Deltek Vision

Getting Started Guide

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Deltek Vision®

Getting Started Guide

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1 In This Guide...

Welcome to Deltek Vision®, the Web-based software solution for professional services organizations. Vision is a truly revolutionary product that combines all of your front-office and back-office data into one integrated system. Vision enables all the members of your firm to use and share the same information—thereby helping increase the efficiency and productivity of your business.

Getting Started

Getting Started introduces you to the many features and capabilities offered in Vision. This guide intends to provide a clear understanding of Vision's functionality and logic, and help you realize this product's full potential.

You will learn about the Vision applications, how to navigate through Vision and use its system-wide features, how to modify the interface to suit your needs, how to use records and reports, and learn about Vision's Work Breakdown Structure (WBS).

2 The Vision Applications

The Vision Applications

Vision applications are accessed through the Vision Main Menu. Each application has its own online help section that explains, in detail, how each application functions.

Application	Description
Dashboard	The dashboard is your "portal" into Vision, allowing you to create a personalized view of your business world.
Information Center	The Vision Info Center is a collection of information centers that you use to manage all of your business-related data.
Client Relationship Management (CRM)	Vision provides you with a variety of options for scheduling and managing your daily activities, as well as maintaining information about your clients and contacts.
Proposals	Vision Proposals streamlines production of SF254, SF255, SF330, and Custom proposals, minimizing preparation time and improving communication among the proposal team.

Application	Description
Planning	This application is designed to guide project managers and proposal writers in constructing plans for opportunities and projects.
Billing	The Vision Billing application lets you: bill labor, expenses, fees, and units in all industry-standard formats; process, modify, accept, and print invoices; generate billing-related reports.
Accounting	This application is where you maintain Vision accounting information, including Accounts Payable, Accounts Receivable, budgeting, and employee expenses.
Human Resources	The Human Resources application is where you maintain the ABRA Data Import Utility, benefit hours accruals processing, and the ADP interface. Also included is the Deltek Vision Payroll application. Please see the Payroll section of the Vision Help system to learn about this application.
Time & Expense	Deltek Vision Time and Expense consists of two separate applications—Timesheet and Expense Report—that allow you to record your own time and expense charges and then submit them for processing.
Purchasing	Vision Purchasing allows your firm to automate its procurement processes for items, services and capital items. The application integrates Vision security, accounts payable, billing, and employee and vendor Info Centers, optimizing use of relevant data elsewhere in your Vision database.
Reporting	Vision Reporting offers you a wide range of reports that present information about all aspects of your projects, clients, employees, and accounts.

Overviews

The online help for each application starts with an overview. The overview introduces you to the application and provides links to the application's main features. Overviews often include a "Related Topics" section, as well as important warnings and tips.

Transaction Center

Use the Vision Transaction Center to enter and maintain data on various types of transactions, including disbursements, expenses, invoices, and vouchers.

Utilities and Configuration

Utilities and Configuration are located as well on the main menu. You, or your system administrator, use them to modify the Vision applications.

Inventory

Vision's Inventory feature allows your firm to manage and track all of its items, both inventory items and non-inventory items. This menu item appears only if:

- You have Vision Purchasing installed,
- You have enabled Vision Inventory, and

Your security role has access to some part of Inventory.

Deltek Support

Deltek Support links you to the following Help options:

- E-Support
- Knowledge Base
- Web Meeting
- Contact Us

Please see Chapter 5, The Vision Help System, to learn about these options in detail.

3 Start Vision

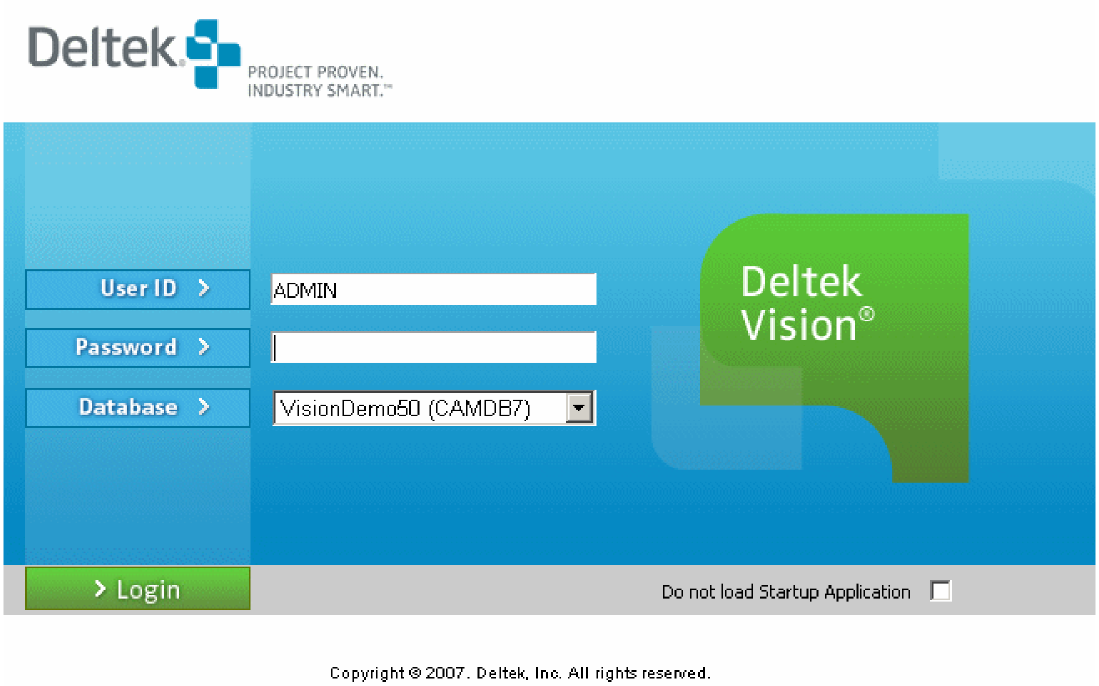
To begin working in Vision, you must do the following:

1. Log on
2. Select an accounting period
3. Select a menu choice

Each step is explained in detail on the following pages.

Log on

The splash screen is where you enter the required data to access Vision. Click the Vision icon to access the splash screen.



Deltek Splash Screen

To log on to Vision:

1. Complete the fields on the splash screen. See the following table for details.

Splash Screen field	Description
User ID	Individual identification for each user, provided by your Vision Administrator.
Password	Individual password for each user, provided by your Vision Administrator.
Database	Use the drop-down list to enter the desired database. See your Vision Administrator if you do not know the database name.

2. Click the **Login** button. The Period Selection dialog appears. See the next section for details on completing this dialog.

Do not load Startup Application

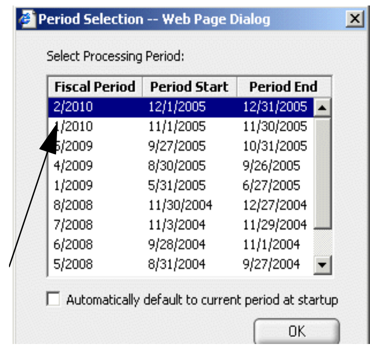
Select the **Do not load Startup Application** box if you do not want your Startup Application to load when Vision is initialized.

Windows Authentication

Select the Windows authentication box if you want to log in one time for both Windows and Vision.

Select an Accounting Period

Once you have completed the fields on the Vision splash screen, the Period Selection screen, appears.



Period Selection Screen

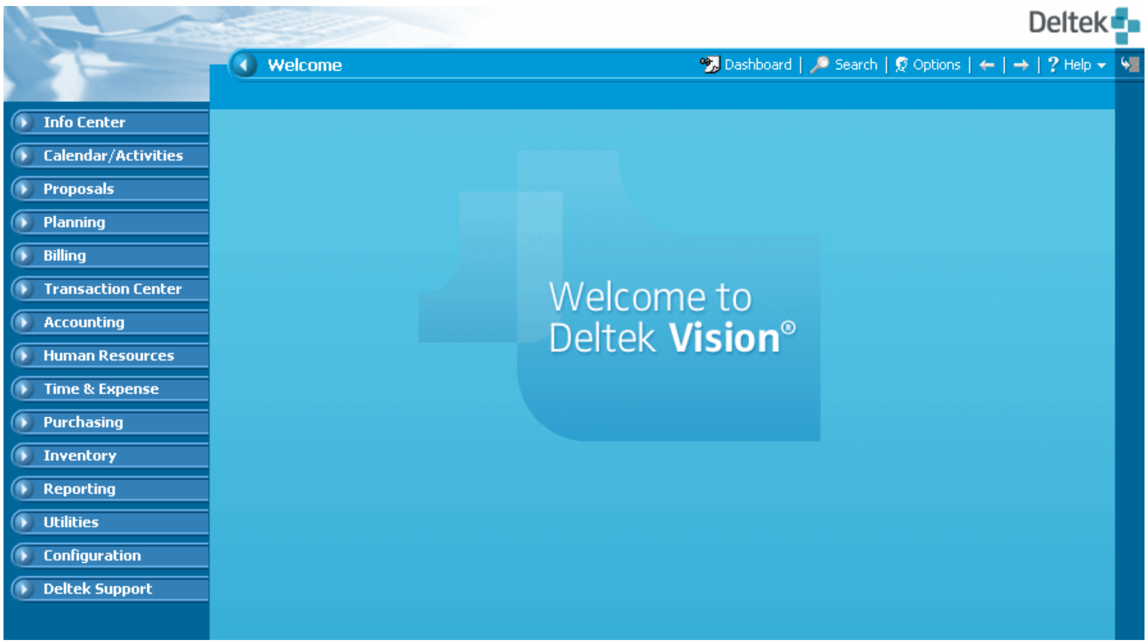
To select an accounting period:

1. Select an accounting period in which to process data.
2. Enable/disable the **Automatically default to current period at startup** option. If you use this option, Vision automatically defaults to the current period each time you start Vision.
3. Click **OK**. The default application appears (see chapter 4 to learn about User Preferences that determine your default application).

> If you select a period other than the current one, a **Prior Period Active** notice appears above the menu tree. Although you can process data in historical periods, the selection of these periods should be used only to print reports reflective of that time frame. Performing processing functions can lead to unexpected results in your database.

Select a Menu Choice

The default application opens once you select an accounting period. The Vision main menu appears on the left side of the screen (see the following screen).



Deltek Vision Screen

A menu tree of options is located to the left of the screen. From here, you can choose to open any of your applications, as well as Transaction Center, Utilities, and Configuration.

> Please refer to chapter 2 to learn more about menu options.

Access a Vision Application Using a URL

Rather than selecting a menu choice, you can access any Vision application using a URL.

To open a Vision application using a URL:

1. Open a browser window.
2. Type the path to Vision on your server.
3. Append the following string:

launchapp.aspx?initialpage=<appname>

For example, to open the Leads Info Center, you would type the following URL:

<Path to Vision>/launchapp.aspx?initialpage=Leads

where <Path to Vision> is the path to your installation of Vision (such as http://www.yourcompanywebsite.com/Vision40).

Using Windows Authentication

If you set up Windows Authentication for logging on, then the Leads Info Center would open directly when accessed via this URL. If you are not using Windows Authentication, the log on page appears first. After logging on, Vision displays the Leads Info Center.

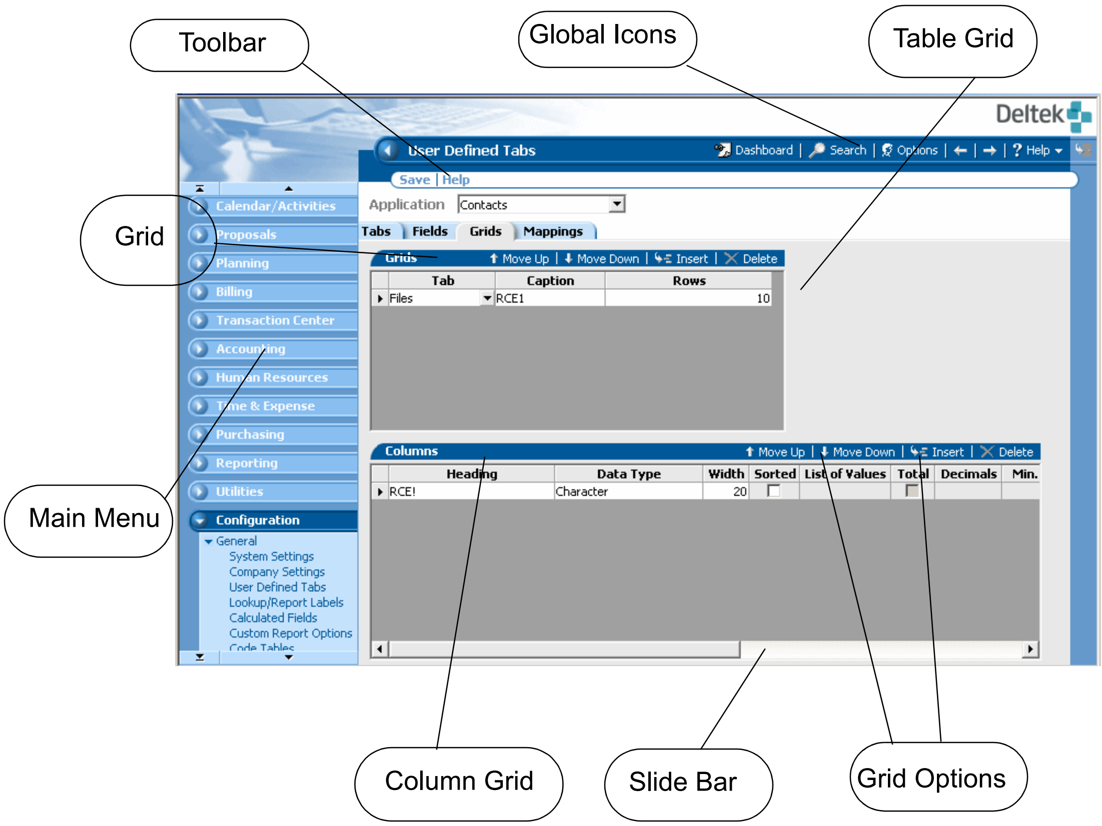
Please see your System Administrator for further assistance.

4 Using Vision

Vision's user-friendly interface lets you easily maneuver between applications, records, and forms. In addition, you can access the Vision Help system from any application, and customize the look of your screen.

The Vision interface components discussed in this chapter are:

- Vision Terminology
- Global Icons
- The Main Menu
- User Options
- Internet Explorer


Toolbar
Global Icons
Table Grid
Grid
Main Menu
Column Grid
Slide Bar
Grid Options

Vision Terminology

Certain terms are used throughout Vision, this guide, and the Help system. See the following definitions of these terms to properly understand and use Vision.

Main Menu

The Vision Main Menu is located on the left side of the Vision screen. It provides one-step access to each Vision application, as well as the Transaction Center, Utilities, and Configuration. Click on a main-menu option. A drop-down list with more options appears. Select the desired option and click. Selected items appear underlined.

Records

A record is a collection of data pertaining to an individual item (such as a project, employee, or client). Information about the record is collected using various forms. For example, each project is a record, containing data from the General, Accounting, and Team tabs. An existing record can be modified, deleted, and copied at any time. Also, new records can be added at any time. Records are maintained through the Info Center.

See chapter 8 for more details.

Options

Options are selections or choices which appear on a menu or form. Options usually appear in drop-down list form. Options allow the user to select the item or response desired.

Configuration

This term is no longer intended solely for your system administrator! Vision offers a variety of user-friendly ways that you can change the look and feel of your product, such as renaming tabs and labels, adding new tabs, and reformatting your Dashboard.

Global Icons

Global icons are function keys that let you maneuver around the Vision applications. They are located in the upper-right corner of your screen and can be accessed at any time. The global icons are explained below.

Application Area

Shows which part of Vision you currently have open (in the case above, it would be the Dashboard). Click the left-arrow to hide the main menu, and click the right-arrow to show it again.

Dashboard

Clicking this icon sends you to the Dashboard application.

Search

Click this icon to open the Info Center Search application.

Options

Clicking this icon lets you access the User Options dialog. In this dialog, you can access Activity Reminders, choose reporting preferences, and select a startup application.

Back Arrow

Selecting the back arrow moves you back to the application you were previously working in.

Forward Arrow

Returns you to the application you were working in before using the Back arrow.

Help

Connects you to the Vision Help system. The Help system appears in its own window so you can continue to reference the application while using the help. Please note that other help buttons, found in an application or a form, are intended for the specific application you are working in.

Logoff

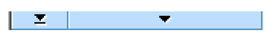
Clicking the logoff icon takes you out of Vision and back to the splash screen. From there, you can either log on again or exit Vision.

The Main Menu

The Main Menu is located on the left side of the Vision screen. It provides one-step access to each Vision application, as well as the Transaction Center, Utilities, and Configuration.

Click on a Main Menu option. A drop-down list with more options appears. Select the desired option and click. Selected items appear underlined.

Main Menu Navigation Buttons



Navigation buttons appear at the top and bottom of the Main Menu when the menu is open. Use them for scrolling up and down, as well as jumping to the top or bottom of the main menu.

Hiding the Main Menu

You can hide the Main Menu in order to enhance the size of the Vision screen. To set this preference:

1. Access the Options icon on the Vision screen.
2. Select the **Automatically hide navigation** menu from the General tab and click **OK**.
3. For your changes to take effect, log off and log back into Vision. Vision hides the navigational menu after you select a menu item.

Open an Application in a New Browser Window

From the main menu, you can open an application or form in a new browser window. This allows you to have multiple applications or forms open at the same time. Any record that displays as a hyperlink in a field or grid can also be opened this way.

To do so, right-click on an item in the Vision main menu, then select the **Open in new Window** option.

User Options

Vision's User Options dialog enables you to determine how Vision looks. It also provides easy access to frequently-used data.

User Options allow you, by user name, to do the following:

- Set startup and viewing options.
- Change your system and e-support passwords.
- Determine lookup and search options.
- Enable/disable Activity reminders.
- Set reporting and printer preferences.
- Set date, time, and numbering formats.

Setting User Options

User Options are accessed by selecting the Options icon on the Vision toolbar.

User Preference field	Description
Color scheme	Select the desired color scheme for Vision. Vision displays a preview of the scheme.
Automatically retrieve records when opening lookups	Select this option if you want Vision to automatically search for all records when lookups are opened.
Automatically hide navigation menu	Select this option if you want Vision to hide the navigational menu after you select a menu item. Otherwise, Vision keeps the navigational menu open.
Find words that sound the same when performing searches	Select this option if you want Vision to include words that sound alike in its results when performing both finds and searches. For example, if you search for John Smythe, Vision will find John Smith.
Change password	Click on this button to change your password. Vision displays the Change Password form. Enter your old password, your new password, and confirmation of your new password. Then click **OK**.
Startup application	You can choose among a blank page, your dashboard, or a selected application from the main menu. You can also determine whether you want Vision to remember the size and position that you specified for windows and reports.
Remember window sizes and positions for Vision screens and reports	This option determines whether you want to save the size and position of the Vision login window, the main Vision window, or a Vision report window to the size and position that you specified for that report or window.

User Preference field	Description
Default Printer	Select the default printer that Vision will use when printing reports. Only those printers for which you have security access are available.
Default Font	Select the font that Vision will use as a default for all reports, including reports that do not have option pages, such as transaction lists, or posting logs. Note that you can still override this default on reports that have option pages.
Page Size	Select the page size that Vision will use as a default for all reports, including reports that do not have option pages, such as transaction lists, or posting logs. Note that you can still override this default on reports that have option pages.
Margins	Set the top, bottom, left, and right margins that Vision will use as a default for all reports, including reports that do not have option pages, such as transaction lists or posting logs.
Display first page immediately (progressive viewing)	Select this option if you want Vision to immediately open the first page of a report (before other pages are generated).
Date/Time Formats	Date format options are short, medium and long. You also have a choice of date separators and four different time formats.
Number Formats	The number format options are decimal symbols and thousands separator.
Enable email reminders.	Select this option if you want Vision to send you email activity reminders.
Enable popup reminders.	Select this option if you want Vision to send you popup activity reminders.
User Name	Enter your username for Deltek's e-support site, up to twelve characters. This is the same username that you created for the e-support site.
Password	Enter your password for Deltek's e-support site, up to twelve characters. This is the same password that you created for the e-support site.

For your changes to take effect, log off and log back into Vision. Vision hides the navigation menu after you select a menu item.

Internet Explorer

Deltek developed Vision using the highest current standards for Web-based applications. All Vision components run under the latest version of Windows® Internet Explorer®.

Deltek Vision and the Internet

Vision's functionality is similar to many Web sites, containing a side main menu displaying the information you can access, as well as links to move you around the product intuitively.

For Further Information...

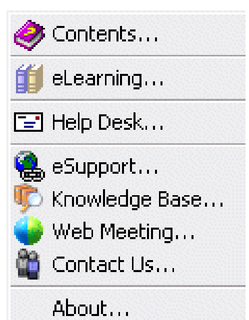
You can find information concerning Microsoft's Internet Explorer, such as Features, Web Accessories, and Internet Service Providers, at http://www.microsoft.com/Windows/ie.

5 The Vision Help System

This chapter introduces Vision's Help system. From here you can find out how to navigate your way through the Help system, and also learn about the icons and related links that you'll find in most topics.

We encourage you to use the help as much as possible. It's easily accessible any time you are working within an application - just click the **Help** button located in the upper right-hand corner of your screen.

When you click the **Help** button, Vision displays a drop-down list with the following options:



- **Contents**—Click this option to open the Vision Help System.
- **eLearning**—Click this option to open electronic computer-based training system modules available from the Internet or your firm's intranet, and accessible on your workstation. Only the computer-based training modules purchased by your firm appear for selection. If no modules have been purchased, the Deltek e-support site appears.
- **Help Desk**—Click this option to open the Send Email dialog. Use this dialog to compose and send a message to a designated Help Desk mailbox. You can send emails directly to Deltek Vision Support, or you can set up an internal Help Desk mailbox to respond to questions from your staff. If you don't have a password to use the support Web site, you can email: passwords@deltek.com to obtain one.

- **eSupport**—Click this option to open the Deltek Online e-Support site. This site is available as part of the Deltek Vision Ongoing Support Plan (OSP). You must have a username and password to access this site.
- **Knowledge Center**—Click this option to open the Knowledge Center tab of the Deltek Online eSupport site.
- **Web Meeting**—Click this option to open the online meeting page of Deltek's Web site.
- **Contact Us**—Click this option to open the Contact dialog that appears when you select the Contact Us tab of the Deltek Online eSupport site.
- **About**—Click this option to view application, database, and server information for Vision.

Search in Vision Help

This section offers tips on locating information in Vision Help.

Find Information in Vision Help

After you have opened Vision Help, you can find information using any of these methods.

Contents		Navigate to a topic using the Table of Contents. The Contents frame is displayed by default, if you have navigated away from this default frame, click the **Contents** button to return to the Table of Contents. After you have opened several topics, Use the **Back** button to navigate back to topics you have previously viewed.
Index/Search		Click the **Index/Search** button to display the index for the entire Help system. You can search for index entries using keywords.
Glossary		Click the **Glossary** button for a list of Vision terms and their definitions.
Print		Click the **Print** button to print the Help topic currently open.
Show/Hide		Click the **Show/Hide** icon once to display all drop-down text in the current topic. Click the icon again to hide the drop-down text.

Help Topic Features

Topics in the Help system include links and icons that, when selected, provide more detail related to a displayed topic. These key features are explained below:

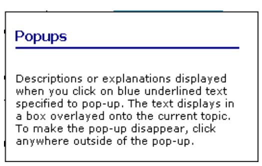
Overviews

The online help for each application starts with an overview. The overview introduces you to the application and provides links to the application's main features.

Links

Links are automatic jumps from the current topic to another topic or to a Web site that offers further information. They are identified by a word or a series of words in blue lettering with a solid line under them. Clicking on this word or phrase brings you from the current topic to the selected topic or Web site. Click on the **Back** button to return to the original topic.

Pop-ups



Pop-ups are descriptions or explanations displayed when you click on green underlined text. The text displays in a box overlayed onto the current topic. To make the pop-up disappear, click anywhere outside of the pop-up. You can also print pop-ups - to do so, right-click your mouse inside of the pop-up and then select **print**.

Drop-down Text

Drop-downs are used in the online Help system to display graphics,toolbar locations, or information relevant to the Help topic you have selected. Drop-down links are always gray and the information always displays below the current text. Click on a drop-down link to open, and click again to close.

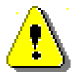
Expanding Text

Expanding Text provides additional explanation and detail relevant to the Help topic you have selected. The Expanding Text link and its subsequent text appears in blue lettering, and displays within the current paragraph. Click once to expand the text, and click again to contract the text.

Notes

Click on a Notepad icon to display helpful facts about a topic. A pop-up window appears containing additional information about the current topic. Topic notes are usually displayed at the bottom of the page under a separating line.

Warnings



Exclamation mark icons provide warnings about a particular process or action.

Related Topics

Click the book icon to display a list of related help topics that may be useful to you. Simply click on any related topic to display it.

Where am I?

When using a checklist in the Vision Help to complete a task, click on the Where am I? icon to display where you are in the checklist process.

Multicompany

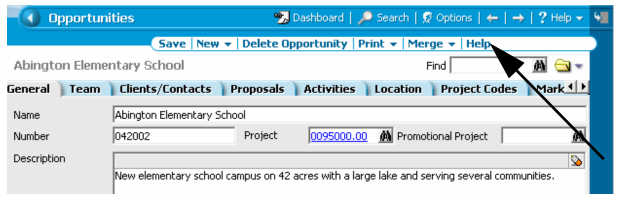
This symbol appears in topics related to Multicompany. Please see the Multicompany help for more information about this feature.

Multicurrency

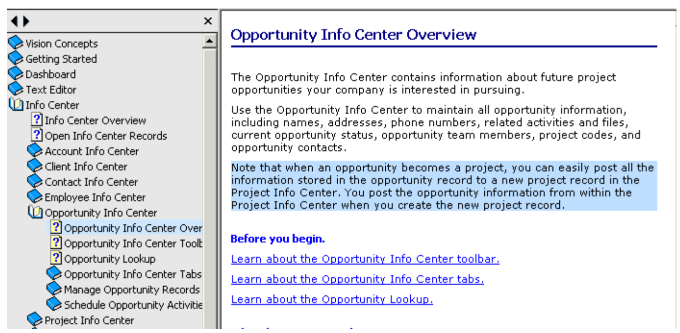
This symbol appears in topics related to Multicurrency. Please see the Multicurrency help for more information about this feature.

Form and Dialog-level Help

An additional **Help** button, located on the toolbar, provides access to a help topic specific to the form or dialog box currently displayed.



For example, selecting the **Help** button in the Opportunities record links you directly to the Opportunity Info Center Overview help topic, as shown in the following screen.



6 System-wide Features

Vision's system-wide features include various data and word processing functions designed to simplify your tasks. They are easily accessible while working in any of the applications. This chapter introduces you to these features.

The system-wide features are:

- Data Access Methods
- Memo Fields
- Customized Table Grids
- Required Fields
- Activity Reminders
- Alerts
- Utilities
- Text Editor

Data Access Methods

Vision is designed to allow easy data access when working in an application, thereby simplifying the process of updating or searching for information. The following table outlines the ways in which data may be selected or entered in Vision.

Access Methods	Description
Drop-down lists	Drop-down lists are denoted by arrows located either to the left or right of a field. They are used in most of the Vision applications. Drop-down lists display valid choices when completing a text field. Click once on a drop-down arrow, then click on your choice to select it. For example, the drop-down box alongside the Prefix field displays **Dr**., **Mr**., **Mrs**., and **Ms**. Select any of these responses for the Prefix field.
Forms	Forms contain groupings of data for each record type. Click on the form name within the record to access it. You can also customize certain forms.
Table Grids	Table grids are the rectangular blocks found in certain tabs (such as in the Experience tab of Employee records). They are used to add a record. Fields within the grids can be reduced in size or hidden completely if they are not needed; to do so, place your cursor on the vertical line between two fields and slide it left or right. You can also customize some tab grids.
Binoculars icon 	The Binoculars icon is found in records and alongside certain fields. It indicates that you have access to a corresponding lookup list for that record or field. Click once on the icon to access the lookup list.
Insert, Copy and Delete buttons	These buttons insert, copy, and delete lines in any record.
Slide Bars	Slide bars let you maneuver among the fields within the table grids when there are too many fields to all fit on the screen. They allow you to view data that may not be initially displayed, and are located next to the **Insert**, **Copy**, and **Delete** buttons.

Required Fields

Most new forms and table grids have required fields. They are highlighted in yellow when empty, and become white after you have entered data.

In the Help system, all required fields are indicated in their field descriptions.

Memo Field

Memo fields are used to add notes or miscellaneous information when working in an application. Memo fields are indicated by a pencil icon.

In memo fields, press the **Enter** key to start a new paragraph, and press the **Shift** and **Enter** keys together for a new line. Paragraphs (using the **Enter** key) appear triple-spaced; new lines (**Shift** and **Enter** keys pressed together) are single-spaced.

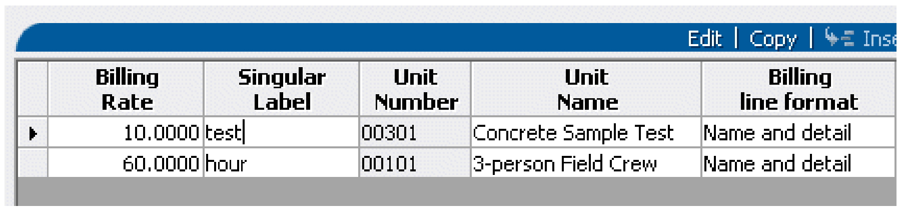
When copying text from other applications into a Memo field, paste it first into Wordpad, then copy and paste it into the appropriate Vision text field.

Customize Table Grids

Fields within the grids can be reduced in size or hidden completely if they are not needed; to do so, place your cursor on the vertical line between two fields and slide it left or right.

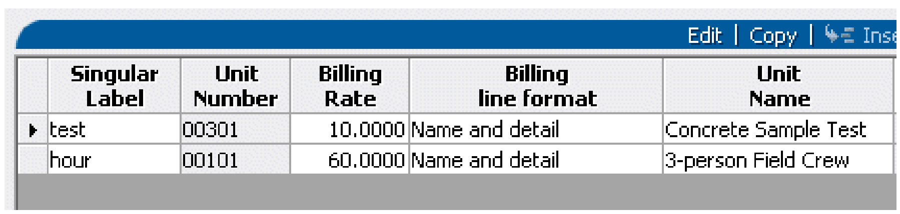
Also, you can rearrange the order of fields within a table grid by highlighting the field name and dragging it left or right to its desired location.

All changes are automatically saved.



	Billing Rate	Singular Label	Unit Number	Unit Name	Billing line format
▸	10.0000	test	00301	Concrete Sample Test	Name and detail
	60.0000	hour	00101	3-person Field Crew	Name and detail

Table grid before customization



	Singular Label	Unit Number	Billing Rate	Billing line format	Unit Name
▸	test	00301	10.0000	Name and detail	Concrete Sample Test
	hour	00101	60.0000	Name and detail	3-person Field Crew

The same table grid after customization

Activity Reminders

The Activity Reminders feature alerts you to any upcoming activity, such as a meeting or conference call, in which you are a participant.

Accessing Activity Reminders

To access Activity Reminders, select the Options icon on the Vision screen and then select the Activity tab.

Setting up Activity Reminders

There are two types of reminders—email and popup:

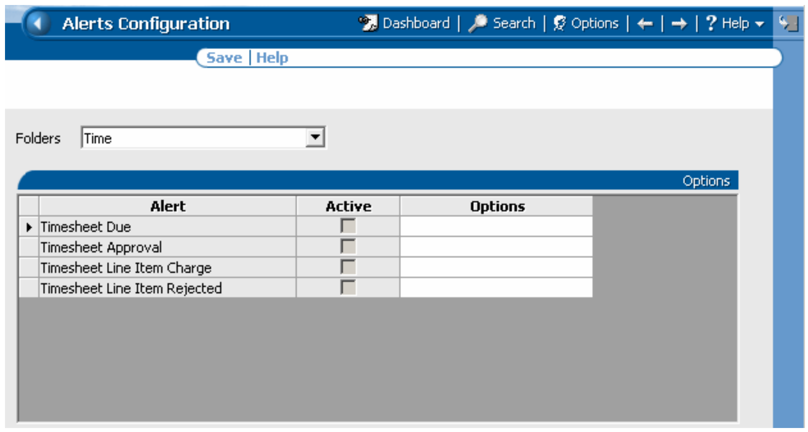
- Select the **Enable email reminders** option to receive email reminders for upcoming activities.
- Select the **Enable popup reminders** option to receive popup reminders for upcoming activities.

You must be using Vision to see a popup reminder; you do not need to be in Vision to receive an email reminder.

Please refer to the User Options section of the Vision Help system to learn more about Activity Reminders.

Alerts

Alerts are a Vision workflow function designed to remind you of calendar events, project tasks to be assigned or approved, and the need to submit timesheets, expenses, and project budgets. How you utilize alerts depends on your role within the team structure (such as project management or accounting).



Alerts Configuration

Depending on the type of alert, Alerts Configuration allows you to determine such options as:

- When alerts are sent
- How the alerts are sent (email or Dashboard)
- Under what conditions the alerts are sent (time sheet overdue, due in x days)
- Contents of email (subject and message body) when alerts are sent via email

Please refer to the Alerts Configuration section of the Vision Help system to learn how alerts are set up.

Utilities

Vision includes a set of utilities, available from the Utilities menu, which perform specific functions on your database.

The following list contains a summary of each type of utility:

Utility	Description
Change Company	Allows you to change the company and allows you to set your startup default company.
Change Period	Allows you to change the open accounting period from within Vision.
Open New Period	Allows you to open a new accounting period.
Period Setup	Allows you to set up periods, including closing and re-opening accounting periods, setting the periods per year, and changing the starting and ending dates for each accounting period. You can also run a Posting Log Review report for any of the accounting periods in the list.
Open New Benefit Year	Allows you to open a new benefit year whenever you need to start tracking time earned and taken for a new benefit year.
Open New W-2 Quarter	Allows you to open a new W-2 quarter to appropriately track any data accumulated by the Payroll module.
1099 Initialization	Allows you to clear out data from the previous year so you can start accumulating data for the new year and store the previous year's activity for 1099 processing.
User Activity	Allows you to display information about active logged on users, application servers, process server activity, and queue names. The Administrator can also use this utility to email all active users and enable/disable all logins, such as when maintenance is needed.
Posted Transaction Files	Allows you to view, print, delete, or resubmit posted transaction files.
Undo Posting	Allows you to undo successful postings.
Upload Advantage Invoices	Allows you to upload saved invoices from Advantage to Vision.

Utility	Description
Locked Transaction Files	Allows you to return an entire portion of a transaction file selected for posting to active status. This utility is useful for postings that failed while they were in progress, leaving them in a selected state.
Incomplete Postings	Allows you to access incomplete, or failed postings. From this utility, you can print a posting log, print a transaction list, resubmit just the unposted portion of the transaction file, or undo the posting and resubmit the entire transaction file.
File Reconciliation Report	Allows you to print a File Reconciliation report to verify that an Unbilled File rec has occurred.
Tolerance Report	Allows you to run a Tolerance report. Tolerances occur when you use Organization Reporting and maintain separate Balance Sheets, and debits and credits may post to separate organizations.
Data Import Utility	Allows you to collect data in files outside of Vision and bring the data into Vision for processing.
Project Closeout	Allows you to close out projects and transfer the closed out project information to either a special completed projects number or to another project of the same project type.
AR Paid Update	Allows you to refresh the AR table.
VO Paid Update	Allows you to refresh the VO table.
EX Paid Update	Allows you to refresh to EX table.
Batch Deletes	Allows you to delete multiple CRM Info Center records using a multi-select lookup for record selection. Batch Deletes also allow you to mark selected records as Inactive, in which case they will not be deleted in the batch delete.
Search and Replace	Allows you to update fields globally for multiple records with a new value with information from another column or via an SQL expression.
Refresh Summary Table	Allows you to calculate and save project summary information (project summary table) for Regular projects only (similar to the Office Earning report).
Datastage TX Integration	Allows you configure and execute data interface routines between source and target databases.
Change W2 Quarter/Year	Allows you to change the W2 quarter or W2 year associated with an existing payroll run.

Utility	Description
Key Conversions	Allows you to change key Vision numbers/codes in your database to either new or existing numbers/codes.
Key Formats	Allows you to reformat the length, delimiter, and/or delimiter position for key numbers/codes in your database.
Process Server	Allows you to offload time-consuming processes from your workstation to another workstation, so that you can continue using Vision on your workstation without interruption. It also allows you to set up profiles, which you can use when running one or more jobs on a regular basis.
History Loading	Allows you to enter information about your firm—such projects, employees, and accounts—when you first set up Vision.
Backup Database	Allows users, who have the appropriate security access, to do a full backup of the Vision database.
Report Administration	Allows you to display reports that are currently running on the report server, load Actuate reports on the report server, and display and refresh the list of available printers for reports.
Download Merge Macro	Allows you to download the list of supported merge codes.
Download Integration	Allows you to download the Microsoft Integration files.
Time Collection Interface Export	If your company uses the Deltek Time Collection application, these utilities allow you to export or import time collection records.

Text Editor

The Text Editor is a word processor that provides the tools necessary for creating and editing simple text documents with the Vision application. These documents can be included in various Memo, Comment, Note, Description, and Proposal fields that display throughout Vision. Although you can enter text directly into one of these fields, to manipulate the text (for example, to change a font size from 8 to 10 point or style from regular to bold), you must use the Text Editor.

The Text Editor uses many of the same features and commands found in other standard word processors. If you have used other word processors, such as Microsoft Word, many of the menu and toolbar options will be familiar to you.

Vision saves your Text Editor files in a Rich Text Format (.RTF extension), allowing you to copy and paste text from any standard Windows application into the Memo, Comment, Note, Description, or Proposal fields using the Text Editor. Some Windows programs and Web pages have unique formatting and graphics options that Vision may not support; thus, you may have to reformat text that you copy and paste from other systems.

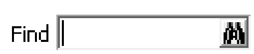
Please refer to the Text Editor section of the Vision Help system to learn more about using this feature.

7 Lookup Lists

Use lookup lists to locate a record, or locate a group of records that share certain characteristics. For example, you can use a lookup list to search for all of your contacts who live in a particular state, or find all of your projects with the same project type. Also, you can access single records, such as an employee's Employee Info Center record, using a specific employee number or name.

Lookup lists are available wherever you see the Binoculars icon in the upper-right corner of a field. Click once on the Binoculars icon to access a lookup list.

Using a Lookup List



Lookup lists work by narrowing your search criteria, thereby eliminating the need to examine large numbers of records to find specific information. Instead, you have only the records you need at your disposal.

Info Center Lookups

Each Vision Info Center (such as Vendors or Employees) offers additional lookup options specific to that Info Center. For example, Vendor Info Center uses searches like "Vendor Number" or "Vendor Name," while Employee Info Center uses searches such as "Employee Last Name" and "Employee Number."

You can also use Info Center Search. This tool enables you to search all Info Center record types.

Please refer to the Info Center section of the Vision Help system to learn more about Info Center lookups.

Configuring Lookup Lists

In General System setup, you can establish a lookup limit, determine the number of records that can be retrieved during a lookup, and authorize users to automatically retrieve records in a lookup.

Setting Up Lookup List Options

Your system administrator determines the following lookup list options for your firm:

Lookup tabs field	Description
Allow users to automatically retrieve records in lookups	If this option is selected, Vision controls whether records are automatically retrieved when lookups are initially opened. If the option is not selected, Vision does not retrieve records automatically in lookups. If this option is selected, you can now determine whether to automatically retrieve records when opening lookups.
Use lookup limits	Select this option to place a limit on the number of records Vision will retrieve in a lookup. If your company has a large database, you may want to limit the number of records Vision retrieves, since retrieval may take some time. If you selected this option, select the maximum number of records in the **Maximum number of records** field.
Maximum number of records	If you selected the previous option, enter in this field the maximum number of records to allow.
Use Dashboard lookup limits	Use this option to limit the number of records you want to display on your dashparts.
Maximum number of Dashboard records	If you selected the previous option, enter in this field the number of maximum records to allow. For example, if you enter a limit of five and a user has ten records in a dashpart, only five will display at a time. The number you select is the same number for all your dashparts that use records.

Please refer to the Configuration section of the Vision Help system to learn more about configuring lookup lists.

Lookup List Options

There are four basic search types to choose from when using a lookup list:

- Direct
- Standard
- Advanced
- SQL Where Clause

Which search type you choose depends on the complexity of your search. Each is explained in the following pages.

Quick Find Searches

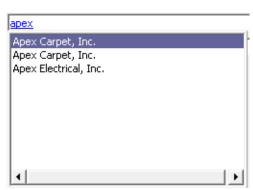
An example of a key code is an employee's last name or a client number.

Quick Find searches let you access a record simply by entering part of a valid key code.

To perform a Quick Find search:

1. Click once inside the **Find** field of the record you are working in.
2. Enter either a single character (for example, the letter "a" or the number three) or a string of characters ("ab" or "13") and then press **Enter**. If you enter a single character, then Vision will search for every record beginning with that character. If you enter more than one character, then Vision will search for every record that contains that string of characters. For whole word searches, enter a space before and after the word to search for only that word.
3. If the information you have entered matches a value in the Vision database, then the record appears.

Multiple Record Matches



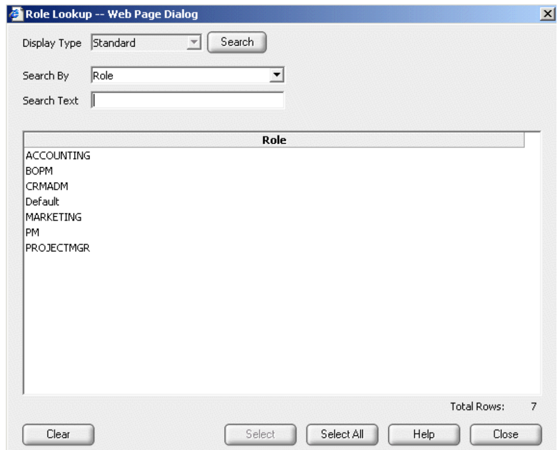
Sometimes, the information you enter produces more than one result. In the case of multiple record matches, a box appears containing all records that match your criteria. Click on the record you wish to access.

Quick Find and Info Center

When performing a quick find search in the Info Center application, the Active Only checkbox setting is applied. For example, when perform a quick find for projects that start with the letter "a", if the Active Only checkbox had previously been checked in the lookup dialog, then only "active" projects will be returned in the quick find drop-down display.

Direct Lookup

Direct lookups are located throughout Vision. They look, and function, much the same as the Standard lookup (see page 7-47), but provide fewer search options.



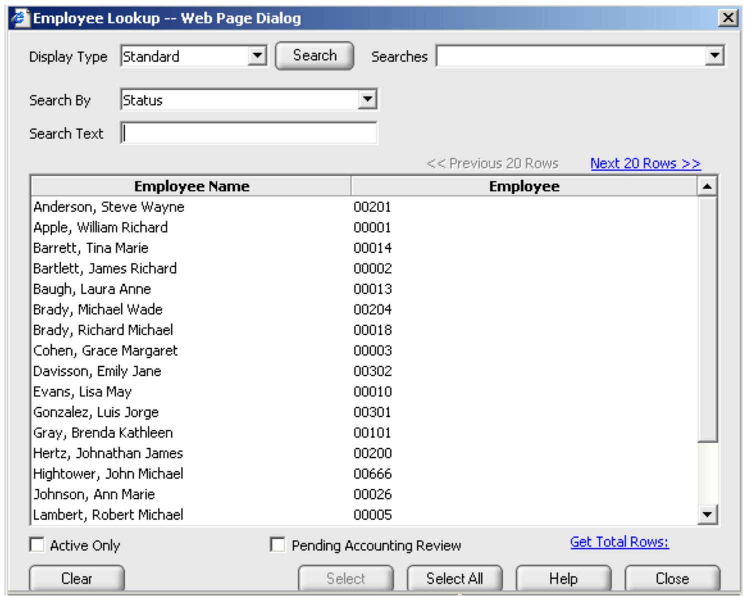
Direct Lookup

To search using the Direct lookup:

1. Click the Binoculars icon, located in the upper-right corner of the record, to display the lookup list.
2. Select the type of criteria you plan to search by using the drop-down list in the **Search By** field (Client Number or Employee Name, for example).
3. Enter any data in the **Search Text** field that narrows your search, such as an employee's last name or the beginning of a project number.
4. Click **Search**. A list of all records matching your search criteria appears.
5. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** button and then clicking **Select**. The first record that matches your criteria appears.
6. Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.

Standard Lookup

Use the Standard lookup for one-time searches using basic criteria such as Names, Numbers, and Types.



Standard Lookup

To search using the Standard lookup:

1. Click the Binoculars icon, located in the upper-right corner of the record, to display the lookup list.
2. Select **Standard** by using the drop-down list in the **Display Type** field.
3. Select the type of criteria you plan to search by using the drop-down list in the **Search By** field (Client Number or Employee Name, for example).
4. Enter any data in the **Search Text** field that narrows your search, such as an employee's last name or the beginning of a project number.
5. Select **Active Only** to display only those records whose status is currently Active.
6. Click **Search** (or press **Enter**). A list of all records matching your search criteria appears.
7. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** button and then clicking **Select**. The first record that matches your criteria appears.
8. Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.

Get Total Rows Function

Select **Get Total Rows:** to display the row count in a completed search.This function is available when the **Use Lookup Limit** option is selected in General System Settings.

Displaying Records

- Click on the **Next X Rows >>** hyperlink to view the next group of rows (X represents the number you choose in the General System Settings).
- Click on the **<< Previous X Rows** hyperlink to view previous rows (X represents the number you choose in the General System Settings).

This function is available when the **Use Lookup Limit** option is selected in General System Settings.

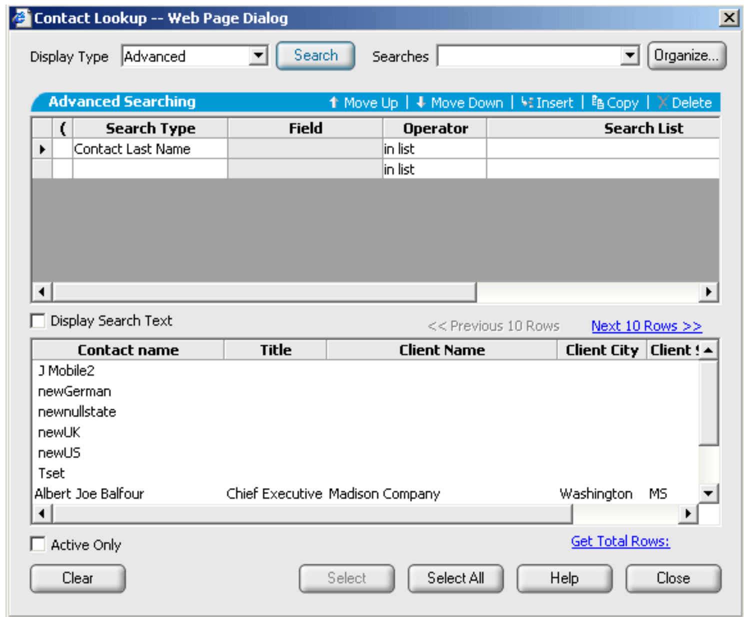
Be sure to click the **Clear** button before starting a new Standard search so that information from the previous search is not included in the new search.

Multicompany

An Active Company field appears in the Standard lookup when Multicompany is enabled. Select the Active Company field to select Projects, Employees and Organizations that belong to the active company. Selecting this field also allows you to create global saved searches containing active company items without creating a different search for each company.

Advanced Lookup

The Advanced lookup lets you enter additional criteria that limits the data retrieved by the search.



Advanced Lookup

To search using the Advanced lookup:

1. Click the Binoculars icon, located in the upper-right corner of the record, to display the lookup list.
2. Select **Advanced** from the **Display Type** drop-down list. The Advanced search form appears.
3. Enter the desired search type using the drop-down list for the **Search Type** field (Client Number or Employee Name, for example). The drop-down arrow appears when you click anywhere in the Search Type field.

Comparative operators are used in SQL Where clauses to select records based on numeric or character values.

4. Enter a comparative operator using the drop-down list for the **Operator** field (which appears when you click anywhere in the Operator field). For an Advanced search, you can implement searches such as “Is Me” and “Is Not Me, and “Is Mine” and “Is Not Mine” (see page 7-51 for an explanation of the these operators).
5. Click inside the **Search List** field to display the Binoculars icon, then click once on that icon to display a dialog box that corresponds to your **Search Type** selection.
6. In the Search List dialog box, highlight the records you wish to display and then click **Select**.
7. Select one of the logical operators, **AND** or **OR,** using the drop-down list for the **Cond** text grid (which appears when you click anywhere in the Cond field).
8. Use the **Move Up** and **Move Down** buttons to arrange the order of your search criteria.

9. Use **Insert**, **Copy**, and **Delete** to modify your search criteria as needed.
10. Select **Active Only** to display only those records whose status is currently Active.
11. Click **Search**. A list of all records matching your search criteria appears.
12. For an Advanced search, you can implement the **Organize** button to use the criteria for future searches (please see page 7-53 for an explanation of the **Organize** function).
13. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** and **Shift** keys at the same time and then clicking **Select**. The first record that matches your criteria appears.
14. Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.

Get Total Rows Function

Select **Get Total Rows:** to display the row count in a completed search.This function is available when the **Use Lookup Limit** option is selected in General System Settings.

Displaying Records

- Click on the **Next X Rows >>** hyperlink to view the next group of rows (X represents the number you choose in the General System Settings).
- Click on the **<< Previous X Rows** hyperlink to view previous rows (X represents the number you choose in the General System Settings).

This function is available when the **Use Lookup Limit** option is selected in General System Settings.

The Clear Button

Be sure to click the **Clear** button before starting a new Advanced search so that information from the previous search is not included in the new search.

Sub Tables

Sub tables corresponding to certain Search Types are displayed in the **Sub Table** field. You can use this information to manually order sub tables together so that they will be combined in a single EXISTS clause. When searches of like sub tables are not entered sequentially in the Advanced grid, then a separate EXISTS clause will be created for each search type.

Info Center Queries

From the Advanced lookup, you can perform Info Center queries based on a field in another Info Center. For example, you can query for all Employees whose Supervisor has a title of CEO.

Using this option means that you can build a query from multiple Info Centers without creating a SQL Where Clause.

These lookup options are listed with "Lookup -" preceding their labels in the Search Type field. After selecting one of these options, the Field option becomes active. Use the Field drop-down list to select the desired field type.

Searches are available for both standard and user-defined fields.

Is Me and Is Not Me Operators

You can use the "is me" and “is not me” operators specifically for Report Favorites and saved searches. These operators work only with search fields that are employee numbers, such as **Employee Number** or **Supervisor Number**. It does not work with search fields based on names, such as **Employee Last Name**.

To use this option, enter "Supervisor Number," for example, in the **Search Type** field and "is me" in the **Operator** field.

Is Mine and Is Not Mine Operators

"Is mine" and "is not mine" operators are used for all Organization-based search fields, with the exception of names. For example, if you have two levels of organization—office and discipline—you can perform searches that automatically match the organization of the employee logged in at the time.

Some examples are "organization is mine" "office is mine" and "discipline is not mine". This functionality is similar to the "is me" operator for employee numbers and can be very useful for setting up global searches and record level security.

SQL Where Clause Lookup

The SQL Where Clause lookup lets you create more complex selection criteria by creating your own SQL WHERE clause.

Vision then uses that SQL WHERE clause to query the database and find records that meet your selection criteria.

> Please refer to the Lookup Lists section of the Vision Help system for more information about using the SQL Where Clause lookup, including the SQL operators that allow data to be filtered.

The Organize Function

Advanced and SQL Where Clause searches provide an **Organize** button that lets you save, delete and rename search criteria without re-entering all the necessary data.

Save a search

Searches are saved by selecting a folder from the **Folder Name** field, or creating a new folder. Then, you enter a name for your search in the **Save Name** field.

The types of searches you can save depend upon your "role" within your organization. Your role must be determined before you can save a search.

> Please go to the Configuraton section of the Vision Help system to learn how Roles are assigned.

Retrieve a saved search

To retrieve a saved search:

1. Click the open folder icon located in the top-right corner of each record. The Save Searches display opens.
2. Double-click on the saved search that you wish to retrieve.

Modify a saved search

You can also delete and rename your saved searches.

To delete a saved search:

1. Click the drop-down arrow for the **Searches** field on the Lookup dialog to display the Organize Options dialog.
2. Right click on the search that you want to delete and select **Delete**. Vision asks you to confirm the deletion.
3. Click **Yes** to confirm. Vision deletes the saved search.
4. To delete multiple saved searches, repeat steps two and three before closing the dialog.
5. Click **Close** to exit the Organize Options dialog for searches.

To rename a search:

1. Click the drop-down arrow for the **Searches** field on the Lookup dialog to display the Organize Options dialog.
2. Right click on the search that you want to rename select **rename**.
3. Enter the new name.
4. To rename multiple saved searches, repeat steps two and three before closing the dialog.
5. Click **Close** to exit the Organize Options dialog for searches.

Launch saved searches from a URL

You can launch a saved search directly from a URL. To do so:

1. Open a browser window.
2. Type the path to Vision on your server.
3. Append the following string:

launchapp.aspx?initialpage=<appname>&keyValue=Search|<folder name>|<sub folder name>|<searchname>

Please see your system administrator for further assistance.

8 Records

A record is a collection of data pertaining to an individual item (such as a project, employee, or client). Information about the record is collected using various forms. For example, each project is a record, containing data from the General, Accounting, and Team tabs. An existing record can be modified, deleted, and copied at any time. Also, new records can be added at any time. Records are maintained through the Info Center.

Record Types

There are eleven Info Center record types:

Clients	Marketing Campaigns	Projects	Text Library
Contacts	Opportunities	Units	Accounts
Leads	Employees	Vendors	

Record Management

Most records are managed in the Vision Info Center. They are fully integrated and designed to work together to make it easier for you to find and use the data you need. You can:

- Add records
- Copy records

- Delete records
- Edit records
- Link records
- Link external files to records
- Merge records
- Print records
- Schedule activities

Other records you might work with in Vision include:

- Plans
- Proposals
- Vouchers
- Invoices

Please refer to the Info Center help section to learn more about record management.

Scroll Through Records

You can scroll through multiple open records using the **arrow** buttons, located to the left of the **Find** field.

The **far-left** button brings you to the first selected record, and the **far-right** button brings you to the last record.

Use the **left arrow** and **right arrow** buttons to search the open records in the order they were selected.

Use Quick Find to Enter Data

You can use the Quick Find feature to enter data in any field where the Binoculars icon is displayed.

Please refer to chapter 7 to learn how to use Quick Find.

9 Configure Vision

Configure Vision

There are many parts of the Vision product that you can modify to suit your particular needs. For example, you can change the layout and contents of your Dashboard, choose your security options, add your own tabs to forms, and rename labels.

Configuration is located on the Vision Main Menu. From there, your system administrator can modify Vision to meet your firm's individual needs.

Please refer to the Configuration section of the Vision Help system to learn more about these features.

User Options

Vision's User Options dialog is where you determine how Vision looks, providing easy access to frequently-used data such as selecting a startup application and changing your password.

See chapter 4 for more details.

10 Reports

The Vision reporting application offers you a wide range of reports that present information about all aspects of your projects, clients, employees, and accounts. The reports come with a set of default formatting options, which you may keep or change.

You can use Vision Reporting to:

- Generate reports for previewing onscreen or for printing. You can print a report right away or schedule it to run at a later time.
- Set report options, which determine how information is displayed on the report, which columns are included, and how the data is sorted and grouped.
- Select data with which to populate reports.
- Save sets of report options, which include all settings on all options tabs. Similarly, you're able to save sets of selection criteria. Both types of named, saved sets are available in any future reporting session, making the reporting process easier and quicker.
- Create and save favorite report formats. Once you have created a favorite, it takes just one click to generate a favorite report with current data—Vision automatically applies all options settings, including formatting options, and retrieves the appropriate records. You can even access any of your favorites from your dashboard.
- Drill down for detail on certain types of data.
- Export Vision data directly to an Adobe® PDF file, a Microsoft® Excel® spreadsheet file, or a Rich Text Format (RTF) file through the Data Export reports.

Report Types

The following types of reports can be accessed from the reports application, located on the Vision Main Menu:

- Client Reporting
- Contact Reporting
- Lead Reporting
- Marketing Campaign Reporting
- Opportunity Reporting
- Employee Reporting
- Project Reporting
- Unit Reporting
- Vendor Reporting
- Text Library Reporting
- Payroll Reporting
- Purchasing Reporting
- Accounts Receivable Reporting
- Billing Reporting
- General Ledger Reporting
- Accounting Reporting
- Project Planning Reporting
- Performance Management Reporting
- Data Export Reporting

Each type lets you organize favorites, as well as schedule, refresh, preview, email, and print a report.

Saved Settings and Favorites

The Reporting application lets you use two time-saving features, called Saved Settings and Favorites.

Saved Settings

Saved Settings are a saved selection of report options, which includes all settings on all options tabs. You can also save sets of selection criteria. Both types of saved sets can be named and used during any reporting session to quickly generate a report.

Favorites

A Favorite is a saved report format, consisting of the report name, a set of saved report options, and a set of saved selection criteria. Once a favorite is created, it takes just a click to generate the report with current data.

> Please refer to the Vision Help system to learn more about Reporting.

11 Work Breakdown Structure (WBS)

A work breakdown structure (WBS) divides each of your projects into distinct, manageable work elements in a way that balances management needs with the need to collect an appropriate and effective level of project data. A WBS is used by various groups in a company, such as marketing, business development, project management, and accounting. A well-planned WBS is integral to successful project proposals, planning, scheduling, budgeting, and reporting.

Your Vision work breakdown structure impacts the:

- Value you get from the data you store.
- Ability to leverage past work to generate new business.
- Ability to improve job performance based on past experience.
- Ease and quality of knowledge sharing among groups in your company.
- Quality of service and level of reporting and billing customization that you can provide to your clients.

There are four key components to the Vision WBS, which work together to provide a comprehensive tracking and reporting system for cost and revenue information. Before you begin to set up your firm's work breakdown structure within Vision, your firm must understand how each of the four components work together to provide a structure that gathers and reports information to meet your firm's internal and external reporting needs.

The four components are:

- The organizational (or profit center) structure
- The WBS or project structure.
- The labor code structure for labor cost.
- The chart of accounts structure for expenses.

Please refer to the WBS section of the Vision Help system to learn more about the work breakdown structure.

12 Getting Additional Help

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of client services has grown out of this close contact. A summary of these services is as follows:

Ongoing Support Plan

As a user of Deltek software, you rely on our solutions and support every day to perform the most important functions in your firm, such as project accounting, financial reporting, billing, labor and payroll, client relationship management, and resource planning. Deltek is committed to providing the timely, premium-level support that our clients have come to expect.

Ongoing Support Plan = OSP

Recognizing that your Deltek software is critical to the success of your business, we have developed the Ongoing Support Plan (OSP) to help you maximize the benefits of your software investment.

Deltek users have a wide range of phone and Web-based support options included as part of the Ongoing Support Plan. Our experienced, well-trained support analysts are available via the Web, telephone, and email to answer your questions relating to the application and technical operation of your Deltek software.

Your firm's OSP also entitles you to receive valuable information and materials, including software updates, payroll tax updates, priority service, a quarterly newsletter, unlimited access to our e-Support site, and discounts on other Deltek products.

Premium Technical Services Plan

The Premium Technical Services Plan is an extension of your Ongoing Support Plan, not a replacement.

As an extension of the Deltek Ongoing Support Plan, Deltek offers the Premium Technical Services Plan.

While the Ongoing Support Plan offers a range of phone and Web-based support options to access support relating to the application and some technical operation of your Deltek software, the Premium Technical Services Plan is designed to provide you with proactive, personalized Deltek technical consulting services to help protect your investment in Deltek products.

Above and beyond the benefits you get from our standard Ongoing Support Plan (OSP), the Premium Services Plan provides you with technical services tailored to your firm. We become an extension of your team!

With its own technical staff dedicated to getting to know you, your business, and your Deltek IT environment, Premium Services helps your organization achieve higher levels of success.

Some of the highlights of this plan are: an assigned Technical Consultant (TC), a welcome meeting, an annual assessment, status meetings, case management, an alert service, advisory services, automatic Deltek upgrade services, quarterly Microsoft® SQL server maintenance checkups, 24x7 emergency support, early access to beta software, named contacts, and discount consulting hours.

Please contact your account manager if you are interested in subscribing to the Premium Technical Services Plan.

e-Support Site

To access the e-Support site:

1. Go to https://support.deltek.com to log on to your company's portal.
2. Enter your **User ID** and **Password**.
3. Click **Login**.

An OSP entitles you to access Deltek's support Web site (e-Support). With an assigned user ID and password, you can access the following Deltek e-Support options:

- **Support Home Page—**View alerts from here. You can also select the Find Answers, Ask Support, Live Support Chat, or My Stuff links to open other e-Support pages, or instead, click the corresponding tab.

- **Find Answers—**From the Knowledge Center tab you can:
  - Search the Support Knowledge Base for solutions to issues and questions. New solutions are added each day. The Knowledge Base is available 24 hours a day.
  - View or save to your workstation Deltek product information such as release notes, user guides, technical information, or white papers (in PDF format).
  - Read information and follow links to third-party software downloads, Deltek forms, and third-party vendor forms.

  On the Knowledge Center tab, enter a product, and then select an option from the **Category** field to select a specific area to search—such as the Knowledge Base, release notes, technical information, or reference materials. For any item you retrieve on the Knowledge Center tab, you have the option to be notified by email if the item is updated in the future.
- **Ask Support —** Submit a question directly to the Support queue for a reply from our Support staff. As you type your question, possible related answers from the Knowledge Base are provided for your review before you submit your question. You can also attach pertinent documentation to your question.
- **Live Support Chat—**Chat with a support technician online.
- **My Stuff—**From the My Stuff tab, you have the following options:
  - **Case History—**Check the status of your questions in the Support queue or provide additional information for your questions in the queue.
  - **My Knowledge Center—**If you have subscribed to be notified of future changes to an item from the Knowledge Center tab, check for any updates to those items here. You will also be notified by email of any changes.
  - **Account Profile—**Update your account profile to set new preferences or reflect changes to your contact information.
  - **Change Password—**Use this tab to change your password.
  - **My Subscriptions—**Manage the information you receive from Deltek about support, user groups, events, best practices and more.
  - **Contact Management—**Add new contacts from your firm so they can access the Deltek e-Support site. This link appears only if you are a Deltek support contact manager at your company.
  - **Events—**View Deltek news and events.
  - **Usergroups—**View usergroup information.
  - **Training—**Obtain training information.
  - **My Files—**Upload your files to Deltek if necessary.
- **Provide Feedback—**Use this option from the Support home page to submit comments, suggestions, or opinions on this site to Deltek.

Email and Telephone Support

When Web-based support isn't enough, turn to our email and telephone support services. Use the following email address and phone number:

Deltek Product	Telephone	E-mail Address
Deltek Vision®	**North America:** **1 877 HLP PROJ** **(1 877 457 7765)** **Europe:** **+0800.077.8960** **Australia:** **+61 (8) 8150.550**	visionsupport@deltek.com
Deltek Vision® (International)		visionsupport@deltek.com

Priority Service

When you call the telephone support line, you normally speak with the Support staff directly. If we are experiencing exceptionally high call volume, you speak with a Technical Receptionist, who asks you for a detailed description of your issue, and logs it in our call tracking database.

Deltek answers over 90% of telephone calls directly, and strives to return all messages within one hour.

When Using Telephone Support...

When you call the phone support line, please have the following information ready:

- Deltek client account number (five-digit)
- Telephone number
- Email address
- Type of call—application or technical
- A brief description of the problem

Weekly Telephone Support Schedule

As soon as you are up and running on Vision, your staff can call one of our Vision Support Analysts at any time with questions and to get assistance with application problems. You'll find our staff well prepared to handle the everyday operating issues of Vision users.

Current telephone support hours are (Eastern Time):

Monday - Friday	Saturday
7:00 AM - 10:00 PM*	9:00 AM - 5:00 PM*

You can leave a message on our voice mail system 24 hours a day.

* Clients who subscribe to the Premium Technical Services Plan have emergency 24/7 support available.

To log on to the e-Support site from within Vision, click the global Help icon, and then click e-Support on the drop-down menu.

After you have set up a username and password, you can log on to the Deltek e-Support site at:

https://support.deltek.com

Call Escalation Procedures

Despite our best efforts to ensure that all client concerns are treated efficiently, you may sometimes feel that an issue is not being handled to your satisfaction. If so, please contact your account manager. You may also contact our Client Care Group, whose helpful staff can address virtually any request, including finding the appropriate staff member or manager to address your issue.

Deltek Ongoing Communication

Important!

Email is Deltek's primary means of communication with our clients. Therefore, it is important that we keep your e-mail address on file.

You must also subscribe to receive important support bulletins. To do so, simply log on to the support site and you can manage your subscriptions online.

Your Firm's Contact Information

To provide you with timely support, it is important for us to have current information, especially email addresses, for all Deltek contacts at your firm.

You can view and update this information online. Please be sure to keep it current.

Software Updates

Your OSP entitles you to online software updates for your current Deltek software. These important, periodic updates include new features and enhancements requested by clients and by Deltek Support staff, along with software fixes and corrections. Online software updates also include payroll tax tables, as applicable.

Deltek's online software updates incorporate technology upgrades to ensure that your system stays current and operational. These upgrades are not available to firms without an OSP. Once Deltek ships a software update (generally, six months after the general release date), we only support the two most recently released versions of the software.

Technical Services

techservices@ deltek.com or 800.836.1600

In addition to our application experts, we have technical specialists trained and certified in the latest Microsoft technologies. Our Technical Services Group can provide you with current information on hardware, software, and licensing requirements. If you are new to Deltek software, we offer technical implementation and deployment consulting—we help you make the right decisions now, to avoid needless time and expense later.

As is the case with all software, some areas are not covered by the OSP or the Premium Technical Services Plan. Work in these areas is normally billed on a time and materials basis.

Technical Support

Deltek's Technical Services Group can assist your firm on matters such as:

- Network connection issues.
- General technical support relating to third-party products used by Deltek software, including Microsoft® Office Access, Microsoft SQL Server, Microsoft® Database Engine (MSDE), Microsoft® Visual FoxPro®, Citrix MetaFrame®, Actuate®, Nokia Intellisync™, and Crystal Reports®.
- Deltek software installation and deployment.
- Hardware and software requirements for systems running Deltek software.
- Deltek product system messages.
- Database and software installation issues.
- Deltek product upgrade issues.

Consulting Services

To contact Deltek's Consulting Group, please send an email to consultingservices@deltek.com or call 800.836.1600 or 617.492.4410, extension 1264.

Deltek is not only a software vendor, but also an experienced team of professionals, dedicated to the specific needs of professional services firms. Our consulting team—which includes members with 25 years or more of industry experience—is available to support you every step of the way as you install Deltek products and use them day-to-day. From implementation planning, to operational support, to custom programming, our Consulting Group is ready to help you maximize your investment in Deltek products.

> As with all software, some areas are not covered by the OSP or the Premium Technical Services Plan (for example, implementation and work breakdown structure design). Deltek normally bills for these services on a time and materials basis.

Custom Programming, Reports, and Invoices

To contact the Custom Programming Group, call 800.836.1600 or 617.492.4410 and ask for the Custom Programming Group.

At Deltek, we pride ourselves on the array of reports, templates, and style sheets included as standard features in our software applications. But what if your firm has unique reporting, billing, or processing needs not addressed by standard Deltek applications? First, ask our Support staff whether the enhancement you need is on our development list. We may even have a scheduled date for its release.

If the enhancement is not on our development list, please contact our Custom Programming Group. This experienced group of reporting specialists can create reports to your specifications, or help you develop custom reports on your own.

Implementation Planning

We strongly recommend investing in Deltek consulting when you implement Deltek software. Our consultants work side-by-side with your senior management and key staff members to establish an implementation schedule and ensure that your firm's important implementation decisions are informed and timely. Deltek's senior consultants can also help you look critically at your current business practices and financial management strategies—with the goal of improving them as part of the software implementation process.

Business Process Consulting

Firms periodically examine their procedures to identify ways of improving them. During a Business Process Consultation, Deltek consultants work with your marketing staff, contract managers, and senior management to optimize your firm's use of its Deltek software.

Onsite Application Consulting

After implementation, Deltek consultants can provide consulting tailored to your firm's individual needs. Consider calling Deltek Consulting Services when your firm installs additional software features or adds key staff members.

Management Seminars

Management seminars provide focused training for principals, contract managers, and marketing staff. These seminars are designed to increase both management effectiveness and proficiency in using the application. Our own most senior consultants, who are experts in the critical management needs of professional services firms, conduct these seminars.

Online Web Consulting

As a more economical alternative to onsite consulting, consider communicating with Deltek consultants over the Web. By receiving live interactive consulting over the Web, our consultants see your workstation as you use it, and make changes to your setup interactively. Many of our clients use online Web consulting to address specific issues without incurring airfare and hotel expenses.

Conversion Assistance

What if you want to import data from other sources, or merge multiple Deltek databases? Many firms convert their existing computer systems without assistance. Others receive support from Deltek's Data Consulting Group, who review existing data and help prepare it for use in the new software.

A firm's approach to conversion depends on its size and in-house resources. If you think your firm might benefit from conversion assistance, contact the Data Consulting Group.

Deltek University

Training is an important part of gaining the maximum value from your investment in Deltek solutions. It also plays a key role in providing ongoing education for your team members. Our trainers not only are Deltek product experts, but also bring real-life experience to the training process. Our trainers are experienced in Adult Learning Principles and how best to achieve success in Education. Deltek University offers a wide variety of training classes at our Deltek offices in Cambridge, MA; Portland, OR; Fort Collins, CO; and Herndon, VA. Classes can also be brought onsite or attended on the internet.

Implementation and Application Training

Deltek University offers classes covering business process overviews, system configuration, transaction processing, and reporting. Training will aid you in making configuration decisions, understanding business processes, entering transactions, and generating reports. These classes apply to all audiences, including the C-level Executive, Controller, Project Manager, Accountant, Project Team Member, Billing or AP Specialist/Clerk, and Project Planner.

Onsite and Customized Training

Deltek University can bring the classroom to your facility to deliver one of our standard classes or one customized to meet your organization's individual needs.

Online Web Training

As a more economical alternative to onsite training, receive live interactive instruction over the Web. Our expert trainers will deliver the same quality of training that is offered in the classroom or onsite. This will not only save time and travel expense, but it will also provide the in-depth training that your team needs.

e-Learning Products

The e-Learning products are hands-on, interactive, voice guided, software simulation training tutorials available over the Web from the Help menu in Vision. Vision e-Learning was designed to provide just-in-time, on demand training to all users. Currently, there are two products available**—**Vision Time e-Learning and Vision Expense e-Learning. Vision User Basics e-Learning is coming soon.

Customer Care and Account Management

Deltek's Customer Care Department ensures that we consistently provide responsive, individualized attention to our clients. We understand that our long-term success depends not only on satisfying our clients, but also on delighting them with exceptional customer service. We are dedicated to making sure you are totally satisfied with Deltek services and products.

The only way we can determine whether good customer value is being created and delivered is to listen to you—our client. By responding to your ideas and recommendations for process, product, and service innovation, we can provide greater value both now and in the future.

We encourage you to provide us with any and all of your comments, so we can learn what we're doing right and what is important to you. You can do this in a number of ways, including completing one of our periodic client satisfaction surveys, or by sending an email to customercare@deltek.com.

Related Documentation

In addition to this guide, there are several other guides you can review for further information about installing and using Vision.

- ***Deltek Vision Concepts Guide***—This guide describes the concepts underlying the basic accounting, project control, and customer relationship management (CRM) functions of the Vision application.

- ***Deltek Vision Technical Installation Guide***—This guide contains detailed instructions for installing all technical components of Vision, including the servers, the database, and the application itself.
- ***Deltek Microsoft SQL Server 2005 Express Edition/Microsoft MSDE 2000 Administrator's Guide***—This guide provides all details relevant to using Microsoft SQL Server 2005 Express Edition or MSDE 2000 and the Microsoft SQL Server Express Edition/MSDE 2000 Deltek console application with Deltek Vision or Deltek Advantage. As you use this guide, remember to reference the information that is appropriate for your specific product.
- ***Deltek Microsoft SQL Server 2000 Administrator's Guide***—This guide provides all details relevant to using Microsoft SQL Server 2000 with Deltek Vision, Deltek Advantage or Deltek CRM and Proposals, and provides notes and outlines the general steps you will need to follow as you are installing SQL Server 2000. These steps are detailed throughout the guide. As you use this guide, remember to reference the information that is appropriate for your specific product.
- ***Deltek Microsoft SQL Server 2005 Administrator's Guide***—This guide provides all details relevant to using Microsoft SQL Server 2005 with Deltek Vision or Deltek Advantage, and provides notes and outlines the general steps you will need to follow as you are setting up and configuring Microsoft SQL Server 2005. These steps are detailed throughout the guide. As you use this guide, remember to reference the information that is appropriate for your specific product.
- ***Deltek Vision Implementation Guide***—This guide contains information about configuring and setting up the various Vision applications and features.
- ***Deltek Advantage to Deltek Vision Migration Guide***—This guide contains information about migrating from Advantage to Vision, including the steps involved in the migration process and a review of the new features in Vision.
- ***Deltek CRM and Proposals to Deltek Vision Migration Guide***—This guide contains information about migrating from CRM and Proposals to Vision, including the steps involved in the migration process and a review of the new features in Vision.
- ***Deltek Sema4 to Deltek Vision Migration Guide***—This guide contains information about migrating from Sema4 to Vision, including the steps involved in the migration process and a review of the new features in Vision.
- ***Deltek Vision Data Dictionary***—This guide contains information about all the tables in your Vision database. (You can access this guide from the Table of Contents in the Vision Help System.)
- ***Deltek Award to Deltek Vision Migration Guide***—This guide contains information about migrating from Award to Vision, including the steps involved in the migration process and a review of the new features in Vision.

PDFs of all Vision print guides can also be downloaded from the e-Support site.

Printed copies (one each) of the *Getting Started Guide* and *Implementation Guide* are shipped with Vision. In addition, the appropriate Migration guide is shipped if you are migrating from an existing Deltek product (Advantage, CRM) to Vision, with the exception of the Sema4 to Deltek Vision Migration Guide. The *Sema4 to Deltek Vision Migration Guide* is provided by Implementation Services prior to the migration.

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