Deltek

Deltek Vantagepoint 7.0

Enhancements Summary

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Contents

Vantagepoint 7.0 Enhancements

This document describes the new features and enhancements in the Deltek Vantagepoint 7.0 release.

Analysis Cubes

Standalone Analysis Cubes Module

Vantagepoint now supports standalone Analysis Cubes, without Vantagepoint Intelligence. To specify this approach, enable Analysis Cubes on the Modules form (**Settings » General » Modules**) without also enabling the Intelligence module. (As in earlier releases, when you enable the Intelligence module you automatically get access to both Vantagepoint Intelligence and Analysis Cubes.)

API

Expose the GET Open Purchase Order Voucher Detail API Endpoint and Update AP Vouchers-related API Endpoints

To further support your ability to create vouchers from purchase orders, the GET Open Purchase Order Voucher Detail API Endpoint is now available. This endpoint retrieves a list of available purchase order lines to be chosen for the voucher. This new API endpoint honors existing validations and restrictions as well as security requirements at the application level.

In addition, AP Vouchers-related API Endpoints now accommodate create voucher from purchase order functionality.

Azure Active Directory

Azure Active Directory is Now Microsoft Entra ID

References to “Azure Active Directory” and “Azure AD” were changed to “Microsoft Entra ID” throughout the Vantagepoint and Vantagepoint Mobile online help, PDF guides, and user interface. These changes reflect Microsoft’s name change for this product.

Billing Terms

Create Fee-Based Billing Phases Using Existing WBS Items and Compensation Values

On the Fees tab in Billing Terms, you now have the option to create billing phases that are set up automatically using work breakdown structure (WBS) items and compensation values that have already been entered for a project. This helps you create billing phases more efficiently and accurately.

Turn On and Set Up the Feature

Use the new Billing Terms Fee Update section of the Fee form in **Settings » Billing » Fee** to turn on and set up this feature:

- Set **Enable Billing Phase Creation** to **Yes** to turn on this feature.

- In the Compensation Grouping for Fees grid, specify the compensation amounts from the Compensation tab in **Hubs » Projects » Contract Management** to use for calculating the fee amounts that will prefill for the billing phases in the Fee Billing Phases grid on the Fees tab in Billing Terms.

If you have multiple companies in Vantagepoint, you enable this feature and set up the compensation grouping for each company.

For more information about the setup, see the following help topics:

- Contents of the Fee Form
- Enable and Set Up Billing Phase Creation

Create Billing Phases Using Existing WBS Items and Compensation Values

On the Fees tab in **Hubs » Projects » Billing Terms**, a new **Create Billing Phases from WBS** action displays on the toolbar of the Fee Billing Phases grid when you complete the setup described above.

Click this action to open the Billing Phases dialog box and select the existing WBS items from which to automatically create billing phases. When you click the **Add Selected** button on the dialog box, new billing phases based on the selected WBS items from the dialog box are added to the Fee Billing Phases grid on the Fees tab. The calculated fee or percent of fee values, as well as other information from the selected WBS items on the Billing Phases dialog box, prefill for the new billing phases that are added to the Fee Billing Phases grid.

The **Create Billing Phases from WBS** action is an alternative to using the **+ Add Billing Phases** action on the Fee Billing Phases grid toolbar, which requires you to manually enter billing phases from scratch in the grid.

For more information, see the following help topics:

- Fees Tab of the Billing Terms Form
- Create Fee-Based Billing Phases from Existing WBS Items and Compensation

Cloud ODBC Changes

Users Form Updates

These changes apply if you have activated the Flex Cloud ODBC Connectivity module.

In **Settings** » **Security** » **Users**, in the Cloud ODBC Settings section of the Users form, the **Password** field was removed because Deltek now manages the password for the ODBC service. If you need to change your ODBC password, contact Deltek Support. As a cloud administrator, you see this change when you configure your company's cloud users with ODBC access. When you select the **Enable Cloud ODBC Connectivity** checkbox in the Cloud ODBC Settings section, only the **Email** field is enabled and required.

For more information, see the following help topics:

- Content of the Users Form, in the Vantagepoint Online Help
- Create ODBC Accounts, in the Vantagepoint Cloud Administrator Online Help

Connect Integration Utility

Connect Combines Sync Options and Administrative Functionality

On the Navigation pane, under **Utilities » Integration**, the Vantagepoint Connect add-in is now labeled **Connect**. The new user interface for the Connect add-in combines synchronization options with administrative functionality. Connect Sync Options is no longer a separate utility.

Only those users who are members of a security role that has the **Administrator** checkbox selected have administrator rights for Connect, including the ability to manage users and select the **Delete All Connect Configurations** option on the Actions menu in Connect.

Upgrade note: If a user previously had access to Connect Administration but not to Connect Sync options, you must update their security role to give them access to the new **Connect** option on the Navigation pane. To do this, navigate to **Settings » Security » Roles**, select the appropriate role, and on the Overview tab of the Roles form make sure that **Connect Administration** is selected under **Utilities » Integrations**.

Dashboards

Upcoming Employee Availability System Dashpart

Use the new Upcoming Employee Availability system dashpart to display a list of employees with their current and future availability, based on planning assignments. Use options for this system dashpart to fine tune the details and employees displayed.

You can specify that this system dashpart display any of the following:

- Only available employees
- Employee availability for a specific forecast range (scale, duration, and start)
- Employee availability that is based on scheduled or utilization hours, percentages, or both hours and percentages.

Custom Colors for Dashpart Title Bars

You can now customize the font color and background color of dashpart title bars for new and existing dashparts. The **Title Bar Formatting** options are available in the following locations:

- For table and chart dashparts with a hub based dashpart base, specify title bar formatting on the Table Options dialog box or Chart Options dialog box.
- For dashparts with the Web URL Link dashpart base, specify title bar formatting on the Add New Dashpart dialog box or Edit Web Link Dashpart dialog box.
- For other dashpart bases, specify title bar formatting on the Dashpart Designer form.

You cannot specify title bar formatting for system dashparts.

Security for the AP Detail Dashpart Base

Specify role-based access for the new AP Detail dashpart base and its columns on the Access Rights tab of the Roles form (**Settings » Security » Roles**).

AP Detail Dashpart Base

Use this new dashpart base to display the details of your AP vouchers and related firm data in Dashboards. In the Dashpart Designer, you can customize dashparts with the AP Detail dashpart base in many ways—you can apply sorting, groupings, filters, date ranges, and other display options to fine tune the data. You can also add calculated fields, or associate drill-to dashparts to display more information that is not included in the list of available columns.

If you use multiple companies, the AP Detail dashpart base includes data from all companies and you can group or sort this data by company on the dashpart.

Data Import Utility

New Data Import Utility for User-Defined Hubs in the Browser Application

You can now use the Data Import application in **Utilities » Imports & Exports » Data Import** to bring records from user-defined hubs into your Vantagepoint database. You can create new records or update existing records. Using the Import Settings dialog box, you configure the import to trigger workflows and/or ignore fields required by Screen Designer.

When you import a comma-separated values (CSV) file, Vantagepoint:

- Loads the first 10 records into the grid of the Import utility
- Automatically attempts to map each column from the import file to a database column by using the column captions from the import file
- Displays the column captions from the import file

When you import the data, Vantagepoint:

- Validates the record against your database and configuration
- Displays a count of the number of rows imported
- Imports all valid records into Vantagepoint
- Provides a file that lists any non-valid records in an error table for you to review, correct, and re-validate

For more information, see Data Import Utility in the online help.

Employees Hub

Termination Date Required when Employee is Terminated

When you change an employee's status to **Terminated** in the Summary pane, you are now required to complete the **Termination Date** field in the Key Dates section of the Employment Details tab.

Hubs

New Explicit Save in List View Feature Streamlines Updates for Multiple Records (Opt-In Available)

You can now opt in to the new **Explicit Save in List View** feature.

You can choose to opt in to this feature for the Vantagepoint 7.0 release. The ability to opt in is temporary and will be removed when the feature becomes automatically enabled for all Vantagepoint users in a future release. For more information, see Opt-In Features Overview.

Use the **Explicit Save in List View** feature to quickly update information for multiple records in list view and simultaneously disable the auto-save mechanism for hubs. After you enable **Explicit Save in List View**, Vantagepoint displays **Save** and **Cancel** buttons that you can use as you update records. When you finish updating records, click **Save** to save all validated records.

If validation errors occur, Vantagepoint highlights the errors in the grid, with the first error in the list given focus. Errors are also displayed on the Errors dialog box, which includes an error count. The dialog box also lists the field in which each error occurred and a message about the error. For some errors, possible corrections are also listed on the dialog box.

For more information, see Explicit Save in List View (Opt-In Available).

Mobile

Touch Server Upgraded to PHP 8.2.13

The Touch Server for this version of the Vantagepoint mobile application has been upgraded to support PHP 8.2.13.

Add Touchpoints to Projects, Firms, and Contacts in Mobile CRM

You can now add touchpoints to project, firm, and contact records in Vantagepoint Mobile CRM. A touchpoint is a streamlined activity type that enables you to quickly add notes about an interaction with a client to a project, firm, or contact record. To add a touchpoint, tap the new **Touchpoint** option under the Create New menu in the active record.

Mobile Time and Expense

Default to Using Keypad for New Installations

New installations of Mobile Time and Expense now default to using the keypad instead of the picker for timesheet entries. You can change this option at any time in Settings.

Absence Requests

You can now request absences, and view previously requested absences, in Mobile Time and Expense. If absence requests are configured in the Absence Accrual application **(Settings » Accounting**) in Vantagepoint and an approval workflow is configured for absence requests, the **Request Absence** and **View Previous Requests** options become available under the **Periods** and **Timesheet Hours** menus in Mobile Time and Expense. If an absence request has been rejected, you need to resubmit a new request with the appropriate correction.

Approve Expense Reports Regardless of Company

In databases with multiple companies, approvers can now view all assigned expense reports for approval regardless of the employee's home company. Expense details and amounts display using the currency and expense settings of each company.

Opt-In Features Overview

Opt-In Features Support Testing in Your Company

As an administrator, you can use the new Opt-In Features form (**Settings » General » Opt-In Features)** to enable designated new features for your Vantagepoint users. Features listed on this form will be optional during a specific timeframe. In a future release, the features will become automatically enabled for all Vantagepoint users.

This enhancement supports testing by users in your company. When you enable an opt-in feature in a sandbox database, you give your users the opportunity to experience how that feature will potentially impact their workflow, data, and application use. You control the timing of this testing, which you can schedule to take place before you enable the feature in a production database and before the feature is automatically enabled for all users in a release. During the opt-in timeframe, you can also disable most opt-in features, if necessary.

In a later release, after the opt-in timeframe is over, these features will become automatically enabled for all Vantagepoint users and will no longer be listed on the Opt-In Features form. While some features may have additional settings or security to enable at that point, most will become standard in the product.

Vantagepoint 7.0 Opt-In Features

The following features are available on the Opt-In Features form in Vantagepoint 7.0:

- **Purchasing**: Create Voucher from Purchase Order (Create VO from PO)
- **Purchasing**: Request for Price Quote
- **Transaction Cente**r: Enhanced Row Level Validation (Transaction Entry and AP Invoice Approvals)
- **Hubs**: Explicit Save in List View

Opt-In Features Described in Online Help and Other Content

Throughout Vantagepoint content, opt-in features are identified by this label: **(Opt-In Available)**. Topics that discuss opt-in features also include the following statement:

> You can choose to opt in to this feature for the Vantagepoint 7.0 release. The ability to opt in is temporary and will be removed when the feature becomes automatically enabled for all Vantagepoint users in a future release. For more information, see Opt-In Features Overview in the online help.

When the feature becomes a standard part of Vantagepoint in a future release, this label and statement will be removed from all associated content.

Planning

Cost Rate and Billing Rate Columns Added

On the Labor tab of the Plan form, in the Labor grid, use the new **Cost Rate** and **Billing Rate** columns to see cost and billing rates associated with resources in labor plans.

Edit Dates and Duration Values on the Schedule Tab

On the Schedule tab of the Plan form, improved precision is now available for editing project dates. On this tab, you can now edit these columns in the Schedule grid: **Plan Start**, **Plan End**, and **Duration**.

Automatically Update Plan when Absence Requests are Approved

You can now set up Vantagepoint to automatically update planned hours from approved absence requests. This feature saves time and provides up-to-date employee availability for you when you are planning projects. If an employee later removes an approved absence request, the plan is automatically updated to reflect the deletion.

If you already use the custom package "Absence Request Automation: Timesheet & Project Plan Updates," avoid using both the custom package and this new feature so that planned hours are not doubled on the PTO plan.

New Location of Scale Control on the Plan Form

The **Scale** control now displays only on the individual tabs for which it applies.

Projects Hub

New Project Smart Summary and Related Security Settings

The project Smart Summary is now available in the Summary pane of the Projects form. Click the **Smart Summary** button to rapidly build project Smart Summary briefings using AI-generated technology and your project data.

Project Smart Summary briefings highlight important information about your project, including a high-level overview, financial health information for regular awarded projects, a pursuit summary for regular in-pursuit projects, recent activities, and a plan summary.

Disclaimer: Each Smart Summary briefing is generated by an artificial intelligence tool using your Vantagepoint data exclusively. This tool is provided subject to the terms of your Vantagepoint licensing agreement governing the use of Smart Summaries. Deltek does not represent, warrant, or independently verify briefing accuracy. You are strongly encouraged to independently review and verify the accuracy of each Smart Summary briefing that you generate.

The project Smart Summary is available for regular and promotional projects.

Depending on the project charge type, the project stage, and the modules enabled, the project Smart Summary briefing includes one or more of the sections listed in the following table.

Section	Contents
Overview	This section presents general project information, including the project status, the primary client, key dates, key project employees, and upcoming project milestones.
Financial Health	This section provides a snapshot of the project's current financial state and key performance indicators (KPIs).
Recent Activities	This section displays information about the five most recent activities, by start date, excluding any private activities.
Pursuit Summary	This section displays pursuit details such as the estimated fee, weighted fee, and key pursuit employees.
Plan Summary	This section displays, for projects with planning data, a plan summary that includes the plan schedule and the employees with the highest estimate-at-completion hours and labor category

Your administrator grants system-level access to the Smart Summaries tool in **Settings » General » Options** and specifies user access to generate Smart Summaries via role security.

For more information about the project Smart Summary briefing, see Contents of the Project Smart Summary Preview and Project Smart Summary KPIs and Calculations in the online help.

Purchasing

Create Request for Price Quote (RFQ)-Only Records in Purchase Requisitions (Opt-In Available)

You can now create standalone Request for Price Quote-only records in Purchase Requisitions.

You can choose to opt in to this feature for the Vantagepoint 7.0 release. The ability to opt in is temporary and will be removed when the feature becomes automatically enabled for all Vantagepoint users in a future release. For more information, see Opt-In Features Overview.

To enable this feature, navigate to **Settings** » **General** » **Opt-In Features** and enable **Create Request for Quote Only**. When you enable this feature, your database is permanently converted to support the feature and that action cannot be undone. Before you move RFQ records to the browser application, make sure that you have approved all pending requests.

To create RFQ-only requisition records, navigate to **Purchasing » Purchase Requisitions** and on the General tab of the form select the **Create RFQs Only** checkbox. Selecting this option does not change the item inventory counts in **Purchasing » Item Review**. You can filter RFQ-only requisitions from other purchase requisitions on forms and reports.

Request for Price Quote No Longer Available in the Desktop Application

Now that you can create Request for Price Quote records in **Purchasing** » **Purchase Requisitions** in the browser application, **Purchasing** » **Request for Price Quote** is no longer available in the desktop application. You can still access and reference any data associated with legacy requisitions through Reporting.

With the removal of the Request for Price Quote application from the desktop application, the following related settings that control elements in that application were removed in **Settings** » **Purchasing & Inventory** » **Company**:

- **Required Data section**: **Cost Distribution in P.O./R.F.Q.** checkbox and **Requisition/RFQ Number in P.O./R.F.Q.** checkbox
- **Approval section**: **Use Approval Workflow for RFQs** checkbox and drop-down menu
- **Next Numbers section**: Price Quote Request Number text box

New Categories for Record Types

The following record type categories are now available:

- **Requisition**: These are purchase requisition records created in the browser application.
- **RFQ Only**: These are request for price quote-only records, created after you select the **Create RFQ Only** checkbox on the General tab of the Purchase Requisitions form.
- **Legacy Requisitions:** Also referred to as legacy RFQs, these are price quote records that you originally created in **Purchasing** » **Request for Price Quote** in the desktop application and have now transferred to the browser application.

Related User Interface Changes

When you opt in to the **Create Request for Quote Only** feature, the following user interface updates occur.

Purchase Requisitions Form Updates

The **Create RFQs Only** checkbox is now available on the General tab of the Purchase Requisitions form. Use this option to define purchase requisition records as requests for price quotes (RFQs) only.

Purchase Orders > Create From Updates

When you create a purchase order in **Purchasing** » **Purchase Orders**, two new options are available on the form: **From Requisition** and **From Legacy Price Quote**. When you create a purchase order from a requisition, you can now filter to select from requisitions that are marked as “Create RFQ Only.” These options follow the new categories for record types.

Reporting Updates in My Stuff » Reporting

To create reports based on legacy price quote records, use the Request for Price Quote Status – Legacy report (formerly called the Request for Price Quote Status report).

To filter RFQ-only and legacy requisitions on the Request for Price Quote Form report and the Purchase Requisition and Price Quote report, use the new filtering options for those reports.

Project Review Form Updates

On the Purchasing tab of the Project Review form in **Hubs » Projects » Project Review**, in the Purchase Requisitions grid, a new **RFQ Only** column was added, along with indicator checkboxes. You can use the grid filters to filter RFQ-only records.

Item Review Form Updates

On the item Review Form, in the Purchase Requisitions grid, use the new **Type** column to display the record type of associated records: **Legacy Requisition**, **Requisition**, or **RFQ Only**.

Approvals Updates

In **Settings » Approval » Approval Workflows**, when you define a condition for an approval workflow, select **POPR.RFQ Only** to set approval conditions to include RFQ-only records.

You can no longer approve legacy requests for price quotes in the desktop application.

Save and Cancel Buttons on Purchasing Forms

Save and **Cancel** buttons are now available in form headers in **Purchasing** » **Purchase Requisitions** and **Purchasing** » **Items**. These buttons are enabled when you make changes on the forms.

Reporting

The Project Forecast Report Now Includes Phases and Tasks (WBS2 and WBS3 Levels)

You can now report revenue forecasts, and view compensation and contract amounts, at the work breakdown structure (WBS) levels to which they are assigned, not just at the project (WBS1) level. You can see the project's allocation method in a new project column on the report. You can also group and total data using fields such as organization or project manager at the project, phase, or task level.

Aged Unbilled Revenue Report Now Available

Prior to the 7.0 release, the Aged Unbilled Revenue report was available as a custom report. Now, you can access this project report in Reporting. This report is a critical tool for controllers, accountants, and project managers because it provides a comprehensive view of Unbilled Revenue aging, which in turn supports decision making for financial management and project success.

Use the Aged Unbilled Revenue report to show the balance between revenue generated less billings/invoice amounts in which billing is relief from revenue aging buckets on a first-in, first-out (FIFO) basis. The report ages unbilled revenue based on the revenue recognition date in the journal entry. This determines the aging bucket for the unbilled revenue. You can also specify how the report displays currency information, filters report output, and summarizes all levels of projects, including project, phase, and task levels. For more information, see Aged Unbilled Revenue Report Overview.

Resource Management

View Scheduled and Utilization Hours or Hours/% in Resource View

In addition to viewing scheduled or utilization percentages, you can use the new **Show** options in Resource View to view scheduled or utilization hours, or both hours and percentages, for your resources. These values display with cell background colors that indicate scheduled or utilized thresholds:

- **Gray**: Properly utilized or properly scheduled
- **Blue**: Under-utilized or under-scheduled
- **Red**: Over-utilized or over-scheduled

The Grid Settings dialog box includes new columns and sorting options that support further analysis.

For more information, see Contents of the Resource View Form.

Search

Advanced Project Search Enhanced to Display WBS Levels in the Record Results List and in List View

When searching for projects, you can now specify which levels of the work breakdown structure (WBS) are included in the results.

On the New Project Search dialog box, use the following options to specify the WBS levels that display in search results and in the Record Results list.

- **Results to Display**: Use this option to specify the project level or levels that you want displayed in the Record Results section on the New Project Search dialog box. Select one of the following choices:
    - **Project:** Select this option to display only the top-level project records, regardless of the number of phases and tasks associated with the project or the matches for the search. For example, you search for **Project Manager is Me** on the task level and you are the project manager for two tasks but you are not the project manager for the top level. In this case, the record results list includes one result for the project.
    - **Phase:** Select this option to display only the phase levels of the project, regardless of the number of tasks associated with the project or the matches for the search. For example, you search for **Project Manager is Me** on the task level and you are the project manager for four tasks on two different phases of the project, but you are not the project manager for the project or phase level. In this case, two phases are included in the record results list for the phases that own the tasks on which you are the project manager and the phase column is added to the record results list.
    - **Task:** Select this option to display records for the task levels of the project, regardless of the matches for the search. For example, you search for **Project Manager is Me** on the task level and you are the project manager for four tasks on two different phases of the project, but not for the project or phase level. In this case, the four task records on which you are the project manager are included in the results, as well as the phase and task columns. (This option is hidden if you do not use the task level.)
    - **All Matches**: Select this option to display records for all levels of the project that match your criteria. For example, you search for **Project Manager is Me** on any level of the WBS and you are the project manager for four tasks and two phases on a project, but you are not a project manager for the project. In this case, the record results list includes six items, one for each task and phase for which you are the project manager. The phase and task columns are added to the results list.
- **List View Display**: Use this option to specify how your project search records display project levels when you are working in the Record Results list. Select one of the following choices:
    - **Tree List**: Select this choice to display project levels in a hierarchical structure. Each top-level project can contain related phases and each phase can contain related tasks. This choice is available only when you set the **Results to Display** option to **Project**.
    - **Flat List:** Select this choice to display records in a list, without any hierarchy. This is the only choice available if you set the **Results to Display** option to **Phases**, **Tasks**, or **All Matches**.

Extended Search Navigation Control Functions Enable You to Track New Records

You can now add and track new records in Search Navigation Controls on most forms in the hubs and in other applications. When you save one or more new records on an active form, Vantagepoint displays the **New Records** label in the Saved Search control, along with a confirmation message for each new record saved. You can then use the **New Records** paging control to view, track, and edit information for each new record on the active form.

When you move the focus from the **New Records** control and navigate to another field, search, or form, you lose the ability to use New Records to view, track, and page through new records and the **New Records** label reverts to **Saved Search**.

For more information, see Use Search Navigation Controls to Track New Records.

Timesheets

Enable Timesheet Assist

You can now set up Vantagepoint to display reminders for employees to complete timesheet entries for the current timesheet period.

In **Settings » Time » Time Groups**, select the **Enable Timesheet Assist** checkbox and enter the number of days before the timesheet due date that you want the reminder to display. By default, all time groups and associated employees in the active company will receive the reminder. In the Time Groups grid, use the checkboxes to specify the time groups for which you want to enable or disable Timesheet Assist.

When you log in as a regular user (rather than as an administrator), the Timesheet Updates dialog box displays. This dialog box shows timesheet period information, such as approved absences and non-work days, and a list of projects that you can immediately add to your timesheet. Use the **Snooze** or **Dismiss** button to specify whether you want to receive reminders for the current timesheet period the next time that you log in.

Transaction Center

Row-Level Validation in Transaction Center (Opt-In Available)

You can now work on Transaction Entry and AP Invoice Approvals forms seamlessly, with enhanced row-level validation for the Project Information grid.

You can choose to opt in to this feature for the Vantagepoint 7.0 release. The ability to opt in is temporary and will be removed when the feature becomes automatically enabled for all Vantagepoint users in a future release. For more information, see Opt-In Features Overview.

Row-Level Validation for Transaction Records

When you select the **Enabled** option for the **Row Level Validation for Transaction Center** feature in **Settings » General » Opt-In Features**, you can work in the Project Information grid and make multiple changes without being interrupted by required field validations. Instead, Vantagepoint now validates when you save the record.

If validation errors occur, Vantagepoint displays them on the Errors dialog box, with an error count. The dialog box also lists the field in which each error occurred and the message associated with the error.

Row-Level Validation for AP Invoice Approvals

In **Transaction Center » AP Invoice Approvals**, when you are associating a project with an AP Invoice Approval (APIA) record that has no purchase order record associated with it, you can now work in the Project Information grid and make multiple changes without being interrupted by required field validations. Instead, Vantagepoint now validates when you save the record.

Matching Values in Invoice Amount and Total Amount Fields

For AP Invoice Approval records that are not associated with a purchase order, you now receive an error message if you save the record and the value of the **Invoice Amount** field in the header of the AP Invoice Approvals form does not match the value of the **Total Amount** field in the Project Information grid. For AP Invoice Approval records that are associated with a purchase order, you receive a warning message if the values do not match.

Create Vouchers from Purchase Orders in the Browser Application (Opt-In Available)

You can now create vouchers from purchase orders in the browser application.

You can choose to opt in to this feature for the Vantagepoint 7.0 release. The ability to opt in is temporary and will be removed when the feature becomes automatically enabled for all Vantagepoint users in a future release. For more information, see Opt-In Features Overview.

Enabling Create Voucher from Purchase Orders in the Browser Application

When you select the **Enabled** option for the **Create VO from PO** feature in **Settings » General » Opt-In Features**, you can create vouchers from purchase order records on the AP Vouchers entry form in **Transaction Center » Transaction Entry » AP Vouchers**.

If you have open transactions in the desktop application when you opt in to this feature, Vantagepoint prompts you to post those open transactions before you proceed.

When you enable the **Create VO from PO** feature in the browser application, the desktop application is updated to remove access to the feature.

Creating Vouchers from Purchase Orders

In list view on the AP Vouchers form, select **+ New AP Voucher** (or **AP Voucher File**) **» Create Voucher from PO** (or **PO File**) to create a new voucher.

Closing Fully Vouchered Purchase Orders

If you are using the browser application and Vantagepoint is set up to group transactions into a file, the **Close Fully Vouchered Purchase Order** option is automatically selected on the New File dialog box. When this option is selected, Vantagepoint automatically closes the purchase order record when the full amount of all the line items has been vouchered.

If Vantagepoint is not set up to group transactions into a file, the **Close Fully Vouchered Purchase Order** option is available on the AP Vouchers entry form. You can select the option or leave it cleared.

In addition, the read-only **Vouchered From Purchase Order** column is available on the List view of the AP Vouchers form.

Redesign of the AP Vouchers Form

To streamline the process of creating vouchers from purchase order records, the AP Vouchers form features a redesigned user interface.

- The **Payment Terms** field and the **Payment Date** field now prefill with the values that you entered in the purchase order record when you created it.
- The Purchase Order Line Items grid was added to the AP Vouchers form. In the desktop application, items that will be vouchered are added to the Open to Voucher grid on the Create VO from PO form.
- The **Match Method** option is displayed in the header of the Create VO from PO form in the desktop application and as an option in the Purchase Order Line Items grid of the same form in the browser application.
- The **Prorate** option was also moved to the Purchase Order Line Items grid. When you click this option, Vantagepoint opens the Prorate dialog box, on which you can specify shipping and miscellaneous amounts that are prorated across the items that will be vouchered. In the desktop application, the **Prorate** option, the **Shipping Amount** field, and the **Amounts 1-5** fields display below the Open to Voucher grid on the Create VO from PO form.
- **View Detail**, **Cost Distribution**, and **Default Estimated Costs** are now row options in the Purchase Order Line Items grid in the browser application. Selecting the **Cost Distribution** option adds the **Committed Amount** field in the Project Information for the selected purchase order line item.
- In the browser application, to exclude a purchase order line item from the voucher run, you must now click the **Unselect** row option in the Purchase Order Line Items grid to remove the line item from the grid. In the desktop application, in the Open to Voucher grid, you clear the checkbox next to the line item that you want to exclude.
- When you select an item in the Purchase Order Line Item grid, the Project Information grid displays information specific to the selected item such as the account, total tax amount, and total payment amount.

Changing the Net Quantity and Amount of Purchase Order Line Items

The **Edit Amounts** row option is now available in the Purchase Order Line Items grid. When you select this option, the Purchase Order Quantity and Amounts dialog box opens. On this dialog box, you can review the ordered and vouchered (open) quantity and amounts of the line item, or change the net quantity and amount of the line item.

Comparing Vouchered Amount and Invoice Amount

The **Variance** field was added to the Vendor Review dialog box (in the browser application). This field displays the difference between the values of the **Vouchered Amount** and the **Invoice Amount** fields that were entered in the AP Vouchers form. If the voucher is yet to be posted, you can adjust the value of the **Invoice Amount** field in the header of the AP Vouchers form

Voucher Options in the AP Invoice Approvals Form

The voucher options in **Transaction Center » AP Invoice Approvals** were modified to accommodate creating vouchers from purchase orders in the browser application. In Vantagepoint 7.0, if you associate a purchase order record with an APIA record by entering a value in the **Purchase Order** field, clicking **Other Actions » Voucher Options** displays the Create Voucher from Purchase Order Options dialog box. Otherwise, the Transaction Center Voucher Option dialog box displays.

On both dialog boxes, you specify whether you want to include the APIA record in an existing run or create a new run. Vantagepoint filters the drop-down options in the **Select Existing Run** field and lists files that contain vouchers that are the same with the APIA record you are creating (associated with a purchase order or not).

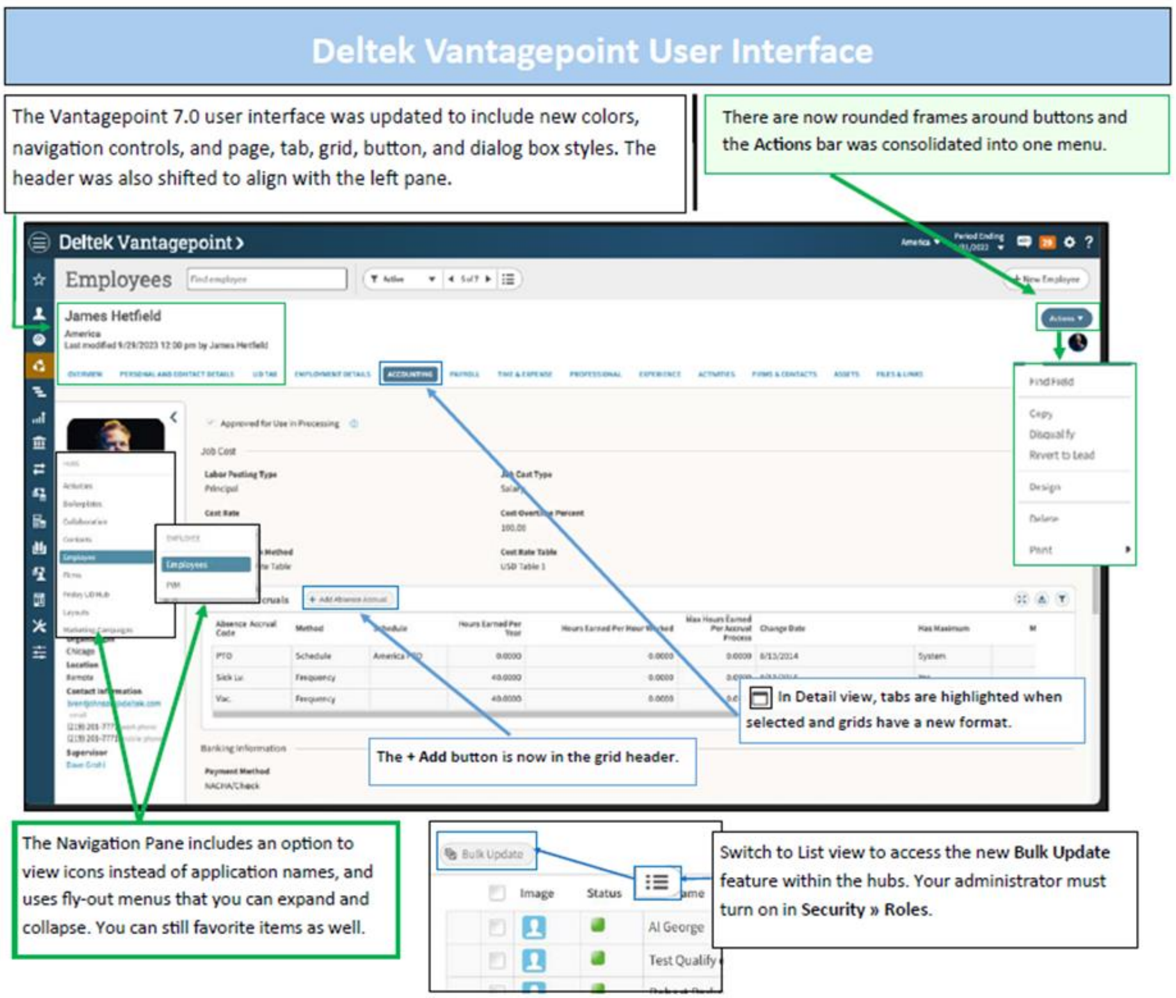
User Interface Updates

Visual, Navigational, and Functional Enhancements

The Vantagepoint 7.0 release includes a comprehensive set of user interface updates that provide visual enhancements as well as navigational and functional improvements.

UI Elements	Enhancements
Color Scheme	A new color scheme, including support for Dark Mode, is now available.
Navigation Pane	New methods for using the pane are now available: ▪ **Fly Out Menus:** Use the fly-out menus to expand and collapse the application areas. Click the application name to collapse the top level. ▪ **Minimize Size:** Use this option to minimize screen size and view icons rather than application names.
Actions Bar	Actions options are now available from a single Actions menu.
Tabs	When active or selected, tabs now highlighted on forms.
Header	Record headers were shifted to the left. to better align with the left pane.
Buttons	For improved aesthetics, buttons now have rounded frames.
Change Indicator for Fields and Grids	For fields and grid cells, the background color of the field and grid cells that you are changing are light blue. When you are using Dark Mode, the fields and grid cells are dark blue.
Grids	In addition to the change indicator, grids include the following updated options and new options: ▪ **+ [Row]:** For easier access, the add [row] function was moved from the bottom of the grid to the grid header. ▪ **Expand:** The grids now expand as a pop out dialog box, instead of a full screen display. To close the expanded grid, click X. ▪ **Bulk Update:** In conjunction with list view, use the **Bulk Update** option to update multiple records at the same time. To make this option available, select the **Allow Access to Bulk Update in List View** option on the Record Access tab in S**ettings » Security » Roles**.

UI Elements	Enhancements
	▪ **New Keyboard Shortcuts:** A new keyboard shortcut launches when you press ALT + K or select Keyboard Shortcuts from the help menu. Use these shortcuts for grids, drop-downs, dates, and checkboxes. ▪ **Jump to Any Row in a Paged Grid:** When you use list view in a grid with a large number of records, you can now use the search navigation popup to select a specific record and jump to it in a paged grid.



User-Defined Fields for Posted Transactions and GL Account Review

Ability to Create User-Defined Fields for Posted Transactions and New Application

Two new related features are available in this release:

- The ability to create user-defined fields to use with posted transactions
- A new GL Account Review application, in the Transaction Center

In GL Account Review, you can view posted transactions and make or change an entry in user-defined fields for posted transactions.

User-Defined Fields for Posted Transactions

User-defined fields for posted transactions give you the ability to track metrics on transaction data and provide flexibility on the metrics that you want to track. For example, you could track Environmental, Social, Governance (ESG) requirements, such as carbon accounting (tracking for carbon footprint/emissions).

You create user-defined fields to use for posted transactions on the Transactions form in **Settings » Accounting » Transactions**. You specify which transaction types each of the user-defined fields apply to and whether a user-defined field is Active or Inactive.

If you have multiple companies in Vantagepoint, you set up user-defined fields to use for all your companies. Then you log into each company and specify the user-defined fields to use for that company.

For more information, see the User-Defined Fields for Transactions help topic.

GL Account Review

On the GL Account Review form in **Transaction Center » GL Account Review**, you enter search criteria in the Search Criteria pane to determine the posted transactions to view in the Transactions grid on the form. You can select various transaction types to view. User-defined fields are available to use with some transaction types but not others, so some posted transactions in the grid show user-defined fields and others do not.

You choose the columns that display in the grid, including any user-defined fields that you created for transactions. All columns (fields) in the grid are read-only except the user-defined fields. You enter, edit, and view data in the user-defined fields.

For more information, see the help topics in the GL Account Review section of the help.

Vantagepoint Database Change

PlanID Column Removed from the PR Table

The PlanID column has been removed from the PR table in the Vantagepoint database. This change will not cause any changes to the Vantagepoint application behavior. However, if you have a workflow that uses a custom stored procedure and it references the removed column, you must change that reference. Instead, use the WBS1 column in the PNPlan or RPPlan tables to find a plan associated to a project.

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