

Deltek for Professional Services® 1.1

Basics

August 27, 2018

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Basics

DPS is designed to be simple to learn and simple to use. After reviewing the basics, you will know your way around the application and be ready to manage your pursuit of business opportunities.

This section of the help covers basic tasks: logging in, navigating through tabs and grids, saving your work, and so on.

See [Concepts](#) for in-depth details about the transactions, processes, and activities that are vital to the work that you perform in DPS.

Getting Started with DPS

When you first implement DPS, a set of simple Activation and Setup pages walk you through your initial setup decisions.

If you are the DPS administrator for your enterprise, you are responsible for initial Activation and Setup tasks. When you complete the process, your enterprise can begin using DPS for daily activities.

Follow these general steps:

1. Log in to DPS. The Activation menu displays at the left side of the Startup page.
2. Complete each Activation step in the same order as the menu. No other users can log in to DPS until Activation is completed.
3. Log out after you complete the final step, Activate Organizations.
4. Log back in using the Setup username. The Setup menu displays at the left side of the page.
5. Complete each Setup step in the same order as the menu.
6. Let other users log in and begin their activities.

To take advantage of advanced features and to tailor DPS to the specific needs of your enterprise, you will most likely choose to perform additional setup and integration steps, outside of Activation and Setup. You will perform these steps in the Settings area and in other areas of the DPS software.

Cloud Administration Help

If you are the DPS administrator for your company, you can use the cloud administration help system to learn more about your role and responsibilities.

Video Library

DPS comes with a library of short videos focused on getting you up and running quickly. Each video is about five minutes long and focuses on a specific task or area. New videos are added regularly.

To view the videos:

- Click the links below, or
- Click **Help » Videos** from the toolbar in the user interface.

For All DPS Users

| Title | Description |
|------------------------------------|---|
| Navigation Tips | This video includes tips to help you successfully navigate, including how to add a record, use list view, select columns, use filters, and perform a simple search. The video also discusses hierarchies. |
| Time for End Users | Use this video to learn how to complete and submit a timesheet using your computer or mobile device. |

For Business Development and Marketing Users

| Title | Description |
|---|---|
| Get Started with CRM for Administrators | Use this video to learn how to navigate through the hubs and set up labels and lists. The video also introduces the import process, which automates the data entry process. |
| Use Hubs for CRM | Use this video to learn about the hubs used by CRM users, and how to enter data into hubs manually, import data from outside sources, and quickly find or add a record. |
| Import Data for CRM | Use this video to learn how to separate CRM contacts from personal contacts, locate duplicates and remove them, and import contacts from outside sources. |
| Lead Qualification | Use this video to learn how to search for, create, qualify, and disqualify leads. |
| Outlook Integration | Use this video to learn how to use the Outlook add-in to integrate DPS and Microsoft Outlook. |
| Integration with Salesforce | Use this video to learn how to use the Salesforce Integration module to integrate Salesforce and DPS. Learn how to use existing Salesforce information to create projects in DPS, how to access and report on sales data in one place, and how to use Salesforce information to create estimates. |

For Project and Resource Managers

| Title | Description |
|---|---|
| Work Breakdown Structure Basics | Use this video to learn how to set up a work breakdown structure that reflects the project numbering system that you currently use. |
| Set Up Project Control | Use this video to learn how to set up projects, coordinate project activities, monitor project progress, process labor and expense transactions, charge direct and overhead costs to projects, track employee time, generate project reports, and maintain project budgets. |
| Set Up Resource Planning | Use this video to learn how to set up the resource planning module, including selecting options for entering and viewing project, opportunity, and resource plans. |

| Title | Description |
|-------------------------------------|---|
| Resource Management | Use this video to learn about using Resource Management to add and maintain resource assignments, construct opportunity plans, and review plans or resource assignments using a report format. This video explores the resource and project views as well as reporting, and provides an overview of the opportunity plan structure. |
| Set Up Billing | Use this video to learn how to set up billing, including selecting options for preparing and formatting client invoices and tracking revenue and taxes. |

For Accounting Users

| Title | Description |
|---------------------------------------|---|
| Set Up Accounting | Use this video to learn how to set up accounting processes. You will use the Settings area of the desktop application. |
| Set Up Time | Use this video to learn how to set up time tracking so that employees can enter, submit, and approve timesheets. |
| Set Up Expense | Use this video to learn how to set up expense report tracking so that employees can enter, submit, and approve expense reports. |
| Groups and Categories | Use this video to learn about time and expense groups and categories. |
| Set Up Billing | Use this video to learn how to set up billing, including selecting options for preparing and formatting client invoices and tracking revenue and taxes. |

For Administrators

| Title | Description |
|---|---|
| Activation Overview | Use this video to prepare for the activation process and learn about the information that you should gather before you begin. |
| Work Breakdown Structure Basics | Use this video to learn how to set up a work breakdown structure that reflects the project numbering system that you currently use. |
| Activate Organizations | Use this video to learn how to set up an organization structure that reflects how your enterprise is structured and to specify whether or not you need to track multiple companies. |
| Activate Multiple Currencies | Use this video to learn how to set up monetary currencies and to enter exchange rates for them. |
| Setup Overview | Use this video to prepare for the setup process and learn about the information that you should gather before you begin. |
| Set Up Hubs | Use this video to learn what hubs are, how to enter data into hubs manually, and how to quickly find or add a record. The video also introduces the import process, which automates the data entry process. |

| Title | Description |
|---|---|
| Get Started with CRM for Administrators | Use this video to learn how to navigate through the hubs and set up labels and lists. The video also introduces the import process, which automates the data entry process. |
| Import Data | Use this video to learn how to separate CRM contacts from personal contacts, locate duplicates and remove them, and import contacts from outside sources. |
| Set Up Labels and Lists | Use this video to learn how to set up a new custom label, edit an existing label, and edit lists and their drop-down values. |
| Set Up Project Control | Use this video to learn how to set up projects, coordinate project activities, monitor project progress, process labor and expense transactions, charge direct and overhead costs to projects, track employee time, generate project reports, and maintain project budgets. |
| Set Up Accounting | Use this video to learn how to set up accounting processes. You will use the Settings area of the desktop application. |
| Set Up Time | Use this video to learn how to set up time tracking so that employees can enter, submit, and approve timesheets. |
| Set Up Expense | Use this video to learn how to set up expense report tracking so that employees can enter, submit, and approve expense reports. |
| Groups and Categories | Use this video to learn about time and expense groups and categories. |
| Set Up Billing | Use this video to learn how to set up billing, including selecting options for preparing and formatting client invoices and tracking revenue and taxes. |
| Set Up Resource Planning | Use this video to learn how to set up the resource planning module, including selecting options for entering and viewing project, opportunity, and resource plans. |
| Integration with Salesforce | Use this video to learn how to use the Salesforce Integration module to integrate Salesforce and DPS. Learn how to use existing Salesforce information to create projects in DPS, how to access and report on sales data in one place, and how to use Salesforce information to create estimates. |
| Outlook Integration | Use this video to learn how to use the Outlook add-in to integrate DPS and Microsoft Outlook. |

Initial Log In

The first time that you use DPS, you must enter a valid user ID and password. Your welcome email message includes a link to the login page.

To log in:

1. Use your DPS URL to display the login page.
2. In the **User ID** field, enter **SETUP**.

3. In the **Password** field, enter the password included in your welcome email message.
4. Click **Log In**.
The DPS Getting Started page displays the Activation menu.

Activation

During activation, you make important decisions about how to configure your database.

Activation is a one-time process, and the settings that you make are permanent. Complete each step in the order shown on the Activation menu on the Getting Started page.

Activate Modules, Accounting Periods, and Fiscal Years

Use the Activate Modules page to verify the DPS applications that you plan to use and to set up your starting accounting period and fiscal year.

To activate modules:

1. Click **Activate Modules**.
2. On the Modules tab of the Activate Modules form, review the list of modules to confirm that it includes all the modules that your enterprise is licensed to use. If any applications are missing, contact Deltek Operations for help.
3. If you are licensed to use the PSA module and you are integrating DPS with QuickBooks, select **Yes** for the **Will your PSA instance integrate with QuickBooks Online** setting below the modules list.
4. If you are licensed to use the Accounting module or PSA module, click the Fiscal Period tab.
5. On the Fiscal Period tab:

- If you are licensed to use the Accounting module, enter your starting accounting period and fiscal year.

This is the first accounting period and fiscal year in which you will enter history or process data in DPS.

Assume, for example, that you are setting up DPS in April 2018, and your fiscal year runs from January to December. You may choose to enter historical data for January through March of 2018, so that you can track data and produce reports for the entire fiscal year. In this case, you would enter January 2018 as your first accounting period and 2018 as your first fiscal year. Alternatively, you may decide to enter history for the entire prior year, in which case you would enter January as your first accounting period and 2017 as your first fiscal year.

After you begin using DPS, you will maintain a calendar of accounting periods, opening and closing periods as the year progresses. To learn more about this process, see the [Accounting Periods and Processing Cycles](#) help topic.

- If you are licensed to use the PSA module and you are integrating DPS with QuickBooks, enter the fiscal year and accounting period in which you will start tracking new project labor and expenses.

You must enter the first and last days of a calendar month for the fiscal year start and end dates and the accounting period start and end dates.

6. Click **Save** and then click **Done Activating Modules**.

Activate Defaults

Use the Activate Defaults page to specify the industry and country in which your enterprise operates and define your coding system for projects.

During the Activation process, you can identify up to three levels of project numbering, although many firms use only one (for example, project) or two (for example, project and phase). For example, you might say that you identify each of your projects using a seven-character code such as 45622.01, in which the first five characters are the main project and the final two represent additional work. The two parts are separated by a period, called a delimiter.

If you already have a project numbering structure, you should probably continue using it. If you are considering a change, consult with your project management and finance teams to be sure that any changes that you make address their needs.

The project number is just one element of the work breakdown structure that your enterprise could use. To learn more about the overall work breakdown structure, see the [Work Breakdown Structure Overview](#) help topic.

To activate your defaults:

1. On the Activation menu, click **Activate Defaults**.
2. On the Industry Defaults tab, in the **Industry** field, select the industry that best matches the work that your enterprise performs, and select your country in the **Country** field.

Based on the industry that you specify, some settings and terminology in DPS automatically change to reflect common industry practices. For example, if you choose Architecture and Engineering Services, DPS uses a chart of accounts that is common to the A/E industry and uses terms such as "project," "project manager," and "client" throughout the user interface.

These settings and terminology are just a starting point. After you complete the Activation process, you can review these default settings and terms and further tailor DPS to your needs. For example, you can use the Label and Lists page in Setup to change the names of specific fields or change the items that are available in drop-down lists. Or you can use the Time page in Setup to modify the default settings for employee timesheets.

3. Click **Use Industry Defaults**.
The WBS (work breakdown structure) tab displays. This is where you specify the structure of your project numbers.
4. Click the **WBS Structure** tab.
5. Set up the work breakdown structure for the way your enterprise manages projects.
If you are using QuickBooks integration with DPS, you can set up work breakdown levels in DPS, but any project data from DPS that is passed to QuickBooks is passed at work breakdown level 1 (project) and not lower levels.
6. Click **Done Activating Defaults**.

Activate Email

Use the Activate Email page to enter email addresses that DPS will use to send automated messages.

You can have DPS send emails to employees and others for administrative and approval processes, including to remind an employee of a task to complete or send someone a report to review.

You may also want to route all of your employees' questions about DPS to a single email address, monitored by your system administrator or another internal product expert.

To activate your email addresses:

1. On the Activation menu, click **Activate Email**.
2. In the **Default Sender Email** field, enter the email address that will display as the "sender" of these automated email messages.
3. Check the **Add DeltekAdmin_ prefix to the Default Sender Email Address** option to add an extra layer of security to the emails that DPS sends automatically. Selecting this option adds the prefix DeltekAdmin_ to the sender's email address, which makes it an email address that cannot receive replies. This practice also prevents spoofing, because only valid emails can come from this appended email address.
4. Enter the help email address in the **Default Help Desk Email** field. This address is used to send automated messages to the DPS Help Desk.
5. Click **Done Activating Email**.

Activate Currencies

Use the Activate Currencies page to identify the monetary currencies that your enterprise uses and to set up exchange rates between currencies.

DPS lets your enterprise track its financial transactions and project performance using multiple global currencies. To learn more about how this works, read the [Multiple Currencies](#) section under Concepts.

If you enable the multiple currencies feature, your database automatically changes so that it can track multiple currencies and exchange rates. Additional fields display in the user interface to prompt you to enter currency-related information. After these database changes are made, you cannot reverse them. However, you can choose to not enable the multiple currency feature now, but enable it later, after you complete the Activation and Setup process.

To set up one or more currencies:

1. On the Activation menu, click **Activate Currencies**.
2. Select **Yes** or **No** for the question **Do you need to track more than one currency**. If you are using QuickBooks integration, you can use only one currency, so this question does not display.
3. Use the remaining fields on the Currency tab to enter information about your main currency, including the number of decimals to use and its name. The main (or functional) currency is the currency of the primary economic environment in which your enterprise operates. For example, an enterprise located in France normally

uses the Euro as its main currency. For more information about the different currency types used in DPS, see the [Currency Types](#) help topic.

4. Complete one of the following steps:
 - If you use only one currency, click **Done Activating Currencies** to complete and exit the currencies activation. You do not need to complete steps 5-10.
 - If you use multiple currencies, click **Enable Multicurrency**, confirm your choice, and continue with steps 5-10.
 5. Click the Multicurrency tab and click **+ Add Currency**.
 6. Enter each currency that you use and click **Save**.
 7. Click the Exchange Rates tab and click **+ Add Exchange Rate**.
 8. Select a pair of currencies, enter an effective date, and enter an exchange rate. You do not need to enter information for one pair of currencies (for example, US Dollars to Yen) and also enter information for its inverse (Yen to US Dollars). In fact, doing so can cause incorrect results. Instead, enter information for one exchange (for example, US Dollars to Yen) and let DPS automatically calculate the inverse (Yen to US Dollars). For more information about how exchange rates work in DPS, see the [Exchange Rates Overview](#) section.
- Repeat this process for multiple currency pairs. You can also switch back and forth between these tabs, entering currencies and setting up exchange rates.
9. Click **Save**.
 10. Click **Done Activating Currencies**.


Activate Organizations

Use the Activate Organizations page to provide information about the structure of your enterprise, including your companies and your "organizations" or business units.

To set up the structure for your organizations:

1. On the Activation menu, click **Activate Organizations**.
2. If you are licensed to use the PSA module and you are activating DPS with QuickBooks integration, enter the name of your company on this page and continue with step 11 below. Otherwise, continue with step 3.
3. In response to the question **Do you have multiple companies?**, select **Yes** or **No**.
If you select **Yes**, you set up your main company now, and then set up additional companies after the Activation and Setup process is complete.
4. If your enterprise is made up of separate organizations, select **Yes** for **Do you have Profit Centers or Business Units that require their own income statements**; otherwise, answer **No**.
DPS provides the framework for tracking multiple "organizations" in your company. These separate organizations are business units that incur expenses and/or generate revenue. For example, if your company is divided into regions and offices, you might create a separate organization for each region and office and maintain information for each of these segments of your business. To learn more about how this works, see the [Organization Reporting Overview](#) help section.
5. Enter the name of your main company.

6. Select the number of levels required by the structure of your organizations. Depending on the size and complexity of your enterprise, you can create a fairly simple structure or a more complex one. To learn more about organization levels, see the [Organization Reporting Structure](#) help topic.

If you have multiple companies, your companies are automatically considered to be the first level. So, if you have multiple companies and also want to track branch offices and disciplines, you need a three-level organization structure.
7. Enter the singular and plural names for the levels in your organization.
8. Click **Activate** to update the database to reflect your organization structure. The Level Values and Combinations tabs display. Use these tabs together to identify the specific business entities that you want to track.
9. Click **Level Values** and enter all of the valid values for the organization that you want to define.
For example, if you have two levels, Office and Studio, list all of your offices and all of your studios. Assign a two-character code to each of the values (for example, BA for Buenos Aires or BR for Branding).
10. Click **Combinations** and identify valid combinations of these values.
For example, if you have two levels, Offices and Studios, identify valid combinations, such as Paris/Branding, Paris/Consumer and New York/Tech. If your Paris office does not have a Tech studio, do not enter that combination.
11. If you want to review or change any of your prior activation settings, do so now, before you activate organizations, which is the last step in the activation process.
After you click **Done Activating Organizations**, you cannot change any of the activation settings that you selected.
12. When you are satisfied that your activation entries are complete, click **Done Activating Organizations**.
13. Click  and then click **Log Out**.

Activation is now complete. Continue with the setup process to enter information about your projects, employees, and finances.

Setup

During the Setup process, you define policies and processes for common DPS functions. Use Setup to get up and running quickly. Setup areas are located in both the DPS browser and the desktop applications.

Depending on the modules that you use, you may need set up modules in both applications. You set up most modules in the browser, but you set up Accounting and Purchasing & Inventory in the desktop.

Set Up Project Control

Use the Project Control Setup forms to enter information about how your enterprise tracks labor and overhead and applies these costs to projects.

Each of the setup forms focuses on a different area.

| Form | Description |
|----------------------------|---|
| Summary | This form shows you all of the work that you have done on the other forms. |
| Time Analysis | <p>Use this form to set up the Time Analysis report, which lets you review how your employees are using their time. You can view employee time from several perspectives, using comparisons of direct time, indirect time, and total time worked. An analysis of indirect time helps you monitor paid time off and control non-billable time.</p> <p>See the Time Analysis help topic for more information.</p> |
| Options | Use this form to indicate if you want to enter project fee information at all work breakdown structure (WBS) levels or only at the lowest WBS levels. |
| Labor Posting | <p>Use this form to set up direct and indirect labor accounts associated with specific labor types, such as Employee, Management, and Principal. When an employee charges time to a regular or indirect project, the labor cost is charged automatically to the appropriate account.</p> <p>Use the Override Labor Accounts section to set up exceptions to these rules.</p> <p>See the Labor Types Settings Overview help topic for more information.</p> |
| Absence Accruals | <p>Use this form to identify the absence accruals (vacation, sick leave, and so on) that your enterprise tracks for its employees. For each absence accrual, you specify if you want to show the accrual balance on employee timesheets and if you want to set up an absence request approval process and, if so, the employee who is the approval administrator. You also set up a project of range of projects for each accrual.</p> <p>See the Accruals Processing Overview help topic for more information.</p> |
| Overhead Allocation | <p>Use this form to define how the costs accumulated in overhead projects (such as vacation pay, sick time, rent, utilities, office supplies, and administration) will be distributed to regular, revenue-producing projects.</p> <p>See the Overhead Allocation help topic for more information.</p> |

Set Up Time

Use the Time Setup forms to make decisions about how employee time will be tracked and how timesheets will be formatted.

Each of the setup forms focuses on a different area.

| Form | Description |
|------------------------|--|
| Summary | This form shows you all of the work that you have done on the other forms. |
| Options | Use this form to make basic decisions about how employee timesheets will work, including the increments in which time can be tracked, whether employees can enter overtime hours, and whether an employee signature is required. See the Timesheet Overview help topic for more information. |
| Time Periods | Use this form to set up timesheet periods. Employees must enter a timesheet for each timesheet period. |
| Non-Work Days | Use this form to identify the days of the week and the holidays on which employees are not expected to work. |
| Time Groups | Use this form to set up time groups to distribute timesheet administration responsibilities among different administrators. For example, you can use time groups to bring together employees who share the same job function, work in the same department, or work in the same office. After you set up a time group, you can assign employees to it. |
| Time Approvals | Use this form to determine if you will use an approval workflow to have leaders approve employee timesheets. You can choose among several workflow options. See the Approvals Center help area for more information about approval workflows. |
| Time Categories | Use this form to specify that certain common time categories, such as vacation and administration, should display automatically on timesheets, to save employees time. You can have a time category display on timesheets for all employees or for only those who belong to specific time groups. |

Set Up Expense

Use the Expense Setup forms to make decisions about how employee expense reports will be tracked.

Each of the setup forms focuses on a different area.

| Form | Description |
|----------------|---|
| Summary | This form shows you all of the work that you have done on the other forms. |
| Options | Use this form to make basic decisions about how employee expense reports will work, including whether employees can enter advances on their expense reports and whether an employee signature is required. See the Expense Reports help topic for more information. |
| Groups | Use this form to set up expense groups to distribute expense report administration responsibilities among different administrators. For example, you can use expense groups to |

| Form | Description |
|-------------------|---|
| | bring together employees who share the same job function, work in the same department, or work in the same office. After you set up an expense group, you can assign employees to it. |
| Categories | <p>Use this form to specify that certain common expense categories, such as hotels, meals, and airfare, should display automatically on expense reports, along with the correct accounting and billing information.</p> <p>You can have an expense category display on expense reports for all employees or for only those who belong to specific expense groups. See the Expense Categories help topic for more information.</p> |
| Payments | Use this form to determine the format of employee expense checks and remittance advices, as well as the bank account that they will be drawn upon unless a different bank is chosen. |
| Approvals | Use this form to determine if you will use an approval workflow to have leaders approve employee expense reports. You can choose among several different workflow options. See the Approvals Center help area for more information about approval workflows. |

Set Up Billing

Use the Billing Setup forms to make decisions about how your clients will be billed.

Each of the setup forms focuses on a different area.

| Form | Description |
|-------------------------|--|
| Summary | This form shows you all of the work that you have done on the other forms. |
| Options | <p>Use this form to make basic decisions about how clients will be billed, including how invoices are formatted and numbered, whether retainers and retainage are tracked, and whether you use an invoice approval workflow.</p> <p>See the Retainers, Retainage Overview, and Invoice Approval Overview help topics for more information.</p> |
| Invoice Accounts | <p>During final invoice processing, invoice transactions are charged to general ledger revenue accounts. Use this form to specify the default revenue account for each section of your invoice. For example, specify the revenue account associated with fee billings.</p> <p>Also use this tab to enter the label that will appear above each invoice section.</p> |
| Labor Categories | Use this form to define a master list of labor categories and related standard billing rates. Labor categories are standard staff roles on projects (for example, Principal, Project Manager, or |

| Form | Description |
|--------------|---|
| | Supervisor). In the Employees hub, you can associate each employee with a default labor category. You can use labor category rates to invoice new projects. If you use the Resource Planning module, you can use these rates to set up plans for new projects. (If DPS is set up to use both multiple companies and multiple currencies, this form is not available.) |
| Taxes | Use this form to set up the taxes that you need to calculate and include on invoices. For each tax, specify the tax rate, the invoice sections to which it should be applied (labor, expense, fees, and so on), and the general ledger account to which the tax is charged. |

Set Up Resource Planning

Use the Resource Planning Setup forms to make decisions about how you will use the Resource Planning application.

Each of the setup forms focuses on a different area.

| Form | Description |
|----------------------|---|
| Summary | This form shows you all of the work that you have done on the other forms. |
| Plan Settings | <p>Use this form to make basic decisions about how you will use Resource Planning, including whether you will plan consultant and non-consultant expenses, and what overhead rate you will apply to planned projects.</p> <p>Select Yes for the Enable Expense Planning option if you want to be able to enter plan data for expenses. You can enter plan data for direct, indirect, and reimbursable expenses.</p> <p>Select Yes for the Enable Consultant Planning option if you want to be able to enter plan data for consultants. You can enter plan data for direct and reimbursable consultants.</p> <p>In the Starting Day of the Week field, select the first day in your work week.</p> <p>Enter the default target labor cost multiplier. The target multiplier represents how much revenue is anticipated for each labor cost dollar spent on a project. It is commonly used as the basis for evaluating the EAC labor cost multipliers as projects move forward.</p> <p>In the Overhead % field, enter the default overhead percentage for plans, as a whole number. For example, enter 10 for 10 percent. A user with the necessary security rights will still be able to enter different percentages for individual projects and opportunities.</p> |

| Form | Description |
|--------------------------|--|
| | If the Resource Planning module is activated but the Accounting module is not activated, select the character (a period, for example) that you want to use as the delimiter between WBS levels in project numbers. |
| Rates | Use this form to specify whether planned amounts should be based on cost rates, billing rates, or both. Later, you will need to provide additional information about cost and labor rate methods, tables, and multipliers. |
| Resource Settings | <p>Use this form to specify:</p> <ul style="list-style-type: none"> Utilization Thresholds: These are the low and high utilization percentages within which an employee is considered fully utilized. Example: You set the lowest percentage to 95 and the highest percentage to 105. If an employee's target utilization is 80 percent, that employee is considered properly utilized for a given period if their utilization is between 76 percent ($.95 \times 80$) and 84 percent (1.05×80). She is underutilized if her utilization is below 76 percent and overutilized if it is above 84 percent. Scheduled Thresholds: These are the low and high scheduled percentages within which an employee is considered fully scheduled. Example: You set the lowest percentage to 95 and the highest percentage to 105. If an employee's available hours for a week is 40, that employee is considered properly scheduled if they are scheduled for between 38 hours ($.95 \times 40$) and 42 hours (1.05×40). He is underscheduled if his scheduled hours are less than 38 and overscheduled if they are more than 42. Soft and Hard Booking: This is an option to tentatively plan, or "soft book" assignments, then "hard book" them when they are confirmed. The soft and hard book feature enables you to distinguish between tentative or placeholder resource assignments and those confirmed or approved assignments that you consider a permanent part of the plan. When you generate planning reports, you can filter those reports to include or exclude assignments based on booking status if you include the Booking column on the report. |
| Labor Categories | Use this form to define a master list of labor categories and related standard billing rates. Labor categories are standard staff roles on projects (for example, Principal, Project Manager, or Supervisor). In the Employees hub, you can associate each employee with a default labor category. You can use labor |

| Form | Description |
|----------------------|---|
| | category rates to invoice new projects. If you use the Resource Planning module, you can use these rates to set up plans for new projects. (If DPS is set up to use both multiple companies and multiple currencies, this form is not available.) |
| Non-Work Days | Use this form to identify the days of the week and the holidays on which employees are not expected to work. When DPS spreads planned hours for you in Resource Planning, non-work days and holidays are allocated no hours, but planners can still assign planned hours to them. |

Set Up CRM

The CRM Setup page guides you through the multiple-step process of setting up your CRM processes, data, and user access.

This page walks you through the four main CRM setup steps and suggests videos and other learning resources for each of the steps.

You will perform the CRM setup steps throughout DPS, not just on this page.

| Step | Description |
|------------------------------|---|
| Make a plan | <p>Before you do anything, gather key stakeholders to discuss your goals for using DPS CRM and how you will achieve those goals. Discuss the data that you will bring into DPS from others sources, the terminology that you will use, and the workflows that you will establish.</p> <p>See the CRM Overview help topic for more information.</p> |
| Set up your processes | <p>Set up the framework for your CRM system, including establishing workflows, establishing terminology, and choosing the values that are available from drop-down lists. If you plan to integrate DPS CRM with Salesforce, set up the integration process.</p> <p>See the Workflow Configuration Overview help topic for more information.</p> |
| Set up your hubs | <p>The "hubs" area of DPS is the place where you store key data about your projects, employees, and more. As part of setting up CRM, you enter data about the firms (vendors and clients) with which you work, your contacts, your opportunities, and your marketing efforts. You will probably import this data into DPS from information sources that you already maintain.</p> <p>See the Hub Records help topic for more information.</p> |
| Empower your users | <p>Identify the employees who will use DPS CRM and give them appropriate security access to the CRM applications. See the Security Configuration Overview for more information.</p> |

Set Up Labels and Lists

Use the Labels and Lists Setup form to set up the terminology used in the CRM application and the values that will be available from drop-down lists.

Each of the setup forms focuses on a different area.

| Form | Description |
|----------------|--|
| Summary | This form shows you all of the work that you have done on the other forms. |
| Labels | <p>During the Activation process, you identified the primary industry in which your enterprise operates. Based on this industry choice, your DPS database was updated to use industry-specific terminology.</p> <p>Now, on the Labels form, you can further customize terminology. For example, you might change the term "Employees" to "Team Members," "Associates," or "Specialists."</p> |
| Lists | <p>Throughout DPS, your users will make choices from drop-down lists. For example, your business development staff will select a value from the Proposal Status field to identify the current state of a proposal.</p> <p>Here, on the Lists form, you can review the values that are pre-set for these drop-down lists. (In the case of Proposal Status, for example, these values are In Progress, In Review, and Submitted.) You can change the default values to better reflect your business needs, add new values, and remove values you do not want.</p> |

Set Up Accounting

Use the Accounting page to review and modify your accounts, establish your bank accounts, and set parameters for accounting postings.

Set up Accounting in the desktop application. Accounting has multiple menu options, each focused on a different area. The fields are pre-populated with default entries based on the options you selected during activation. We recommend you keep the default settings in each area, but you may need to change items that need to be specialized for your enterprise.

Review the default settings in each area and update any fields as needed. You can modify any fields and implement advanced features later in DPS Settings after the setup process is complete.

| Menu Item | Description |
|--------------------------|---|
| Chart of Accounts | <p>Use this option to review the preset default accounts for your firm. You can rename, add, or delete accounts.</p> <p>See the Chart of Accounts Settings help topic for more information.</p> |
| Company | Use this option to review and update the default settings. |

| Menu Item | Description |
|----------------------------|---|
| | See the Accounting Company Settings help topic for more information. |
| Taxes | Use this option to set up the tax codes that are used to calculate taxes throughout DPS. See the Tax Code Settings help topic for more information. |
| Banks | Use this option to set up the bank codes your enterprise uses. See the Bank Codes Setup help topic for more information. |
| Company AP | Use this option to set up company-wide accounts payable features, including default payment terms, liability codes, vendor types, and discount codes. See the Company Accounts Payable Settings help topic for more information. |
| Accounts Receivable | Use this option to set up the AR Ledger report and to set up mapping accounts for invoices and accounts receivable. See the Accounts Receivable Settings help topic for more information. |

Set Up QuickBooks Integration

You set up the QuickBooks integration with DPS using the QuickBooks integration utility in DPS.

To open the utility, select **Utilities » Integrations » QuickBooks** in the DPS Navigation pane. You can use this utility when you log in to DPS with your setup credentials to initially activate and set up DPS, or use it when you log in after the initial setup to complete or modify the QuickBooks integration setup. The same QuickBooks form, tabs, and settings are included in the utility whether you use it during the initial DPS setup or after the initial setup.

For the integration setup, you connect DPS with QuickBooks Online, enter other integration settings, and mapping certain records.

Before you can connect DPS with QuickBooks Online, you must first do the following:

- [Create an Intuit Developer Account](#)
- [Create an Intuit App for DPS](#)

Then complete the settings on the tabs in the QuickBooks integration utility.

| Tab on the QuickBooks Form | Description |
|----------------------------|--|
| Integration Setup | Use the settings on this tab to: <ul style="list-style-type: none"> ▪ Enable QuickBooks integration. ▪ Connect DPS with QuickBooks Online. |

| Tab on the QuickBooks Form | Description |
|----------------------------|---|
| | <ul style="list-style-type: none"> Schedule how often to automatically update the data between the two products. Enter advanced and default settings. |
| Accounts Mapping | Use this tab to review and map the general ledger accounts that are linked between DPS and QuickBooks Online. |
| Tax Code Mapping | Use this tab to review and map the tax codes that are linked between DPS and QuickBooks Online. |
| Employee Mapping | Use this tab to link an employee record with a corresponding vendor record so you can pay an employee in QuickBooks Online for expenses entered in an expense report in DPS. |

For more information about each tab in the QuickBooks integration utility and how to complete the setup, see [QuickBooks Integration Utility](#).

Set Up Integrations

Use the Integrations Setup forms (**Utilities » Integrations**) to set up integrations between DPS and other software products and to import data into DPS from a spreadsheet or other CSV file.

Each of the integration forms focuses on a different type of integration.

| Form | Description |
|--------------------------|--|
| Ajera | Use this form to set up integration between DPS and Ajera. This tab has just one check box, Enable Ajera Synchronization . |
| API Authorization | <p>Use this form if you are licensed to use the Resource Planning module and want to use any APIs to import data from other applications into the DPS database.</p> <p>Click Generate Secret to generate the Client ID and Client Secret.</p> |
| GovWin IQ | Use this form to set up integration between DPS and GovWin IQ, a Deltek service that helps companies find government contract opportunities. |
| Kona | Use this form to set up integration with the Kona collaboration and communication tool. Before you perform this step, you must obtain a Client ID and Client Secret from Deltek. |
| Salesforce | <p>Use this form to set up integration between DPS and Salesforce, including the rules that will control which data is shared between the two applications, when it is shared, and how data is mapped between the two applications.</p> <p>See the Salesforce Integration help topic for more information.</p> |
| Maconomy | Use this form to configure APIs to connect your Maconomy instance to DPS. This allows you to integrate Maconomy |

| Form | Description |
|-------------------|---|
| | information with DPS and synchronize user-defined fields and workflow data. |
| VAT Registrations | Use the VAT Registrations form to configure the subscription license for DPS to use the vatlayer API system to validate European Union VAT numbers. |

User Interface Fundamentals

When you are new to DPS, it is a good idea to become familiar with the terminology, icons, and toolbar options that you see throughout the application.

Access to DPS Based on Role

A security role that your system administrator sets up controls your access to DPS forms, tabs, and fields. It also defines the individual records that you can display, and it specifies whether or not you can add and change those records or only view them.


The DPS help system describes all available forms, tabs, and fields, and provides instructions for performing all tasks. However, because of restrictions defined for your security role, some components of the user interface described here may not be available to you, and you may not be able to perform some of the procedures included in the help.

If you have questions about your DPS access rights, contact your system administrator.

Terminology

If you are new to DPS, you may find it helpful to become familiar with the terms that are used throughout the application and documentation.

Contents

| Field/Option | Description |
|----------------------------------|---|
| Browser and Desktop Applications | The DPS user interface provides a mix of features in both a web-based browser interface and a desktop (Smart Client) interface. Some functionality, such as the Employee and Project hubs, exist in both interfaces. The default interface is the browser application. In cases where functionality is accessed through the desktop application or both applications, this is indicated in the help topics. |
| Navigation Pane | The Navigation pane is located on the left side of the DPS screen. It provides access to all of the applications in DPS. When you click an application in the Navigation pane, the application opens on the right side of the screen. To hide or display the Navigation Pane, click  in the DPS toolbar. |
| Records | A record is a collection of data pertaining to an individual item (such as a project, employee, or contact). Information about the record is collected on various forms. For example, each project is a record that contains data from the Overview, Team, and other tabs in the Projects Hub. Depending on your |

| Field/Option | Description |
|--------------|---|
| | security role, you can modify, copy, or delete an existing record. You can add new records at any time if you have security rights. You create and maintain records in the Hubs. |
| Tabs | DPS applications are organized in a tabular format. The tabs in an application may contain fields and/or grids on which you enter or modify information. |
| Dialog Boxes | Dialog boxes display as pop-up windows in the DPS application. Dialog boxes may contain fields and grids for entering information. Dialog boxes display when you click certain Navigation menu options as well as certain toolbar and field-level icons. |
| Fields | Fields display on tabs and dialog boxes. Use fields to enter and maintain data for a record or transaction. Some fields are display-only; you cannot enter or edit data in these fields. These fields are grayed out on your screen. |
| Grids | Grids display on tabs and dialog boxes. A grid is essentially a collection of fields arranged using columns and rows. Use grids to enter, maintain, and view data for a record or transaction. Grids make it easy for you to sort and organize data. You can sort data in most grids by clicking a grid column heading to establish a sort order (ascending or descending). Click the column heading again to reverse the sort order. |
| Options | Options are selections or choices that appear on a menu or form. Options usually display in drop-down lists. |
| Settings | In addition to standard system setup options, DPS offers a variety of ways for you to change the look and feel of the application, such as renaming tabs and labels, adding new tabs, and reformatting your Dashboard. See the Settings section of the help to learn more. |

Main Areas of Deltek for Professional Services

Get acquainted with the basic areas of DPS.

| Area | Description |
|--|---|
| Notification Center (browser) | The Notification Center provides a central location for you to view notifications and take action on required action items. |
| My Stuff (browser) | Use My Stuff to access your daily activities, including your calendar, timesheets, expense reports, and approval requests. |
| Dashboard (browser and desktop) | The Dashboard is your "portal" into DPS, allowing you to create a personalized view of your business world. |
| Hubs (browser and desktop) | The Hubs are where you enter and manage your business-related data, including basic information about activities, contacts, projects, employees, and firms. |
| Resource Management (browser) | Resource Management is designed to guide resource and project managers in constructing and monitoring plans for opportunities and projects. |

| Area | Description |
|--|---|
| Billing (desktop) | Billing lets you bill labor, expenses, fees, and units in all industry-standard formats. It also lets you process, modify, accept, and print invoices and generate billing-related reports. |
| Transaction Center (desktop) | The Transaction Center is where you enter and post various types of transactions, including disbursements, expenses, invoices, and vouchers. |
| Accounting (desktop) | Accounting is where you perform accounting processes, including accounts payable, accounts receivable, budgeting, and employee expense processing. |
| Human Resources (desktop) | Human Resources is where you process payroll and benefit hours accruals, and maintain the ADP interface. |
| Purchasing (desktop) | Purchasing allows your firm to automate its procurement processes for items, services and capital items. |
| Asset Management (desktop) | Asset Management works with the Equipment hub to track and process depreciation or amortization for asset items that you capitalize. |
| Inventory (desktop) | Inventory lets your firm manage and track all of its items, both inventory items and non-inventory items. |
| Reporting (desktop) | Reporting offers you a wide range of reports that present information about all aspects of your business. |
| Utilities (browser and desktop) | Utilities are maintenance activities that you use to keep your DPS implementation running optimally. |
| Settings (browser and desktop) | Settings is where you make decisions about how you want DPS to work for your firm, including choosing the features and settings you want to use. |

Logins and Passwords

Each time that you log in to DPS, you must enter a valid user ID and password.

DPS may end your session and require you to log back in if the application remains idle for a period of time (the default is 20 minutes). When you log back in, you are returned to where you were working when your session expired.

How to...

Review log in and log out procedures, and how to retrieve a forgotten password or user ID.

Log In

Each time that you want to use DPS, you must enter a valid user ID and password.

If the application is idle for a period of time (approximately 20 minutes), the session is closed and you need to log back in. When you log back in, you are returned to where you were working when your session expired.

To log in:

1. Use your DPS URL to display the login page.
2. Select one of the following actions:
 - If you are logged in to Windows with your network login credentials and you want to log in to DPS using Windows Authentication, select the **Windows Authentication** check box when you log in.
 - If you are not using Windows Authentication, enter your user ID in **User ID** and your password in **Password**.
3. If more than one database is available, click ▼ in **Database** to select a different database.
4. In **Language**, select the language that you want to use while you work in DPS.
The drop-down list contains all the languages that DPS supports. However, you can only select a language for which your enterprise has purchased a license.
5. Click **Log In**.

Log In Using Multi-factor Authentication

If your system administrator has enabled multi-factor authentication, when you log in to DPS you must provide a six-digit code from an authentication application, in addition to your valid user ID and password.

Multi-factor Authentication must be enabled by your system administrator in Security Settings. For this additional step to appear when you log in, it must also be enabled for your user account.

For the multi-factor authentication application, we recommend Google Authenticator or Duo Mobile, both of which have been tested with DPS. Although these two applications are recommended, you can also use other authentication applications.

To log in with Multi-factor Authentication enabled:

1. Use your DPS URL to launch DPS and display the DPS login screen.
2. Select one of the following actions:
 - If you are logged in to Windows with your network login credentials and you want to log in to DPS using Windows Authentication, select the **Windows Authentication** check box when you log in.
 - If you are not using Windows Authentication, enter your user ID in **User ID** and your password in **Password**.
3. If more than one database is available, click ▼ in **Database** to select a different database.
4. In **Language**, select the language that you want to use while you work in DPS.
The drop-down list contains all languages that DPS supports. However, you can only select a language for which your enterprise has purchased a license.
5. Click **Log In**. (If you are logging in from the DPS desktop application, click **OK**.)
6. In the DPS Multi-factor Authentication screen (or in the Multi-factor Authentication dialog box in the desktop application), enter the six-digit code from your authentication application on your mobile device in the **Enter Your Six-Digit Code** field.

- If this is your first time logging in with multi-factor authentication enabled, do the following:

1. Click **Set Up Multi-factor Authentication**.
2. Open the authentication application on your mobile device and scan the QR code that displays on the Set Up Multi-factor Authentication dialog box (or the Multi-factor Authentication dialog box in the desktop application) in DPS.

This adds the DPS account in your authentication application and generates a six-digit code in your authentication application that you use to log in to DPS this one time.

3. In the Set Up Multi-factor Authentication dialog box, click **Done with Setup**.
 You only need to set up multi-factor authentication once. On your next log in, you must open the authentication application on your mobile device and generate a new six-digit code.
7. In the browser application, click **OK**. In the desktop application, click **Log In**.

Log In Using Windows Integrated Security

If your enterprise uses Windows Integrated Security with DPS, you can log in once for both Windows and DPS.

Prerequisites: You must be logged in to Windows with your network login credentials.


To log on to DPS using Windows Integrated Security:

1. Open Internet Explorer and start DPS.
2. If more than one database exists, select the database that you want to use.
3. In **Language**, select the language that you want to use while you work in DPS.
 The drop-down list contains all languages that DPS supports. However, you can only select a language for which your enterprise has purchased a license.
4. Click **Log In**.

Log Out

You must log out when you are finished working in DPS.

To log out:

Click  on the toolbar and select **Log Out**.
 The application and all associated windows close.

Replace a Forgotten Password

If you forget your password, you can replace it with a new password on the login page.

Prerequisite: This procedure requires that your employee information includes an email address.

To replace a forgotten password:

1. Use your DPS URL to display the login page.
2. Click **Forgot your password or user ID?**.
3. On the Log In Assistance dialog box, enter your User ID.
4. Click **Send**.
 - If the user ID is valid and has an associated email address, an email message that contains a temporary password is sent to that address. Follow the directions in the email message to reset your password the next time that you log in.
 - If the user ID is not valid or does not have an associated email address, an error message displays. Click **OK** to return to the login page, and contact your system administrator for assistance.

Retrieve a Forgotten User ID

If you forget your user ID, you can retrieve it from the login page.

Prerequisite: This procedure requires that your employee information includes an email address.

To retrieve a forgotten user ID:

1. Use your DPS URL to display the login page.
2. Click **Forgot your password or user ID?**.
3. On the Log In Assistance dialog box, select **I forgot my user ID**.
4. In **Email**, enter the email address that is associated with your employee information.
5. Click **Send**.
 - If the email address that you entered is associated with one valid user ID, an email message with the user ID is sent to that address.
 - If the email address that you entered is not associated with a valid user ID, or is associated with more than one user ID, an error message displays. Click **OK** to return to the login page, and contact your system administrator for assistance.

Fields and Options

Use Login Assistance to update or retrieve your password and user ID.

Deltek DPS Login Screen

Use this screen to enter your user ID and password and log in to DPS.

Display the Deltek DPS Login Screen

You display this screen when you launch DPS.

Use your DPS URL to launch Deltek.
The DPS Login Screen displays.

Contents of the Deltek DPS Login Screen

Use the fields on this screen to log in to DPS using your User ID and password.

| Field/Option | Description |
|----------------------------------|--|
| User ID | Enter your DPS User ID. |
| Password | Enter your DPS password. |
| Forgot your password or User ID? | Click this link to retrieve your User ID and password information. |
| Database | If more than one database is available, select the database that you want to open. |
| Language | <p>If it is not already selected, select the language that you want to use while you work in DPS.</p> <p>The drop-down list contains all languages that DPS supports. However, you can only select a language for which your enterprise has purchased a license.</p> |
| Log In | Click this button to log in to DPS. |

Deltek DPS Multi-factor Authentication Screen

If multi-factor authentication is enabled for your account, you must enter a six-digit code from an authentication application in addition to your password.

Display the Deltek DPS Multi-factor Authentication Screen

You display this screen from the login screen.

Prerequisite: Multi-factor Authentication must be enabled by your System Administrator in Security Settings. For this additional step to appear when you log in, it must also be enabled in your user account.

1. Use your DPS URL to display the login page.
2. Select one of the following actions:
 - If you are logged in to Windows with your network login credentials and you want to log in to DPS using Windows Authentication, select the **Windows Authentication** check box when you log in.
 - If you are not using Windows Authentication, enter your user ID in **User ID** and your password in **Password**.
3. If more than one database is available, click ▼ in **Database** to select a different database.
4. Click **Log In**.
DPS displays the multi-factor authentication screen.

Contents of the Deltek DPS Multi-factor Authentication Screen

Use these fields to set up multi-factor authentication and enter a six-digit code generated from your authentication application each time you log in to DPS.

| Field/Option | Description |
|------------------------------------|---|
| Enter your Six Digit Code | Enter the six-digit code that is generated from your authentication application on your mobile device. |
| Set Up Multi-factor Authentication | <p>If this is your first time logging into DPS with multi-factor authentication enabled, click this link to set up the new account for DPS in an authentication application on your mobile device.</p> <p>In the browser application, the Set Up Multi-factor Authentication dialog box shows a QR code that you can scan with an authentication application on your mobile device to add the new account.</p> <p>In the desktop application, the Multi-Factor Authentication dialog box extends to show the QR code.</p> |
| QR Code | <p>In the DPS browser application, the Set Up Multi-factor dialog box displays when you click Set Up Multi-factor Authentication. Scan this QR code with the authentication application on your mobile device.</p> <p>In the DPS desktop application, the dialog box extends to show the QR code.</p> |
| Log In | In the browser application, click this button to log in to DPS. |

Log In Assistance Dialog Box

You can retrieve your DPS User ID or reset your password if you forget either one.

Display the Log In Assistance Dialog Box

Display this dialog box from the login screen.

1. Open the DPS login screen.
The **Forgot your password or User ID?** link displays if you are not using Windows Authentication and email settings are configured.
2. Click the **Forgot your password or User ID?** link.

Contents of the Log In Assistance Dialog Box

Use this dialog box to change your password and/or user ID.


| Field/Option | Description |
|----------------------|---|
| I Forgot My Password | Select this option to reset your DPS password. DPS checks the email address associated with the user account. |


| Field/Option | Description |
|---------------------|--|
| | <ul style="list-style-type: none"> If there is a valid user ID and email address for this account, click OK to receive an email message with a temporary password that will allow you to access your account. Follow the directions in this email message to reset your password the next time that you log in. If there is not a valid user ID and email address for the account, an error message displays and you need to click OK to return to the login screen. |
| I Forgot My User ID | <p>Select this option to receive a reminder for your assigned user ID. When you select this option, the Email Address field is activated. Enter the email address that is associated with your user ID, and click OK.</p> <ul style="list-style-type: none"> If the email address is valid, you will receive an email message with the user ID information. Follow the directions in this email message and use this DPS user ID the next time that you log in. If the email address is not valid, an error message displays. You can enter a different email address in the Email Address field or contact your system administrator for help. |
| Using Database | This field displays information about the current database. |
| Send | Click Send to send the temporary password and/or user ID to your email address for this account. |

DPS Toolbar (Browser)

Use the main DPS toolbar to perform actions that apply globally. For example, you can view online help, view action items, specify your personal settings, or log off.

Contents


| Field/Option | Description |
|---|--|
|  | Click this option to hide or display the Navigation Pane. |
| Company | If DPS is set up to use multiple companies, your currently active company displays on the toolbar. If your security role gives you access to more than one company, you can change your active company at any time. Click the company name to select the company you want. |
| ?Help | <p>Use the options on this menu to do the following:</p> <ul style="list-style-type: none"> Help: Display the online help. About: Display the DPS version number, the database to which you are connected, and the user ID that you used to log in. Other information provided includes lists of installed components and applications, software licensing and copyright information, and additional miscellaneous system information. |

| Field/Option | Description |
|---|---|
| ✱ Options | <p>Use options on this menu to do the following:</p> <ul style="list-style-type: none"> ▪ My Preferences: Set the date format, select decimal and digit grouping symbols, and connect your DPS account to Kona Business or GovWin IQ. ▪ Usage Tracking: Send high-level usage statistics, such as the number of times that the application is launched and the number of sessions, to Deltek. ▪ Log Out: Log out of DPS and return to the login page. |
| ▼ Record History | Click this option to view the records that have been open during your current browser instance. You can select and open a record from this list. |
|  Notification Center | The Notification Center button displays the number of active action items and notifications for your current instance. Click this option to view the action items and notifications. You can select and open an item from this list. |

DPS Toolbar (Desktop)

Certain options are always available in the toolbar at the top of the screen wherever you are the DPS desktop application.

| Field/Option | Description |
|----------------------|--|
| Hide/Show Navigation | Toggle between these buttons to hide and display the Navigation menu. |
| Back Arrow | Click this button to return to the application you were previously working on. |
| Forward Arrow | Click this button to return to the application you were working on before you used the Back Arrow. |
| Dashboard | Click this button to open the Dashboard application. |
| Browser | Click this button to open the Browser application. |
| Kona | <p>Click this button to launch Kona.</p> <p>If your firm's Kona Business token is entered in Kona Account Key on the General System Settings form, and if you log on to Kona on the Misc tab of the User Options dialog box, you are automatically logged on when Kona displays. If your firm's Kona Business token is not entered in Kona Account Key, or if you have not logged on to Kona on the User Options dialog box, you must log on to Kona yourself after it displays.</p> <p>If you use Microsoft® Internet Explorer® 8, Kona displays in a separate browser window. If you use Internet Explorer 9 or later, it displays within DPS.</p> |

| Field/Option | Description |
|----------------|---|
| | If the toolbar does not contain a  Kona option, your system administrator has disabled the option in the web.config file. |
| Search | Click this button to open the hubs Search dialog box, where you can choose an hub and search in it for a particular record. |
| My Preferences | Click this button to access the My Preferences dialog box, where you can choose your individual preferences for how DPS looks and behaves. |
| Help | <p>Click Help to select from the following options on the Help menu:</p> <ul style="list-style-type: none"> ▪ Contents: Display the DPS online help. ▪ Data Dictionary: Display the data dictionary, which provides information about the data tables, columns, and indexes in the DPS database. ▪ Help Desk: Display the Send Email dialog box. Use this dialog box to compose and send a message to a designated Help Desk mailbox. You can send email messages directly to Deltek Customer Care or, if your company has an internal Help Desk mailbox, to your internal DPS experts. ▪ Customer Care Connect: Go to the Deltek Customer Care Connect site. You must have a username and password to access the site. ▪ Knowledge Base: Go to the Deltek Customer Care Connect site and open the Knowledge Center, which provides solutions and answers for thousands of user-submitted issues and questions. You must have a username and password to access the site. ▪ Contact Us: Go to the Deltek Customer Care Connect site, where you can submit a support case or chat with a support analyst. You must have a username and password to access the site. ▪ About: Display the DPS version number, the database to which you are connected, and the user ID that you used to log in. Other information provided includes lists of installed components and applications, software licensing and copyright information, and additional miscellaneous system information. |
| Log Off | Click this button to log out of the DPS desktop application and return to the login dialog box. From there you can log on again, perhaps using a different accounting period or database, or exit DPS. |

Custom Labels


You can modify DPS to use key terms that are familiar to your firm and employees.

You can replace the default DPS labels with those that are used in your firm (for example, replace the default "Client" with "Customer"). If you enter a custom label, it is used throughout the DPS user interface and online help in place of the default label. For details, see the [Labels & List Settings](#) help topic.

Notification Center

The Notification Center indicates your action items and notifications in the DPS browser application.

The Notification Center provides a central location for you to view notifications and take action on required action items. To open the Notification Center, click the orange notification icon (for

example, ) at the top right of the DPS menu bar in the browser application. The count on this button is dynamic and indicates how many active action items and notifications you have. The Notification Center and its activity count is refreshed every 5 minutes.

Two types of notifications are reported in the Notification Center: **Action Items** and **Notifications**.

Note that if you enable Kona Business integration, the collaboration notifications do not display in the Notification Center. They display as a separate number in the toolbar.

Action Items

Action items require you to take action. They are grouped into types, for example, activity reminders or approval workflows, with the number of items for each type indicated. Each item in the list includes a hyperlink which opens the associated dialog box or application when you click the link. Action items are not cleared from the Notification Center list and its corresponding count until you complete the expected action. Action items include:

- Activity reminders for upcoming activities on your calendar
- Approvals for draft billing invoices
- Approvals for items going through an approval process, such as timesheets, expense reports, AP invoices, purchase orders, and so on for which you are currently assigned
- Timesheets that are due

Notifications

Notifications are informational items that may need your attention. These items are not grouped; each is listed separately. The most current items are displayed at the top of the list. Notification items are cleared when you click and view them or when you dismiss them directly from the list. Notifications include:

- Draft billing invoices notifications
- User-initiated and scheduled workflow notifications
- Approval workflow notifications
- System and company alerts
- Shared calendar notifications
- GovWin IQ integration import errors, Talent Management sync errors, CSV import errors, and Salesforce import errors.


How to...

These help topics provide step-by-step instructions for tasks that can be performed in Notification Center.

Open the Notification Center

You open the Notification Center from the DPS menu bar.

To open the Notification Center:

1. Click  in the menu bar.
The number on the button indicates how many active notifications are available.
2. To close the Notification Center, click anywhere outside the Notification Center dialog box.

Open an Activity Reminder

You can open reminders for scheduled activities from the Notification Center.

To open an activity reminder:

1. Open the Notification Center.
2. Click the Activity Reminder item in the Actions Items list.
The Reminders dialog box displays, where you can review and manage activity reminders and information.

Delay an Activity Reminder

You can delay reminders for scheduled activities from the Reminders dialog box.

To delay an activity reminder:

1. Open the Notification Center.
2. Click the activity reminders item to display the Reminders dialog box.
3. Select a reminder in the reminder list.
The details of the selected reminder are displayed above the reminder list.
4. Select a delay time value from the first drop-down from the top left.
5. To delay only one reminder, select **Snooze** from the second drop-down from the top left.
To delay all reminders by the same time, select **SnoozeAll** instead.
The activity indicator count in the Notification Center icon decreases by the number of activities you delay. The count goes back up when the delay period ends.

Dismiss an Activity Reminder

You can dismiss reminders for scheduled activities from the Reminders dialog box.

To dismiss an activity reminder:

1. Open the Notification Center.

2. Click the activity reminders item to display the Reminders dialog box.
3. Select a reminder in the reminder list.
The details of the selected reminder are displayed above the reminder list.
4. To dismiss the selected reminder, select **Dismiss** from the drop-down found at the top right. To dismiss all reminders, select **DismissAll** instead.
The activity indicator count in the Notification Center icon decreases by the number of activities you dismiss.

Open an Action Item

You open action items from the Notification Center.

Action items are grouped into different assignment types. Each type displays as a single line that indicates how many of the type are awaiting your action. The most recent action items display at the top of the list.

To open an action item:

1. Open the Notification Center.
Action items display at the top of the Notification Center.
2. Click the action item.
The item opens an application in either the DPS browser or desktop application. For example, if you click a link for an expense report action item, **My Stuff » Approval Center** opens automatically in the browser application. If you click a link for an action item for an AP invoice approval awaiting approval, **Accounting » Approvals Review** opens automatically in the desktop application.

Note that the desktop application only opens in Internet Explorer. If you are using a different browser, a message displays indicating that the desktop application requires Internet Explorer.

Dismiss an Action Item

You dismiss action items from the Notification Center by completing the expected action.

To dismiss an action item:

1. Open the Notification Center.
2. Click the action item.
The item opens in the corresponding DPS browser or desktop application.
3. Complete the expected action.
Action item types can include draft invoice approvals, approval workflow assignments, and timesheet due alerts. Possible actions for each type are:
 - Draft invoice approvals: Approve or reject the invoice. Draft invoices can also be cleared if they are unsubmitted in interactive or batch billing operations.
 - Approval workflow assignments: Approve, reject, suspend, or move the approval assignment. An approval workflow assignment item can also be cleared when someone else closes the approval assignment.

- Timesheet due alerts: Submit your timesheet.

The item is removed from Notification Center when the action has completed successfully.

Open a Notification

You open notification items from the Notification Center.


To open a notification:

1. Open the Notification Center.
2. Click an item in the Notifications list.
Some items display the Notification Details dialog box while some items displays the record instead. When a record is displayed, the notification is removed from the list and the count in the Notification Center icon decreases
3. If the Notification dialog box displays, you can click **Navigate to Record** to display the record for the notification or click **Close** to close the notification.
Selecting **Navigate to Record** or **Close** removes the notification from the list and the count in the Notification Center icon updates accordingly.

Dismiss a Notification

You can dismiss your notifications from the Notification Center.

To dismiss a notification:

1. Open the Notification Center.
2. Do one of the following:
 - To dismiss all notifications, click the **Dismiss All** link at the top right of the Notifications list.
 - To dismiss a single notification, click  next to the item.
 - Click the notification to open the Notification Details dialog box.

The notifications are removed from the list and the count on the Notification Center icon decreases.

Fields and Options


Review descriptions of individual dialog box fields and options in the Notification Center.

Notification Center Dialog Box

Use the Notification dialog box to display your action items and notifications.

Display the Notification Center Dialog Box

You display the Notification Center dialog box from the DPS menu bar.


Click  to open the Notification Center.

The number on the button indicates the current number of notifications.

Contents of the Notification Center Dialog Box

The Notification Center dialog box lists your activity reminders, actions items, and notifications.

Contents

| Field/Option | Description |
|---|---|
| Action Items | <p>This section lists any activity reminders at the top of the list, followed by action items that require a response.</p> <p>The activity reminders are grouped together on one line. Click the activity reminders item to display the Reminders dialog box, where you can view, delay, or dismiss the reminders.</p> <p>Action items are grouped into approval assignment types. Each type displays as a single line that indicates how many of the type are awaiting your action. The most recent action items display at the top of the list. Click the link in the action item to open it in the corresponding DPS browser or desktop application.</p> |
| Notifications | <p>This section lists any notifications. These items are informational and do not require a response. Click a notification to either navigate directly to the corresponding DPS browser or desktop application or open the Notification Details dialog box, where you can view details and navigate to the original record.</p> |
| Dismiss All | <p>Click this link at the top of the list to dismiss all notifications.</p> |
|  | <p>Click this icon next to a notification to dismiss it.</p> |

Notification Details Dialog Box

Use the Notification Details dialog box to view information about your notifications.

Display the Notification Details Dialog Box

You display the Notification Details dialog box from the Notification Center.

1. Open the Notification Center.
2. Click an item in the Notifications list.

Contents of the Notification Details Dialog Box

The Notification Details dialog box provides information about a notification.

Contents

| Field/Option | Description |
|--------------------|---|
| Summary | The Summary fields provide a high-level summary at the top followed by notification details in the field below. |
| Navigate to Record | Click this button to navigate to the record that initiated the notification. |
| Close | Click this button to close the notification. |


Reminders Dialog Box

Use the Reminders dialog box to view, delay, or dismiss reminders for scheduled activities.

Display the Reminders Dialog Box

The Reminders dialog box displays if you have chosen to receive reminder popups via My Preferences and when you have an upcoming activity. You can also manually display the Reminders dialog box from the Notification Center to review activity reminders.

You must be logged on to DPS to access the Reminders dialog box.

1. On the header section, click  to open the Notification Center.
The number on the button indicates the current number of notifications.
2. Under the Actions Items list, select **Activity Reminders** to open the Reminders dialog box.

Contents of the Reminders Dialog Box

The Reminders dialog box displays activity reminders for scheduled activities.

Contents

Reminder Controls Section

Use these reminder controls to set alternative times for reminders, to snooze individual or all activities, and to dismiss the current or all activities in the list.

| Field/Option | Description |
|--------------|--|
| Snooze | Two drop-downs are available to manage snooze options for your activity reminders. |

| Field/Option | Description |
|--------------|--|
| | <ul style="list-style-type: none"> First drop-down from the top left: Select a time value to be applied as the snooze or delay time for the activity reminder. Alternatively, if you want to use a time increment that is not listed in the drop-down, then manually enter a time increment (for example, 45 minutes) to the left of the drop-down arrow. Second drop-down from the top left: Select Snooze to snooze a selected activity reminder, or select Snooze All to snooze all activity reminders in the reminder list. Click DPS displays another pop-up reminder for the selected activity at the specified time. |
| Dismiss | Select Dismiss from the drop-down menu to dismiss the selected activity reminder from the reminder list or Dismiss All to dismiss all activity reminders in the reminder list. |

Reminders Grid

The Reminders dialog box is composed of a detail area and a list of all the activity reminders. Each reminder row contains descriptive information about the activity.

| Field/Option | Description |
|-----------------|---|
| Reminder Detail | <p>The reminder detail is an area found above the reminder list. This area displays the following information and options:</p> <ul style="list-style-type: none"> Activity subject: Displays the subject of the selected activity from the reminder list. ✓: Click this option to mark the activity as completed. Primary firm: Displays the primary firm associated with the activity. Activity notes: Displays the first few lines of the notes that were made for the activity. ...more: Click this option to display the Activity dialog box for the activity. The Activity dialog box displays the activity hub record details. Use this dialog box to view, schedule, copy, delete, and modify activities related to the scheduled reminder. |
| Completed | Click the grey checkmark to the right of the activity's subject if you want to mark the activity as completed and remove it from the list. The checkmark turns green, a strikethrough appears on the activity, and after a short delay the activity is removed. |
| Reminder List | The reminder list displays a list of activity reminders. Select an activity reminder to display additional details above the list in the reminder detail area. Scroll down the list to check other activity reminders. A row item in the list displays the following information about the activity reminder: |

| Field/Option | Description |
|------------------|--|
| | <ul style="list-style-type: none"> Activity subject: Displays the subject of the selected activity, such as Initial Consultation or Follow-up Visit. Click the blue title text to open the activity. Activity type: Displays the type of activity. Duration and Day: Displays the duration of the activity and the day when the activity is scheduled. Date: Displays the date when the activity is scheduled. Location: Displays the location for the activity if available. |
| Reminder Counter | The reminder counter displays the number of activity reminders available in the reminder list. The reminder counter is located at the bottom right of the dialog box. |

Activity Dialog Box from Reminders

Use this dialog box to schedule, copy, delete, and modify activities related to a scheduled reminder. These activities are added to your hub records on the Activities tab within each hub, on the Dashboard, and on the Calendar.

Display the Activity Dialog Box from Reminders

Display this dialog box directly from a reminder.



On the Reminders dialog box, click **more...** on the activity reminder to view or modify the activity's information.

Contents of the Activity Dialog Box from Reminders

Use this dialog box to enter or update activity information.

Contents

This dialog box may contain a Files and Links tab where you can upload, view, and store files that are related to the activity record. You can also add URLs, email addresses, and links to files and graphics. See the Add Files and Links to a Record online help topic in Hubs Basics for more information.

The main fields on this dialog box provide an overview of the activity's details. To access the activity's detailed information or to edit the activity, click  icon next to any one of the fields. This opens an associated field, lookup, or dialog box and allows you to enter or edit details as needed. For example, click  next to the **When** field to open the When dialog box where you can enter or change the activity's start and end dates, reminders, classifications, and so on.



Alternatively, you can click the **Actions » Edit** menu option to edit the activity's details.

Contents

When

This set of field information contains information about an activity's start and end dates, reminders, recurrence patterns, whether or not the activity is an all day event and if it is private, and how the activity should be shown (Busy, Tentative, or Free) in Calendar.

| Field/Option | Description |
|------------------|--|
| Activity Subject | Enter a brief description of the activity or select a subject from the drop-down list. Typically, this is a short descriptive statement, such as Initial Consultation or Follow-up Visit . Your system administrator defines the activity subject values using the Activity Subject Code Table in Settings. |
| Start Date | Select the start date and start time for the activity. |
| End Date | Select the end date and end time for the activity. |
| Reminder | <p>Select this option and the timeframe if you want to receive a reminder at a specified time prior to the start of the activity.</p> <p>You can choose to receive email activity reminders, pop-up activity reminders, or both. You can change the way you receive activity reminders at any time. To change the way you receive activity reminders, click My Preferences on the toolbar and select the General tab. In Remind Me About Activities, specify the type of reminders you wish to receive.</p> |
| All Day Event | Select this option if the activity will last for an entire day. When you select this option, the activity start time displays as 8:00 AM and the activity end time displays as 5:00 PM. However, you can change these times, if necessary. |
| Private | Select this option if you want the activity to be classified as private. Details for a private activity can be viewed only by the attendees of the activity. If you are an attendee of a private meeting, the actual subject line displays on the Activity dialog box and you can open the activity and edit it based on your calendar access rights. |
| Repeats | <p>If the activity is recurring, specify the type of recurrence as well as the end date for the recurrence:</p> <ul style="list-style-type: none"> ▪ None: There is no recurrence (default). ▪ Daily: Select this option to repeat the activity on a daily basis. The Daily options allow you to specify the number of days as well as every day or only weekdays. ▪ Weekly: Select this option to repeat the activity on a weekly basis. The Weekly options allow you to specify the actual week and days of the week for the activity. ▪ Monthly: Select this option to repeat the activity on a monthly basis. You can specify the actual date, week, and month for the activity to repeat. ▪ Yearly: Select this option to repeat the activity on a yearly basis. You can specify the actual year, date, week, and month for the activity to repeat. |

| Field/Option | Description |
|--------------|---|
| Show Time As | Select an option that indicates how participants' time is classified, such as Busy or Tentative , on their calendar for the duration of the activity. |
| Location | Enter the location where the activity will occur. |
| Type | Select a descriptive type for the activity, such as Meeting or Teleconference . The type of the activity determines whether it displays in the calendar. To define activity type options, use the Activity Type List in Settings » Labels and Lists . See your system administrator for information about adding values to this list. |
| Priority | Select a priority ranking that indicates the relative importance of individual activities: High, Medium, or Low. |
| Notes | Enter any notes related to the activity. You can use the text editor to enter text directly in this field. After a note is entered and saved, a  displays in the grid row to indicate a note for the activity. If no notes are entered, a  displays instead. Click the icon in the grid row to open the Notes dialog and enter details. |

Stakeholders

Use the Stakeholders fields to assign the attendees and firms that are related to the activity. Stakeholder refers to any person or business entity that is involved in an activity. Stakeholders can include your company's employees as well as external contacts, clients, vendors, and their associated firms.

| Field/Option | Description |
|--------------|---|
| Attendees | The Attendees grid lists all the attendees and their associated firms who are scheduled to participate in the activity. Attendees include both contacts and employees. Click + Add Attendees to specify the attendees to assign to this activity. As a rule, the first contact you add to the attendees list is the primary contact; however, you can change the primary designation at any time. By default, the person who creates the activity is the Owner. You can also change the owner to a different employee if you wish. Click the ▼ arrow and select Make Primary or Make Owner to change the status as needed. |
| Firms | A firm is any type of business or entity external to your company, including clients, vendors, government agencies, trade associations, and competitors. Click + Add Firms to specify the firms to assign to this activity. If this is the primary firm associated with the activity, click the ▼ arrow and select Primary . If the status changes and the firm is no longer primary, you can click the arrow and remove the primary status or select another firm as the primary. Only one firm can be designated as primary. |

Associations

Use the Associations fields to select opportunity, project, and marketing campaign hub records that you want to associate with the activity. If your administrator has created user-defined hubs with activities, then lookups to those hubs also appear in this section as well.

| Field/Option | Description |
|--------------------|--|
| Opportunity | Click the ▼ arrow and select the opportunity that is associated with the activity. You can type part of the opportunity name or number to quickly find it in the list. Click the blue, underlined name to display the info bubble that contains information about the opportunity. |
| Project | Click the ▼ arrow and select the project that is associated with the activity. You can type part of the project name or number to quickly find it in the list. Click the blue, underlined name to display the info bubble that contains information about the project. |
| Marketing Campaign | Click the ▼ arrow and select the marketing campaign that is associated with the activity. You can type part of the name or number to quickly find it in the list. Click the blue, underlined name to display the info bubble that contains information about the marketing campaign. |
| User Defined Hubs | Your administrator may have created one or more user defined hubs to track information that could not be tracked in a standard hub. Click + Add link to add a user defined hub record to an activity. |

Learn More About...

These topics provide additional information about key concepts that are applied in the Notification Center.

Action Items in the Notification Center

This topic provides action item configuration details for system administrators.

Action items are grouped into types, for example, activity reminders or timesheets due, with the number of items for each type indicated. Action items are not cleared from the Notification Center list and its corresponding count until the expected action is complete. Action items are:

- **Activity reminders**

Activity reminders are reminders for upcoming calendar events. These events can be created from the Activities hub, from the Activities tab in many other hubs, or from the Calendar. Clicking the link in the activity reminders item displays the Reminders dialog box, where they can be viewed, delayed, or dismissed.

- **Items going through an approval process**

These are items such as timesheets, expense reports, and accounts payable invoice approvals that have an approval workflow set up for them in **Settings » Workflow » Approval Workflows** in the desktop application.

These items appear in the action item list because the employee is assigned to the current approval step. These approval workflow action items are *not* based on any notification alerts that the system administrator sets up in the Step Actions grid on the Workflow tab in **Settings » Workflow » Approval Workflows**. Any notifications set up in this way display in the Notification list in the Notification Center.

Approval action items include:

- Requests for price quotes

- Purchase requisitions
- Purchase orders
- Purchase order - change orders
- Purchase orders - releases
- Item requests
- AP invoice approvals
- Absence requests
- General ledger budgets
- Expense reports
- Timesheets
- **Draft billing invoices that require approval**
 Action items for draft billing invoices display in the action item list if the system administrator enables approvals for billing invoices on the Miscellaneous tab in **Settings » Billing » General** in the desktop application. An action item displays for the employee who is assigned to approve/reject a draft billing invoice (the employee is entered in the **Employee to Approve/Reject** field for an action item for invoice approvals in the Actions grid in **Settings » Billing » Invoice Approval Process**) in the desktop application.
- **Timesheet due alerts**
 Timesheet due alerts are sent if the Timesheet Due alert has been set up and activated by a system administrator in **Settings » General » Company Alerts** in the desktop application.

 Note that these alerts are *not* part of the alerts that the system administrator sets up for timesheet approvals in **Settings » Workflow » Approval Workflows**. Those alerts display as approval action items.

Notifications in the Notification Center

This topic provides notification item configuration details for system administrators.

Notifications are informational items that need your attention. These items are not grouped; each is listed separately. These items display in the Notifications section:

- **User-initiated and scheduled workflows**
 These are actions that the system administrator inserts for user-initiated workflows and scheduled workflows as a **Notification Center Alert** in the Actions grid in **Settings » Workflow** in the desktop application.
- **System and company alerts**
 These are system alerts and company alerts that the system administrator sets up with the **Notification Center** delivery option in **Settings » General » System Alerts** and **Settings » General » Company Alerts** in the desktop application.
- **Approval workflows**
 These are notification alerts that the system administrator sets up in the Step Actions grid on the Workflow tab in **Settings » Workflow » Approval Workflows**. Note that an action

item also displays in the Action Items section of the Notification Center if the employee is assigned to the current approval step.

- **Draft billing invoices**

Notifications for draft billing invoices display in the list if the system administrator has set up approvals for billing invoices on the Miscellaneous tab in **Settings » Billing » General** in the desktop application. A notification displays for the employee who is entered in the **Employee to Alert** field for an action item for invoice approvals in the Actions grid in **Settings » Billing » Invoice Approval Process**.

- **Shared calendar notifications**

These notifications are triggered when an employee shares their calendar with the active user.

- **Error notifications**

These error types are delivered to the Notifications list by their corresponding applications:

- GovWin IQ integration import errors
- Talent Management sync errors
- CSV import errors
- Salesforce import errors

Approvals in the Notification Center

This topic provides details about action items and notifications that can be generated by approval workflows.

Both action items and notifications can be generated to the Notification Center for items such as timesheets, expense reports, and accounts payable invoice approvals that have an approval workflow set up for them under **Settings » Workflow » Approval Workflows** in the desktop application. Note that this topic does *not* apply to billing invoice draft approval items.

Action Items: Action items are automatically generated for the employee who is currently assigned to an approval step. This occurs regardless of the notifications that a system administrator sets up in the Step Actions grid on the Workflow tab in **Settings » Workflow » Approval Workflows**.

Notifications: The notification alerts that the system administrator configures in the Step Actions grid on the Workflow tab in **Settings » Workflow » Approval Workflows** display in the Notifications section of the Notification Center.

This means that it is not necessary to configure approval assignment notifications for the **Currently Assigned** approval role in Approval Workflows configuration. However, if the system administrator does configure any notifications for this role, then there will be two notifications for the employee in the Notification Center when they are assigned to the current approval step — one in the Action Item section because they are assigned to the current approval step and one in the Notification section based on the action item set up on the approval workflow.

Dismissing the item in the Notification section has no impact on the corresponding item in the Action Items section because the employee may still be required to take action on the record. To clear the action item, the employee must take the expected action on the assigned approval

record or suspend it. Note that it is also possible for an employee's assignment record to be closed by another assignee if they have approval rights.

Employee Card

The employee card allows you to easily view employee information when you are in various applications throughout DPS without having to leave an application to open the Employees hub.

For example, in Resource View you can open the employee card and view relevant information about employees as you consider them for assignments to projects. When you open the employee card in Timesheets, you can view your absence request and utilization ratios.

You open the employee card (the Employee Card dialog box) by clicking an employee name in various applications. For example, you can click the employee name at the top of the Timesheet form in **My Stuff » Timesheet** to open the employee card.

The contents of the employee card vary, based on the application from which you open it. The employee information that is most relevant for an application displays in the employee card. Additionally, the employee information that you see in the employee card is determined by your security role's record access rights for the Employees application and field-level security.

If you have multiple companies in DPS, any company-specific information on the employee card is from the employee's home company.

You cannot customize the employee card using Screen Designer.

How to...

You view employee information from the Employees hub on the employee card.

View Employee Information

From some applications, you can open the employee card to quickly review relevant employee information to help you make decisions about entering information in those applications.

The applications from which you can open the employee card are: Timesheets, Expense Reports, Approval Center, Resource View, Project View, and the Projects hub in planning mode.

To view employee information on the employee card:

1. Open one of the applications listed above, and select a record.
2. In the application, navigate to an employee's name, wherever it is located, and click it.
For example, in Timesheets, the employee name is in the upper left corner of the Timesheets form. In Resource View, the employee name is located in the grid in the Resource Level column.
3. On the Employee Card dialog box (the employee card), use the tabs to review general information, skills and credentials, projects and opportunities that the employee is associated with, and other employee information.

The information that you see on the employee card varies, based on the application from which you open it. The employee information that is most relevant for an application displays on the employee card. Additionally, the employee information that you see on

the employee card is determined by your security role's record access rights for the Employees application and field-level security.

4. Use the **Actions** drop-down menu on the Employee Card dialog box to click **Go to Employees Hub** to open the Employees hub and see the complete information for the employee if your security role gives you access.
5. To close the Employee Card dialog box, click **X** in the upper right corner.

View Absence Accrual Information

You can view absence accrual information from Timesheet, Expense Report, and Approval Center.

The accrual information includes hours earned and taken and balances for absence accruals such as sick leave and vacation.

Prerequisites:

- You can view absence accrual information only if an absence accrual has been selected to show on timesheets. (A system administrator selects the **Show on Timesheets** check box for an absence accrual on the Absence Accrual Setup tab in **Settings » Advanced Accounting » Time Analysis** in the desktop application.)
- You can view absence accrual information from a timesheet or expense report for yourself and for other employees if you have security access to other employee's timesheets and expense reports.
- If you are designated as an approver of timesheets and/or expense reports, you can view absence accrual information for employees when you approve their timesheets and/or expense reports in Approval Center.

To view absence accrual information from Timesheet, Expense Report, or Approval Center:

1. In the Navigation pane, go to the My Stuff section, and then select **Timesheet, Expense Report, or Approval Center**.
2. On the Timesheets, Expense Reports, or Approval Center form, select a record to view.
3. Click the employee name on the form to open the Employee Card dialog box.
 - On a timesheet and expense report, the employee's name is in the upper left corner of the form.
 - On the Approval Center form, an employee's name for a timesheet or expense report approval record displays in the **Employee Name** field in a row in the grid.
4. On the Employee Card dialog box, click the Absence Hours tab to view absence accrual information.
5. To close the Employee Card dialog box, click **X** in the upper right corner.

View Utilization Ratios

You can view utilization ratios from Timesheet, Expense Report, and Approval Center.

These ratios are important for employees who work on billable projects. Each ratio compares an employee's direct (billable) hours with other types of hours, such as standard hours and benefit hours.

Prerequisites

- A system administrator determines which utilization ratios and time periods for the ratios that you can view. These settings are on the Ratios tab in Time Settings.
- You can view utilization ratios for yourself from your timesheets and expense reports. You can view utilization ratios for other employees in Timesheet and Expense Report if your security role gives you access to view and edit other employee's timesheets and expense reports.
- If you are designated as an approver of timesheets and/or expense reports, you can view utilization ratios for employees when you approve their timesheets and/or expense reports in Approval Center.

To view utilization ratios from Timesheet, Expense Report, or Approval Center:

1. In the Navigation pane, go to the My Stuff section, and select **Timesheet, Expense Report, or Approval Center**.
2. On the Timesheets, Expense Reports, or Approval Center form, select a record to view.
3. Click the employee name on the form to open the Employee Card dialog box.
 - On a timesheet and expense report, the employee's name is in the upper left corner of the form.
 - On the Approval Center form, an employee's name for a timesheet or expense report approval record displays in the **Employee Name** field in a row in the grid.
4. On the Employee Card dialog box, click the Ratios tab to view the utilization ratios.
5. To close the Employee Card dialog box, click **X** in the upper right corner.

View Employee Assignments

You can view employee assignments that have ETC (Estimate to Complete) hours remaining from Resource View, Project View, and the Projects hub (planning mode).

To view employee assignments:

1. Open Resource View, Project View, or the Projects hub in planning mode, and select a record.
2. In the application, navigate to an employee's name, wherever it is located, and click it. For example, in Resource View, the employee name is located in the grid in the Resource Level column.
3. On the Employee Card dialog box, click the Assignments tab to view assignments for the employee.
4. To close the Employee Card dialog box, click **X** in the upper right corner.

Fields and Options

View employee information on the tabs and fields on the Employee Card dialog box.

Employee Card Dialog Box

From this dialog box, which displays in various applications, you can easily view employee information without having to leave the application to open the Employees hub.

The employee information that you see on the employee card is determined by your security role's record access rights and field-level security.

If you have multiple companies, any company-specific information on the dialog box is from the employee's home company.

Display the Employee Card Dialog Box

This dialog box displays from various applications.

Use the instructions in the following table to display the Employee Card dialog box from a specific application.

| Application | Instructions |
|--------------------------|--|
| Timesheet | <ol style="list-style-type: none"> 1. In the Navigation pane, go to the My Stuff section and select Timesheets. 2. Open a timesheet. 3. Click the employee's name at the top of the timesheet. |
| Expense Report | <ol style="list-style-type: none"> 1. In the Navigation pane, go to the My Stuff section and select Expense Reports. 2. Open an expense report. 3. Click the employee's name at the top of the expense report. |
| Approval Center | <ol style="list-style-type: none"> 1. In the Navigation pane, go to the My Stuff section and select Approval Center. 2. On the Approval Center form, select an approval record type in the field beside the Approval Center heading. 3. In the grid on the Approval Center form that displays the records to approve, click the employee's name in the Employee Name field. |
| Projects hub — Plan mode | <ol style="list-style-type: none"> 1. In the Navigation pane, go to the Hubs section and select Projects. 2. Select a project, and click the Plan toggle. 3. Click the Labor tab. |

| Application | Instructions |
|---------------|---|
| | <ol style="list-style-type: none"> Click ► and then click ▼ beside an entry in the Level/Resource field to expand the entry (work breakdown structure) so an employee's name is visible. Click the employee's name. |
| Resource View | <ol style="list-style-type: none"> In the Navigation pane, go to the Resource Management section and select Resource View. Search for resources. In the resource view grid, click an employee name in the Resource/Level column. |
| Project View | <ol style="list-style-type: none"> In the Navigation pane, go to the Resource Management section and select Project View. Select a project or opportunity. Click ► and then click ▼ beside an entry in the Level/Resource field in the grid to expand the entry (work breakdown structure) so an employee's name is visible. Click the employee's name. |


Header Section of the Employee Card Dialog Box

The header area of the Employee Card dialog box (above the tabs) provides basic employee information from the Employees hub.

Contents

If you have multiple companies in DPS, the employee information in the header of the dialog box is from the employee's home company.

| Field/Option | Description |
|--------------------------|---|
| Employee's image | The employee's image displays to the left of the employee name if an image was uploaded in the Employees hub. |
| Employee name and suffix | The employee's preferred name, last name, and suffix displays to the right of the image. If the employee has no preferred name, first name, last name, and suffix displays. |
| Professional suffix | If a professional suffix was entered for an employee, it displays under his or her name. This indicates educational degrees or professional licenses or accreditation (PhD , AIA , for example). |
| Job title | The employee's job title displays below the professional suffix. |
| Organization | If you have configured DPS to use organizations, the employee's organization displays below the employee's job title. |
| Location | The employee's work location displays below the organization. |

| Field/Option | Description |
|--------------|---|
| Actions | Click  , and select Go to Employees Hub . This opens the employee's record in the Employees hub if your security role has access. |

Profile Tab of the Employee Card Dialog Box

On this tab, view an employee's contact information, work history, current work status, education, citizenship information, and basic timesheet and expense report information.

If you have multiple companies in DPS, the employee information on this tab is from the employee's home company.

The information on the Profile tab comes from a number of different tabs in the Employees hub. Review the following help topics for the Employees hub for descriptions of the fields that you see on the Profile tab:

- [Summary pane](#)
- [Overview tab](#)
- [Personal and Contact Details tab](#)
- [Professional tab](#)
- [Accounting tab](#)
- [Time & Expense tab](#) (Information from the Time & Expense tab is included on the Profile tab only when you open the Employee Card dialog box from Timesheet, Expense Report, or Approval Center.)

Skills & Credentials Tab of the Employee Card Dialog Box


View an employee's skills and credentials.

The information on this tab is from the Professional tab in the Employees hub. See the [Professional Tab](#) topic for descriptions of the fields that you see on the Skills & Credentials tab.

Assignments Tab of the Employee Card Dialog Box

View an employee's assignments that have ETC (Estimate to Complete) hours remaining.

This tab displays on the Employee Card dialog box when you open it from Resource View, Project View, Projects hub (in planning mode). Information on this tab is particularly useful for a project manager who is working in Project View and wants to quickly see the current and future assignments that an employee has for other projects.

| Field/Option | Description |
|----------------|--|
| Forecast Range | Click Forecast Range or click  next to Forecast Range to open the Change Forecast Range dialog box and define the range of calendar period columns you want to display in the grid. |
| Show Capacity | Click Show Capacity to select the type of values that you want to display in the calendar period columns. Options are: |

| Field/Option | Description |
|--------------|---|
| | <ul style="list-style-type: none"> ▪ Planned hours: Shows the planned hours for the calendar period. ▪ Schedule percentage: Shows the planned hours for the calendar period / Total available hours for the calendar period. On the Totals row of the grid, cell background color indicates schedule status: gray (properly scheduled), yellow (under-scheduled), red (over-scheduled). ▪ Utilization percentage: Shows the Billable planned hours for the calendar period / Total available hours for the calendar period. (Billable hours are hours planned for projects that are assigned the Regular charge type.) On the Totals row of the grid, cell background color indicates utilization status: gray (properly utilized), yellow (under-utilized), red (over-utilized). |

Assignments Grid

| Field/Option | Description |
|-------------------------|--|
| Level | <p>This column displays the work breakdown structure (WBS) elements for which the employee has ETC hours.</p> <p>Click ► and ▼ to expand or collapse the WBS levels.</p> <p>Click a WBS element to display a tooltip containing the WBS element name and ID, contract start and end dates, project manager, client, project or opportunity name and ID/number (if the WBS element is not the top-level element in the WBS), status, and any notes entered for the WBS element. Click the Open in Project View link in the tooltip to close the Employee Card dialog box and display the resource plan for the project or opportunity in Project View.</p> <p>If ⓧ displays in this field next to a WBS element, that WBS element is inactive.</p> |
| ETC Before | <p>This column displays the total ETC hours that exist for dates after the JTD date and before the start date of the first calendar period column in the forecast range. (Generally, the JTD date is the date of the latest historical labor record in the database, but your system administrator can specify a different date.)</p> <p>On the Totals row, this column displays the sum of the employee's ETC hours for dates before the start date of the first calendar period column in the forecast range.</p> <p>If the day following the JTD date falls within the date range for the first calendar period column, no ETC hours exist for dates prior to the forecast range, so this column does not display.</p> |
| Calendar period columns | <p>The calendar period columns display planned hours for the employee by day, week, or month.</p> <p>The forecast range you specify in the Change Forecast Range dialog box determines the time frame each calendar period column represents. For example, if you select Weeks in SCALE, 8 in DURATION, and July 1, 2017 in START WEEK, the grid displays eight calendar period columns, each column represents a week, and the first calendar period column is for the week that contains July 1, 2017.</p> |

| Field/Option | Description |
|--------------|--|
| | <p>Using the options in Show Capacity above the grid, you can also display utilization percentages and scheduled percentages for employees in these columns on the Totals row. The values in calendar period columns are calculated and displayed as follows, based on your selection in Show Capacity:</p> <ul style="list-style-type: none"> ▪ Planned hours: Planned hours for the calendar period for the WBS element. The Totals row displays the total planned hours for the employee for the calendar period. ▪ Schedule percentage: The Totals row displays the schedule percentage for the employee: Planned hours for the calendar period / Total available hours for the calendar period. Cell background color indicates schedule status: gray (properly scheduled), yellow (under-scheduled), red (over-scheduled). WBS rows display planned hours. ▪ Utilization percentage: The Totals row displays the utilization percentage for the employee: Billable planned hours for the calendar period / Total available hours for the calendar period. (Billable hours are hours planned for projects assigned the Regular charge type.) Cell background color indicates utilization status: gray (properly utilized), yellow (under-utilized), red (over-utilized). WBS rows display planned hours. <p>For the WBS level rows, bold values in the calendar columns indicate that the hours for the period are hard booked, and italic values indicate they are either all soft booked or a mix of soft-booked hours and hard-booked hours.</p> |
| ETC After | <p>This column displays the total ETC hours that exist for dates after the end date of the last calendar period column in the forecast range.</p> <p>On the Totals row, this column displays the sum of the employee's ETC hours for dates after the end date of the last calendar period column in the forecast range.</p> |

Projects Tab of the Employee Card Dialog Box

View information about the projects that an employee has worked on.

This tab displays each project's name, primary client, start and end dates, and the actual hours that the employee worked on a project. The complete information for the projects that an employee has worked on is on the [Projects tab](#) of the Employees hub.

The **Actual Hours** column on the Projects tab of the Employee Card dialog box displays the total number of job-to-date (JTD) hours that the employee charged to a project. These hours also display in the **Hours** tab on the Projects tab of the Employees hub. Hours charged to lower-level elements of the WBS are rolled up to the top level to get the total hours. These hours are automatically updated when you use the API or the Historical Labor import to bring in hours charged to projects.

Ratios Tab of the Employee Card Dialog Box

View an employee's utilization ratios.

These ratios are important for employees who work on billable projects. Each ratio compares an employee's direct (billable) hours with other types of hours, such as standard hours and absence hours.

The Ratios tab is included on the Employee Card dialog box when you open the dialog box from Timesheet, Expense Report, and Approval Center (for timesheet and expense report approvals).

The tab contains a grid with rows for the ratios and columns for different timeframes for the ratios. A system administrator determines the ratios and timeframes that display in the grid. These settings are on the Ratios tab in Time Settings. If none of the ratios or timeframes is selected to display, the Ratios tab does not display on the Employee Card dialog box.

When the Employee Card dialog box is opened from a timesheet:

- The utilization ratios are calculated specifically for the timesheet period of the timesheet from which you open the Employee Card dialog box.
- Any ratio that involves direct hours is based on the date range for the timesheet period of the timesheet from which you open the Employee Card dialog box.
- Any ratio that involves standard hours is based on the current accounting period.

When the Employee Card dialog box is open from an expense report or an approval record:

- Any ratio that involves direct hours is based on the date range of the current timesheet period.
- Any ratio that involves standard hours is based on the current accounting period.

Grid Rows

Possible ratios that display in rows in the grid are:

| Field/Option | Description |
|-------------------------------|--|
| Direct / Total | This ratio represents the percentage of total hours that are direct (billable) hours. This is also known as the gross chargeable ratio. |
| Direct / (Total – Absence) | This ratio represents the percentage of total hours less absence hours that are direct (billable) hours. This is also known as the net chargeable ratio. |
| Target | This ratio represents the expected percentage of direct (billable) hours for the employee as defined on the Accounting tab of the Employees hub. |
| Direct / Standard | This ratio represents the percentage of standard hours that are direct (billable) hours. Standard hours are based on the non-working days and holidays that a system administrator defines on the Non-Work Days tab in Time Settings. |
| Direct / (Standard – Absence) | This ratio represents the percentage of standard hours less absence hours that are direct (billable) hours. Standard hours are based on the non-working days and holidays that a system administrator defines on the Non-Work Days tab in Time Settings. |

Grid Columns

Possible timeframes for the ratios that display in columns in the grid are:

- **Current**
- **Month-to-Date**
- **Quarter-to-Date**
- **Year-to-Date**

To sort the rows in the grid by one of the grid columns—in ascending or descending order—click a column heading, and then click ▼ or ▲ to the right of the column heading.

Absence Hours Tab of the Employee Card Dialog Box

On this tab, view your or another employee's absence accrual hours, such as hours earned and taken and the current balances for absence accruals such as sick leave and vacation.

The Absence Hours tab is included on the Employee Card dialog box when you open the dialog box from Timesheet, Expense Report, and Approval Center (for timesheet and expense report approvals). If no absence accruals are specified to show on timesheets (the **Show on Timesheets** check box is **not** selected for any absence accruals on the Absence Accrual Setup tab in **Settings » Advanced Accounting » Time Analysis** in the desktop application), the Absence Hours tab does not display on the Employee Card dialog box.

To view other employee's absence accrual information, you must have appropriate security access to view their timesheets.

Grid Rows

Each row in the grid on this tab contains the employee's absence accrual hours that are entered on the Accounting tab in the Employees hub, but only if an absence accrual has been selected to show on timesheets.

Grid Columns

The absence accrual values in this grid are always the most up-to-date values, regardless of timesheet period that you have open.

| Field/Option | Description |
|---------------------|--|
| Absence Accrual | This field displays the name of the absence accrual, such as vacation or sick leave. |
| Starting Balance | This field displays the total hours that the employee has accrued but has not taken at the beginning of the current year. |
| Current Year Earned | This field displays the total number of hours that the employee has earned year-to-date. |
| Current Year Taken | This field displays the total number of hours that the employee has used year-to-date. |
| Unposted Time | This field displays the total absence hours on employee timesheets from the current timesheet that are being charged but have not yet been posted. This applies only to the timesheets entered from the Timesheets |

| Field/Option | Description |
|-----------------|--|
| | application, not the timesheet transactions that are entered in the Transaction Center. |
| Current Balance | This field displays Starting Balance + Current Year Earned – Current Year Taken – Unposted Time. |

To sort the rows in the grid by one of the grid columns—in ascending or descending order—click a column heading, and then click ▼ or ▲ to the right of the column heading.


Change Forecast Range Dialog Box from the Employee Card

Use this dialog box to define the range of calendar period columns to display in the grid on the Assignments tab of the Employee Card dialog box.

Display the Change Forecast Range Dialog Box from the Employee Card

You display this dialog box from the Assignments tab of the employee card.

The Assignments tab displays only when you open the employee card from certain applications.

1. In DPS, open the employee card from such applications as Resource View, Project View, or the Projects hub in planning mode.
2. On the Resource View or Project View form, click an employee name in the grid.
3. In the Employee Card dialog box, click the Assignments tab.
4. On the tab, click **Forecast Range** or click  next to **Forecast Range**.

Contents of the Change Forecast Range Dialog Box from the Employee Card

Use the fields on this dialog box to define the range of calendar period columns to display in the grid on the Assignments tab of the Employee Card dialog box.

Contents

| Field/Option | Description |
|---------------------------|---|
| Scale | Select whether you want the calendar period columns to represent days, weeks, or months. |
| Duration | Select the number of calendar period columns to include for the forecast range. Each calendar period column contains planning data for one day, week, or month, based on what you selected in the Scale field. For example, if you select Weeks in Scale and select 8 in Duration , eight columns display. Each column contains planning data for one week. The options available in the Duration field vary depending on the scale you selected. |
| Start Date/ Week/Month | Based on what you entered in the Scale field, select the first day, week, or month in the forecast range. |

| Field/Option | Description |
|--------------|--|
| | The starting period must be after the JTD date, or if the columns are for weeks or months, the starting period must contain at least one day after the JTD date. After you select the original start day, week, or month, the forecast range automatically shifts forward as time passes. When the first calendar period is no longer in the future, the first calendar period column changes to the next day, week, or month and other calendar period columns shift accordingly to preserve the same forecast range. |

Learn More About

Review topics that have conceptual information about the employee card.

Role Security and the Employee Card

A user's security role determines how much information the user sees on the employee card for an employee.

The employee card allows you to easily view employee information when you are in various applications throughout DPS without having to leave the application to open the Employees hub. For more information about the employee card see [Employee Card](#).

Record Access Security

On the Record Access tab in **Settings » Security » Roles**, the entry that you make in the **Record Level View** field in the Application Record Access grid for the Employees application determines the information that members of a role can see on the employee card for an employee.

Members of a role will see:

- All possible information that is viewable on the employee card for the employees that you specify in the **Record Level View** field.
- Limited information on the employee card for the employees who are not specified in the **Record Level View** field:
- The employee's name and organization (if you use organizations) display on the employee card.
- The Profile tab displays limited information: the employee's full name, email address, labor category, hours per day, and utilization target.

Other Security That Affects the Employee Card

Access Rights to Menu Items

On the employee card, an **Actions** drop-down menu lets you open the Employees hub or Resource View if your security role gives you access to these applications. Access rights to applications (menu items) are entered on the General tab of the Roles form in **Security » Roles**.

When you open the employee card from Timesheet, Expense Report, Resource View, or Project View, you can open the Employees hub from the **Actions** menu if your role gives you access rights to the Employees hub.

When you open the employee card from Project View and the Projects hub (in plan mode), you can open Resource View from the **Actions** menu if your role gives you access rights to Resource View.

Field-Level Security

In Screen Designer, you can specify the fields in the Employees hub that you want to hide from users based on their security role. The Employees hub fields that you hide are also hidden on the employee card.

Info Bubbles and Help

DPS provides graphical elements that display information about certain fields and features within the application. It also provides online help that provides more detailed information about a field or function.

How to...

DPS provides quick access to application and system information.

View an Info Bubble

Many of the DPS tabs and fields include info bubbles, which are small text boxes that contain additional information about the active field, record, data, or user interface object.

To view an info bubble:



- If text in a field displays as a link (blue), click it to view additional related information in an info bubble dialog. The info bubble may include the following types of links:
 - **More...:** Click this link to open the link's respective record in another browser window. To open this record, your security role must have the appropriate access rights to the record that the link will open. Your system administrator must use the Screen Designer to hide any fields that a role should not be able to access. See the Screen Designer help topics for additional information.
 - **Open:** Click this link to open the respective record. Close this dialog box to return to the original view.
- If ⓘ displays near a set of fields or a chart, click that icon to display additional information about the data. This may include calculations and details about where the data is used.
- If a field label displays with a dotted underline, click the label to display additional information about the field.
- To display a description of various user interface objects, hover over the object. (If you are using a tablet or other mobile device, tap the object to display the tooltip.)

Display Help Topics

You can access help topics throughout DPS.


To display help topics:

Do one of the following:

- Click  on the toolbar and click **Help** on the menu. Use the Contents pane or the list of links at the end of the overview topic to display additional information.
- Click  in the upper-right corner of a dialog box to see help specific to that dialog box.

Display DPS Version Number and Other System Information

You can display, in the About dialog box, the DPS version number, the database to which you are connected, and the user ID that you used to log in. Other information provided includes lists of installed components and applications, software licensing and copyright information, and additional miscellaneous system information.

1. Do either of the following:
 - In the browser application, click  on the DPS toolbar.
 - In the desktop application, click **Help** on the DPS toolbar.
2. Click **About**.

Fields and Options


The fields and options in these dialog boxes provide access to application and system information.

About Dialog Box

Use this dialog box to view information about your DPS installation, including the DPS version number, the database to which you are connected, and the user ID that you used to log in.


Other information provided includes lists of installed components and applications, software licensing and copyright information, and additional miscellaneous system information.

If you use the Microsoft Outlook add-in, the System tab on this dialog box displays the file name for the Microsoft Outlook add-in manifest URL that you need when you install the Microsoft Outlook add-in.

To access this dialog box, click the help  on any DPS screen and then click **About**.

Display the About Dialog Box

You display the About dialog box from the main DPS toolbar in either the browser application or the desktop application.

1. Do either of the following:
 - In the browser application, click  on the DPS toolbar.
 - In the desktop application, click **Help** on the DPS toolbar.
2. Click **About**.

Send Email Dialog Box for Help Desk

Use this dialog box to compose and send an email message to a designated help desk email address.

The **To** field on the dialog box prefills with the email address that you entered in the **Default Help Desk** field on the Email tab in **Settings » General » System Settings** in the desktop application. You could enter the email address of the DPS system administrator at your company or Deltek Customer Care.


The message box in the email prefills with user and software information.

You can change the prefilled email address and message as needed.

To display this dialog box, click the help ? icon on the main toolbar in the desktop application, and then click **Help Desk**.

Drop-Down Lists and Lookups

When you enter data on DPS forms, you often can display a drop-down list or a lookup and select the value for the field or grid column.

The ▼ symbol displays in fields and grid cells that have a drop-down list. In some cases, you can also hover over the field, click , and enter or select the value. Most drop-down list values are configurable by your administrator.




Lookups in the Browser Application

Lookups are available in certain fields and give you the ability to search for and select records from either the database or values that were defined by your enterprise.

Lookup lists are available when the search filter ▼ displays in a field. Some lookups may search entries from your database while others are options that are defined by your system administrator. In either case, you can enter search criteria to narrow your search and eliminate the need to scan through large numbers of records.

Click the search filter ▼ in a field to display a list of records that meet the filtering criteria and which your security role is allowed to access. For some fields, this list may include visual cues that provide a quick indication of a record's status. For example, project, firm, or contact lookups display inactive record icons in a lighter, grayed-out font while active records display in a normal color. In addition, some types of lookups include a different icon to indicate another type of status or a status that must be changed before you can select the record.

For example, following are the different visual cues that may display in a Contact lookup:

| Icon | Type | Usage |
|---|----------|---|
|  | Active | The contact is currently active. |
|  | Inactive | The contact is dormant or not active. |
|  | Lead | If your firm uses CRM Plus and enables the Lead Qualification Process in Settings, the Lead icon displays to indicate that the contact is a new lead for your firm. |

| Icon | Type | Usage |
|------|------|---|
| | | If you select a lead from a lookup, you are prompted to qualify the lead to make it a contact. Click Yes to open the Lead Qualification dialog box and qualify the contact before associating it to the project or opportunity record on the Associations tab. |


Each application area may have its own set of indicators. Refer to a specific area for additional information.

For information on configuring lookups, see [Lookups in the Desktop Application](#).

Lookups in the Desktop Application

Use a Lookup to locate a record or group of records in an application or find a record to enter in a field.

In a Lookup, you can enter search criteria that narrows your search and eliminates the need to scan through large numbers of records. A Lookup searches across all records of a single type (all projects, all employees, all contacts, and so on). You can search for records that share certain characteristics. For example, use a Lookup to search for all of your contacts who are located in New York, or all of your projects of the same type. You can also use a Lookup to find a single record, such as a particular employee's Employees hub record.

Lookups are available wherever you see  in the upper-right corner of a field. Click the icon to display a lookup dialog box.

Search Types

On a lookup dialog box, there are four basic search types to choose from when you use a Lookup:

- **Standard:** Use the Standard Lookup for searches using basic criteria such as names, numbers, and types.
- **Advanced:** Use the Advanced Lookup to enter additional criteria that limits the data retrieved by the search.
- **SQL Where Clause:** The SQL Where Clause Lookup lets you perform more complex searches, using your own SQL WHERE clauses.

Clear Button

Before you start a search, click the **Clear** button on the lookup dialog box so that information from the previous search is not included in the new search.

Multicompany

If you have multiple companies in DPS **Active Company** is one of the Search By criteria you can use for projects, employees, and organizations. Using this criterion returns only those records that belong to the currently active company. If you create a global saved search using the **Active Company** criterion, you can use it for all companies.

Configure Lookups

On the Lookups tab in **Settings » General » General System** in the desktop application, you establish settings that control how lookups work, such as how many records can be retrieved by a lookup at one time and how search results display on your Dashboard.



Get Total Rows

The **Use lookup limits** check box and the **Maximum number of records** field on the Lookups tab in **Settings » General » General System** in the desktop application control the number of records that display at one time in the results grid on a lookup dialog box. When you select the check box and enter a maximum number of records to display, the following items display on a lookup dialog box after you click the **Search** button:

- **Show Results (x-xx)** displays above the results grid on the right side of the lookup dialog box. It helps you know your place in the list of records since you cannot see or scroll through them all at one time. Use the right or left arrow beside this text to scroll through and view the next or previous set of retrieved records in the lookup grid.
- **Get Total Rows** text displays in the lower right corner of the lookup dialog box. Click the text to display the total record count for the search results. The **Get Total Rows** text is replaced with **Total Rows** text when you click it.

Search Results Paging

On the Lookups tab in **Settings » General » General System** in the desktop application, if the **Use Lookup Limits** check box is selected and the number of records per page is identified in the **Maximum number of records** field, then the search results are displayed in pages in the search results grid. For search results to be displayed in pages, the number of records must exceed the number identified in the **Maximum number of records** field.

With search results paging enabled, left and right navigation buttons are available at the top of the search results grid. You can use these buttons to switch from page to page. If the **Allow Lookup Limit Override** check box is selected on the General tab of **Settings » Security » Roles** in the desktop application for your role, then the  button is available beside the navigation buttons. The  button disables the paged search results and instead displays the search results in a list.

Displaying Records in Dashparts

When you create system dashparts for the Dashboard in the desktop application, you use a lookup to select the records to display in the dashpart. The **Use Dashboard lookup limits** check box and the **Maximum number of Dashboard records** field on the Lookups tab in **Settings » General » General System** in the desktop application control the number of records that display at one time in the dashpart grid. When you select this check box and enter a maximum number of Dashboard records to display, **<< Previous X Records** and **Next X Records >>** hyperlinks display in the bottom left and right corners of the dashpart dialog box. (X is the maximum number of records you can view at a time.) Click these hyperlinks to scroll through and view all retrieved records in the grid.

Adding New Hub Records on the Fly

Some lookup fields support the option to add a new hub record without going to the Hubs area in the Navigation pane.

This feature enables you to create a new hub record without leaving the form you are currently working on.

Adding new hub records on the fly is supported in the following lookup field types found in different DPS forms:

- Opportunity
- Firm
- Contact
- Project
- Marketing Campaign
- Employees

In the lookup field that supports adding a new hub record on the fly, the **+ New <hub record>** option is available in the drop-down menu of the lookup field. Click the **+ New <hub record>** option to display the corresponding hub dialog box where you can fill in the hub details and save the new record.

For example, in the Marketing Campaigns form, go to the Opportunities & Projects tab. Click **+ Add Opportunity** to add a new row in the Opportunity grid. Click the drop-down for in the **Name** field and select **+ New Opportunity** in the drop-down menu, the Opportunities dialog box displays where you can now add details on the opportunity you are creating.

If the **+ New <hub record>** option is not displayed in the drop-down menu for supported lookup fields, it means that you do not have the appropriate access right to create new records for the hub that the lookup is associated with.

The fields and options that are available in the hub dialog box are also found in the corresponding hubs form. Refer to the corresponding hub form topics for field and option descriptions:

- Opportunities Dialog Box: [Opportunities Form: Opportunities](#)
- Firms Dialog Box: [Firms Form](#)
- Contacts Dialog Box: [Contacts Form](#)
- Projects Dialog Box: [Projects Form](#)
- Marketing Campaigns Dialog Box: [Marketing Campaigns Form](#)
- Employees Dialog Box: [Employees Form](#)

Error Dialog Boxes

An Error dialog box displays when you encounter an error while using DPS.

The dialog box contains a brief summary of the error and some options that you can use for further assistance.

Click **View** to display details of the error, or click **Copy** to copy the error message to the clipboard to send the details to Deltek for support.

Rich Text Editor

Use the rich text editor to enter or review a comment, note, or description on various DPS forms. In some cases, a note field itself provides rich text editing and formatting. In others, you can click an icon near the field to display the editor in a separate dialog box when you want a larger text entry/viewing area or when you want to apply formatting to the text.

Contents

| Field/Option | Description |
|-------------------------|---|
| Text entry area | <p>Enter the text of the comment, note, or description. Click the drop-down arrow in the upper-right corner to display or hide the toolbars that provide editing and formatting options:</p> <ul style="list-style-type: none"> ▪ Bold, italic, underline, strikethrough ▪ Numbered lists ▪ Bulleted lists ▪ Text indent, alignment, and direction ▪ Formatting styles ▪ Paragraph formats ▪ Font types and sizes ▪ Text color and background color ▪ Paste as plain text ▪ Remove formatting |
| Save, Cancel, and Close | <p>Click Save to close the dialog box and display the text in the comment, note, or description field. (To actually save the text to the database, you may also have to save the record of which the comment, note, or description field is a part.)</p> <p>Click Cancel to close the dialog box and discard any text entries or formatting changes you made in that dialog box.</p> <p>If the comment, note, or description is not editable, a Close button displays in place of Save and Cancel.</p> |

Supporting Documents and Files

You can upload supporting documents, files, and images for use with records in the application.

For example, you could upload a file that contains copies of sales receipts for line items on an expense report. Or, you could upload a variety of images to include within a proposal that will be sent to a client.

Supported File Types

Supported file types that you can upload include images, PDFs, Microsoft Word documents, and Microsoft Excel spreadsheets. DPS does not support the upload of password-protected documents.

Upload Documents and Files

You can upload supporting documents and files in the following areas of DPS:

- AP vouchers, accounts payable disbursements, unit transactions, and units by projects transactions that are entered in Transaction Entry.
- Credit Card Reconciliation in Cash Management in the desktop application.
- Expense reports that are entered in My Stuff.
- Interactive Billing
- Purchasing
- AP Invoice Approvals
- Inventory Item Requests
- Hubs
- Proposals

View Documents and Files

The following are other areas of DPS where you can view the contents of uploaded supporting documents on the Supporting Document dialog box:

- Vendor Review and Create Voucher from PO
- Project Review
- Item Review
- Expense Line Item Approval
- Credit Card Review

Upload Examples

There are various methods for uploading a supporting document. For example, to a supporting document for an AP Voucher, you would use the Voucher Supporting Documents dialog box. After uploading the document, a paperclip icon displays on the Vouchers grid to indicate a supporting document was uploaded for the line item.

Or, to upload receipts that are in support of an expense report, click the **Upload Receipts** button on the Expense Reports grid to open the Expense Reports Receipts dialog box. Use this dialog to browse for and select the receipt file. After you save, the receipt is listed in the grid with an icon indicating an attached file.

Files Administration Utility

DPS includes a Files Administration utility, where you can search for and view any of the supporting documents and files that are uploaded in DPS. This utility also confirms that the uploaded files are synchronized between the DPS and FILESTREAM databases. See **Utilities » Files Administration** for additional information.

DPS On-Premises

If you use the DPS on-premise product, you can upload supporting documents only if your administrator has configured the Transaction Document Management (TDM) feature and FILESTREAM. The *Deltek DPS Technical Installation Guide* provides your administrator with detailed instructions.

If you use the DPS Cloud product, the Deltek Cloud Ops Team sets up and maintains TDM and FILESTREAM for you.

Personalizing the User Interface

You can personalize the DPS interface according to your preferences.

Setting Up Preferences

You can use the **My Preferences** option to personalize the DPS interface according to your preferences.

In **My Preferences** you can do the following:

- Change your DPS password.
- Set date and decimal formats.
- Specify a default qualified status for contacts.
- Specify a default country for new records.
- Enable and disable activity reminders.
- Specify what you see when you start DPS.
- Set up approval delegation.
- Add or update an image.
- Enter credentials for linking to a third-party application.

The options that display are based on your application's configuration and security access rights.

How to...


You can establish your own settings for date and number formats, set activity reminders, and more.

Connect to Kona Business

If your firm has implemented integration of DPS with Kona Business, use the My Preferences dialog box to connect to Kona Business.

If you are associated with the integrated Kona Business account, you can connect to that account on the My Preferences dialog box in DPS and then access Kona spaces for opportunities. You can also create Kona tasks for touchpoints related to opportunities.

To connect to Kona Business:

1. On the toolbar, click  and click **My Preferences**.
2. Click **Connect** next to **Kona**.
If your firm has not implemented Kona Business integration, this option is not available.
3. On the Log In dialog box, enter the email address and password that you use to access Kona Business, and click **Log In**.
The connection is established and related information displays on the My Preferences dialog box.


4. Close the My Preferences dialog box.
You remain connected until you click **Disconnect** on the My Settings dialog box.

Connect to GovWin IQ

If your firm has implemented integration with GovWin IQ, use the My Preferences dialog box to connect to GovWin IQ from DPS.

If you have login credentials for GovWin IQ and the required access in DPS, you can create opportunities in DPS by importing opportunities from GovWin IQ.


To connect to GovWin IQ:

1. On the toolbar, click  and select **My Preferences**.
2. On the My Preferences dialog box, click **Connect** next to **GovWin IQ**.
If your firm has not implemented GovWin IQ integration, this option is not available.
3. On the GovWin IQ dialog box, enter the email address and password that you use to access GovWin IQ, and click **OK**.
The connection is established and related information displays on the My Preferences dialog box.
4. Close the My Preferences dialog box.
You remain connected until you click **Disconnect** on the My Preferences dialog box.

Change Your Password

Passwords help ensure system security. You can change your password to ensure system security when needed.

To change your password:

1. On the toolbar, click  **My Preferences** and click **Change Password**.
2. On the Change Password dialog box, enter your current password in **Old Password**.
3. In **New Password**, enter your new password.
If your system administrator established password policies, your new password is accepted only if it meets those requirements.
4. In **Confirm Password**, enter your new password again.
5. Click **OK**.
The next time that you log in, you must use the new password.

Set Date and Number Formats

You can specify your own formats for dates and numeric fields.

To set date and number formats:


1. On the toolbar, click  and click **My Preferences**.
2. Select the General tab.

3. In **Date Format** on the My Settings dialog box, click ▼ and select a format for displaying dates.
4. In **Decimal Symbol**, click ▼ and select the symbol (period or comma) for separating decimal digits from non-decimal digits in numbers.
5. In **Digit Grouping Symbol**, click ▼ and select the symbol (comma or period) for grouping digits in numbers.
6. Click **Save**.
The formats that you select are applied throughout Deltek. You may need to refresh the current page to see your selections reflected.

Set Reminder Preferences

You can create preferences for how you receive reminders for your scheduled activities. These reminders can occur via email or a pop-up alert.

To set a reminder:

1. On the toolbar, click  and click **My Preferences**.
2. Select the General tab.
3. In **Remind me about activities** on the My Preferences dialog box, click ▼, select one of the following types:


| Option | Description |
|---------------------|---|
| No | Reminders are given in the notification center only and you do not receive a pop-up or email message. |
| By email | Reminders by email message only. |
| By pop-up | Reminders by pop-up only. |
| By email and pop up | Reminders by email message and by pop-up. |

4. Click **Save**.

Delegate Approvals

You can assign another person, called a delegate, to perform approvals for you.

To assign a delegate:

1. On the toolbar, click  and click **My Preferences**.
2. Select the General tab.
3. Select the **Delegate Approvals to** check box.
4. In the field to the right of the check box, select the employee who will perform approvals in your absence.


5. Click **Save**.
6. When you want to resume performing approvals, clear the **Delegate Approvals to check** box on the My Preferences dialog box.
The delegate stops receiving approval alerts and no longer receives approval assignments on your behalf.

Set Default Qualified Status and Country

You can specify defaults for qualifying contacts and for the country that displays when you create a new record in the Opportunities, Firms, Contacts, or Projects hubs.

The **Default Qualified Status** and **View Leads in Contact Fields** options display if you use CRM Plus and the Lead Qualification process is enabled in Settings.


To choose the qualified status and country:

1. On the toolbar, click  and click **My Preferences**.
2. Select the Defaults tab.
3. From the **Default Qualified Status** drop-down list, select the default status for new contacts created in the Contacts hub.
 - Choose **New Lead** to create new contacts in the "lead" phase without any associated firm or other records.
 - Choose **Qualified Contact** to create all new contacts as qualified.
4. Select the **View Leads in Contact Fields** checkbox to include leads in all contact lookups. If this option is not selected, leads are hidden from the user in those areas.
5. From the **Default Country** drop-down list, select the country to display when you create a new opportunity, firm, contact, or project.
6. Click **Save**.

Set Startup Preferences

You can choose the startup page that displays when you launch DPS.

To select your startup page:


1. On the toolbar, click  and click **My Preferences**.
2. Select the Startup tab.
3. Choose your default startup preference — the Welcome page, the last application that was in use, or a specific application.
4. Click **Save**.
The specified page will display each time you log in to DPS.

Upload a Personal Photograph or Other Image

You can upload a photograph of yourself or another personal image to display on the My Preferences dialog box. You can also select an image from the library of images that is supplied with DPS.

Supported image file types are .GIF, .JPG, .JPEG, .PNG, and .BMP.

To upload a personal photograph or other image:

1. Click  on the DPS toolbar, and click the Images tab on the My Preferences dialog box.
2. Hover over the image box and click **Update Image**.
3. On the Update Image dialog box, select one of the following actions:
 - To upload your own image file, click **Upload**, select the image file, and click **Open**.
 - To select an image supplied with DPS, click **Library**, select an image, and click **Select**.
 - To remove the current image, click **Remove**.

If you assigned a new image, DPS automatically scales the image to fit in the frame.

4. You can resize and crop the image if needed. Any portion of the image outside the frame is cropped when you save the image. If necessary, do either or both of the following:
 - Drag the slider beneath the image frame to resize the image and increase or decrease the portion of the image that is within the frame.
 - Drag the image to change the portion of the image that is within the frame.
5. Click **Save**.

Fields and Options

These forms and dialog boxes are available via My Settings options.

My Preferences Dialog Box

Use this dialog box to select settings to personalize DPS.

These settings apply only to you.

Display My Preferences Dialog Box

You display this dialog box from the DPS toolbar.

On the toolbar, click  and click **My Preferences**.

General Tab of My Preferences Dialog Box

Use this tab to define the general settings for the DPS application.

Contents

| Field/Option | Description |
|----------------------------|---|
| Date Format | Select a format for displaying dates. |
| Decimal Symbol | Select the symbol (period or comma) for separating decimal digits from non-decimal digits in numbers. |
| Digit Grouping Symbol | Select the symbol (comma or period) for grouping digits in numbers. |
| Remind Me About Activities | You can create preferences for how you receive reminders for your scheduled activities. These reminders can occur via email and/or a pop-up alert, and you can specify the frequency with which you receive activity reminders. This option is only available if you own CRM. |
| Delegate Approvals To | <p>Select this option to temporarily assign another person, called a delegate, to perform approvals in your absence. This option is only available if Accounting is enabled.</p> <p>The delegate can approve various types of records in DPS on your behalf, but only if their role security allows access to the DPS menu items from which to approve records as well as access to specific records, such as projects and employees. The delegate receives approval alerts and can approve and reject records for you. You (the delegator) continue to receive alerts (along with the delegate) so that you are aware of any approvals processed in your absence. At a future time, you can reverse this and resume the task of performing the approvals yourself.</p> <p>When you select this option, the Employees lookup is enabled. Specify the employee who will serve as the delegate for you.</p> |
| Change Password | Passwords help ensure system security. You can click Change Password to open the Change Password dialog box and change your password. |

Defaults Tab of My Preferences Dialog Box

Use the Defaults tab of the My Preferences dialog box to specify defaults for qualifying contacts and for the country that displays when you create a new record in the Opportunities, Firms, Contacts, or Projects hubs.

Contents

| Field/Option | Description |
|------------------------------|--|
| Default Qualified Status | <p>This option displays if you use CRM Plus and the Lead Qualification process is enabled in Settings. Use this option to specify the default value for the Qualified Status when a new contact is created in the Contacts hub. Options include:</p> <ul style="list-style-type: none"> ▪ New Lead. Select this option for all new contacts to be created with a qualified status of New Lead. This indicates that the contact is in the "lead" phase without any associated firm or other records. As you work with the contact and your relationship evolves through the lead qualification process, you can change the contact's status in the Contacts hub to Qualified Contact. Business developers are likely to select New Lead as the default. ▪ Qualified Contact. Select this option for all new contacts to be created as qualified contacts. This option is selected by default and allows you to bypass the qualification process if your role does not typically work with prospects. |
| View Leads in Contact Fields | <p>This option displays if you use CRM Plus and the Lead Qualification process is enabled in Settings. Select this check box to include leads in all contact lookups. If this option is not selected, leads are hidden from the user in those areas.</p> |
| Default Country | <p>Select the default country that displays when you create a new opportunity, firm, contact, or project. You can change this field.</p> <p>When you create a new opportunity, firm, contact, or project record, the country should default to the default country in My Preferences. This should only default if there is no other place from which to default the field. For example, if you create a new record by copying an existing record, then the country should be copied from the other record and not defaulted from settings. Also, Project Templates and Defaults override settings.</p> |

Startup Tab of My Preferences Dialog Box

Use the Startup tab to specify what you see each time that you log in to DPS— the Welcome page, the last application that was in use, or a specific application.

Contents

| Field/Option | Description |
|----------------------------|---|
| Open Application Used Last | <p>Select this option to automatically open the last application that was in use.</p> |

| Field/Option | Description |
|-----------------------|---|
| Open Welcome Page | Select this option to open the Welcome page. |
| Open This Application | Use this lookup to select a specific application that will open when you log in. The options that display are based on your security role's access rights. Note that if the specified application is subsequently removed from your security role's access rights, the Welcome page displays. |

Credentials Tab of My Preferences

Use this tab to enter credentials for connecting to GovWin IQ.

This tab displays when using CRM and GovWin IQ credentials (Client ID and Secret) have been entered on the GovWin IQ tab in **Utilities » Integrations**.

Contents

| Field/Option | Description |
|--------------|---|
| GovWin IQ | Select this option to connect to GovWin IQ. |

Image Tab of My Settings Dialog Box

You can upload an image (for example, a logo or a contact photograph) to DPS so that you can assign it to an opportunity, firm, contact, or employee. You can also select an image from the library of images supplied with DPS. You can also remove an existing image. If you do not assign an image, a default image is used.

Supported image file types are .GIF, .JPG, .JPEG, .PNG, and .BMP.

For you to be able to change an image, your security role must have the access rights to update the record.

Contents

| Field/Option | Description |
|--------------|--|
| Upload Image | <p>Complete one of the following to upload an image:</p> <ul style="list-style-type: none"> To upload your own image file, click Upload, select the image file, and then click Open. To select a supplied image, click Library, select an image, and then click Select. To remove the current image, click Remove. <p>If you assigned a new image, DPS automatically crops and scales the image and displays it in the Image field.</p> |

| Field/Option | Description |
|--------------|---|
| | Use the slider control below the Image field to expand or contract the image as needed. The image will resize accordingly and the cropping frame illustrates what will display for the record's image. The results of your actions display in Cropped Image . |

Update Image Dialog Box

You can upload an image for any hub that displays an image for the selected record (for example, a firm logo or a contact photograph), and you can upload a personal photograph or other image to display on the My Preferences dialog box. You can also select an image from the library of images supplied with DPS. If you do not assign an image, DPS uses a default image.

Supported image file types are .GIF, .JPG, .JPEG, .PNG, and .BMP.

After you upload or select an image, DPS automatically scales the image to fit the frame.

If your security role does not have access rights to update a hub record, you cannot change the image for that record. You also cannot change the image for a hub record that is not active. For records that are not active, the image is dimmed, and the record status displays across the bottom of it in place of the **Update Image** option.

Display the Update Image Dialog Box

You display the Update Image dialog box from the My Preferences dialog box or from any hub that displays an image for the selected record.

- Do one of the following:
 - To update the image for a hub record, display that record in the hub.
 - To update your personal image, click  on the DPS toolbar, and select the Images tab on the My Preferences dialog box.
- Hover over the image box and click **Update Image**.

Contents of the Update Image Dialog Box

Use this dialog box to upload images to DPS.

Contents

| Field/Option | Description |
|--------------|--|
| Upload | Click Upload to upload your own image file. Click Open after you select the file. |
| Library | Click Library to select an image supplied with DPS. Click Select after you select the image. |
| Image frame | After you upload or select an image, the image displays in the image frame. You can resize or crop the image if needed. Any portion of the image outside the frame is cropped when you save the image. |

| Field/Option | Description |
|--------------|---|
| | <p>To resize or crop an image, do either or both of the following:</p> <ul style="list-style-type: none"> ▪ Drag the slider beneath the image frame to resize the image and increase or decrease the portion of the image that is within the frame. ▪ Drag the image to change the portion of the image that is within the frame. <p>Note that if you are using Internet Explorer or Safari, you cannot crop outside of the image area.</p> |
| Remove | Click Remove to remove the image file. |
| Save | <p>Click Save to save your changes. If you removed an image, the stock blue and white picture displays instead. If you cropped the image, only the cropped image is saved.</p> <p>If you save a cropped image and decide you do not like the results, display the dialog box and upload the original image again.</p> |

Change Password Dialog Box

Passwords help ensure system security. Use the Change Password dialog box to change your password or, if you do not yet have one, to create it.

Display the Change Password Dialog Box

You display this dialog box in My Preferences.

On the toolbar, click  **My Preferences** and click **Change Password**.

Contents of the Change Password Dialog Box

Use these fields to change your password.

Contents

| Field/Option | Description |
|------------------|---|
| Old Password | Enter your current password in Old Password or, if you do not currently have a password, leave it blank. |
| New Password | Enter your new password. If your system administrator established password policies, your new password is accepted only if it meets those requirements. |
| Confirm Password | Enter your new password again. Click OK to save your changes. |

Change the Active Company

The company that you select at login is the active company. If DPS is set up to use multiple companies and if your security role gives you access to more than one company, you can switch to a different active company after you log on to DPS.

To change the active company:

Make the change from the browser or desktop application:


- From the browser: On the main DPS toolbar, click the name of the currently selected company and select the company you want from the drop-down list.
- From the desktop: Select **Utilities » Change Company**.

Enable or Disable Usage Tracking

Use the Usage Tracking dialog box to enable usage tracking. When this option is enabled, DPS high-level use statistics, such as the number of times that the application is launched and the number of sessions, are gathered and sent to Deltek.

Deltek uses this tracking information to monitor application use levels and to develop the product. No identifiable personal or company-related information is collected or transmitted.

To enable or disable usage tracking:

1. On the DPS toolbar, click  and click **Usage Tracking**.
2. On the Usage Tracking dialog box, select the **Usage Tracking Enabled** check box to enable tracking. Clear the check box to disable it.
3. Click **OK**.

Customize the UI

Your system administrator can customize DPS UI screens, dashboards, and menus.

To customize the DPS UI:

Do one or more of the following:

| To customize | Do this |
|--|---|
| DPS labels to replace them with labels specific to your enterprise. | Use the Labels & Lists in the browser application. See the Labels & Lists Settings help topic for details. |
| Tabs, fields, and grids in hubs | Use Screen Designer in both the browser and desktop applications. See the Screen Designer help topic for details. |
| Browser dashboards to bring together all of the information and tools that you rely on most. | Use Dashboard Designer in the browser application. See the Dashboard Designer help topic for details. |

| To customize | Do this |
|---|--|
| The desktop Navigation menu to add new menu items, rearrange existing menu items, or delete menu items. | Use Navigation Menu Designer in the desktop application. See the Navigation Menu Designer help topic for details. |

User-Defined Tab

This is a user-defined tab in the DPS browser application that was added by your system administrator.

Because it is a non-standard tab, there is no help topic for it. However, your system administrator may have added helpful information directly on the tab itself. To access this information on the tab:

- Click ⓘ beside a field or divider line to read more information about the field or the section that is defined by the divider line.
- Read other informational or instructional text that is directly on the tab.

For information on how to add i-buttons for fields and divider lines and how to add informational text directly on tabs, see the following topics for system administrators:

- [Add a Tooltip to a Tab in a Hub](#)
- [Add a Label to a Tab in a Hub](#)

Common Tasks

This section describes basic tasks that can be launched from various areas in DPS.

Searching for Records

To locate records in DPS, you can type search characters in the search field, select a standard search filter or a saved custom search, or create a new custom search.

How to...

DPS provides multiple ways to find records.

Search for and Select a Record

Use the search field to find and select a record that you want to review or edit.

To find and select a record:

1. Display the hub or application.
2. Click the search filter ▼ and do one of the following:
 - Select a standard filter, such as **Active** or **Mine**.
 - Select an existing legacy filter.

- Select **+ New Search** to display the New Search dialog box, on which you can create a new custom filter that is immediately applied.

Records that meet the filtering criteria, and which your security role may access, display in a drop-down list. The records in this list may include visual queues that provide a quick indication of the record's status. For example, project, firm, or contact lists display inactive record icons in a lighter, grayed-out font. Active records, however, display in a normal color. Refer to the Lookups in the Browser Application online help topic for additional information.

3. Optional. To refine the list further, type one or more characters in the search field and pause to allow time for the results set to refresh.
4. Select a record from the drop-down list.
5. To see the contents of another record in the search results set, use the paging arrows beside the search field or toggle to the list view and edit many records in a list at once.

Example: Search for and Select a Contact Record

In the Contacts hub, you could find and select a contact from among those considered active leads.

A lead is a contact or contact that you plan to cultivate to help your firm find new opportunities and, ultimately, new projects.

To find and select a contact record:

1. In the Navigation pane, go to the Hubs section and select **Contacts**.
2. To refine the list of contacts, click the search filter ▼ and then select **Active Leads**.
Active contacts with a qualified status of lead, and which your security role may access, display in the drop-down list.
3. Optional. To refine the list further, type one or more characters in the search field and pause to allow time for the results set to refresh.
4. Select the contact.
5. To see the contents of another record in the search results set, use the paging arrows beside the search field.

On the Summary pane, you review or edit key contact data. On the tabs, you review and edit details about the contact's associations, touchpoints, files, marketing campaigns, and employees who are associated with the contact.

Create a Custom Search

If none of the default searches meets your needs, create a custom search. You can save a custom search for future use.

To see the criteria for a custom search, hover over the search name if the search is saved, or hover over **Custom** if it is not saved.

To create a custom search:

1. Display the search drop-down list at the left end of the search field.

2. At the bottom of the drop-down list, click **Custom** to display the Custom Search dialog box.
3. If you intend to save the search, enter a name for it in **Search Name**.
4. If you want other users to be able to use the search, click **+Save Options** and select one or more of the following:
 - **My Role:** All users with your security role can use the search.
 - **Everyone:** All users can use the search.
 - **Specific roles:** Users with the specific security roles you select can use the search.
5. Use the other search fields to enter filter values to restrict the list of records that the search returns.

DPS provides a default set of fields on this dialog box. However, if you need to filter the records search based on values in other fields, you can click **+ Add Field** at the bottom of the dialog box to add a field to the dialog box.

6. Do one of the following:
 - To save the search and then perform the search, click **Save**.
 - To perform the search without saving it, click **Apply**.

The Custom Search dialog box closes. The search field on the hub or application form displays a drop-down list of the records returned by the search.

Example: Create a Custom Search for Firms

The example explains how to create a custom search that limits firms in the results sets to those that specialize in the education market and which have done work for your company in the past.


To create the custom search:

1. In the Navigation pane, go to the Hubs section and select **Firms**.
2. Display the search drop-down list at the left end of the search field.
3. At the bottom of the search filter drop-down list, click **Custom** to display the Custom Search dialog box.
4. In **Search Name**, enter a descriptive name such as **Schools and prior work**.
5. In **Market**, select **Education**.
6. To add prior work as a search criterion:
 - a) At the bottom of the Custom Search dialog box, click **Add Field**.
 - b) Click ▼ and select **Prior Work**.
The **Prior Work** field displays on the Custom Search dialog box.
 - c) Click ▼ in the **Prior Work** field and select **Yes**.
7. Click **Save**.
The custom search that you is now available in the drop-down list of searches and can be used in future sessions.

Edit a Custom Search

If saved custom searches exist for a given hub, you can edit their contents. You can also save a search with a new name to create a new similar search.

To edit a custom search:

1. Display the search drop-down list at the left end of the search field.
2. Hover over the search you want edit and click  next to the search name.
3. On the Edit Custom Search dialog box, change any criteria.
4. To change the name of the search:
 - a) Click **+Save Options** above the **Search Name** field.
 - b) Click **Edit Search Name**.
 - c) On the Edit Search Name dialog box, specify a new name and click **Save**.
5. To update the existing search with your changes, click **Save**.
To save the modified search criteria as a new custom search, click **Save As** and enter a name for the new search on the Save As dialog box.

Fields and Options

You can search for records on most screens throughout DPS.


Search Dialog Box

Use the Search dialog box to search for records across all of the hubs.

Use the Options tab to specify search criteria. Use the Results tab to review the records that match your search criteria. Searches retrieve only those records to which you have security access.

Display the Search Dialog Box

Display the Search dialog from the DPS toolbar.

Click  **Search** on the DPS toolbar.

Contents of the Search Dialog Box

| Field/Option | Description |
|--------------|--|
| Search Text | Enter the text value for the search. Then specify the Hub and the columns that you want to search. |
| Search | Click this button to initiate the search. When the search is complete, DPS switches to the Results tab and displays a list of records that match the search criteria specified on the Options tab. |

Search Options Grid

| Field/Option | Description |
|------------------|--|
| Search Drop-down | <p>Click the drop-down arrow on a grid header to complete any of the following actions:</p> <ul style="list-style-type: none"> To print grid data, click Print. On the Print Preview form, click File » Print to send the grid data to your default printer. To export grid data to an Excel spreadsheet, click Export to Excel. When Microsoft Excel opens, use its features to modify, print, or email the grid data, or to save the spreadsheet file locally. To turn on grouping for a grid, click Enable Grouping. When a field displays with the instruction: "Drag a column header here to group by that column," drag and drop column headers into the field, in the sequence that you want them to display. <p>Not all options are available on all grids.</p> |
| Hubs | This field displays the names of the hubs that are available for searching. |
| Search | Select the hubs that you want to include in the search. If a check mark displays in this field, the hub is included in the search. |
| Search Columns | <p>Use this field to select the columns that you want to search in each hub. Your column selections determine what data DPS looks at when it searches for records that contain your search text.</p> <p>The columns available for searching vary for each type of hub. For example, you want to search on columns in the Opportunities hub. If you select Opportunity Name and the search text you enter displays in the Opportunity Name column of an opportunity record, DPS includes that record in the results list.</p> <p>You can select as many columns as you like.</p> |

Search Results Grid

| Field/Option | Description |
|--------------|---|
| Hub | This field displays the name of the hub in which the matching record is located. |
| Name | This field displays the name of the hub record that contains the search text that you entered. Click a name in this field to open the corresponding record. |

Custom Search Dialog Box

Use this dialog box to create, edit, and save custom searches.

Display the Custom Search Dialog Box

You can display this dialog box from any search field.

1. Click ▼ in the search field to display the standard search filters and any custom searches that have been created for the hub or application.
2. At the bottom of the drop-down list, click **Custom**.
 - To create a new custom search, click **Custom** at the bottom of the drop-down list.
 - To edit an existing custom search, click ✎ next to that custom search on the drop-down list.

Contents of the Custom Search Dialog Box

Establish and save your custom searches on this dialog box. Many of the fields vary depending on the hub or application in which you are working.

This topic provides a general description of the options in all Custom Search dialog boxes. If there is additional information specific to custom searches for a given hub or application, that information will be available in the area of the help for that hub or application.

Contents

| Field/Option | Description |
|--------------------------------------|--|
| Search Name | <p>If you want to save the custom search so you can use it again in the future, enter a name for it in Search Name.</p> <p>If you do not want to save the search, do not enter a name.</p> |
| +Save Options / +Hide Options toggle | <p>When you add or edit a saved search, click +Save Options to specify who can use the search. Use the drop-down list and the Special Selections option on that list to select one or more of the following:</p> <ul style="list-style-type: none"> ▪ Myself: You can use the search. This option is automatically selected for all saved searches. ▪ My Role: All users with your security role can use the search. ▪ Everyone: All users can use the search. ▪ Specific roles: Users with the specific security roles you select can use the search. <p>You can always save searches for your own use, but you save searches for other users if your security role is set up to allow that.</p> <p>Also use +Save Options for a previously saved search to display the ✎ Edit Search Name option, to change the name of the search, or the 🗑 Delete Search option, to remove the search.</p> <p>To hide the save options, click +Hide Options.</p> |
| Records | <p>Select one of the standard filters provided for the hub or application in which you are working (for example, All, Active, or Mine).</p> |

| Field/Option | Description |
|------------------------|--|
| Search fields | <p>Use the other fields on the dialog box to enter search values to further restrict the list of records that the search returns.</p> <p>If you select multiple fields for a custom search, those search criteria are joined by an implied AND. For example, if you set up a search for projects with the Status field set to Active and the Charge Type field set to Regular, the search returns only projects that have both the Active status AND the Regular charge type.</p> <p>If you select multiple values for a single search field, those search criteria are joined by an implied OR. For example, if you set up a search for projects with both Brian Waters and Ann Johnson selected in the Project Manager search field, the search returns all projects that have either Brian Waters OR Ann Johnson as the project manager.</p> <p>The following describe the types of search fields that may be available:</p> <ul style="list-style-type: none"> ▪ Date fields: Either enter a specific date range by selecting a beginning date, an ending date, or both, or select from a list of predefined time periods relative to the current date (Last Week, Last Month, Next 3 Months, and so on). Use the Specific Dates / Relative Dates toggle above each date field to select the date search option you want. ▪ Drop-down fields: Select one or more values for the search. For example, when you are trying to locate projects, you could search for projects with any of three project types that you select in Project Type search field. You must select the values one at a time, but you can select as many as you want. ▪ Number fields: Specify a range by entering a minimum value, maximum value, or both. ▪ Currency fields: Specify a range by entering a minimum amount, maximum amount, or both. ▪ Text fields: Enter one or more characters in the field to search for records that have a value in that field that contains those characters. ▪ Memo fields: Enter one or more characters in the field to search for any records that have a value in that field that contains those characters. ▪ Check boxes: Select Yes to search for records for which that check box is selected. Select No to search for records for which that check box is not selected. (Select the blank option if you do not want to include that check box as one of the search parameters.) |
| Search field operators | <p>Most search fields have one or more of the following operator options that you select either from the operator drop-down list at the left end of the field or by clicking Special Selections on the drop-down list for the field itself:</p> <ul style="list-style-type: none"> ▪ Equals: Search for records that have a value in the field that exactly matches one of the values in the search field. |

| Field/Option | Description |
|--------------|--|
| | <ul style="list-style-type: none"> ▪ Not Equal: Search for records that have a value in the field that does not match any of the values in the search field. ▪ Starts With / Contains: If you enter one character in the search field, search for records that have a value in that field that starts with that character. If you enter more than one character in the search field, search for any records that have a value in that field that contains those characters. ▪ Is Empty: Search for all records for which the field is blank. ▪ Is Not Empty: Search for all records for which the field is not blank. ▪ Is Me: For employee fields, search for records that have you in that field. For example, to find projects for which you are the project manager, you could select the Is Me option for the Project Manager search field. (Use the Not Equal operator along with this one to do an "is not me" search.) ▪ Is Mine: For full organization or organization level search fields, search for records for which the organization matches the organization to which you are assigned in the Employees hub. (Use the Not Equal operator along with this one to do an "is not mine" search.) ▪ Is Active Company: For a full organization search field or organization 1 search field, search for records for which the organization 1 matches the current active company (the currently selected company). (Use the Not Equal operator along with this one to do an "is not the active company" search.) |
| + Add Field | <p>DPS provides a default set of fields on this dialog box. However, if you need to filter the search based on values in other fields, you can add them to the dialog box. To add a field, click + Add Field at the bottom of the dialog box and select the new search field in the field that displays.</p> <p>You can also delete fields from the dialog box that you never expect to use. Search Name and Records are the only fields you cannot delete. To delete a field, hover over the field and click X to the right of the field name.</p> <p>When you add or remove fields and click Save, Save As, or Apply, that new set of fields becomes the default set for any new searches you create. The changes do not affect the fields that are available when you edit an existing saved search that used a different set of fields.</p> |
| x Clear All | <p>If you enter search parameters and then decide you want to clear all of them and start over, click x Clear All at the bottom of the dialog box. DPS removes entries from all fields except Search Name.</p> |
| Save | <p>To save a new custom search with a search name, click Save.</p> |
| Save As | <p>To save an existing search with a new search name, click Save As.</p> <p>This displays the Save As dialog box so you can enter a name for the search before you save it.</p> |

| Field/Option | Description |
|--------------|---|
| Apply | To perform the search without saving it, click Apply . If the results are not what you want, display the search drop-down list, click Custom again, and make the necessary changes to the search parameters. Though you did not save the search, your latest search settings are preserved until you leave the DPS application that you are working in. |

Importing Records from .CSV Files

If you have access to **Utilities » Imports & Exports**, you can run an import process that adds multiple records from .CSV (comma-separated values) files into DPS. This allows you to quickly add multiple records into the application.

When you run the import process, a new record is added in DPS for each record in the .CSV file that does not already exist in the database. For this to occur, information between the two applications is mapped according to type of record (contact, opportunity, and so on). DPS runs a check to ensure there are no duplicate records in the database.

The import can include any standard or custom data that you enter on any tabs in the area, with the exception of fields in grids. Data that you enter in the grids cannot be imported.

Tablets and other devices that use the iOS operating system cannot upload files through the browser. As a result, you must run the import process using a different device, such as a laptop or an Android tablet.

How to...

You can import record data from a .CSV file into DPS.

Prepare the .CSV File

Before you import data into DPS, prepare a comma-separated values (.CSV) file that contains the data that you want to import.

To prepare the .CSV file:

1. Export the record information from the source application (for example, Deltek Costpoint or Microsoft Outlook) into a .CSV file.
2. Open the .CSV file in Microsoft Excel or another compatible application and verify that the first row of data in the file contains field names.
The import process assumes that the first row contains field names, not actual data. It uses those field names during the field mapping step of the import process.
3. Delete from the file any records that you do not want to import into DPS.
4. Verify that the file has no merged cells.
5. Review the remaining data in the .CSV file to ensure accuracy.

This is particularly important for contact names and firm names because the import process creates new records for those if it does not find a matching contact name or firm name already in DPS. For example, if you import two contacts who are associated with

the Acme, Inc. firm, make sure that you spell the firm name exactly the same in both contact records in the import file. If one contact record contains "Acme" and the other "Acme, Inc.," the import process will create two firms: Acme and Acme, Inc.

Other than making sure the correct records will be imported and the data is accurate, you should not need to "clean up" the .CSV file before you run the import process. Because you explicitly map the .CSV fields to DPS fields during the import process, the field names in the file do not have to match the field names in DPS, and the order of the fields in the .CSV file does not matter. It also does not matter if the .CSV file contains fields that have no equivalent field in DPS or contains fields that you do not want to import for some other reason. The import process ignores fields in the file that you do not map to DPS fields.

6. Save the file.

Map the .CSV Fields to Fields in DPS

Before you can import data from a .CSV file, you must map the .CSV fields to DPS fields.

To map the .CSV fields to fields in DPS:

1. In the Navigation pane, select **Utilities » Imports & Exports**, click **Imports**, and select the area in which you want to import the record.
See [Mapping Information for .CSV Imports](#) for specific field mapping information.
2. On the Import from CSV dialog box, browse to the .CSV file that you want to import and click **Next**.
The first time that you display this dialog box, DPS attempts to provide default field mappings based on the field names in your .CSV file and the field names in DPS. Review those default mappings and change any that are incorrect. Thereafter, your previous field mappings display by default.
3. For each .CSV field in the **Source File Field** column that you want to import into DPS, select the corresponding DPS field in the **Deltek Field** column. If the .CSV file contains fields that you do not want to import, select **Do not import** for those fields.

Check for Duplicate Records

You can specify how you want the import process to handle a contact if it already exists in DPS.

To check for duplicate records:

1. In the Navigation pane, select **Utilities » Imports & Exports**, click **Imports**, and select the area in which you want to import the record.
2. On the Import from CSV dialog box, browse to the .CSV file that you want to import and click **Next**.
Complete one of the following:
 - Select **Do not import duplicate records** if you do not want to import any information for a contact who already exists.
 - Select **Update duplicate records** if you want the import process to update fields in DPS for a contact who already exists in DPS. If a field in the existing record is blank or contains information that is different from information in the mapped field in

the .CSV file, the field in the existing record is updated with the information from the .CSV file.

The import process checks for an existing record. Duplicates are identified by matching on one of the following:

- First name, last name, and firm
- Preferred name, last name, and firm
- Email address

If one of the names and the firm match or if the email address matches, the record in the .CSV file is considered a duplicate.

Run the Import Process

To import data into DPS from a .CSV (comma-separated values) file, click the link for the import on the Imports tab on the Imports and Exports form.

Prerequisites:

- Before you start this procedure, you must generate a .CSV file containing the data that you want to import. A common practice is to download data to Microsoft® Excel® and save the spreadsheet as a .CSV file. Review the file carefully to make sure the data it contains is correct.
- Tablets and other devices that use the iOS operating system cannot upload files through the browser. As a result, you must run the import process using a different device, such as a laptop or an Android tablet. If you are using an iOS device, the import option is disabled on the Imports tab.

To run the import process:

1. In the Navigation pane, select **Utilities » Imports & Exports » Imports**.
2. On the Import From CSV dialog box, click **Browse**, navigate to and select the .CSV file, and click **Open**.
3. Click **Next**.
The Import From CSV dialog box displays a list of fields from your .CSV file and a default mapping to fields in DPS. If **Do not import** displays in **Deltek Field**, DPS was unable to determine how to map that .CSV field.
4. Do one of the following:
 - Select **Do not import duplicate records** if you do not want to import any information for a record that already exists in DPS.
 - Select **Update duplicate records** if you want the import process to update an existing record if a field in that record is blank or contains information that is different from information in the mapped field in the .CSV file.
 - Select **Delete existing records and import** if you want the import process to delete from DPS all records of the type you are importing and then import the contents of the .CSV file. This option is useful if the .CSV file always contains all the current records.

For certain imports, some or all of these options are not available.

5. Review the default field mappings to verify that all fields in the .CSV file, listed in **Source File Field**, are mapped to the correct field in DPS. If a default mapping is incorrect or if **Do not import** displays in **Deltek Field** and you want to import the data in that .CSV field, select the correct field in **Deltek Field** on that grid row.

If the .CSV file contains fields that you do not want to import into DPS, make sure that **Deltek Field** contains **Do not import** for those fields. The import process only imports data from fields that you map to a Deltek field.

6. To start the import process, click **Import**.

Depending on the number of records to be imported, the import process can take a while. You can continue working in DPS while you wait for it to finish.

The import process does the following:

- If you selected **Delete existing records and import**, it deletes from DPS all existing records of the type you are importing.
 - It adds records for any records in the import file that do not currently exist in DPS.
 - If you selected **Update duplicate records**, it updates mapped fields in DPS based on the information in the .CSV file for any records that already exist in DPS.
7. If the import process is unable to import one or more records (because of required data that is missing from the .CSV file, for example), a message displays at the top of the DPS page. If that occurs, click the **Download the CSV file** link in the message to review the records that were not imported and the reasons why the imports failed.

Review Import Errors

You can review errors that occur with the import process.

To review the import errors:

1. To start the import process, click **Import**.
If the import process is unable to import one or more records (because of required data that is missing from the .CSV file, for example), a message displays at the top of the DPS page.
2. Click the **Download the CSV file** link in the message to review the records that were not imported and the reasons why the imports failed.

Fields and Options

These forms and dialog boxes are available in Utilities.

Import From CSV Dialog Box

After you prepare a .CSV (comma-separated values) file that contains data that you want to import into DPS, use the Import From CSV dialog box to map the fields in your .CSV file to the corresponding fields in DPS and to run the process to import the data from the .CSV file.

Display the Import from CSV Dialog Box

You display this dialog box from the Imports tab of the Imports & Exports form.

1. In the Navigation pane, select **Utilites » Imports & Exports » Imports**.
2. On the Imports form, click the link for the type of import that you want to perform.

Contents of the Import from CSV Dialog Box

Use the fields and options on this dialog box to select the .CSV file that contains the data you want to import, to map the fields in the .CSV file to DPS fields, and to start the import process.

The Import From CSV dialog box first prompts you to select your .CSV file.

| Field/Option | Description |
|--------------|---|
| Browse | Click Browse , navigate to and select the .CSV file, and click Open . |
| Next | Click Next to go to the next step in preparing for the import process. |

After you select the .CSV file and click **Next**, the Import From CSV dialog box displays a different set of controls so you can map the fields in the .CSV file to DPS fields and start the import process.


| Field/Option | Description |
|------------------------------------|---|
| Do not import duplicate records | If you do not want the import process to update any information for a record that already exists in DPS, select this option. |
| Update duplicate records | If you want the import process to update fields in DPS for a record that already exists, select this option. If a field in the existing record is blank or contains information that is different from information in the mapped field in the .CSV file, the field in the existing record is updated with the information from the .CSV file. |
| Delete existing records and import | if you want the import process to delete all existing records in DPS of the type that you are importing and then import the contents of the .CSV file, select this option. This option is useful if the .CSV file always contains a complete set of the records of that type. This option is only available for some of the imports. |
| Source File Field | This column contains the field names from your .CSV file. DPS assumes that the first row of the .CSV file is a header row and that the values in that row are the field names. |
| Deltek Field | Use the fields in this column to select the DPS field that corresponds to each of the .CSV file fields that you want to import. The drop-down list contains all standard and custom fields for which you can import data. Grid fields are not listed; you cannot import data for those fields. |

| Field/Option | Description |
|------------------------|--|
| | <p>If the .CSV file contains fields that you do not want to import, select Do not import for those fields.</p> <p>The first time you display this dialog box, it attempts to provide default field mappings based on the field names in your .CSV file and the field names in DPS. Review those default mappings and change any that are incorrect. Thereafter, your previous field mappings display by default.</p> |
| Sample Value | This column displays the value for each field from the first data row in your .CSV file. |
| Records to be imported | This field displays the number of records that your .CSV file contains. |
| Import | <p>To start the import process, click this button.</p> <p>The import process does the following:</p> <ul style="list-style-type: none"> ▪ If you selected Delete existing records and import, it deletes all existing records of the type you are importing that are currently in DPS. ▪ It adds a record in DPS for each record in the .CSV file that does not already exist. ▪ If you selected Update duplicate records, it updates mapped fields in DPS based on the information in the .CSV file for any records that already exist in DPS. |
| Cancel | To close the dialog box without running the import process, click this button. If you mapped fields, you will have to do the mapping again if you decide to run the import at a later time. |

Export Records to .CSV Files

Use the List View to export records from DPS to a .CSV (comma-separated values) file and print associated reports as needed.

To export records:

1. Open a form that contains one or more records that you want to export.
2. On the hub toolbar, click  **List View**.
3. If you want to export data only for some of the records displayed in List View, select the check boxes next to those records.
4. On the Actions bar, click **Other Actions » Export All** or **Other Actions » Export Selected Rows**, whichever applies.
5. On the Download to CSV dialog box, click **Download**.
6. Open the file from its current location or save the file to disk and close the dialog box.

Use the Actions Bar

Use the Actions bar in the upper-right corner of various DPS pages to perform actions that apply to the current page. For example, you can edit or copy the current record, or add a touchpoint.

To use the Actions bar options:


Click the options on the Actions bar and select the action that you want to complete. The options that display depend on the page that you are working in.

Use List View

You can view a record in either detail view or list view. Detail view displays a single record and is the default view that displays when you initially open records in certain sections of the application. In list view, a compilation of fields are displayed in columns in a grid rather than on separate tabs, which allows you to view multiple records at one time and evaluate record data quickly.


After you select a view, DPS defaults to displaying this view each time you open the application.

To use list view:

1. Open an application.
Detail view displays the first time you open a form and includes all tabs and fields for the record. The detail view is the format that is described in help topics in the Help system and is the view in which you can edit a record.
2. Click  to change to list view.

A group of fields display in columns in a grid, and multiple records display on the grid. The control at the top of the page indicates the number of records displayed in the list view

Much of the information for DPS is entered and displayed in grids on various forms. For information about using grids, see [Working with Grids](#).

3. While in list view, you can:
 - Modify a record's information.
 - Use the **Select Columns** option on the grid toolbar to add, remove, or change the order of the columns in the grid.
 - Drag and drop columns to change their order.
 - Use the row tools to copy or delete a list view record.
 - Use the **Actions** menu to export the contents of the grid.
 - Scroll through the list to locate the desired record.
 - Hover over a row and select **Show in Detail View** to switch to the Detail view.
 - Select one, multiple, or all records. The **Select All** option is useful when printing reports.
4. Click  to change back from list to detail view for the selected record.


Working with Grids


Much of the information for DPS is entered and displayed in grids on various forms. For example, when you enter a new opportunity for a contact, you add it to a grid that also contains all of the previously entered opportunities for the contact record.

Saving Your Work in a Grid

When you add a row to a grid or make a change to the information in an existing row, your work is saved automatically when you tab or click off of that row.

Grids with Many Rows

In some grids, all fields do not fit on a row. In those cases,  displays near the end of the row when you hover over the row. Click that icon to display the additional fields in a dialog box.

Other icons with special purposes may also display in grid rows. For example, if your firm implements the integration with Kona Business,  may display in touchpoint grid rows, and you can click that icon to add a task in Kona for that touchpoint.

In grids with many rows, DPS may load only part of the rows initially so that the tab displays quickly. If you then scroll the grid, the scrolling action sometimes pauses to load the next set of rows as you approach the bottom of the scroll bar. The same thing may happen if you have scrolled down in the grid and then start scrolling up and approach the top of the scroll bar.

A more efficient method than scrolling a grid with many rows is to use the search option that is available for most grids to locate the row that you want.

How to...

Use grids to work with records on various forms.

Add a Record to a Grid

Some grids allow you to add a new record directly to the grid. This saves time and also updates the record's respective hub or application.

To add a record to a grid:

1. Open a record.
2. Click the tab that contains the grid that you want to display.
3. Click **+ Add** below the grid to add a new row.
Use the blank fields in each column to enter the new record's information.

Filter the Grid Results

When there are a large number of records in a grid, you can filter the results to further refine the records that display.

To filter the rows in a grid:

1. Click  above the upper-right corner of the grid.

2. To filter the grid based on values in one or more columns, do the following for each of those columns:
 - If the blank filter field above the column has an operator drop-down list, select an operator (for example, = **Equals** or { } **Empty**).
 - In the blank field, enter or select a filter value.

The grid updates to display the records that fit the criteria that you enter.

3. To hide all filter fields, click ▼ above the upper-right corner of the grid. The filter remains in effect while hidden.

To remove filter criteria for a column, click ▼ next to the column heading, or blank out the filter field.

Unless you remove the filter criteria, the filter remains in effect as long as you are in that DPS application. However, if you leave the application to go elsewhere in DPS and then return, the filter is no longer in effect.

Copy a Grid Row

You can copy and modify an existing record on a grid to create a new record.

To copy a grid row:

1. Open a record.
2. Click the tab and then the grid row that you want to copy.
3. Mouse over the right end of the grid row so the ⋮ **Grid Options** icon displays. Select **Copy**.
A copy of the selected grid row displays on the row beneath the original. Modify this record's information and save to create a new record.

Delete a Grid Row

You can delete a record from a grid.

To delete a grid row:

1. Open a record.
2. Click the tab and then the grid row that you want to delete.
3. Hover over the right end of the grid row so the ⋮ **Grid Options** icon displays. Select **Delete**.
DPS prompts you to confirm the delete before removing the record from the grid.

Sort Grid Row Order

Use column headings to sort the information in a grid in ascending or descending order.

If a grid displays a sort icon (▼ or ▲) next to one of the column headings, you can change the default order of the rows in that grid. The column in which the sort icon appears is the current sort column, and the direction the icon points indicates whether the rows are sorted in ascending (▲) or descending (▼) order based on the values in that column.

You can change the sort order in two ways:






1. To reverse the sort order without changing the current sort column, click the column heading for that column. The sort icon changes to indicate the new order.
2. To sort the rows based on the values in a different column, click the column heading for that column. The sort icon displays next to the heading for the new sort column.

Select Columns for a Grid

You can select the columns that you want to display on a grid.

The columns available for each grid include both standard fields and user-defined fields that are used in the corresponding DPS area.

To select columns for a grid:


1. Click  at the upper-right corner of the grid.
2. For Timesheets and Expense forms only, select either **Left Grid Column Selections** or **Right Grid Column Selections**.
3. To add one or more columns to the grid:
 - Click a specific column in **Available Columns** and click  to move the column to the **Selected Columns** list.
 - To add multiple columns at once, press CTRL as you click each column that you want to add, and then click .
 - To add all the available columns to the **Selected Columns** list, click **Add All**.
4. To remove a column from the grid, click the column in **Selected Columns** and click  to move the column to the **Available Columns** list. Click **Remove All** to remove all the columns from the **Selected Columns** list.
5. To move a column on the grid, hover over the row for that column in **Selected Columns**, and click-and-drag  to move the column up or down in the list.
6. If you want to return the column selections to the default settings, click **Restore Defaults**.
7. Click **Apply**.


Change the Order of Grid Columns

In many grids, you can change the order of the columns directly on the grid or via the dialog box for selecting columns. There are some applications in which you must use the selecting columns dialog box to reorder columns on a grid. For example, list reports on the My Stuff > Reporting section.

To change the order of the columns:

Do one of the following:

- If you can select the columns that you want to display:
1. Click  to display the dialog box for selecting columns.

2. In the list of currently selected columns, hover over the first column row that you want to move.
 3. Click-and-drag the  icon to move the column up or down in the list.
 4. Repeat these steps for each column that you want to move.
 5. Click **Save** to close the dialog box and apply the changes.
 - If you cannot select the columns that display:
1. Hover over the heading for the first column that you want to move.
In some browsers, the mouse pointer changes shape to indicate that you can move the column. For example, this behavior occurs in Resource Management Reporting when using the IE browser. (If the pointer does not change, that column is not movable.)
 2. Click-and-drag the column to the correct location.
 3. Repeat these steps for each column that you want to move.

Change the Width of a Grid Column

In many grids, you can change the width of individual columns

To change the width of a column:

1. Hover over the heading for that column.
Result: The boundaries between that column heading and its neighbors display. (If the boundaries do not display, the option to change column width is not available.)
2. Move the mouse pointer over one of the boundaries.
Result: The mouse pointer changes to a double arrow.
3. Drag that boundary to increase or decrease the width of the column.

Fields and Options


These help topics describe individual dialog box fields and options in grids.

Column Selections or List View Settings Dialog Box

Use the Column Selections or List View Settings dialog box to select the columns to display in a grid.

Display the Column Selections or List View Settings Dialog Box


You can display this dialog box to select the columns to display in a grid.

1. Click  in the upper right corner of the grid.
2. For Timesheets and Expense forms only, select either **Left Grid Column Selections** or **Right Grid Column Selections**.

Contents of the Column Selections or List View Settings Dialog Box

On this dialog box, select the columns to display in a grid.

Contents

| Field/Option | Description |
|-------------------|--|
| Available Columns | <p>This list contains all of the columns that are available to display in the grid that have not already been selected to display. After you select a column from this list, it is moved to the Selected Columns list on this dialog box.</p> <p>To add a column to the grid, click the column in the Available Columns list. The column is moved to the Selected Columns list. Click Add All to add all available columns to the Selected Columns list.</p> |
| Selected Columns | <p>This list contains all of the columns included by default or that you selected from the Available Columns list to display in the grid pane. The column selections apply only to you. Other users can choose to display a different set of columns. The columns that display by default in the grid and the columns that are available for selection on the column selections dialog boxes are determined by selections that a system administrator makes in Settings > Time. For more information about selecting columns, see Select Columns for a Grid.</p> <p>The order of the columns from top to bottom in this list is the order that they will appear from left to right in a grid.</p> <p>To change the order, click  to the left of the column name that you want to move, and drag to move the column.</p> <p>To remove a column from the grid, click the x to the right of the column in the Selected Columns list. The column is moved back to the Available Columns list. Click Remove All to move all selected columns back to the Available Columns list.</p> |
| Save | After you select the columns that you want, click Save to close the dialog box and update the grid. |
| Cancel | To close the dialog box without changing the columns in the grid, click Cancel . |
| Restore Defaults | If you change the columns in the grid and then later decide to restore the columns to the default selection originally provided, click Restore Defaults . |

Save Your Work

There are different methods for saving your work; in some cases, you click a save icon or Action menu item, and in others, DPS saves your work automatically.

Explicit Saves

When you enter new or changed data, some forms, individual tabs, and dialog boxes require you to explicitly save your work by clicking a Save button or selecting Save from an Actions menu. DPS displays a message at the top of the page to confirm that your work was saved.

If you cancel the form or dialog box without saving, any unsaved work is discarded.

If you try to go to another tab or close a form without saving when a save is required, DPS displays a message asking if you want to save.

Automatic Saves

In many forms, particularly when you enter additional information for a previously saved record, DPS saves your work automatically. You do not have to explicitly initiate the save process. For a non-grid field, the automatic save occurs when you move the focus off of the field by clicking or tabbing, or when you press Enter. In a grid, the save occurs when you move the focus off of the grid row by clicking or tabbing, or when you press Enter from one of the grid fields.


For example, when you enter contacts on the Our Team tab in the Opportunities hub, the only required field is **Name**. If you select a contact in **Name** and move the input focus off of that grid row (by clicking elsewhere on the Our Team tab, for example), DPS automatically saves that contact as part of the team information for the opportunity.

When an automatic save occurs, DPS displays **Saving...** and a processing icon beneath the record title.

If Your Work Cannot Be Saved

If DPS tries to save and you have not made an entry in a required field (identified with a red asterisk near the field or grid column name) or an entry is not valid for some reason, DPS displays a message that describes the problem and highlights in red the field that caused the save to fail so you can correct it.

The message gives you the option to continue without saving, in which case your unsaved work is discarded, or you can cancel the message and correct the invalid or missing entry.



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