Deltek

Deltek Vantagepoint

Enhancements Summary for 6.0

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Enhancements Summary for Vantagepoint 6.0.0

This section summarizes enhancements made in Vantagepoint 6.0.0.

API

Expose Additional User-related API Endpoints

Additional user-related API endpoints are now available. These new API endpoints honor existing validations and restrictions, as well as security requirements at the application level.

Update the GET PSA General Ledger Data API Endpoint

The **GET PSA General Ledger Data** API endpoint has been updated to expose the following fields:

- The **Batch** field, for all transaction types
- The **InvoiceNumber** and **InvoiceDate** fields, for AP Voucher (AP) and AP Payment (PP) transaction types
- The **InvoiceNumber**, **InvoiceDate**, and **DueDate** fields, for Invoice (IN) and Cash Receipt (CR) transaction types

Connect

Customize Connect Context Pane

You can now customize contact, firm, and project records in the contextual pane in Connect for Outlook and Connect for Gmail. You can select which fields (including user defined fields) are included for each record type in the pane and whether the fields are read-only or required. Screen Designer settings for locked and required fields are automatically applied to the records in the pane; the customizing options that you specify are applied on top of the Screen Designer settings, to provide additional control for any records created in, or edited in, Connect.

Dashboards

New Columns for the Employee Dashpart Base

In addition to user-defined fields from the Employees hub, the following columns are now available as columns for the employee dashpart base:

- City
- Country
- Disable Timesheet Revision Auditing
- Firm indicator
- Firm Name
- Firm Number
- Hire Date

- Location
- Raise Date
- Row Count
- Social Security Number
- Tax Reg. #
- Termination Date
- State
- Zip Code

Role Based Security for Dashpart Bases and its Columns

You can now apply role based security settings for dashpart bases and for columns of the employee dashpart base. You configure this new security setting on the Access Rights tab of the Roles form (**Settings » Security » Roles**).

You can configure access rights for dashpart bases by role:

- You can identify which dashparts display in a dashboard, by dashpart base. When you display a dashboard that contain dashparts restricted by the dashpart base security setting, the contents of those restricted dashparts are replaced with an access restriction message.
- You can, when using edit mode on the Dashboards form, still create dashparts that are restricted to you and you can see the restricted dashparts in the Dashpart Library, but you are unable to view those restricted dashparts on a dashboard.

You can configure access to specific columns in the employee dashpart base by role:

- You can identify the specific columns that are available for a role, to restrict which columns display in the dashpart when members of that role display a dashboard. If all columns are restricted for the dashpart, the contents of the dashpart are replaced with an access restriction message.

With the update to Vantagepoint 6.0, roles that don't have **Save for All Roles** selected for the **Dashboards and Dashparts** option on the Overview tab of the Roles form, still do not have access to the employee dashpart base. An administrator needs to assign employee dashpart base and column access for these roles before the dashparts with the employee dashpart base can display on a dashboard.

If the columns in a dashpart are dependent on, or linked with, a restricted column, then the dashpart content is also replaced with an access restriction message. Column dependency is a factor when a restricted column is used for any of the following:

- Grouping
- Sorting
- Filtering (with the exception of hidden columns)
- Table dashparts with conditional formatting

You can also restrict which columns are available while you are creating and modifying dashparts in the edit mode of the Dashboards form.

Find Dashparts in the Dashparts Library

Use the new **Quick Find** field at the top of the Dashpart Library pane to find available dashparts more efficiently. When you enter a criterion in the **Quick Find** field, the **Available Dashparts** list updates with dashparts that match your entry, use dashpart titles as the basis for finding matches. (If you have the appropriate access rights, you can access the Dashparts Library while working in edit mode on the Dashboard form.)

Memo Dashparts

You can now post notes, reminders, warnings, announcements, URL link, or images on a dashboard by using the new memo dashpart. Create a dashpart with the new memo dashpart base and then enter the content for the memo dashpart in the **Memo** field of the Dashpart Designer. You can use the rich text editor to format your note. After you save a new memo dashpart, add the memo dashpart to your dashboard to display it.

Updated AR Comment Column for AR Detail Dashpart Base

The **AR Comment** column was updated so that AR comments are displayed at the Invoice grouping level. Previously, AR comments and the option to add a comment were displayed with the transaction lines under the Invoice grouping. With this update, you can now see the AR comments without expanding the Invoice grouping. If there are no AR comments for the Invoice, you can add an AR comment from the Invoice group level.

Drill To Indicator in the Dashpart Library

In the Used Dashpart section of the Dashpart Library, the icon now displays to the right of the dashpart name when the dashpart is associated to another dashpart as a drill to.

New Columns for the Project Dashpart Base

The following columns are now available for the project dashpart base:

- Weighted Percent Complete Total Compensation
- Committed Purchase Order Expense Billing
- Committed Purchase Order Expense Cost

To access the **Committed Purchase Order Expense Billing** and **Committed Purchase Order Expense Cost** columns, you must enable the Purchasing module.

You set the default presentation currency for these columns with the **Use Billing (Not Project) Currency for Reporting** option in **Settings » Accounting » Labor Options**, but you can change the presentation currency in Dashpart Designer.

Update to Selecting a Filter by Organization

When you create or modify a dashpart with the Account or Account Detail dashpart bases in the Dashpart Designer, you can apply a filter to an applicable column by organization. When you display the lookup for the organization from the Filter dialog box, you can now select the parent level organization. This enables you to select all organizations in a parent organization level simultaneously, instead of selecting sub-organizations one at a time.

New Predefined Dashparts

The following new, predefined dashparts are available for dashboards if the Accounting module or the PSA module is enabled:

- **Top 10 Clients - Receivables**: Use this dashpart to display billing clients with invoices that have not been fully paid.
- **Top 10 AR by Billing Client with Drill To**: Use this chart dashpart to display the top 10 billing clients with invoices that are not yet fully paid. Click an AR amount to display a drill to dialog box that provides more information about the record.

The following new, predefined dashparts are available if the CRM module is enabled:

- **Weighted and Estimated Fee by Stage with Drill To**: Use this chart dashpart to display the weighted and estimated fees for projects that you are actively pursuing, grouped by stage. Click a fee value to display a drill to dialog box that provides more information about the record.
- **Pursuits by Probability with Drill To**: Use this chart dashpart to view the weighted and estimated fees of in pursuit projects, by probability.

Updated Predefined Dashboards

The following predefined dashboards were updated to display the **Employee Utilization This Year** predefined dashpart instead of the **Utilization** predefined dashpart:

- Accounting
- Principal

This update does not apply for existing databases. If you are using these predefined dashboards on an existing database, the **Utilization** predefined dashpart is not replaced by the **Employee Utilization This Year** predefined dashpart.

Custom Multipliers for Calculated Fields

You can now configure the **Multiplier** field while working with a percentage data type on the Calculated Fields dialog box of the Dashpart Designer.

Documentation

Help » About

The System Info tab on the Vantagepoint Help About dialog now includes a **Read-Only-Replica Database Server** field that lists the Read-Only-Replica server, if one is identified in the Weblink utility.

Draft Invoice Approvals

View Supporting Documents from the Draft Invoice Approvals Form

You can now view supporting documents from the Draft Invoice Approvals form, if you have the appropriate role security access rights. To display the Supporting Document dialog box from the Draft Invoice Approvals form and print all supporting documents to a single file, click **Other Actions » View Supporting Documents**.

To activate the feature, navigate to **Settings » Security » Roles**, click the Accounting tab, and in the Billing Security: Interactive Billing and Invoice Approvals section select the **Allow Changes to Support Documents** checkbox.

Hubs

Employee Picture Icons: Show Users Editing a Record or Initiate a Microsoft Teams Chat

When you open a record in Vantagepoint, you can view the employee picture icons to quickly assess who is editing or view a record.

- **Profile Picture with Orange Outline**: When another employee is currently editing a record, that employee's picture displays with an orange circle around the icon. The person actively editing the record always displays as the first picture.
- **Profile Picture with Blue Outline**: When other employees are viewing the record, their pictures display with a blue outline.

You can also click an employee picture icon to open an info bubble that contains additional information about the employee:

- **Email**: Click the employee's email address to send an email message directly from the form. Vantagepoint opens your email application.
- **Microsoft Teams Chat**: Click this option to initiate a one-on-one chat from Vantagepoint to another employee on your team. This option displays if you select the **Enable Microsoft Teams Chats from Deltek Vantagepoint** option in **Settings » General » Communications**.

As edits are made and saved to a record, color-coded status messages display at the top of the form to alert all employees of the changes to the record. These updates display if you select the **Enable Real-Time Notifications and Interactions** option in **Settings » General » Options**.

In-Product Guides

New In-Product Guides

Vantagepoint 6.0 includes new in-product guides that help you learn more about the application. In-product guides open automatically from various pages in Vantagepoint that contain the features described.

This release includes new in-product guides for the following areas:

- **What's New in 6.0**: Introduces new features in this release
- **Search Dialog Restyling**: Explains changes in search functionality
- **Search Navigation Improvements**: Details enhancements related to finding and selecting records in applications
- **Resource Management Reporting**: Illustrates changes to the Resource Management screen
- **Invoice History Columns**: Explains how to add new columns to the Invoice History tab of Interactive Billing. When you open the Invoice History tab, a pop-up window points to the gear icon on the Invoice grid toolbar and lets you know that you can click this icon to add columns to the grid that displays invoice amounts and other details for posted invoices.
- **IQ Integration**: Explains how to take advantage of the latest IQ integration

- **Undock Project Structure:** Shows you how to move the project structure dialog box so that it is always visible in project-related applications. The first time that you open a project application that has the Project Structure dialog box, a blue hotspot displays on the Project Structure dialog icon. When you click the blue hotspot, a message explains that you can click and drag the Project Structure dialog box so that it remains open while you navigate the project structure. The project structure also remains open when you navigate to certain other project areas in the Projects hub.

Interactive Billing

Changing the Period Start/End Dates on a Submitted Draft Invoice No Longer Requires You to Resubmit

This enhancement applies for projects that use an approval process for billing invoices.

In previous versions of Vantagepoint, if you submitted or approved a draft invoice and then changed the period start or end dates in the Invoice Presentation Dates section on the Billing Session Options dialog box in Interactive Billing, you had to resubmit the draft invoice for approval. This step was required even though the period start and end dates do not affect the transactions included on the invoice.

Now, after you submit or approve a draft invoice and you change the period start or end dates, you can choose whether or not to resubmit the invoice. To do this you must change the period start and end dates on the Billing Session Options dialog box in Interactive Billing, without changing the transaction bill-through dates at the same time. When you click **OK** on the Billing Session Options dialog box to save the changes to the period start or end dates, you can choose either **Resubmit** or **Save** on the Resubmit dialog box. The new **Save** button enables you to update the period start and end dates without having to submit the draft invoice for approval again.

If you change the period start and end dates and the transaction bill-through dates at the same time, you are required to resubmit the draft invoice for approval again.

For more information, see the following help topics:

- Contents of the Billing Session Options Dialog Box (see the **Period Start/End Date** description)
- Change the Period Start and End Dates for Submitted or Approved Invoices

New Warning Message When You Void Invoices

If you have applied payments to an invoice, you now receive an error message when you void that invoice from the Invoice History tab of the Interactive Billing form. This gives you the opportunity to review any applied payments for the invoice before you void it.

New Columns Available on the Invoice History tab

The following columns are now available on the Invoice History tab of the Interactive Billing form:

- Amount Due
- Amount Paid
- Applied Retainer
- Credit Memos
- Invoice Total
- Retainage

Use these columns to display more information about the invoice, including amounts and whether or not an invoice has been paid.

Invoice Template Editor in the Browser Application

The Invoice Template Editor is now available in the browser application. Use the Invoice Template Editor form to create and update invoice templates, which determine the format and content of your invoices.

Mobile

Disable the Vantagepoint Mobile URL Deep Link Feature

To prevent security risks, the deep link feature of the Vantagepoint Mobile application URL has been disabled. When you open a Vantagepoint Mobile application URL, you are now redirected to the Deltek screen, from which you can download the latest mobile application and copy the application URL.

On the Server URL screen, the Vantagepoint Mobile application can also populate incomplete application URL details. For example, if you mistakenly enter a URL link that contains **/app**, or there are missing details at the end of the URL link, the mobile application autocompletes the link with either **touch/time** or **touch/crm**.

Hide Help Links in Vantagepoint Mobile Applications if the Language is not set to English (American or International)

To conform with the laws of countries outside the US regarding software documentation, help links in the Vantagepoint Mobile applications are hidden if the selected language is not **English (American or International)**. The help links on the Server URL (**Connection Help**), Menu, and Settings screens are not available for other languages with document translation requirements.

Upgrade Touch Server to PHP 8.1.14

The Touch Server for this version of the Vantagepoint mobile application has been upgraded to support PHP 8.1.14.

Mobile CRM

Support Date/Time Fields in Mobile CRM

The **Date/Time** fields created in the Screen Designer of Deltek Vantagepoint are now available in Vantagepoint Mobile CRM, on the Misc/User-Defined (UDF) tab of all hubs. Tap the calendar icon to add a date, tap the clock icon to add a time, or use the keypad to enter the date and time directly in the fields. If one field is populated, you must enter details in both fields.

Support Phone UDFs in Mobile CRM

Phone user-defined fields (UDFs) created in the Screen Designer of Deltek Vantagepoint are now available in Vantagepoint Mobile CRM, on the Misc/User-Defined (UDF) tab of all the hubs. You can add or edit phone numbers in the new **Phone UDF** field or tap the phone number to start a call.

User-Defined Fields in Activities of Mobile CRM

The user-defined fields (UDFs) created for the Activities hub in the Screen Designer of Deltek Vantagepoint are now available in Mobile CRM, on the Misc/UDF tab of the Add Activity screen and the Edit Activity screen.

Display the Pre-Award Number Field in Mobile CRM

The **Pre-award Number** field is now available in Mobile CRM. The **Pre-award Number** is the project number assigned at the time the project was originally created. If pre-award numbering is enabled and a pre-award number is assigned to the project, the **Pre-award Number** field is displayed under the **Number** field on the Details screen of Projects. (This read-only field is not available on the Add Project screen.) The **Pre-Award Number** field uses the field properties set in the Screen Designer of Deltek Vantagepoint.

Rating and Feedback in Mobile CRM

An in-app review is now available in the Vantagepoint Mobile CRM application running on the iOS or Android operating systems. After you upgrade to a newer or major version of the Mobile CRM app and create a new contact or activity record, you are prompted one time to submit a rating. (This feature is not available when you create a new contact or activity through record association.) The **Provide Feedback** button is also available on the Mobile CRM menu screen. Tap this button at any time to send feedback to Deltek product management using your default email application.

Improved Add Projects function from the Contacts and Firms Hubs in Mobile CRM

When you add projects in the Contacts and Firms hubs, you now experience more consistent behavior and the process ensures proper business logic.

Start and End Time Fields for all Activity types in Mobile CRM

The **Start Time** and **End Time** fields are now available for all **Activity** types in Mobile CRM, whether or not you set a reminder for the selected **Activity** type.

Support Image Icon Configuration in Mobile CRM

To conform with the General Data Protection Regulation (GDPR) laws of EU countries, the **Edit** link on the image icon of Contacts, Firms, and Projects is hidden if the image icon was configured to be locked in the Screen Designer of Deltek Vantagepoint. If the image icon is locked, you cannot add a new photo or replace an existing photo in the record.

Mobile Time and Expense

Viewing Benefit Hours in Mobile Time and Expense

You can now view the summary of your benefit hours or absence accruals in Mobile Time and Expense. Tap and select the **View Benefit Hours** option to display the Benefit Hours screen. The Benefit Hours screen displays the summary of PTO/personal, Sick, Holiday, and any other type of benefit hours that you have accumulated for the year or used for the year. The **View Benefit Hours** option ⋮ is available on all Timesheet screen menus.

Improved Date Navigation on the Start/End Times Screen

When you add or edit start and end times by day in Timesheet Hours, you can now use a date carousel on the Start/End Times screen to navigate to a different day, or to tap a different day. By reducing the number of taps needed to enter time on multiple days, the date carousel enables you to enter time more quickly.

Rating and Feedback in Mobile T&E

An in-app review is now available in the Vantagepoint Mobile T&E application running on the iOS or Android operating systems. After you upgrade to a newer or major release of Mobile T&E and submit a timesheet or expense report, you are prompted one time to submit a rating.

The **Provide Feedback** button is also available on the Mobile T&E menu screen. Tap this button at any time to send feedback to Deltek product management using your default email application.

My Preferences

Preferred Application View

The General tab of the My Preferences dialog box now includes a **Preferred Application View** option. Use this option to specify the preferred view that displays in all Vantagepoint applications that support both Detail View and List View. Select one of these settings:

- **Always Open in Detail View**
- **Always Open in List View**
- **Always Open in View Last Used**

Role-based User Education Within the Application

Vantagepoint now displays targeted in-app information about feature enhancements, common tasks, and communications based on your selected role in the new **My Education Interests** field on the My Preferences dialog box.

By default, the following roles are selected: **Time and Expense User**, **Project Manager**, **Finance**, **CRM**, **Executive**, and **System Administrator** (if the role was granted administrator rights). To change the selection, click ▼ in the **My Education Interests** field, select or clear the checkbox next to a role, and click **Save**.

Planning

Updated Expense and Consultant Planning Level Selections

On the Plan Settings form in **Settings** » **Resource Planning** » **Plan Settings** and on the Plan Settings dialog box in **Hubs » Projects » Plan**, the Expenses and Consultants **Planning Level** drop-down options are now labeled **Project**, **Phase**, and **Task,** to correspond to the Vantagepoint WBS system levels.

Support for Units in Project Planning

To make it possible to develop full plans for your projects, Vantagepoint now offers the ability to plan and manage units on the new Units tab in Project Planning (**Hubs » Projects » Plan**).

If you have the Resource Planning module, you enable the Unit Planning feature for a company in **Settings » Resource Planning » Plan Settings**.

Use the Units tab to assign units to the lowest-level work breakdown structure (WBS) elements in a branch of the project's plan and enter planned quantities for those unit assignments. As you enter unit quantities, Vantagepoint automatically updates the totals and other planned values for the individual unit assignment and for each WBS element above the assignment in the plan structure.

Enter Contract Amounts for Units

The Contract tab in Project Planning enables you to identify which portion of a compensation amount is used for units in regular or promotional charge type projects, giving you a more specific breakdown of the amounts as you review the project's contract information.

Process Server Utility

Run System Process Server Jobs without a User Account

The Vantagepoint process server is shipped with system jobs. These system jobs are not associated with a user account--you can run these jobs at any time. If you run system job without a user account, the **Submitter** field on the Queue Manager form displays as blank.

Project Information Management (PIM) Utility Integration

Ability to Initialize Data to PIM Multiple Times

You can now initialize records to PIM multiple times. You can also re-initialize the sync of all validated Info Center records from Vision to PIM (on the Schedule dialog box).

You can also reset an existing initialization process that might be stuck. To do this, press and hold the CTRL key and click **Initialize**. When you choose to proceed, you must enter a password, which you can obtain from Deltek Customer Support.

Project Review

Planned Units in Project Review

Any amounts planned for units in the project are now included in the Key Performance Indicators grid at the bottom of the Project Review form.

New Total Billed Field in Project Review

A new **Total Billed** field in the Revenue section of the grid indicates the total amount billed for the project.

Projects Hub

New Pre-Award Project Numbering Feature

If you use a different numbering system for pre-award (in-pursuit) projects and awarded (won) projects, you can now set up Vantagepoint to allow a regular project’s number to be changed when the project is awarded. You turn on the Pre-Award Project Numbering feature with the new **Update project number when approved for use in processing** checkbox on the Numbering form in **Settings » Workflow » Numbering**. To use this feature, you must own CRM, or Resource Planning and Accounting, or PSA.

With this feature turned on, if your security role is an accounting type role, you are prompted to change a project's number on the new Assign New Project Number dialog box that displays when you select the **Approved for Use in Processing** checkbox for a project on the Accounting tab of the Projects form in the Projects hub.

This checkbox is the trigger for the number change because typically when a project is awarded, someone from the Accounting department does both of the following:

- Changes the project number.
- Selects the **Approved for Use in Processing** checkbox to make the project available for processing in accounting transaction throughout Vantagepoint.

Also, when you change a project's stage to **Won** (in the **Stage** field on the Summary pane in the Projects hub), the **Approved for Use in Processing** checkbox is automatically selected for the project if you are an accounting user. The Assign New Project Number dialog box displays automatically.

If other users are working with a project record in the Projects hub or in other applications in the Projects hub (such as Contract Management) when the project's number is being changed, those users will not be able to save any changes they made to the project. They must reload the project and re-enter any changes that were previously made and lost. For this reason, it is best to change a project's number after work hours or when other users are not editing the project record.

After you assign and save the new project number, you see the original pre-award number displayed in the new **Pre-Award Number** field in the Pursuit Details section of the Summary pane. The new awarded number displays in the **Project Number** field in the Summary pane.

See the following help topics for more information about this new feature:

- Using Different Numbering Systems for Pre-Award and Awarded Projects
- Setting Up Different Auto Numbering Systems for Pre-Award and Awarded Projects
- Assign New Project Number Dialog Box
- Change a Project's Number Immediately When the Project Is Awarded
- Schedule a Project Number Change for an Awarded Project

Purchasing

Purchasing Applications Now in the Browser Application

You can now access these purchasing applications in the browser application:

- **Purchasing » Purchase Requisitions**: Moved to the browser application in 5.5.
- **Purchasing » Purchase Orders**: Moved to the browser application in 4.5.
- **Purchasing » Items**: Formerly known as the Items Master application and located in **Settings » Purchasing & Inventory » Items Master** in the desktop application; moved to the browser application in 4.5.
- **Purchasing » Item Review**: New to the browser application in 6.0; currently still available in the desktop application.
- **Purchasing » Receiving**: New to the browser application in 6.0; formerly located in the desktop application.

Option to Enable Purchasing Applications in the Browser Application Has Been Removed

Since most purchasing applications are now available in the browser application, the **Enable Purchase Orders in the Web Application** option has been removed from the Modules form in **Settings » General » Modules**.

All Purchasing Reports Now in the Browser Application

You can now work with the complete set of purchasing reports in the browser application, in **My Stuff » Reporting**:

- Request for Price Quote Status
- Request for Price Quote Form
- Purchase Requisition Status
- Purchase Requisition Form
- Purchase Requisition and Price Quote
- Purchase Order Status
- Purchase Order Form
- Purchase Order Detail
- Purchase Order Cost Distribution Detail
- Item by Vendor
- Blanket Purchase Orders
- Open Purchase Orders
- Vouchered Purchase Order Items
- Received Purchase Order Items

Improved Loading Speed for List View

Performance enhancements have been made to improve the loading speed for the List View in the Purchase Orders and Purchase Requisitions applications.

User Interface Improvements for the Receiving Application

Starting in 6.0, you can access the Receiving application in the browser application, in **Purchasing » Receiving**.

- The Receiving form features a redesigned user interface that incorporates the design elements used in the browser application, for a more unified look and feel.
- The header of the Receiving form includes common search functions like those found in the hubs in the browser application. The header also shows the item's name, as specified in the Items application in **Purchasing » Items**.
- On the Actions bar of the Receiving form, click **Actions » Reporting** to launch the Reporting application in a dialog box, which is automatically filtered to display all the Purchasing reports.
- In the Receipts grid, you can do the following:

  - Click **+ Add New Receipt** and enter receipt information in the relevant fields.
  - Hover over the **Note** field to access a tooltip that displays all the information entered in the field.
  - Attach the image of the actual receipt or other supporting documents in the **Document** field.
  - In the grid row options, click **Print** to launch the Purchase Order Receivings report in a separate window.
- In the Line Items grid, you can do the following:
  - Receive a specific line item, or all line items that are associated with a receipt, by using the **Receive** and **Receive All** buttons on the grid toolbar.
  - Enter data for a new receipt or review existing receipts for a specific line item; in the grid row options, click **Summary** to launch the Summary dialog box.
  - View or modify line item information; in the grid row options, click **View PO Line** to launch the Purchase Order Line Detail dialog box.

User Interface Improvements for the Item Review Application

Starting in 6.0, you can access the Item Review application in the browser application, in **Purchasing » Item Review**.

- The Item Review form features a redesigned user interface that incorporates design elements used in the browser application, for a more unified look and feel.
- The header of the Item Review form includes common search functions, like those found in the hubs in the browser application. The header also shows the item name, as specified in the Items application in **Purchasing » Items**.
- In the Purchase Requisitions on File grid, you can review all purchase requisition records that have been filed for an item. To open a purchase requisition record from the grid, click the hyperlink for the appropriate grid row entry.
- In the Purchase Orders on File grid, you can review all purchase order records that have been filed for an item. To open a purchase order record from the grid, click the hyperlink for the appropriate grid row entry.

You can still access the full Item Review application in the desktop application, in **Purchasing » Item Review**.

Rate Tables Settings

New Employee Search Dialog Box Replaces Employee Lookup in Settings » Rate Tables

The standard Employees Lookup has been replaced with a new Employee Search dialog box that provides both basic and advanced Search functions. Now, you can search for, filter, and select employee records from either the database or by specifying values that were defined by your enterprise. In addition, you can now use multiselect functionality to add multiple values, select the checkbox for each value, or select a range of values using SHIFT+click.

For more information, see the Display the New Employee Dialog Box and Contents of the New Employee Search Dialog Box help topics.

Reporting

SyncCustomReports Switch

When you install or upgrade to Vantagepoint 6.0, you can now use the SyncCustomReports switch to synchronize custom reports from the Vantagepoint (transaction) database with the custom reports in the Vantagepoint server database. The SyncCustomReports switch performs the same function as the **Synchronize** button on the Custom Reports tab in **Utilities » Report Administration**, in the desktop application.

For more information, see "SyncCustomReports Switch" in the [Vantagepoint Installation and Maintenance Guide].

Workflow Report for Webhook Action

The webhook action in **Settings » Workflow » Application Workflows** now includes support for a workflow subreport. Click **Print All Workflows** or **Print Workflow** to generate the report.

Screen Designer

Lock an Image

In **Settings » General » Screen Designer**, you can now lock an image to restrict employees from changing the image when it is associated with a record.

If an image is locked, employees cannot change the image in the following areas:

- On the Summary pane of the Employee hub
- On the Image tab of the My Preferences dialog box

In addition, if your organization uses Vantagepoint Mobile CRM, employees cannot change or delete the image on the Contacts screen.

Set the Number of Columns on a Tab

Use the new **Display Columns** field on the Tab Properties form in **Settings » General » Screen Designer** to set the number of columns that display on a tab. In Screen Designer, select a tab and then specify a value in the **Display Columns** field. By default, a tab displays 3 columns; you can display up to 5 columns. If you want to reduce the number of columns displayed on a tab, you must first delete, move, or resize elements on the tab before you enter the new value.

Search

Improved Layout of Search Dialog Box

The Search dialog box has been restyled to present information more clearly and to make it easier for you to build or edit both standard and advanced searches.

Layout and styling changes include these enhancements:

- At the top of the Search dialog box, a new, clearly defined grid header displays the **Select Search** drop-down list, a series of Actions, and the **Advanced Settings** toggle.
- The **Show Preview** toggle was removed.

- When you click the **Check SQL** button, Vantagepoint displays a SQL Where Clause status message. If the query that you specified is validated, a shaded message is displayed in the Vantagepoint toolbar. If the query is not validated, the error message is displayed in red at the top of the Search dialog box.

For more information, see the Contents of the New Search Dialog Box and Actions for Advanced Searches help topics.

Enhanced Search Navigation and Record Selection Pane

You can now use the **Records Selection** pane to quickly add multiple records, or all records, to an ad hoc Selection search. You can also navigate directly to a search or to a single record.

The search improvements include:

- **Removal of the Multiselect toggle**: Instead of using the **Multiselect** toggle to add multiple records to a Selection search, you can now select checkboxes for multiple records and then click **Done** to quickly create an ad hoc Selection search.
- **New Select All button:** Click the **Select All** button to include all records in the ad hoc Selection search. Vantagepoint then navigates directly to the Search Navigation Control for the ad hoc Selection search.
- **Navigate Directly to a Record**: Click any area to the right of a record's checkbox to quickly navigate to the record's form. The Saved Search Control displays the saved search that you used to navigate to the record, along with its record number, in the paging control.

For more information, see Search Vantagepoint Quick Reference and Search Navigation Controls.

Timesheet, Expense Report, and Approval Center

View Employee's Current and Future Assignments in Timesheet, Expense Report, and Approval Center

If you own the Resource Planning and Time & Expense modules, you can now display employee assignment information when you open the employee card from the following areas:

- **My Stuff » Timesheet**
- **My Stuff » Expense Report**
- **My Stuff » Approval Center**

Use the Assignments tab on the Employee Card dialog box to review an employee's assignments that have estimate-to-complete (ETC) hours remaining. This is particularly useful when you want to quickly see the current and future assignments that an employee has for other projects, without needing to leave the application to navigate to the Resource View form. On the Assignments tab, you can define the forecast range and the type of values (such as planned hours, scheduled percentages, and utilization percentages) that you want to display in the calendar period columns.

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