Deltek

Deltek Vantagepoint

Enhancements Summary for 5.5

December 15, 2022

This edition published December 2022.

Contents

Enhancements Summary for Vantagepoint 5.5.0

This section summarizes enhancements made in Vantagepoint 5.5.0.

Analysis Cubes

Incremental Refresh for Analysis Cubes

The option to run an incremental refresh, for non-cube configuration related fields that were updated since the last Analysis Cubes refresh, is now available. As an Analysis Cubes user, you can refresh to see the latest data in the analysis cubes without waiting for a full refresh, which takes more time to complete.

To run the update against the process server: On the Refresh tab of the Analysis Cube Settings form, click the **Schedule** button and then select the new **Incremental Data Refresh** option on the Schedule dialog box.

APIs

Expose Workflow API Endpoints

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

Approval Center

Restart Approval Workflows for Timesheets and Expense Reports

A new **Restart Approval** option is now available for Timesheet and Expense Report approval types in **My Stuff » Approval Center**. This option displays at the end of a grid row on the Approval Center form if you are the specified approval administrator or its delegate for the respective approval workflow. Use this option to return an approval record to the first step of the approval process. When you restart approvals, Vantagepoint removes all approved history and comments that are associated with the submitted record and starts over from the first step, regardless of where the record is in the approval process.

The **Restart Approval** option does not apply to posted records, or to timesheet line and expense line approval types. If you want to reset an approved record to the last step of the approval workflow, use the existing **Reopen** action (if enabled).

Billing

Overtime Premium Calculation Has Been Updated to Honor Billing Labor Override Tables

When you use a billing labor override table to override labor cost rates on an invoice, the overtime premium calculation now uses the cost rate in the billing labor override table, instead of the cost rate in the Employees hub for an employee. This calculation applies when you enter the following settings in the Labor section on the Rates tab in Billing Terms for a project:

- In the **Method** field, select **Rate times multiplier**.

- In the **Overtime Method** field, select **Bill ovt premium as cost**.
- In the **Override Table** field, select a billing labor override table that has an override cost amount or an override max cost amount to override cost rates.

Billing Labor Category Rate Tables

Print Billing Labor Category Rate Tables

You can now print billing labor category rate tables in **Settings » Rate Tables » Billing Labor Categories**. On the Billing Labor Category Table form, click **Other Actions** select **Print** and then select one of the following options:

- **Current Record**
- **Current Selected Records**
- **Select Records to Print**

For more information, see the following help topics:

- Contents of the Billing Labor Category Tables Form
- Print or Download a Billing Labor Category Table

Cash Management and Payroll Payments

Support for Email Templates in Payment Applications

You can now create email templates and reuse standard information, such as regular text or database fields, whenever you send electronic payment remittances by email in the following Payment applications:

- **Cash Management » Vendor Payments**
- **Cash Management » Employee Payments**
- **Cash Management » Payment Review**
- **Payroll » Payroll Payments**

When vendor, employee, or payroll payments are in the printing and numbering stage of the process, click the **Email Remittance action** in the Payments grid and then select either the **Recipients** or **Specific Address** option to display the Email Remittance dialog box. Depending on your security role and save rights settings, you can use the **Save Email Options** button to create, modify, and save email templates for personal use, for the use of those who share your role, or for use by all roles. You can then use the **Select Email Template** option to select a previously saved email template.

Email templates that you saved from Vendor Payments, Employee Payments, or Payroll Payments are available for selection when you send or resend electronic payment remittances from **Cash Management » Payment Review**. In Payment Review, you can also create and modify email templates for vendor, employee, or payroll payment types to select and reuse in the respective applications.

Cash Management: Bank Reconciliation

Post Cash Receipts from Bank Reconciliation

Previously, Vantagepoint introduced the ability to automatically create cash receipts in Bank Reconciliation (**Cash Management » Bank Reconciliation**).

You can now post cash receipts that were created in Bank Reconciliation. On the Import Tab of the Bank Reconciliation form, the **Post Cash Receipts** option is now available in the **Other Actions** menu. Select this option to display the Post Cash Receipts dialog box.

The **Post Cash Receipts** option is available if:

- Your system administrator granted posting rights to your role on the Accounting tab in **Settings » Security » Roles**.
- You set the **Enable Transaction Center Approvals** option to **No** in **Settings » Accounting » Transactions**.

When you choose to post cash receipts, the new Post Cash Receipt dialog box displays the cash receipts associated with the currently selected bank code. You can select the check box next to the cash receipt or cash receipt files that you want to post, and then click the **Post** button.

If you are using files to group cash receipt transactions, Vantagepoint does not provide a warning or error message when the total amount of the cash receipts file posted from Bank Reconciliation does not match the control total. If your company requires that the total amount of the posted cash receipts file matches the control total, enter a value in the **Control Total** field on the New File dialog box when you create a new cash receipt file in **Transaction Center » Transaction Entry » Cash Receipts**.

Dashboards

Drill To Another Table or Chart Dashboard from Dashpart Column Values

You can now define which additional information displays when you click dashpart column values on a parent dashpart. The information that you can link depends on the available table or chart dashparts in the Dashpart Library. For example, you can set up Vantagepoint to display a dashpart with AR invoice detail when you click on a column value from a dashpart that displays outstanding accounts receivable data for a project.

Use the Drill To dialog box to configure the drill to dashpart that displays when you click a dashpart column value. To access the Drill To dialog box from the Dashpart Designer, click the option under **Drill To** in the column table area for the dashpart column that you want to configure. Note that the option under **Drill To** is not displayed for hidden dashpart columns.

You can also configure the following on the Drill To dialog box:

- Some dashpart columns have existing default dialog boxes or info bubbles that display when you click the column values. Use the settings on the Drill To dialog box to override these defaults with your preferred drill to dashpart.
- Filter the displayed information on the drill to dashpart based on the information from the parent dashpart. You can filter the drill to dashpart based on the record selected, chart grouping, or date ranges applied to the column value.

  For example, when your dashpart is configured to display the outstanding accounts receivable balance for a project, the drill to dashpart can be filtered to only show AR invoice detail for that selected project. Filtering a drill to dashpart requires that the dashpart you are drilling to contains the information to be filtered.

As mentioned above, the additional information that you can associate with a dashpart column is based on the available table or chart dashparts. Table or chart dashparts that are displayed based on the Drill To dialog box settings are non-editable (read-only) and any links in these table and chart dashparts are disabled.

Access Rights for Dashparts

Role based access rights are now applied to dashparts. To configure a role's access rights to dashparts, go to the Access Rights tab of the Roles form (**Settings » Security » Roles**), and select the Dashparts functional area. Dashpart access rights work in conjunction with the role's rights to create dashboards.

Roles without rights to create dashboards:

- Users with this role configuration can only access dashparts from dashboards that are shared with them by role or by employee.
- Users with this role have full access to all dashparts, which ensures that they can view all dashparts in the dashboards that they can display.

Roles with rights to save personal dashboards only:

- Users with this role configuration can access dashparts based on the settings specified on the Access Rights tab of the Roles form.
- When a dashboard is shared with this role and some dashparts in the dashboard are restricted for the role, the settings on the Access Rights tab of the Roles form are updated to give the role access to all dashparts in the shared dashboard.
- When a dashboard is directly shared to an employee and some dashparts in the dashboard are restricted for the employee's role, the settings on the Access Rights tab of the Roles form are not updated to grant the role access to the restricted dashparts. Any restricted dashparts in the dashboard display a message indicating the access restriction.

Roles with rights to save dashboards and dashparts for all roles:

- Users with this role configuration will always have full access to all dashparts.

Access to dashparts can also be removed after a dashboard is shared with a role. In this case, when a user displays a dashboard, a message displays in the restricted dashpart to indicate the access restriction.

Access rights for a new dashpart are automatically granted to the role when that dashpart is added to a shared dashboard. However, if a new dashpart is not added to a dashboard, access rights for that new dashpart must be configured on the Access Rights tab of the Roles form.

If you are upgrading from an earlier Vantagepoint release to Vantagepoint 5.5, access rights to all dashparts are allowed. You can configure access rights to dashparts after upgrading.

Personal Dashboards

You can now create personal dashboards, which only you can access. In addition, you can create these personal dashboards without the assistance of a dashboards administrator or a manager.

The option to create personal dashboards is based on your role's configuration in the **Dashboards and Dashparts** field on the Overview tab of the Roles form (**Settings » Security » Roles**). Dashpart access rights are managed in the Dashparts functional area on the Access Rights tab on the Roles form.

If your role has access rights to create personal dashboards, the following apply:

- To create personal dashboards with existing dashparts from the Dashpart Library, use the edit mode of the Dashboard form.
- You cannot create or delete dashparts from the Dashpart Library.
- Your role's access rights determine which dashparts you can access in the Dashpart Library.
- Personal dashboards are displayed in a corresponding section in the Navigation pane.
- To arrange the order of the Personal Dashboards in the Navigation pane and apply dashboard filters, use the Dashboard Options form (list view), which you access by clicking **Options** on the toolbar of the Dashboards form while in edit mode.

If you are a dashboards administrator, with access rights to create dashboards and dashparts for all roles:

- When you create or copy a dashboard, you can save the dashboard as a personal dashboard on the Create New Dashboards dialog box or Dashboard Copy dialog box, respectively.
- Personal dashboards are displayed in a corresponding section in the Navigation pane.
- To arrange the order of personal dashboards in the Navigation pane, or to apply dashboard filters to your personal dashboards: On the toolbar of the Dashboards Options form, click **View Options » My Personal Dashboards**.
- To view a display-only list of all personal dashboards along with the username of the employee who created each one: On the toolbar of the Dashboards Options form, click **View Options » All Personal Dashboards**.
- You cannot share personal dashboards with other users or roles.

New Columns in Project Dashpart Base

The following columns were added to the list of available columns for the project dashpart base.

- **Weighted Percent Complete Bill**
- **Weighted Percent Complete Cost**

Use these columns to display the percentage of completion for a project's billing amounts or cost amounts from a dashboard. These columns also calculate a weighted percent complete at higher levels of the work breakdown structure (WBS) after you enter the percentage of completion at the lowest level of the WBS. Weighted percent complete values displayed in these columns are based on information in **Hubs » Projects » Budget**. To display more information about the percent completes, click the values under the appropriate column.

Employees Hub and Vantagepoint Connect

Synchronize Employees and/or Contacts

When you use the Vantagepoint Connect integration, the Overview tab in the Activities hub now includes a **Calendar Invitation** field. Use this field to specify whether employees, or both employees and contacts, automatically receive activity invitations when you synchronize Vantagepoint with your email application.

Select from these options:

- **Do Not Send Invitations**: No calendar invitations are sent when synchronization completes. This is the default setting.
- **Send to Employees Only**: Synchronize the activity to your email application calendar and automatically send an invitation from your email application to the employees that are associated with the calendar activity.

- **Send to Contacts and Employees**: Synchronize the activity to your email application calendar and automatically send an invitation from your email application to the contacts and employees that are associated with the calendar activity.

After the activity is synced to your email application, you can change the **Calendar Invitation** setting. However, if the **Send to Employees Only** option or the **Send to Contacts and Employees** option was selected when you initially set up the activity, the attendees were already invited. To cancel invitations for any attendees, you must remove them from the invitation.

General Options Settings

Real-Time Notifications and Interactions

If you want the ability to see the names of all users who are viewing the same record from hubs, or across multiple applications, navigate to the Global Options section in **Settings » General » Options** and select the new **Enable Real-Time Notifications and Interaction** option. To see the usernames, click the bubble at the upper-right of the current record.

These information bubbles are updated in real time and are available on forms in the following areas:

- All hubs, including user-defined hubs
- **My Stuff » Expense Report**
- **Billing » Interactive Billing**
- **Billing » Billing Groups**
- **Transaction Center » AP Invoice Approvals**
- **Cash Management » Vendor Payments**
- **Cash Management » Employee Payments**
- **Cash Management » Bank Reconciliation**
- **Cash Management » Credit Card Reconciliation**
- **Payroll » Payroll Payments**
- **Purchasing » Purchase Requisitions**
- **Purchasing » Purchase Orders**
- **Purchasing » Items**
- **Settings » Security » Roles**
- **Settings » Security » Users**

In-Product Guides

New In-Product Guides in Vantagepoint

Use the new in-product guides in Vantagepoint to learn about the key features and enhancements in Vantagepoint. In-product guides bring features to your attention and provide you with resources on how to use the features for your firm's projects and operations.

An in-product guide is a pop-up window that typically contains descriptions, videos, and links to more learning resources. You view in-product guides when they automatically open from various pages in

Vantagepoint that contain the features. Many in-product guides are available only for a limited period based on when a feature is released, while other guides display the first time that you use a feature.

Two in-product guides have been added to Vantagepoint version 5.5:

- An in-product guide has been added to project plans to help you learn the ways to add schedule dependencies to your plans. This guide is available if you own Resource Planning.
- An in-product guide as been added to report options to describe changes to the options layout.

Mobile

Session Timeout Feature in Vantagepoint Mobile

When you reach the mobile session inactivity limit in your Deltek Vantagepoint Mobile application, you are redirected to the Session Expired screen to re-enter your security PIN or fingerprint/face ID. You can continue working on the same screen with the unsaved changes that you specified before the session timeout occurred. However, if you incorrectly enter your fingerprint/face ID multiple times or incorrectly enter your security PIN three (3) times, you are logged out of the application and redirected to the database Login screen. For iOS device users (with fingerprint authentication) and Android users, the domain Login screen displays first; iOS device users (with face ID authentication) are redirected to the database Login screen.

If you use Windows authentication to log in to your mobile application, you are redirected to the Microsoft login page to re-enter your password after you re-enter your security PIN. If your account has been configured to use Two-Factor authentication (2FA), you need to enter the verification code from your 2FA authenticator application after you re-enter your security PIN or fingerprint/face ID.

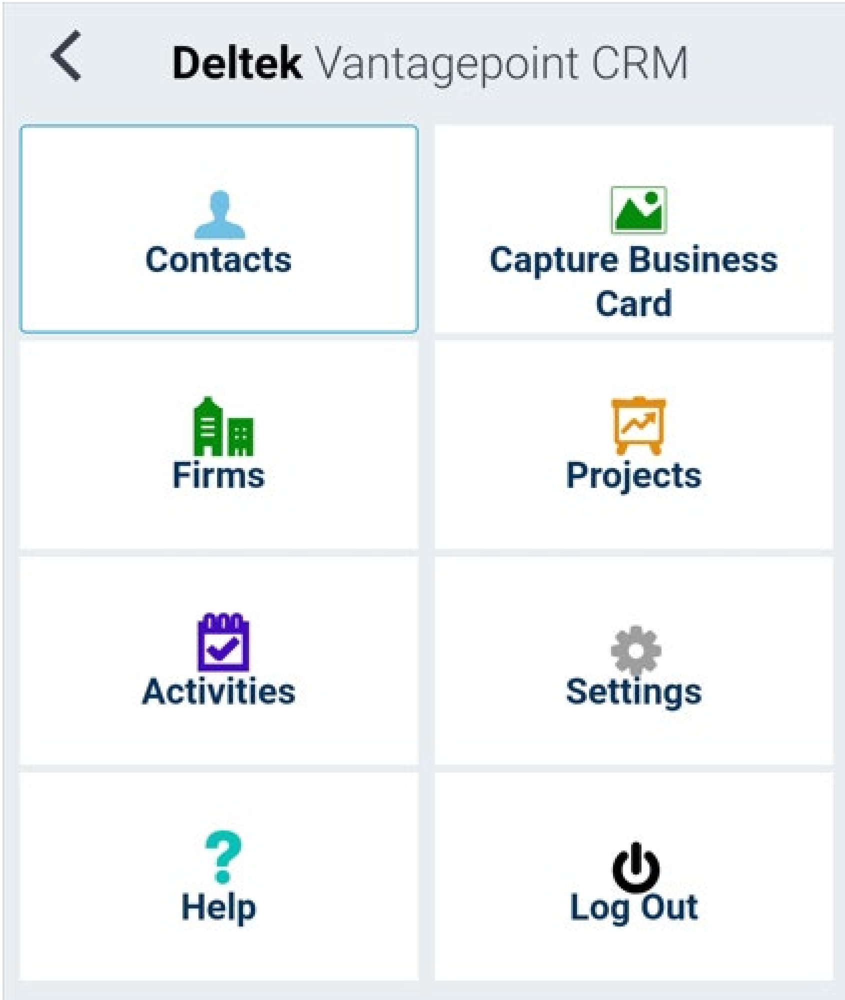
Upgrade Touch Server to PHP 8.1.8

The Touch Server for this version of the Vantagepoint mobile application has been upgraded to support PHP 8.1.8.

Mobile CRM

New Navigation Menu Interface for the Mobile CRM

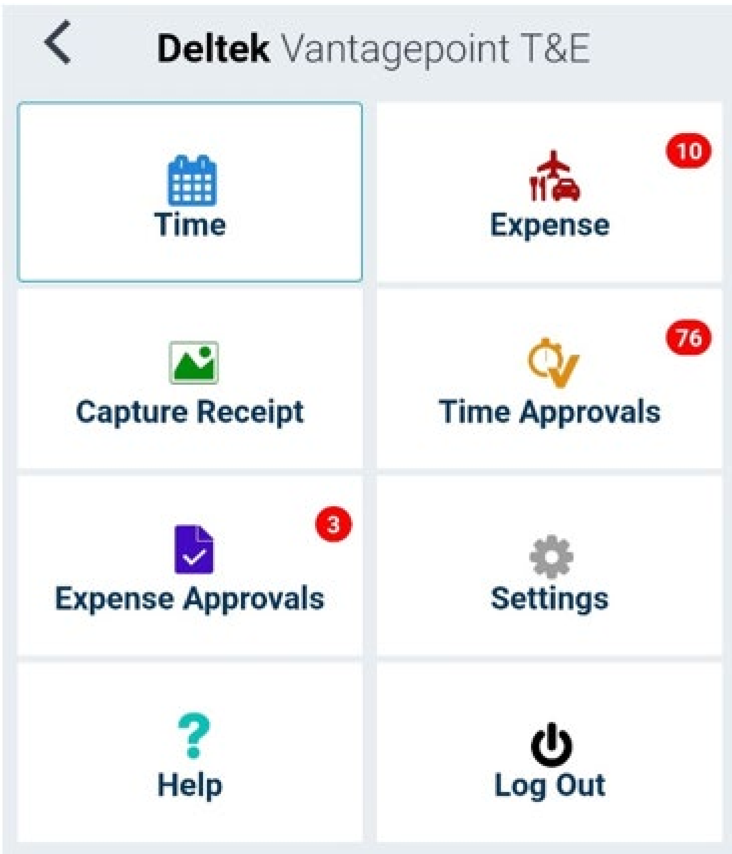
The navigation menu for the user interface in the Deltek Vantagepoint Mobile CRM application has been updated. Graphical icons replaced the old menu links for a better user experience.


Deltek Vantagepoint CRM
Contacts
Capture Business Card
Firms
Projects
Activities
Settings
Help
Log Out

Mobile Time and Expense

New Navigation Menu Interface in Mobile T&E

The navigation menu for the user interface in the Deltek Vantagepoint Mobile Time & Expense application has been updated. Graphical icons replaced the old menu links for a better user experience.



Updated Revision Auditing in Mobile T&E

Some details in the revision auditing process of the Deltek Vantagepoint Mobile Time & Expense application were updated. (These changes are related to the Vantagepoint revision auditing updates).

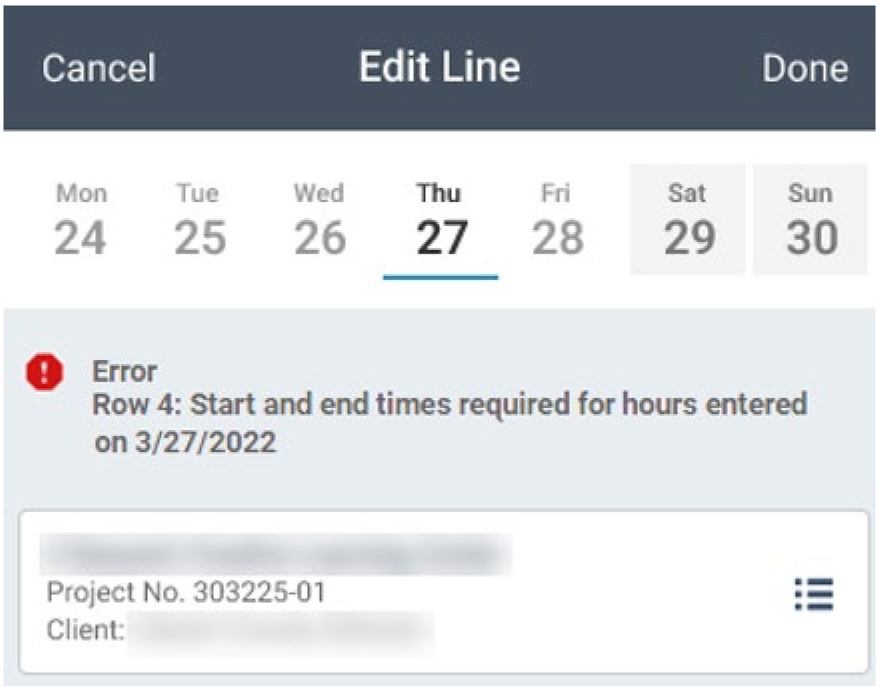
The following auditing now applies:

- Start and End times are audited when you set **Start/End Times** to **Day** in Vantagepoint Settings.
- In Timesheet, you cannot edit user-defined fields (UDFs) after revision auditing has started.
- Timesheet comments are audited in all configuration scenarios, including when you do not enable **Start/End Times**, or when you use the **Start/End Time Entry** option in Vantagepoint Settings to specify that **Start/End Times** are enabled by day or by project.
- The revision auditing comments for **Start/End Times** that are configured by project are displayed in date/time format, not in a timestamp format.
- Meal break times and breaks taken for **Start/End Times** by day or by project are audited.

Improved Date Navigation on the Edit Line Screen

On the Edit Line screen in Timesheet Hours, you can now navigate to or tap a different day on an existing timesheet line by using the new date carousel. By reducing the number of taps needed to enter time on multiple days, the date carousel saves you time.

If you attempt to save while there are blank required fields for an updated timesheet line on the Timesheet Hours screen, a Notifications screen displays error messages. When you tap an error message, you are redirected to the specific date of the timesheet line on the Edit Line screen. (Error messages are also displayed below the date carousel on the Edit Line screen.)

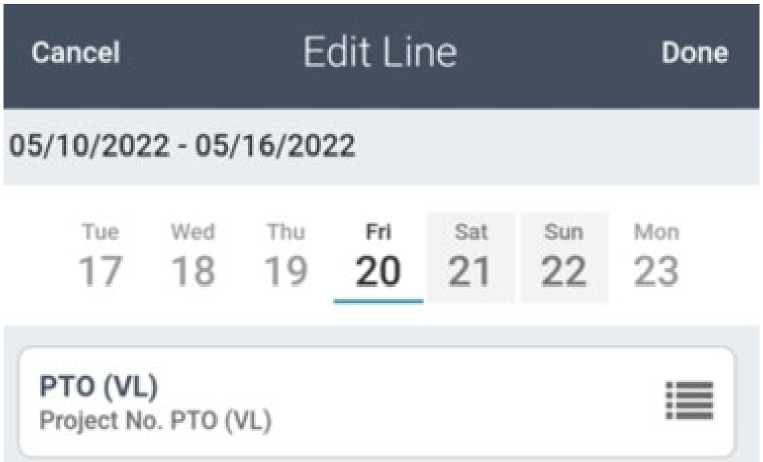


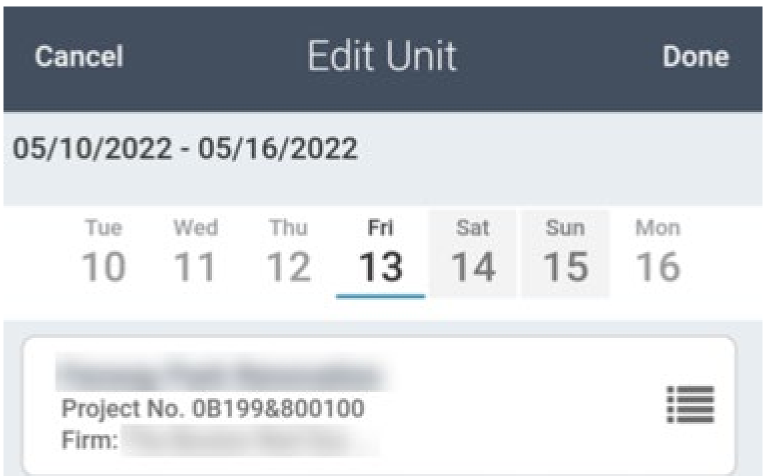
Improve Timesheet Line and Unit Navigation in Mobile T&E

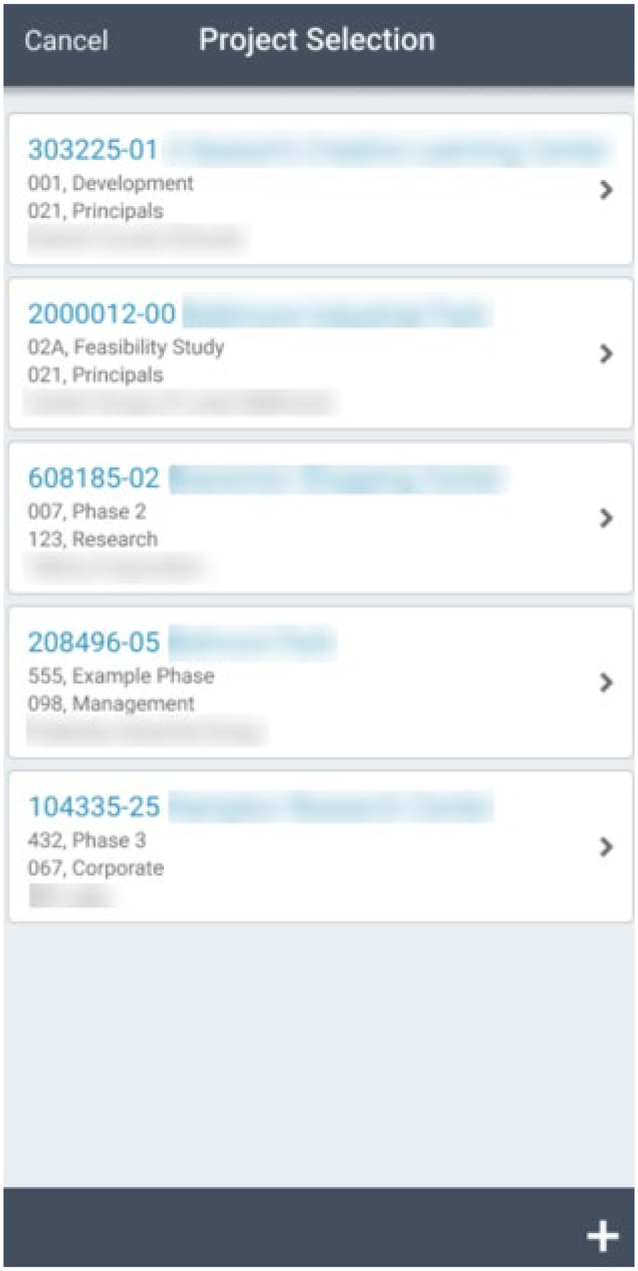
You can now navigate to a different timesheet line and unit using the List icon beside the project header on the Add Line and Edit Line screens in Timesheet Hours and on the Add Unit and Edit Unit screens in Timesheet Units.

When you tap the List icon, you are redirected to the Project Selection screen, which contains a list of existing timesheet lines or units for the timesheet period. If the project that you need has not yet been added to this timesheet, you can add a new line by tapping (plus sign) at the bottom of the screen. The project of the selected timesheet line or unit is displayed on the project header, on the same date that was set before you tapped the List icon.

The List icon is only available if there are multiple timesheet lines or units in the timesheet period.

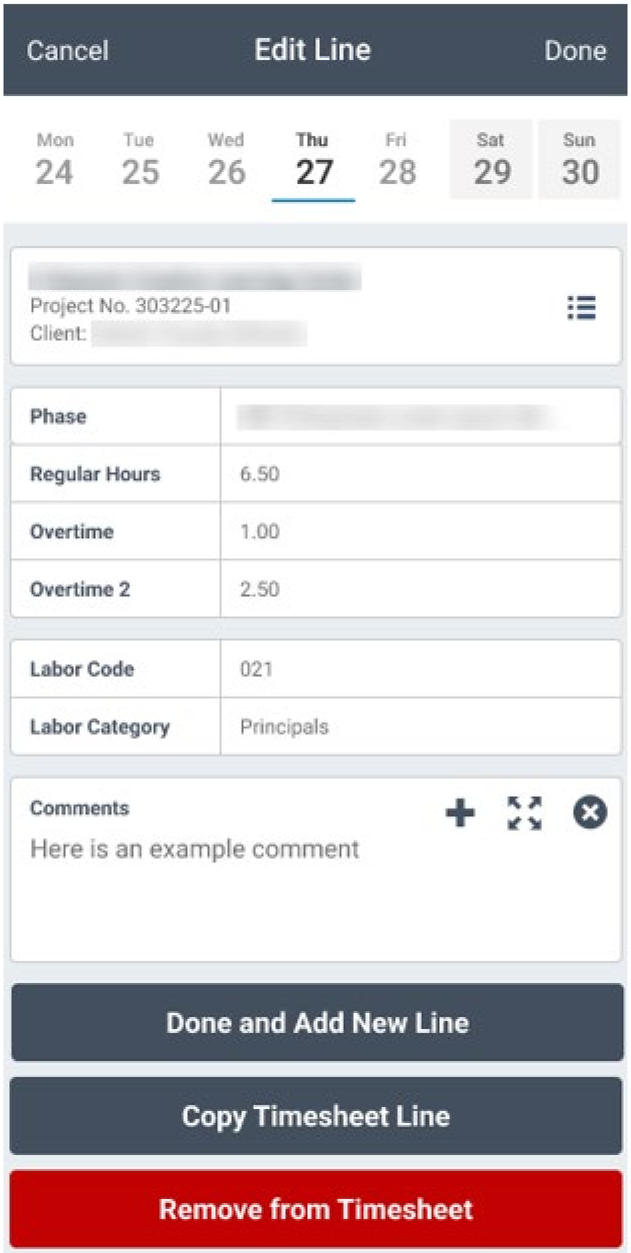

Cancel
Edit Line
Done
05/10/2022 - 05/16/2022
Tue 17
Wed 18
Thu 19
Fri 20
Sat 21
Sun 22
Mon 23
PTO (VL)
Project No. PTO (VL)


Cancel
Edit Unit
Done
05/10/2022 - 05/16/2022
Tue 10
Wed 11
Thu 12
Fri 13
Sat 14
Sun 15
Mon 16
Project No. 0B199&800100
Firm:



Add New Timesheet Lines and Timesheet Units on Edit Screens

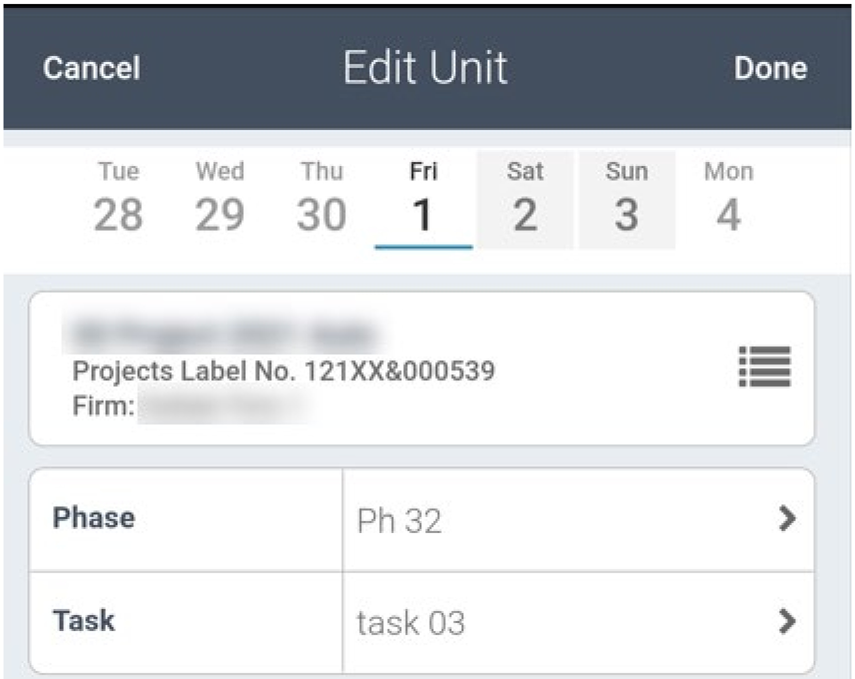
On the Edit Line screen (under Timesheet Hours) and on the Edit Units screen (under Timesheet Units), you can now add a timesheet line using the new **Done and Add New Line** button. You save time when you use this button instead of returning to the main Timesheet Hours screen or Timesheet Units screen to create a new timesheet line or unit.



Improved Date Navigation on the Edit Units Screen

On the Edit Units screen in Timesheet Units, you can now navigate to or tap a different day on an existing timesheet unit using the new date carousel. By reducing the number of taps needed to enter units on multiple days, the date carousel saves you time.

When you move to another day while editing a timesheet unit, tap **Done**, and then return to the main Timesheet Units screen, the original date of the edited timesheet unit is still displayed.



Improved Date Navigation on the Add Project Screen

On the Add Project screen, when you create a new timesheet line or unit and add a new project, you can now navigate to or tap a different day on an existing timesheet line by using the new date carousel. By reducing the number of taps needed to enter time on multiple days, the date carousel saves you time. However, if you swipe the date carousel on the Add Project screen to another day, you are redirected to the Edit Line screen or the Edit Unit screen.

Navigation Menu

Navigation Menu Favorites

You can now designate frequently used applications as favorites in the Navigation menu. To indicate a favorite, click the star icon next to a menu item. After you designate one or more favorite applications and again access the Navigation menu, your favorites display in a separate menu for quick access.

You can also use the **Find Application** feature on the Navigation Menu to quickly search for and locate some of the Vantagepoint applications and their sub menus. Note that if a sub menu does not display in the search results, you can still navigate directly to it from the Navigation menu.

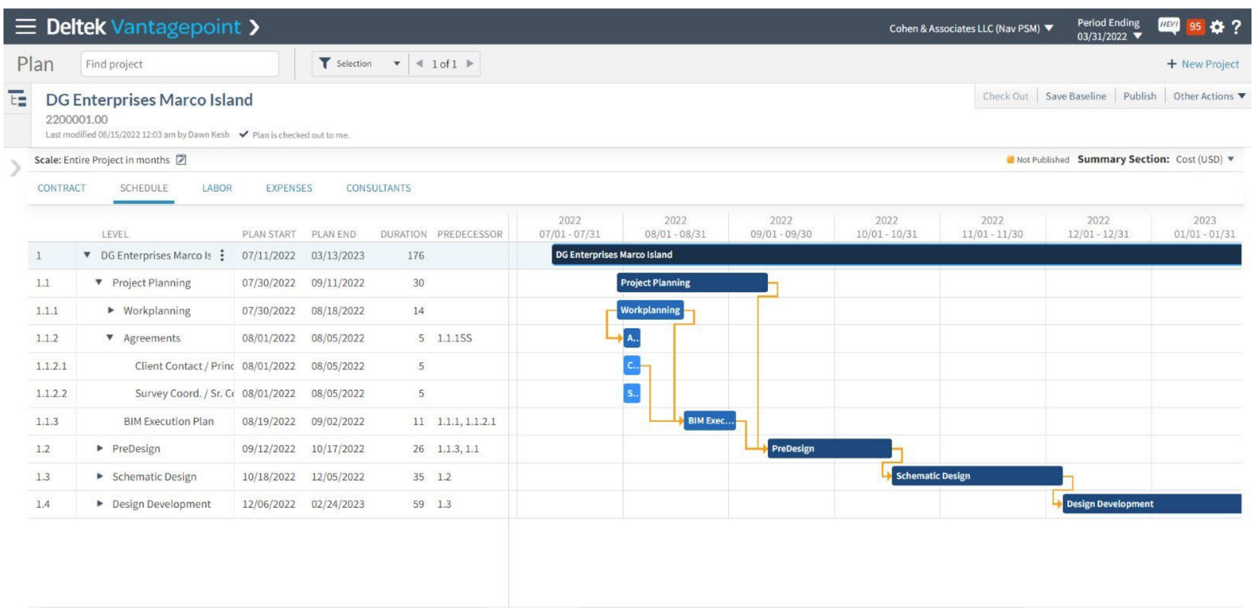
Planning

Create Dependency Relationships Using the Gantt Chart

If you have the Resource Planning module, you can now create dependency relationships between work breakdown structure (WBS) elements on a project plan and ultimately build your project's critical path. Establishing dependencies and a critical path on a project plan empowers a project manager to quickly understand and adjust for project schedule changes and risks. Schedule dates are also streamlined so that when dates change on one level, all of the dependent levels are automatically updated, not just the parent/child relationship.

Use the Schedule tab of Project Planning to set up dependencies between WBS elements. This tab provides an interactive Gantt chart that displays a timeline for each level of your project plan's WBS. The Gantt chart provides a quick way to see, and work with, the project schedule, WBS elements, relationships between the elements, and the critical path.

You can create many dependency relationships for a single project. Each dependency relationship is based on two selected elements--one is considered the predecessor and the other is the successor. There are several ways to create dependent relationships between WBS elements. When you create a dependency, a yellow connector line from the predecessor to the successor displays on the Gantt chart. If you change dates for a predecessor, all successor dates change accordingly. All updates to project plans honor the dependency relationships that have been established, no matter where the updates are initiated.



For more information, see [Create Dependency Relationships](#).

Dependency Relationships and Key Conversion Operations

When possible, key conversion operations now honor any dependency relationships established on a project plan. Affected key conversion operations include combining, changing, or disabling projects, phases, tasks, or labor codes. For combination operations, any schedule dependencies on the existing record, as well as any dependencies on associated records under that level, are removed when you click Run or Schedule to combine phases.

View Schedule Dependency Information in Project Planning Reports

On the Project Planning Performance and Project Planning Schedule reports, you can now view information about dependency relationships between WBS elements (projects, phases, tasks, and associated labor codes). To do this, enable the **Gantt Chart** check box on the Options tab and select the **Predecessor**, **Relationship**, and **Lag/Lead** check boxes. If more than one dependency relationship exists for a WBS element or labor code, a new report row is added for each additional relationship.

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.

Projects Hub

Opened and Days Opened Fields

On the Project Summary Pane, the **Opened** and **Days Opened** fields now display at all times regardless of the project's stage.

Proposals

Proposals Tab of the Projects Hub

The Proposals tab of the Projects form includes two options that give you flexibility when entering proposal information for the currently selected project:

- **+ Add Properties and Create New Proposal**: Select this option to use the New Proposal dialog box to enter the proposal's general information, including the name, number, and due date. The current project defaults in the **Project** field. Click **Continue** to open the proposal in the Proposals application, where you can build the remainder of the proposal.
- **+ Add Properties**: Select this option to add new proposal information to the current project without creating a custom proposal. In a new row in the grid, you can then add general details about the proposal. The **Proposal Type** option defaults to **External**, to indicate that the proposal was created outside Vantagepoint.

Proposal Firms Label Change

References to DUNS Number in the SF330 and associated fields have been updated to reflect the **Unique Entity Identifier** label that is now used in the form.

Purchasing

Purchasing in the Browser Application

New Name for the Option to Enable Purchasing Applications in the Browser

On the Modules form in **Settings » General » Modules**, the **Enable Purchase Orders in the Web Application** option was renamed to **Enable Selected Purchasing Applications in the Web Application,** which better reflects the actual function of the option.

For more information, see the Contents of the Modules Form help topic.

Enabling Purchasing Applications in the Browser Application

When you select the **Enable Selected Purchasing Applications in the Web Application** check box in **Settings** » **General** » **Modules**, you can access the following Purchasing applications in the Navigation pane of the browser application:

- **Purchasing » Purchase Requisitions:** Formerly located in the desktop application, new to the browser in 5.5.
- **Purchasing » Purchase Orders**: Moved to the browser 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 in 4.5.

The following Purchasing applications are available in the Navigation menu of the desktop application:

- **Purchasing » Request for Price Quote**
- **Purchasing » Receiving**
- **Purchasing » Purchase Template Editor**
- **Purchasing » Item Review**

Key User Interface Improvements for Purchase Requisitions

The Purchase Requisitions form features a redesigned user interface that incorporates the design elements used in the browser application, for a more unified look and feel.

- On the General tab, specify record details and add line items that make up the purchase requisition record. When you select the **Need Price Quote** check box for specific line items, the Suggested Vendors grid is displayed.
- In the Suggested Vendors grid, you can enter price quotes and responses from vendors that can supply the specified line item. Use this information to determine the vendor who best meets specifications for the requested item or service.
- On the Shipping, Comments, and Default Distribution tabs, enter shipping information, supplemental information, and project cost distributions for the purchase requisition record.
- On the Default Vendors tab, select the **Need Price Quote** check box to show the Default vendors grid, where you can enter vendors that you frequently use. Each vendor that you select is automatically added to the Suggested Vendors grid on the General tab when you add line items.
- After you add default vendors and click **View Item** (in the row options), the Vendors dialog box is displayed and the Vendors Items grid includes all line items associated with the selected vendor.

- On the Actions bar, click **Print** and then select options for printing the **Current Purchase Requisition** or the **Current Status Report** for the current record. You can also select **Current Request for Price Quote** to print the request for price quote records from vendors that are listed in the Suggested Vendors grid. For additional Purchase Requisition reporting options, click **Other Actions » Reporting**.

Common User Interface Improvements for Purchasing Applications

- If you use an approval workflow, you can now use the Approvals Timeline on the form's header to see a visual representation of the workflow. Starting in 5.5, you can show or hide the Approvals Timeline when you click the **Expand** / **Collapse** buttons at the right of the form's header. (Previously, you clicked **Other Actions » Show/Hide Approvals Timeline** on the Actions bar of the form.)
- When you work on grids in Purchasing, you can now save multiple grid configurations that display the most relevant information for your purchasing tasks. You can share saved grid configurations with other users or specific security roles, to make sure that you are looking at the same information. You can save grid configurations for List View grids, line item grids, and vendor grids.
- All references to Unit of Measure have been updated to **UOM** (from **U/M**).
- In the List View of Purchasing applications, users with buyer rights can now use the Actions bar to close multiple purchasing records. To do this, select one or more approved records and click **Actions » Close**.
- You can now launch Purchasing reports from the Actions bar of the Purchasing forms. Click **Other Actions » Reporting** to launch the Reporting application as a dialog box, which automatically displays a filtered list of all Purchasing reports. Alternatively, launch the Reporting application in **My Stuff » Reporting** and then, on the Reports tab of the Reporting form, set the **Type** option to **Purchasing** to find the same set of filtered reports.
- If a grid in another Vantagepoint application contains a hyperlink to a purchasing record, Vantagepoint now opens the record on a new tab when you click the link. In addition, when you select a purchasing action item in the Notification Center, Vantagepoint opens the record in the browser application.

Approval of Purchasing Records

When you select the **Enable Selected Purchasing Applications in the Web Application** check box in **Settings** » **General** » **Modules**, Purchasing applications are displayed as approval record types in the Approval Center drop-down menu in the browser application.

You can now select the following record types on the Approval Center form:

- Purchase Orders
- Purchase Order – Change Orders
- Purchase Order – Releases
- Purchase Requisitions – moved to the browser application in 5.5

For more information, see Process for Purchasing Applications in the online help.

All Purchasing Reports Now Available in the Browser Application

You can now work with a complete set of purchasing reports in the browser application. All purchasing reports in the browser application provide the same behavior, functionality, and output options as those in the desktop application.

Depending on your selections for the **Enable Selected Purchasing Applications in the Web Application** option in **Settings » General » Modules**, you can access some or all of the following reports in **My Stuff » Reporting** in the browser application:

- 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 (migrated in 4.5)
- 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

For more information, see the Purchasing Reports Overview help topic.

Reporting

Improved Readability and Page Layout of the Individual Report Form Options

The page layout for individual reports has been enhanced, to improve readability. The improvements include the following changes:

- The message "This report has unsaved changes" is now displayed below the report name to indicate that you need to save your edits before continuing.
- An expandable header field section is now displayed above the report tabs. Toggle the **Show**/**Hide** icons to expand or collapse this section. Fields in this section include the **Records**/**Saved Search** field and the **Create Activity** check box.

For more information, see the Contents of the Individual Report Form help topic.

Emailing Resource Planning Reports

When emailing Resource Planning reports, you can now email the report to project roles rather than having to select individual employees. Resource Planning reports are sent only to the selected role on the WBS1 project level (not lower levels of the WBS). If the selected role has reports for multiple projects in a single run, the reports are all included in a single email message, rather than a separate email message for each project. If no one is assigned to the selected role, no email message is sent.

Record Selection for Reports and New Printing Options

Vantagepoint stores your session data when you work in the Reporting application. Now, when you log in to a new session, Vantagepoint remembers the Report tab of the Reporting form or dialog box that you most recently used in the previous session.

On the Actions bar or Other Actions bar, the **Print Report** action has been replaced with a new **Print** action. Use this new action to display a Print Options menu for both List and Detail Views on most Hub forms and on some application forms. Select one of three options for record selections when you print these reports: **Current Record**, **Current Selected Records**, or **Select Records to Print**.

For more information, see the Select a Print Option to Print Records for a Report help topic.

Screen Designer

Update for Standard Numeric and Standard Currency Fields

In Screen Designer, the **Required** field was removed from the Field Properties pane for standard fields with a field types of numeric and currency. As an alternative, use the new **Min Value** and **Max Value** fields on the Field Settings dialog box for standard fields with the numeric or currency field type. For example, to make a standard numeric field a required field, enter **1** in the **Min Value** field on the Field Settings dialog box.

Subsequently, all users must enter a value of 1 or higher for that standard numeric field. You can also specify an upper limit for a standard numeric field. To do so, enter in the **Max Value** field a value that is greater than the one you specified for the minimum value.

Search

Search Dialog Box Improvements

The **Select Search** drop-down list on the Search dialog box now includes the following search components to help you locate and filter hub or application records more efficiently:

- Standard searches (such as **Active**, **All**, and **My Active**) now display along with your existing personal, shared, SQL Where Clause, and legacy searches. Standard searches are predefined, non-editable searches that are specific to the hub or application in which you are working.
- At the top of the list, use the **Quick Find** field to enter information that matches a saved search.
- At the bottom of the list, use the **+ New Search** option to refine your search criteria or to build a new search.

Timesheet

New Options to Print Timesheet Reports from Floor Check

If you have Group, Company, or System access to **My Stuff » Timesheet** and you are responsible for reviewing employee time entries, you can now print detailed or summarized timesheet reports for one or more employees on the Floor Check dialog box.

Previously, you only had the option to print timesheet reports for individual records that you displayed on the Timesheets form or that you set to print automatically when submitted. On the Floor Check dialog box, use the new **Print Detailed Timesheet** and **Print Summarized Timesheet** options to print timesheet reports for multiple employees at the same time.

In addition, the grid filter option on the Floor Check dialog box now supports drop-down lists. Use this enhanced filter to search for and select records that you want to include in the detailed or summarized timesheet reports.

User Interface Changes

Save and Cancel Buttons

To enable you to display actions while you are editing a record, the **Save** and **Cancel** buttons in many Vantagepoint applications have been moved from the form header to the title bar. There are no functional impacts other than the location and color of these buttons.

The affected applications include:

- Activation
- Billing
- Calendar
- Expenses
- Firms
- Organizations
- Planning
- Reporting

Enhancements Summary for Vantagepoint 5.5.2

This section summarizes enhancements made in Vantagepoint 5.5.2.

Online Help

New "Create Schedule Dependencies" Video

A new video titled Create Schedule Dependencies has been added to the online help. This video shows you the different methods for creating schedule dependencies on the Schedule tab of Project Planning. These methods allow you to identify predecessors and successors, select relationship types, and add lag/lead time for dependencies.

You can access the video in the online help:

- From the Learning Aids menu, when you click **?** on the Plan form in **Hubs » Projects » Plan**.
- In related help topics:
  - Schedule Tab of the Plan Form
  - Videos for Project and Resource Managers
  - The following how-to topics: Create Dependency Relationships, Drag the Arrows Between Bars on the Gantt Chart, Use the Dependency Details Dialog Box, and Enter Details in the Predecessor Field.

PSA

Module Activation

You can now specify whether or not your Vantagepoint PSA database will be used for a third-party general ledger solution, such as QuickBooks Online.

To set up your Vantagepoint PSA instance for automatic integration with a third-party GL solution, click **Activate Modules** and set the **Will your PSA instance integrate with a third-party GL solution?** option to **Yes**.

QuickBooks Integration

Adding New Tax Codes in Vantagepoint Is Prevented When You Have QuickBooks Integration Enabled

On the Integration Setup tab in **Utilities » Integrations » QuickBooks**, if you have the **Enable QuickBooks Integration** setting turned on, the following items no longer display on the Tax Codes form in **Settings » Cash Management » Tax Codes**:

- **+ New Tax Code**
- **Copy** action in the Actions menu

The removal of these items prevents you from creating new tax codes in Vantagepoint that would not get added to QuickBooks. With QuickBooks integration enabled, the tax rates that you enter in QuickBooks are added as tax codes in Vantagepoint during synchronization. However, the tax codes that you create in Vantagepoint do not get added to QuickBooks during the synchronization.

On the Tax Codes form in Vantagepoint, you can still edit or delete tax codes that were added to Vantagepoint during synchronization with QuickBooks.

Talent Management Integration

Deltek Unionpoint

Deltek Unionpoint provides another method for integrating Talent Management and Vantagepoint.

Unionpoint is an Integration Platform as a Service (iPaas) solution that allows non-technical business users to build, deploy, and manage integrations with Deltek solutions. With Unionpoint, you can sync data in real-time, transfer and sync both standard and user-defined fields, and create “recipes” in an intuitive platform as you customize your integration.

Unionpoint is available if you are using Talent Management 17.0 or later and Vantagepoint 5.0 or later. If you set up the integration using the Talent Management utility in Vantagepoint (**Utilities » Integrations » Talent Management**), your setup remains unchanged and Deltek will advise you on when you can use Unionpoint to integrate the two systems.

For more information, see Integration Through Deltek Unionpoint in the Vantagepoint help.

Enhancements Summary for Vantagepoint 5.5.3

This section summarizes enhancements made in Vantagepoint 5.5.3.

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 release of Mobile CRM 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 using your default email application.’

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 using your default email application.

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