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Deltek

Deltek
Vantagepoint® 4.0
Getting Started

June 18, 2021



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Getting Started with Vantagepoint

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

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

Video: [See related video below](#)

Follow these general steps:

1. Log in to Vantagepoint. 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 Vantagepoint 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 Vantagepoint 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 Vantagepoint software.

Cloud Administration Help

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

Video

Title	Description
Implementation Overview	Learn about the implementation process and the steps that you take to get Vantagepoint up and running quickly.

Initial Log In

The first time that you use Vantagepoint, 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 Vantagepoint 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. In the **Database** field, select the database that you want to use.
5. In the **Language** field, select the language that you want to use.
This field displays when more than one language is enabled in Vantagepoint, so that you can select the language in which you want the application to display. This list includes all languages that are enabled. When you select a language here, the application refreshes to display in that language.
If the **Language** field does not display, the application uses the language that is specified by your system administrator in **Settings » General » Options**.
6. Click **Log In**.
The Vantagepoint 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.

Video

Title	Description
Activation Overview	Learn how to prepare for the activation process, including the information that you should gather before you begin.

Activate Modules, Accounting Periods, and Fiscal Years

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

Before you complete these steps, Deltek recommends that you review fiscal period information with a Deltek consultant or Deltek Support to avoid errors that are difficult to reverse.

Note that if you initially implement Vantagepoint without the Accounting module or the PSA module, you do not specify a starting accounting period and fiscal year as described in the steps below; they are not needed in that situation. However, if you later activate one of those two modules, no one can log in to Vantagepoint until a starting accounting period and fiscal year have been specified. To do that, a user with an Administrator security role must log in to the browser application. An explanatory message displays, along with the option to open the Accounting Period Setup form. That form contains the same fields and on-screen prompts as the Fiscal Period tab of the Activate Modules page from the initial Vantagepoint activation process. Once an administrator completes the required entries on the Accounting Period Setup form, they and other users can once again log in to Vantagepoint. (This situation may also occur if Deltek Global Consulting provides your initial database as part of a Deltek Power Launch.)

To activate modules:

1. Click **Activate Modules**.

2. On the Modules tab, 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 Vantagepoint 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 Vantagepoint.
 Assume, for example, that you are setting up Vantagepoint 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 Vantagepoint, 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 Vantagepoint 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.

Video: [See related video below](#)

During the Activation process, you can identify up to three levels of project numbering, although many firms use only one (for example, project only) or two (for example, project and phase). For example, you might 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 (WBS) that your enterprise could use. To learn more about the overall work breakdown structure, see the [Work Breakdown Structure](#) help topic.

If the Resource Planning module is activated but the Accounting module is not activated, you do not define project numbering levels as part of the Activation process. Vantagepoint creates your project structure as you import projects from the application in which you maintain them.

To activate your defaults:

1. On the Activation menu, click **Activate Defaults**.
2. From the **Industry** drop-down list, select the one that best matches the work that your enterprise performs and select your country from the **Country** drop-down list. Based on the industry that you specify, some settings and terminology in Vantagepoint automatically change to reflect common industry practices. For example, if you choose Architecture and Engineering Services, Vantagepoint 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 Vantagepoint to your needs. For example, you can use the Labels and Lists page in Setup to change the names of specific fields or change the options 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**.
In most cases, the WBS tab displays. This is where you specify the structure of your project numbers.
If the Resource Planning module is activated but the Accounting module is not activated, the WBS tab does not display. Go to step 6.
4. Click **WBS Structure**.
5. Set up the work breakdown structure for the way that your enterprise manages projects.
If you are using QuickBooks integration with Vantagepoint, you can set up work breakdown levels in Vantagepoint, but any project data from Vantagepoint that is passed to QuickBooks is passed at the work breakdown level 1 (project) only and not lower levels.
6. Click **Done Activating Defaults**.

Video

Title	Description
Work Breakdown Structure Basics	Learn how to set up a work breakdown structure that reflects the project numbering system that you currently use.

Activate Email

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

You can have Vantagepoint 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 Vantagepoint 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 Vantagepoint 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 Vantagepoint 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.

Vantagepoint lets your enterprise track its financial transactions and project performance using multiple global currencies. To learn more about how this works, see [Multiple Currencies](#).

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.

Video: [See related video below](#)

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 Vantagepoint, see [Currency Types](#).
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 Vantagepoint automatically calculate the inverse (Yen to US Dollars). For more information about how exchange rates work in Vantagepoint, see [Exchange Rates Overview](#).
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**.

Video

Title	Description
Activate Multiple Currencies	Learn how to set up monetary currencies and enter exchange rates for them.


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.

Video: [See related video below](#)

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 Vantagepoint 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**.
Vantagepoint 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.

Video

Title	Description
Activate Organizations	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.

Setup

Use Setup to get up and running quickly. During the Setup process, you define policies and processes for common Vantagepoint functions. Setup areas are located in both the Vantagepoint 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 Purchasing & Inventory in the desktop.

Video

Title	Description
Setup Overview	Learn how to prepare for the setup process, including the information that you should gather before you begin.

Set Up Security

Use the Security 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
Roles	Use the Roles form to establish security rights for each role. These rights determine a role's access to the modules, tabs, templates, reports, and records. In many cases, security rights are hierarchical, meaning that you make a basic choice, then further refine that choice.
Users	Use this form to create a user record, specify a username and password, assign a security role, and set up default report settings.
Password Policies	Use this form to specify the options and restrictions for passwords.

Set Up Time

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

Video: [See related video](#)

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.

Video

Title	Description
Set Up Time	Learn how to set up time tracking so that employees can enter, submit, and approve timesheets.

Set Up Expense

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

Video: [See related video](#)

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.
Expense 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 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.
Expense Categories	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. 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.
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.
Expense 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.

Video

Title	Description
Set Up Expense	Learn how to set up expense report tracking so that employees can enter, submit, and approve expense reports.

Set Up Cash Management

Use the Cash Management Setup forms to set up your company's bank codes, tax codes, accounts payable transactions, and credit cards.

Each of the setup forms focuses on a different area.

Form	Description
Options	Use this form to set up the use of credit cards and tax auditing.
Banks	Use this form to set up bank codes, electronic funds transfers, and formats for export text files.
Tax Codes	Use this form to set up information related to taxes, input and output accounts, debit and credit postings, and tax reports. Vantagepoint uses this information to apply taxes to intercompany transactions.
Accounts Payable	Use the Accounts Payable form to specify how Vantagepoint processes accounts payable vouchers and to enable AP Invoice Approvals. You can establish the accounts payable settings system-wide for all companies in your enterprise. In addition to system-wide accounts payable options, there are other company-wide accounts payable options that you need to set up for each of your companies.

Set Up Accounting

Use the Accounting page to set parameters for accounting postings.

Video: [See related video](#)

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 Vantagepoint Settings after the setup process is complete.

Menu Item	Description
Summary	This form shows you the work that you have done on the other forms.
Options	Use this form to choose how to indicate the levels of the work breakdown structure (WBS) at which you can enter project compensation amounts and contract detail amounts in the Projects hub.
Time Analysis	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. See the Time Analysis help topic for more information.

Menu Item	Description
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 Accrual	<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>

Video

Title	Description
Set Up Accounting	Learn the steps required to complete Accounting Setup. Using Vantagepoint to control project success means keeping project management consistent with your financial records. Accounting Setup provides the options to ensure project reporting is consistent with your company's financial reporting.

Set Up General Ledger

Use the General Ledger Setup form to set up accounts.

Form	Description
Chart of Accounts	Use this form to set up accounts, including specifying account numbers and names, setting the status and type, and establishing account groups. You can also add and modify accounts, define system default accounts, and assign accounts to an account range.

Form	Description
	See the Chart of Accounts Settings help topic for more information.

Set Up Currency

Use the Currency Setup forms to establish currency formats. If you enable multiple currencies, you also specify the functional and triangulation currencies used in calculating currency exchanges. You can also set up and maintain daily and period exchange rates.

Each of the setup forms focuses on a different area.

Form	Description
Options	Use this form to set up currency codes, descriptions, symbols, and units. If only one currency is enabled, you can also use this form to enable the Multicurrency application.
Daily Exchange Rates	Use this form to configure exchange rates from one currency to another currency for a specific date. If your firm uses multiple companies, the available currencies are limited to those enabled for the active company.
Period Exchange Rates	Use this form to configure exchange rates from one currency to another currency for a specific period. If your firm uses multiple companies, the available currencies are limited to those enabled for the active company.

Set Up Billing

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

Video: [See related video](#)

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 clients will be billed, including invoice numbering, whether retainers and retainage are tracked, and whether you use an approval process for invoices. See the Retainers , Retainage Overview , and Invoice Approval Overview help topics for more information.
Fee	Choose whether or not to use scheduled billing. Scheduled billing allows you to invoice fee-based projects based on scheduled invoice dates and percent complete or dollar amounts. See the Scheduled Billing topic for more information.

Form	Description
Invoice Format	On this form, select whether or not to show your company name, byline, and address on billing invoices.
Invoice Accounts	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. Also use this tab to enter the label that will appear above each invoice section.
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.

Video

Title	Description
Set Up Billing	Learn how to set up Billing, including selecting options for preparing and formatting client invoices and tracking revenue and taxes.

Set Up Rate Tables

Use the Rate Tables Setup forms to ...

Each of the setup forms focuses on a different area.

Form	Description
Billing Labor Rates	Use this form to assign hourly billing rates to employees for billing their labor. These rates are used in the Billing application to calculate invoice amounts for a project if you select Rate Table as the labor rate method and a billing labor rate table in the project's billing terms. You can set up rate tables for specific clients or industries.
Billing Labor Categories	Use this form to set up labor categories with hourly rates for standard staff roles such as principal, project manager, or supervisor (different types of work).
Billing Labor Overrides	Use this form to set up a billing rate or labor category for employees whose labor will be billed with a different labor rate or labor category for a particular project. Add the override table to the project's billing terms. The billing rate or labor category from the override table overrides the employee's billing rate or labor

Form	Description
	category that is specified in the labor rate table or the labor category table assigned to the project's billing terms. You can also use these tables to specify a maximum cost rate for an entire labor category, rather than by individual employees.
Billing Expense Accounts	Use this form to assign a multiplier (markup) to individual general ledger expense accounts for calculating billable expenses and consultant expenses on billing invoices for projects. These multipliers are used in the Billing application when invoices are generated for a project whose billing terms has By account selected for the expense rate method or the consultants rate method and an expense account table is specified. The multiplier for a general ledger account in a billing expense account table overrides the multiplier used for all expenses as specified in the Multiplier field in the Expense section and the Consultants section on the Rates tab in Billing Terms.
Billing Expense Categories	Use this form to create billing expense categories that allow you to bill a group of related expenses as one item on a billing invoice for a project. You can set up different billing expense category tables as needed, for example, a table to be used for a specific project. Add expense categories to each table and the multiplier (markup) to use for each expense category for calculating invoice billing amounts. Then add the general ledger accounts for each expense category. For a project to use an expense category table for billing invoices, the project's billing terms must have the expense rate method set to By Category and an expense category table specified.
Billing Expense by Vendor	Use this form if you want billing invoices for a project or class of projects to calculate vendor expenses on a billing invoice based on a multiplier (markup) for the specific vendor rather than on the overall multiplier specified for all expenses in a project's billing terms. You can set up different billing expense by vendor tables for different projects or classes of projects. For each table, add vendors and a multiplier for each vendor. For a project to use an expense by vendor table for billing invoices, the project's billing terms must have the expense rate method set to By Vendor and an expense by vendor table specified.
Cost/Pay Labor Rates	Use this form to set up labor rates to override the cost and/or pay labor rates entered for employees in the Employees hub. When you create a cost/pay labor rate table, you specify whether the rate table applies to cost rates, pay rates, or both. For each employee that you add to the table, enter a labor rate and an effective date for the rate if appropriate. Each employee in a labor rate table can have one row that does not specify an effective date; use this row to indicate a default rate to use if no other row has an applicable effective date. You can assign a cost/pay labor rate table to projects, employees, or both

Form	Description
Cost/Pay Labor Categories	Use this form to override cost or pay rates for specific projects for specific labor categories. Labor categories are standard staff roles on project (for example, principal-in-charge, project manager, or supervisor). The table can override cost rates, pay rates, or both.

Set Up Resource Planning

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

Video: [See related video](#)

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have completed 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.</p> <p>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.</p>
Rates	Use this form to specify whether planned amounts should be based on cost rates, billing rates, or both. Later, you will need to

Form	Description
	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). The employee is under-utilized if their utilization is below 76 percent and over-utilized 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). The employee is under-scheduled if their scheduled hours are less than 38 and over-scheduled if the hours 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 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 Vantagepoint is set up to use both multiple companies and multiple currencies, this form is not available.)

Form	Description
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 Vantagepoint 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.

Video

Title	Description
Set Up Resource Planning	Learn how to set up the resource planning module, including selecting options for entering and viewing project, opportunity, and resource plans.

Set Up Project

Use the Project Setup forms to select options related to entering budgets, compensation, and contract amounts. If Vantagepoint is set up to support multiple companies, these settings apply to all your companies.

Each of the setup forms focuses on a different area.

Form	Description
Budget	Use this form to specify the types of columns that can be displayed on the Budget form in the Projects hub and on the Budget Worksheet report.
Contract Management	Use this form to specify the work breakdown structure levels at which compensation amounts for projects can be entered, to indicate if you want to synchronize compensation amounts with contract amounts, and to define defaults for allocating estimated fees.

Set Up CRM

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

Videos: [See related videos below](#)

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 Vantagepoint, not just on this page.

Step	Description
Make a plan	<p>Before you do anything, gather key stakeholders to discuss your goals for using Vantagepoint CRM and how you will achieve those goals. Discuss the data that you will bring into Vantagepoint 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 Vantagepoint 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 Vantagepoint 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, projects you are pursuing, and your marketing efforts. You will probably import this data into Vantagepoint from information sources that you already maintain.</p> <p>See the Hubs help topic for more information.</p>
Empower your users	<p>Identify the employees who will use Vantagepoint CRM and give them appropriate security access to the CRM applications. See the Security Configuration Overview for more information.</p>

Videos

Title	Description
Get Started with CRM for Administrators	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	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	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 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.

Video: [See related video below](#)

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 Vantagepoint 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 Vantagepoint, 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>

Video

Title	Description
Set Up Labels and Lists	Learn how to set up a new custom label, edit an existing label, and edit lists and their drop-down values.

Set Up General

Use the General Setup forms to establish settings for all users. You can restrict access to these options in Security settings.

Each of the setup forms focuses on a different area.

Form	Description
Options	Use this form to establish both system-wide and company-specific settings. System-wide settings include workflow logs,

Form	Description
	internet authentication, polling intervals for alerts, exported report destinations, FileStream file size upload limits, Hey Deltek interaction, and text editor font defaults. Company-specific settings include your company's name, address, and phone format.
Communications	If you installed Vantagepoint on your own server, use this form to set system-wide options for sending email messages for alerts or errors.
Modules	This form displays the Vantagepoint modules that you activated.

Set Up Integrations

Use the Integrations Setup forms in Utilities to set up integrations between Vantagepoint and other software products and to import data into Vantagepoint from a spreadsheet or other CSV file.

Video: [See related video below](#)

Each of the integration forms applies to a different type of integration.

Form	Description
Ajera	Use this form to set up integration between Vantagepoint and Ajera. This tab has just one check box, Enable Ajera Synchronization .
API Authorization	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 Vantagepoint database. Click Generate Secret to generate the Client ID and Client Secret.
GovWin IQ	Use this form to set up integration between Vantagepoint and GovWin IQ, a Deltek service that helps companies find government contract opportunities.
Collaboration	Use this form to set up integration with Collaboration. Before you perform this step, you must obtain a Client ID and Client Secret from Deltek.
Maconomy	Use this form to configure APIs to connect your Maconomy instance to Vantagepoint. This allows you to integrate Maconomy information with Vantagepoint and synchronize user-defined fields and workflow data.
VAT Registrations	Use the VAT Registrations form to configure the subscription license for Vantagepoint to use the vatlayer API system to validate European Union VAT numbers.
Salesforce	Use this form to set up integration between Vantagepoint and Salesforce, including the rules that will control which data is

Form	Description
	shared between the two applications, when it is shared, and how data is mapped between the two applications.
QuickBooks	Use this form to turn on the QuickBooks integration, connect Vantagepoint with QuickBooks Online, run the initialization to copy records from QuickBooks Online to Vantagepoint for the first time, map records, set up the time interval for automatic updating to occur between Vantagepoint and QuickBooks Online, and complete other settings. For more information, see Set Up QuickBooks Integration .

Video

Title	Description
Integration with Salesforce	Learn how to use the Salesforce Integration module to integrate Salesforce and Vantagepoint. In addition, learn how to use existing Salesforce information to create projects in Vantagepoint, how to access and report on sales data in one place, and how to use Salesforce information to create estimates.

Set Up QuickBooks Integration

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

To open the utility, select **Utilities » Integrations » QuickBooks** in the Vantagepoint Navigation pane. You can use this utility when you log in to Vantagepoint with your setup credentials to initially activate and set up Vantagepoint, 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 Vantagepoint setup or after the initial setup.

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

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

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

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:

Tab on the QuickBooks Form	Description
	<ul style="list-style-type: none"> ▪ Enable QuickBooks integration. ▪ Connect Vantagepoint with QuickBooks Online. ▪ 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 Vantagepoint and QuickBooks Online.
Tax Code Mapping	Use this tab to review and map the tax codes that are linked between Vantagepoint 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 Vantagepoint.

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

Vantagepoint Version and System Information

You can access information about your Vantagepoint installation on the About dialog box.

About Dialog Box

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

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

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

If you use the Vantagepoint Connect add-in, the file name for the Microsoft Outlook add-in manifest URL that you need when you initially add the add-in in Outlook displays on the System Info tab on this dialog box. You must click the **Configure Connect** button in **Utilities » Integrations » Connect Administration** to populate this field.

Display the About Dialog Box

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

1. Do either of the following:

- In the browser application, click **?** on the Vantagepoint toolbar.
 - In the desktop application, click **Help** on the Vantagepoint toolbar.
2. Click **About**.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue.

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