customers, the Language Code and Sell-to Email fields are not picked from the Bill-to Customer. Instead, the Language Code field is picked from the Sell-to-Customer and the Sell-to Email is picked from the Contract instead of the Bill-to-Customer.

  Resolution: When invoicing a contract with different Sell-to and Bill-to Customers, the Language Code and Sell-to Email fields are picked from the Bill-to Customer.

- **Issue 57532**: Creating Invoice from the Contract Card displays a confirmation message which will update dimensions on the document. This occurs when there is a dimension on the salesperson associated to a customer.

  Resolution: Confirmation message which gets displayed while creating invoice from a contract is removed.

Costing and Pricing

- **Issue 58867**: When setting the option for **Project Setup** > **Price/Cost Not Found Action** to 'Warning' or 'Error', an error is shown when entries are invoiced if prices are set by Project/Task for all resources.

  Resolution: Issue is resolved. Invoices are created without errors.

Expense

- **Issue 59548**: Description field on the Expense Archive table does not match the Expense Sheet Description field.

  Resolution: The Description field on the Expense Archive table has been expanded to 100 characters.

Journals

- **Issue 51171**: The Resource Group No. was not populating on a price template, containing the Sub Group, when running the Update Prices process.

  Resolution: **Update Prices** populates the **Resource Group No.** field.

- **Issue 55782**: When importing Time Entries, the system was not calculating Quantity (base) correctly.

  Resolution: The system calculates **Quantity (base)** based on Resource UOM settings, by translating UOM defined on the Journal to the Base UOM of the resource.

- **Issue 49954:** Time/Exp. Journal Batches PGS - Edit Journal doesn't take user to the selected journal batch.

  Resolution: When clicking Edit Journal from the Time/Exp Journal Batches page, the user will be taken to the batch associated with the cursor line.

Project

- **Issue 45376:** Chargeable settings for Resources, Items and Expenses do not match Project Template, Invoicing when using the Quick Project Guide.

  Resolution: Task Templates overrule the Project Template. Quick Project Guide allows the user to select a Task Template to use for the project.

- **Issue 58042**: In Business Central 20.5 Microsoft added a control that prevents creation of projects against a customer that has “Blocked” = <>’’ (is not blank). The same also applies for Dimension Values that are blocked. If the Project Wizard is used to create a new project and a blocked customer/dimension value is selected, an error is triggered. The customer or the dimension can be changed by going back in the wizard, but the **No. Series** for the Project is not incremented.

  Resolution: When updating the dimension or the customer through the Project Wizard, the Last No. in the No. Series is used for the Project.

- **Issue 58665:** Modified Budget Description was not flowing to the Planning Lines, Purchase Order, and Sales Order.

  Resolution: Changes have been made, and a modified Budget Description will flow to the Planning Lines, Purchase Order, and Sales Order.

- **Issue 56732**: Date Filters not working for subform "Tasklist Not Tree (PGS)". Task columns showing full amounts.

  Resolution: Changes were made that filter the Budget and Actual Amounts displayed based on the Budget and Actuals Date filters.

- **Issue 57531**: Row discount is not updated on price adjustments when changing the resource discount on the project.

  Resolution: Changes of resource discounts on a project will also affect the price adjustment transactions.

Purchasing

- **Issue 58132**: Creating a Purchase Order for Project Task Expenses and changing the Pay-to Vendor on the Shipping and Payment tab results in a blank Pay-to Vendor No. on the Purchase line.

  Resolution: Pay-to Vendor No. field on the Purchase lines for a Purchase Order or Purchase Invoice will populate when a new Pay-to Vendor is selected.

- **Issue 59217**: The description from the purchase line(s) on a Purchase Invoice is not flowing to the Project Ledger.

  Resolution: Changes to descriptions on Purchase Invoices are flowing to the Project Ledger entry and the Project Detailed Ledger entry.

Reports

- **Issue 58654**: Headings are missing on the Invoice Specification Report when using the setup option to Hide Res./Expense Name in the Invoice Specification Setup.

  Resolution: The header for each project is shown no matter which setup for the Invoice Resource Specification layout is used.

- **Issue 58986**: On the Invoice Specification Setup it is possible to include Price + Qty and show Resource Name, while in the request page this is not an option.

  Resolution: It is now possible to set the "Hide Res. Name" to on/off (true/false) when Include Price+Qty is selected from both the Invoice Specification Setup page and from the report request page.

System Wide

- **Issue 59274**: Upgrade from Build 9.5 to 9.6 failed due to a PM/PR resource that had been deleted.

  Resolution: Upgrade from 9.5.0.6 to 9.7.0.1 with BC 21.1 is successful.

Time

- **Issue 59704:** Timesheet report attached to approval emails runs very slow and contains timesheet lines from other timesheets in the system. The slow process occurs when the timesheet is submitted, and the first line of the timesheet has no hours entered.

  Resolution: The report filter has been modified so that it only includes time from the timesheet submitted.

- **Issue 59297:** Changes made on a timesheet configuration for approvals are not being saved when exiting.

  Resolution: The problem has been fixed, and any change to a timesheet configuration is saved on exit.

- **Issue 58048**: Changing the Work Type on the timesheet line, does not trigger a Price update on the validate of the work type, or on the validate of UOM, resulting in incorrect time entries.

  Resolution: When Work Type is updated on the timesheet lines, UOM, Unit Cost and Unit Price are updated accordingly.

- **Issue 58060**: Line Manager 2 does not receive an email notification for timesheet approval.

  Resolution: Line Manager 2 will receive an email when the Line Manager Approval is the first level for timesheets.

- **Issue 57724**: Setup changes revert to Default settings when any changes are made on timesheet configuration.

  Resolution: Changes made on time sheet configuration are saved.

- **Issue 57764**: Unit Price(LCY) from Subcontract lines is not being updated correctly in the Invoice Suggestion lines.

    Resolution: Unit price will be the Subcontract line unit price for usage lines on the invoice suggestions and on the sales invoice.

- **Issue 57440**: After moving entries on projects, the Unit cost and Total cost including LCY fields have the wrong signs in the Moved entry and Audit Trail entry in the Project Detailed Ledger .

    Resolution: The Unit Cost and Total Cost fields now have the correct signs in the Project Detailed Ledger on Moved entries and Audit Trail entries created when moving entries.

- **Issue 59391**: Users with Group Permission, PGS Project Exec, are unable to change the Project Manager and Person Responsible on the **Project Card**.

    Resolution: Full Permission set has been added to the Group Permission, PGS Project Exec.