
Deltek Vision®

Getting Started Guide

Version 6.1

13880 Dulles Corner Lane
Herndon VA 20171
TEL: 703.734.8606
FAX: 703.734.1146

Last Updated: 6/09

While every attempt has been made to ensure that the information in this document is accurate and complete, some typographical or technical errors may exist. Deltek Inc. cannot accept responsibility for any kind of loss resulting from the use of this publication.

This page shows the original publication date. The information contained in this publication is subject to change without notice. Any improvements or changes to either the product or the book will be documented in subsequent updates.

This publication contains proprietary information which is protected by copyright. All rights are reserved. No part of this document may be electronically reproduced or transmitted in any form or by any means, electronic or mechanical, or translated into another language, without the prior written consent of Deltek Inc.

This edition published June 2009.

© Deltek Inc., 2009.

Unpublished-rights reserved under the copyright laws of the United States.

This software is protected by copyright law and constitutes valuable confidential and proprietary information of Deltek Inc. and its licensors. This software, and all related documentation, is provided for use only in accordance with the terms of your license agreement. Unauthorized reproduction or distribution of this program or any portion thereof could result in severe civil or criminal penalties.

Notice - This software is 'commercial computer software' as defined in DFARS 252.227-7014 and FAR 12.212 and software documentation is commercial 'technical data' as defined in DFARS 252.227-7015 and FAR 12.211. All use, modification, reproduction, release, performance, display, or disclosure of this commercial software shall be in strict accordance with the manufacturer's standard commercial license which is attached to and incorporated in the governing Government contract. Manufacturer is Deltek Inc., 13880 Dulles Corner Lane, Herndon, VA 20171.

If this software and documentation has been licensed to the U.S. Government, it is unpublished "restricted computer software" as that term is used in FAR Part 27.4, in which Deltek Inc. has reserved all rights under the copyright laws of the United States.

All other trademarks mentioned herein are the property of their respective owners.

Contents

1 - In This Guide...

Getting Started	1-1
-----------------------	-----

2 - The Vision Applications

The Vision Applications	2-3
-------------------------------	-----

3 - Start Vision

Log on	3-8
Select an Accounting Period	3-10
Select a Menu Choice	3-11
Access a Vision Application Using a URL	3-12

4 - Using Vision

Vision Terminology	4-14
Global Icons	4-15
The Applications Menu	4-16
User Options	4-17
Internet Explorer	4-18

5 - The Vision Help System

Search in Vision Help	5-21
Help Topic Features	5-22
Form and Dialog-level Help	5-24

Contents

6 - System-wide Features

Data Access Methods	6-26
Grid Drop-down Options	6-27
Required Fields	6-29
Memo Field	6-30
Customize Table Grids	6-31
Activity Reminders	6-32
Alerts	6-33
Utilities	6-34
Text Editor	6-35

7 - Lookup Lists

Configuring Lookup Lists	7-39
Lookup List Options	7-40
Direct Lookup	7-41
Standard Lookup	7-42
Advanced Lookup	7-44
Is Me Operator	7-46
Is Mine and Is Not Mine Operators	7-46
SQL Where Clause Lookup	7-47
The Organize Function	7-48

8 - Records

Record Types	8-51
Record Management	8-51
Scroll Through Records	8-52
Use Quick Find to Enter Data	8-52

9 - Configure Vision

Configure Vision	9-53
User Options	9-53

Contents

10 - Reports

Report Types	10-56
Saved Settings and Favorites	10-57

11 - Work Breakdown Structure (WBS)

Types of Vision Work Breakdown Structure	11-59
--	-------

12 - Getting Additional Help

If You Need Assistance.	12-62
------------------------------	-------

C o n t e n t s

1

In This Guide...

Welcome to Deltek Vision®, the Web-based software solution for professional services organizations. Vision is a truly revolutionary product that combines all of your front-office and back-office data into one integrated system. Vision enables all the members of your firm to use and share the same information—thereby helping increase the efficiency and productivity of your business.

Getting Started

Getting Started introduces you to the many features and capabilities offered in Vision.

This guide intends to provide a clear understanding of Vision's functionality and logic, and help you realize this product's full potential.

You will learn about the Vision applications, how to navigate through Vision and use its system-wide features, how to modify the interface to suit your needs, how to use records and reports, and learn about Vision's Work Breakdown Structure (WBS).

2

The Vision Applications

The Vision Applications

Vision applications are accessed through the Vision Main Menu. Each application has its own online help section that explains, in detail, how each application functions.

Application	Description
Dashboard	The dashboard is your "portal" into Vision, allowing you to create a personalized view of your business world.
Information Center	The Vision Info Center is a collection of information centers that you use to manage all of your business-related data.
Client Relationship Management (CRM)	Vision provides you with a variety of options for scheduling and managing your daily activities, as well as maintaining information about your clients and contacts.
Proposals	Vision Proposals streamlines production of SF254, SF255, SF330, and Custom proposals, minimizing preparation time and improving communication among the proposal team.

Application	Description
Planning	This application is designed to guide project managers and proposal writers in constructing plans for opportunities and projects.
Billing	The Vision Billing application lets you: bill labor, expenses, fees, and units in all industry-standard formats; process, modify, accept, and print invoices; generate billing-related reports.
Accounting	This application is where you maintain Vision accounting information, including Accounts Payable, Accounts Receivable, budgeting, and employee expenses.
Human Resources	<p>The Human Resources application is where you maintain the ABRA Data Import Utility, benefit hours accruals processing, and the ADP interface.</p> <p>Also included is the Deltek Vision Payroll application. Please see the Payroll section of the Vision Help system to learn about this application.</p>
Time & Expense	Deltek Vision Time and Expense consists of two separate applications—Timesheet and Expense Report—that allow you to record your own time and expense charges and then submit them for processing.
Purchasing	Vision Purchasing allows your firm to automate its procurement processes for items, services and capital items. The application integrates Vision security, accounts payable, billing, and employee and vendor Info Centers, optimizing use of relevant data elsewhere in your Vision database.
Reporting	Vision Reporting offers you a wide range of reports that present information about all aspects of your projects, clients, employees, and accounts.

Overviews

The online help for each application starts with an overview. The overview introduces you to the application and provides links to the application's main features. Overviews often include a "Related Topics" section, as well as important warnings and tips.

Transaction Center

Use the Vision Transaction Center to enter and maintain data on various types of transactions, including disbursements, expenses, invoices, and vouchers.

Utilities and Configuration

Utilities and Configuration are located as well on the main menu. You, or your system administrator, use them to modify the Vision applications.

Inventory

Vision's Inventory feature allows your firm to manage and track all of its items, both inventory items and non-inventory items. This menu item appears only if:

- You have Vision Purchasing installed,
- You have enabled Vision Inventory, and
- Your security role has access to some part of Inventory.

Deltek Support

Deltek Support links you to the following Help options:

- E-Support
- Knowledge Base
- Web Meeting
- Contact Us

Please see Chapter 5, The Vision Help System, to learn about these options in detail.

3

Start Vision

To begin working in Vision, you must do the following:

1. Log on
2. Select an accounting period
3. Select a menu choice

Each step is explained in detail on the following pages.

Log on

The splash screen is where you enter the required data to access Vision. Click the Vision icon to access the splash screen.

Copyright © 2007. Deltek, Inc. All rights reserved.

Deltek Splash Screen

To log on to Vision, complete the following steps:

1. Complete the fields on the splash screen. See the following table for details.

Splash Screen field	Description
User ID	Individual identification for each user, provided by your Vision Administrator.
Password	Individual password for each user, provided by your Vision Administrator.
Database	Use the drop-down list to enter the desired database. See your Vision Administrator if you do not know the database name.

2. Click the **Login** button. The Period Selection dialog appears. See the next section for details on completing this dialog.

Select a Language in Vision

From the splash screen, you can also select a language to use in Vision.

All enabled languages display as link labels in their corresponding languages on the splash screen. The link label is in the language for which it will translate. The splash screen switches to the language of the link label that you click. Then, when you log in, Vision is in that language.

For example, if you click the Deutsch link, the dialog box changes to German. When you log in, the Vision database labels are in German.

No visible language links display on the splash screen if only one language is enabled.

Do not load Startup Application

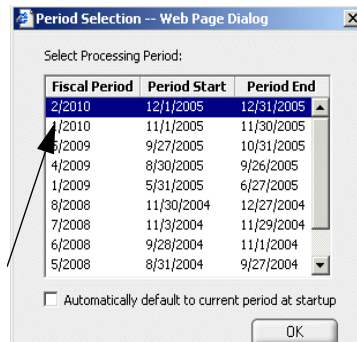
Select the **Do not load Startup Application** box if you do not want your Startup Application to load when Vision is initialized.

Windows Authentication

Select the Windows authentication box if you want to log in one time for both Windows and Vision.

Select an Accounting Period

Once you have completed the fields on the Vision splash screen, the Period Selection screen, appears.



Period Selection Screen

To select an accounting period, complete the following steps:

1. Select an accounting period in which to process data.
2. Enable/disable the **Automatically default to current period at startup** option. If you use this option, Vision automatically defaults to the current period each time you start Vision.
3. Click **OK**. The default application appears (see chapter 4 to learn about User Preferences that determine your default application).



If you select a period other than the current one, a **Prior Period Active** notice appears above the menu tree. Although you can process data in historical periods, the selection of these periods should be used only to print reports reflective of that time frame. Performing processing functions can lead to unexpected results in your database.

Select a Menu Choice

The default application opens once you select an accounting period. The Vision main menu appears on the left side of the screen.

A menu tree of options is located to the left of the screen. From here, you can choose to open any of your applications, as well as Transaction Center, Utilities, and Configuration.



Please refer to chapter 2 to learn more about menu options.

Access a Vision Application Using a URL

Rather than selecting a menu choice, you can access any Vision application using a URL.

To open a Vision application using a URL, complete the following steps:

1. Open a browser window.
2. Type the path to Vision on your server.
3. Append the following string:

`launchapp.aspx?initialpage=<appname>`

For example, to open the Leads Info Center, you would type the following URL:

`<Path to Vision>/launchapp.aspx?initialpage=Leads`

where `<Path to Vision>` is the path to your installation of Vision (such as `http://www.yourcompanywebsite.com/Vision40`).

Using Windows Authentication

If you set up Windows Authentication for logging on, then the Leads Info Center would open directly when accessed via this URL. If you are not using Windows Authentication, the log on page appears first. After logging on, Vision displays the Leads Info Center.



Please see your System Administrator for further assistance.

4

Using Vision

Vision's user-friendly interface lets you easily maneuver between applications, records, and forms. In addition, you can access the Vision Help system from any application, and customize the look of your screen.

The Vision interface components discussed in this chapter are:

- Vision Terminology
- Global Icons
- The Applications Menu
- User Options
- Internet Explorer

Vision Terminology

Certain terms are used throughout Vision, this guide, and the Help system. See the following definitions of these terms to properly understand and use Vision.

Applications Menu

The Vision Applications Menu is located on the left side of the Vision screen. It provides one-step access to each Vision application, as well as the Transaction Center, Utilities, and Configuration. Click on an application menu option, and a drop-down list with more options appears. Select the desired option and click. Selected items appear underlined.

Records

A record is a collection of data pertaining to an individual item (such as a project, employee, or client). Information about the record is collected using various forms. For example, each project is a record, containing data from the General, Accounting, and Team tabs. An existing record can be modified, deleted, and copied at any time. Also, new records can be added at any time. Records are maintained through the Info Center.



See chapter 8 for more details.

Options

Options are selections or choices which appear on a menu or form. Options usually appear in drop-down list form. Options allow the user to select the item or response desired.

Configuration

Vision offers a variety of user-friendly ways that you can change the look and feel of your product, such as renaming tabs and labels, adding new tabs, and reformatting your Dashboard.

Global Icons

Global icons are function keys that let you maneuver around the Vision applications. They are located in the upper-right corner of your screen and can be accessed at any time. The global icons are explained below.

Application Area

Shows which part of Vision you currently have open.

Back Arrow

Selecting the back arrow moves you back to the application you were previously working in.

Forward Arrow

Returns you to the application you were working in before using the Back arrow

Dashboard



Clicking this icon sends you to the Dashboard application.

Search

Click this icon to open the Info Center Search application.

Options

Clicking this icon lets you access the User Options dialog. In this dialog, you can access Activity Reminders, choose reporting preferences, and select a startup application.

Help

Connects you to the Vision Help system. The Help system appears in its own window so you can continue to reference the application while using the help. Please note that other help buttons, found in an application or a form, are intended for the specific application you are working in.

Logoff



Clicking the logoff icon takes you out of Vision and back to the splash screen. From there, you can either log on again or exit Vision.

The Applications Menu

The Vision Applications menu is located on the left side of the Vision screen. It provides one-step access to each Vision application, as well as the Transaction Center, Utilities, Configuration, Inventory, and Deltek Support. When you click on a menu option, a drop-down list appears. Select the desired option and click. Selected items display underlined.

Open an Application in a New Browser Window

From the Applications menu, you can open an application or form in a new browser window. This allows you to have multiple applications or forms open at the same time.

Any record that displays as a hyperlink in a field or grid can also be opened this way. To do so, right-click on an item in the Vision Applications menu, then select the **Open in new Window** option.

Hiding the Vision Applications Menu



You can hide the Vision Applications menu at any time to enhance the size of the Vision screen. To do so, click the red X at the top of the Applications menu. To reinstate the menu, click the Applications global icon.

User Options

Vision's User Options dialog enables you to determine how Vision looks. It also provides easy access to frequently-used data.

User Options allow you, by user name, to do the following:

- Set startup and viewing options.
- Change your system and e-support passwords.
- Determine lookup, search and retrieval options.
- Enable and disable Activity reminders.
- Set reporting and printer preferences.
- Set date, time, and numbering formats.
- Select projects, clients, contacts, opportunities, and activities to download to Mobile Timesheet, Expense Report, and Client Relationship Management (CRM) applications on mobile devices (if you use the Vision Mobile Application Suite).

Set Up User Options

To set up User Options, complete the following steps:

1. From the Vision title bar, click **Options** to display the User Options form.
2. Complete the fields on the following tabs.
 - General Tab
 - Startup Tab
 - Reporting Tab
 - Activity Tab
 - Support Tab
 - Mobile Tab (if your company uses the Mobile Applications Suite)
3. Click OK.



See the User Options online help for details about each tab.

Internet Explorer

Delttek developed Vision using the highest current standards for Web-based applications. All Vision components run under the latest version of Windows® Internet Explorer®.

Deltek Vision and the Internet

Vision's functionality is similar to many Web sites, containing a side main menu displaying the information you can access, as well as links to move you around the product intuitively.

For Further Information...

You can find information concerning Microsoft's Internet Explorer, such as Features, Web Accessories, and Internet Service Providers, at <http://www.microsoft.com/Windows/ie>.

5

The Vision Help System

This chapter introduces Vision's Help system. From here you can find out how to navigate your way through the Help system, and also learn about the icons and related links that you'll find in most topics.

We encourage you to use the help as much as possible. It's easily accessible any time you are working within an application - just click the **Help** button located in the upper right-hand corner of your screen.

When you click the **Help** button, Vision displays a drop-down list with the following options:

- **Contents**—Click this option to open the Vision Help System.
- **Help Desk**—Click this option to open the Send Email dialog. Use this dialog to compose and send a message to a designated Help Desk mailbox. You can send emails directly to Deltek Vision Support, or you can set up an internal Help Desk mailbox to respond to questions from your staff.
- **Customer Care Connect** — Click this option to display the Deltek Customer Care Connect site. This site is available as part of the Deltek Vision Ongoing Support Plan (OSP). You must have a username and password to access this site.
- **Knowledge Base** — Click this option to display the Deltek Customer Care Connect site and go to the Knowledge Center, which provides thousands of solutions for issues and questions.






- **Contact Us**—Click this option to open the Contact dialog that appears when you select the Contact Us tab of the Deltek Online eSupport site.
- **About**—Click this option to view application, database, and server information for Vision.

Search in Vision Help

This section offers tips on locating information in Vision Help.

Find Information in Vision Help

After you have opened Vision Help, you can find information using any of these methods.

Contents		<p>Navigate to a topic using the Table of Contents. The Contents frame is displayed by default. If you have navigated away from this default frame, click the Contents button to return to the Table of Contents.</p> <p>After you have opened several topics, use the Back button to navigate back to topics you have previously viewed.</p>
Index/Search		<p>Click the Index/Search button to display the index for the entire Help system. You can search for index entries using keywords.</p>
Glossary		<p>Click the Glossary button for a list of Vision terms and their definitions.</p>
Print		<p>Click the Print button to print the Help topic currently open.</p>
Show/Hide		<p>Click the Show/Hide icon once to display all drop-down text in the current topic. Click the icon again to hide the drop-down text.</p>

Help Topic Features

Topics in the Help system include links and icons that, when selected, provide more detail related to a displayed topic. These key features are explained below:

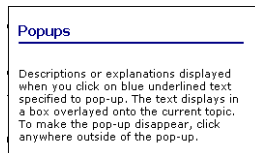
Overviews

The online help for each application starts with an overview. The overview introduces you to the application and provides links to the application's main features.

Links

Links are automatic jumps from the current topic to another topic or to a Web site that offers further information. They are identified by a word or a series of words in blue lettering with a solid line under them. Clicking on this word or phrase brings you from the current topic to the selected topic or Web site. Click on the **Back** button to return to the original topic.

Pop-ups



Pop-ups are descriptions or explanations displayed when you click on green underlined text. The text displays in a box overlaid onto the current topic. To make the pop-up disappear, click anywhere outside of the pop-up. You can also print pop-ups - to do so, right-click your mouse inside of the pop-up and then select **print**.

Drop-down Text

Drop-downs are used in the online Help system to display graphics, toolbar locations, or information relevant to the Help topic you have selected. Drop-down links are always gray and the information always displays below the current text. Click on a drop-down link to open, and click again to close.

Expanding Text

Expanding Text provides additional explanation and detail relevant to the Help topic you have selected. The Expanding Text link and its subsequent text appears in blue lettering, and displays within the current paragraph. Click once to expand the text, and click again to contract the text.

Notes



Click on a Notepad icon to display helpful facts about a topic. A pop-up window appears containing additional information about the current topic. Topic notes are usually displayed at the bottom of the page under a separating line.

Warnings



Exclamation mark icons provide warnings about a particular process or action.

Related Topics



Click the book icon to display a list of related help topics that may be useful to you. Simply click on any related topic to display it.

Where am I?



Where am

When using a checklist in the Vision Help to complete a task, click on the Where am I? icon to display where you are in the checklist process.

Multicompany



This symbol appears in topics related to Multicompany. Please see the Multicompany help for more information about this feature.

Multicurrency



This symbol appears in topics related to Multicurrency. Please see the Multicurrency help for more information about this feature.

Form and Dialog-level Help

An additional **Help** button, located on the toolbar, provides access to a help topic specific to the form or dialog box currently displayed.

For example, selecting the **Help** button in the Opportunities record links you directly to the Opportunity Info Center Overview help topic.

6

System-wide Features


Vision's system-wide features include various data and word processing functions designed to simplify your tasks. They are easily accessible while working in any of the applications. This chapter introduces you to these features.

The system-wide features are:

- Data Access Methods
- Grid Drop-Down Options
- Required Fields
- Memo Fields
- Customized Table Grids
- Activity Reminders
- Alerts
- Utilities
- Text Editor

Data Access Methods

Vision is designed to allow easy data access when working in an application, thereby simplifying the process of updating or searching for information. The following table outlines the ways in which data may be selected or entered in Vision.

Access Methods	Description
Drop-down lists	<p>Drop-down lists are denoted by arrows located either to the left or right of a field. They are used in most of the Vision applications. Drop-down lists display valid choices when completing a text field. Click once on a drop-down arrow, then click on your choice to select it.</p> <p>For example, the drop-down box alongside the Prefix field displays Dr., Mr., Mrs., and Ms. Select any of these responses for the Prefix field.</p>
Forms	Forms contain groupings of data for each type of record . Click on the form name within the record to access it. You can also customize certain forms.
Table Grids	Table grids are the rectangular blocks found in certain tabs (such as in the Experience tab of Employee records). They are used to add a record. Fields within the grids can be reduced in size or hidden completely if they are not needed; to do so, place your cursor on the vertical line between two fields and slide it left or right. You can also customize some tab grids.
Find icon 	The Find icon is found in records and alongside certain fields. It indicates that you have access to a corresponding lookup list for that record or field. Click once on the icon to access the lookup list.
Insert, Copy and Delete buttons	These buttons insert, copy, and delete lines in any record.
Slide Bars	Slide bars let you maneuver among the fields within the table grids when there are too many fields to all fit on the screen. They allow you to view data that may not be initially displayed, and are located next to the Insert , Copy , and Delete buttons.

Grid Drop-down Options

The Vision grids contain a drop-down that displays a combination of the following options:

- Print grid information
- Export grid data to Excel
- Enable Grouping

See each the following for additional information on each option.

Print Grid Information

Use the Print option on the Vision grids to print the grid's information.

To print a grid's information, complete the following steps:

1. Click the drop-down arrow on the grid header.
2. Click **Print**. The Print Preview form displays.
3. Use the toolbar to modify the preview as needed.
4. From the File menu, select **Print** to print the grid information directly to your default printer.

Export Grid Data to Excel

The grids in Vision include an Export to Excel feature that enables you to export the grid's information to a Microsoft Excel file.

To export a grid to Excel, complete the following steps:

1. Click the drop-down arrow on the grid header.
2. Click **Export to Excel**. The Microsoft Excel application opens.
3. Use Microsoft Excel to modify, print, or email the data as needed.
4. Save the file to your local desktop.

Enable Grouping

Some of the grids in Vision include an **Enable Grouping** option. Use this option to select the order of column headers.

To enable a grid's Enable Grouping option, complete the following steps:

1. Click the drop-down arrow on the grid header.
2. Click **Enable Grouping**. A field displays with the instruction to "Drag a column header here to group by that column."
3. Drag and drop the column headers into this field in the order that you want them to display.

The data for each column header displays as you move column headers to the field.

Required Fields

Most new forms and table grids have required fields. They are highlighted in yellow when empty, and become white after you have entered data.

In the Help system, all required fields are indicated in their field descriptions.

Memo Field



Memo fields are used to add notes or miscellaneous information when working in an application. Memo fields are indicated by a pencil icon.

In memo fields, press the **Enter** key to start a new paragraph, and press the **Shift** and **Enter** keys together for a new line. Paragraphs (using the **Enter** key) appear triple-spaced; new lines (**Shift** and **Enter** keys pressed together) are single-spaced.

When copying text from other applications into a Memo field, paste it first into Wordpad, then copy and paste it into the appropriate Vision text field.

Customize Table Grids

Fields within the grids can be reduced in size or hidden completely if they are not needed; to do so, place your cursor on the vertical line between two fields and slide it left or right.

Also, you can rearrange the order of fields within a table grid by highlighting the field name and dragging it left or right to its desired location.

All changes are automatically saved.

Activity Reminders

The Activity Reminders feature alerts you to any upcoming activity, such as a meeting or conference call, in which you are a participant.

Accessing Activity Reminders

To access Activity Reminders, select the Options icon on the Vision screen and then select the Activity tab.

Setting up Activity Reminders

There are two types of reminders—email and popup:

- Select the **Enable email reminders** option to receive email reminders for upcoming activities.
- Select the **Enable popup reminders** option to receive popup reminders for upcoming activities.

You must be using Vision to see a popup reminder; you do not need to be in Vision to receive an email reminder.



Please refer to the User Options section of the Vision Help system to learn more about Activity Reminders.

Alerts

Alerts are a Vision workflow function designed to remind you of calendar events, project tasks to be assigned or approved, and the need to submit timesheets, expenses, and project budgets. How you utilize alerts depends on your role within the team structure (such as project management or accounting).

Depending on the type of alert, Alerts Configuration allows you to determine such options as:

- When alerts are sent
- How the alerts are sent (email or Dashboard)
- Under what conditions the alerts are sent (time sheet overdue, due in x days)
- Contents of email (subject and message body) when alerts are sent via email



Please refer to the Alerts Configuration section of the Vision Help system to learn how alerts are set up.

Utilities

Vision includes a set of utilities, available from the Utilities menu, which perform specific functions on your database.

The Vision utilities are:

- Change Company
- Change Period
- Open New Period
- Period Setup
- Open New Benefit Year
- Open New W-2 Quarter
- 1099 Initialization
- User Activity
- Advanced Utilities
- Key Conversions
- Key Formats
- Process Server
- History Loading
- Backup Database
- Report Administration
- Download Merge Macro
- Download Integration
- Mobile Application Suite



Please refer to the Utilities section of the Vision Help system to learn more about using this feature.

Text Editor

The Text Editor is a word processor that provides the tools necessary for creating and editing simple text documents with the Vision application. These documents can be included in various Memo, Comment, Note, Description, and Proposal fields that display throughout Vision. Although you can enter text directly into one of these fields, to manipulate the text (for example, to change a font size from 8 to 10 point or style from regular to bold), you must use the Text Editor.

The Text Editor uses many of the same features and commands found in other standard word processors. If you have used other word processors, such as Microsoft Word, many of the menu and toolbar options will be familiar to you.

Vision saves your Text Editor files in a Rich Text Format (.RTF extension), allowing you to copy and paste text from any standard Windows application into the Memo, Comment, Note, Description, or Proposal fields using the Text Editor. Some Windows programs and Web pages have unique formatting and graphics options that Vision may not support; thus, you may have to reformat text that you copy and paste from other systems.



Please refer to the Text Editor section of the Vision Help system to learn more about using this feature.

7

Lookup Lists

Use lookup lists to locate a record, or locate a group of records that share certain characteristics. For example, you can use a lookup list to search for all of your contacts who live in a particular state, or find all of your projects with the same project type. Also, you can access single records, such as an employee's Employee Info Center record, using a specific employee number or name.



Lookup lists are available wherever you see the magnifying glass icon in the upper-right corner of a field. Click once on this icon to access a lookup list.

Using a Lookup List

Lookup lists work by narrowing your search criteria, thereby eliminating the need to examine large numbers of records to find specific information. Instead, you have only the records you need at your disposal.

Configuring Lookup Lists

In General System Setup, you can establish a lookup limit, determine the number of records that can be retrieved during a lookup, authorize users to automatically retrieve records in a lookup, authorize Dashboard lookup limits, and determine the maximum number of Dashboard records.

Info Center Lookups

Each Vision Info Center (such as Vendors or Employees) offers additional lookup options specific to that Info Center. For example, Vendor Info Center uses searches like "Vendor Number" or "Vendor Name," while Employee Info Center uses searches such as "Employee Last Name" and "Employee Number."

You can also use Info Center Search. This tool enables you to search all Info Center record types.



Please refer to the Info Center section of the Vision Help system to learn more about Info Center lookups.

Configuring Lookup Lists

In General System setup, you can establish a lookup limit, determine the number of records that can be retrieved during a lookup, and authorize users to automatically retrieve records in a lookup.

Setting Up Lookup List Options

Your system administrator determines the following lookup list options for your firm:

Lookup tabs field	Description
Allow users to automatically retrieve records in lookups	<p>If this option is selected, Vision controls whether records are automatically retrieved when lookups are initially opened. If the option is not selected, Vision does not retrieve records automatically in lookups.</p> <p>If this option is selected, you can now determine whether to automatically retrieve records when opening lookups.</p>
Use lookup limits	<p>Select this option to place a limit on the number of records Vision will retrieve in a lookup. If your company has a large database, you may want to limit the number of records Vision retrieves, since retrieval may take some time.</p> <p>If you selected this option, select the maximum number of records in the Maximum number of records field.</p>
Maximum number of records	If you selected the previous option, enter in this field the maximum number of records to allow.
Use Dashboard lookup limits	Use this option to limit the number of records you want to display on your dashparts.
Maximum number of Dashboard records	If you selected the previous option, enter in this field the number of maximum records to allow. For example, if you enter a limit of five and a user has ten records in a dashpart, only five will display at a time. The number you select is the same number for all your dashparts that use records.



Please refer to the Configuration section of the Vision Help system to learn more about configuring lookup lists.

Lookup List Options

There are four basic search types to choose from when using a lookup list:

- Direct
- Standard
- Advanced
- SQL Where Clause

Which search type you choose depends on the complexity of your search. Each is explained in the following pages.

Quick Find Searches

An example of a key code is an employee's last name or a client number.

Quick Find searches let you access a record simply by entering part of a valid key code.

To perform a Quick Find search, complete the following steps:

1. Click once inside the **Find** field of the record you are working in.
2. Enter either a single character (for example, the letter "a" or the number three) or a string of characters ("ab" or "13") and then press **Enter**. If you enter a single character, then Vision will search for every record beginning with that character. If you enter more than one character, then Vision will search for every record that contains that string of characters. For whole word searches, enter a space before and after the word to search for only that word.
3. If the information you have entered matches a value in the Vision database, then the record appears.

Multiple Record Matches

Sometimes, the information you enter produces more than one result. In the case of multiple record matches, a box appears containing all records that match your criteria. Click on the record you wish to access.

Quick Find and Info Center

When performing a quick find search in the Info Center application, the Active Only checkbox setting is applied. For example, when perform a quick find for projects that start with the letter "a", if the Active Only checkbox had previously been checked in the lookup dialog, then only "active" projects will be returned in the quick find drop-down display.

Direct Lookup

Direct lookups are located throughout Vision. They look, and function, much the same as the Standard lookup (see page 7-47), but provide fewer search options.

To search using the Direct lookup, complete the following steps:

1. Click the magnifying glass icon, located in the upper-right corner of the record, to display the lookup list.
2. Select the type of criteria you plan to search by using the drop-down list in the **Search By** field (Client Number or Employee Name, for example).
3. Enter any data in the **Search Text** field that narrows your search, such as an employee's last name or the beginning of a project number.
4. Click **Search**. A list of all records matching your search criteria appears.
5. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** button and then clicking **Select**. The first record that matches your criteria appears.
6. Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.

Standard Lookup

Use the Standard lookup for one-time searches using basic criteria such as Names, Numbers, and Types.

To search using the Standard lookup, complete the following steps:

1. Click the magnifying glass icon, located in the upper-right corner of the record, to display the lookup list.
2. Select **Standard** by using the drop-down list in the **Display Type** field.
3. Select the type of criteria you plan to search by using the drop-down list in the **Search By** field (Client Number or Employee Name, for example).
4. Enter any data in the **Search Text** field that narrows your search, such as an employee's last name or the beginning of a project number.
5. Select **Active Only** to display only those records whose status is currently Active.
6. Select **Pending Accounting Review** to display only those records that are pending review.
7. Click **Search** (or press **Enter**). A list of all records matching your search criteria appears.
8. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** button and then clicking **Select**. The first record that matches your criteria appears.
9. Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.

Get Total Rows Function

Select **Get Total Rows**: to display the row count in a completed search. This function is available when the **Use Lookup Limit** option is selected in General System Settings.

Displaying Records

- Click on the **Next X Rows >>** hyperlink to view the next group of rows (X represents the number you choose in the General System Settings).
- Click on the **<< Previous X Rows** hyperlink to view previous rows (X represents the number you choose in the General System Settings).

This function is available when the **Use Lookup Limit** option is selected in General System Settings.



Be sure to click the **Clear** button before starting a new Standard search so that information from the previous search is not included in the new search.

Multicompany

An Active Company field appears in the Standard lookup when Multicompany is enabled. Select the Active Company field to select Projects, Employees and Organizations that belong to the active company. Selecting this field also allows you to create global saved searches containing active company items without creating a different search for each company.

Advanced Lookup

The Advanced lookup lets you enter additional criteria that limits the data retrieved by the search.

To search using the Advanced lookup, complete the following steps:

Comparative operators are used in SQL Where clauses to select records based on numeric or character values.

1. Click the magnifying glass icon, located in the upper-right corner of the record, to display the lookup list.
2. Select **Advanced** from the **Display Type** drop-down list. The Advanced search form appears.
3. Enter the desired search type using the drop-down list for the **Search Type** field (Client Number or Employee Name, for example). The drop-down arrow appears when you click anywhere in the Search Type field.
4. Enter a comparative operator using the drop-down list for the **Operator** field (which appears when you click anywhere in the Operator field). For an Advanced search, you can implement searches such as “Is Me” and “Is Not Me, and “Is Mine” and “Is Not Mine” (see page 7-51 for an explanation of the these operators).
5. Click inside the **Search List** field to display the Binoculars icon, then click once on that icon to display a dialog box that corresponds to your **Search Type** selection.
6. In the Search List dialog box, highlight the records you wish to display and then click **Select**.
7. Select one of the logical operators, **AND** or **OR**, using the drop-down list for the **Cond** text grid (which appears when you click anywhere in the Cond field).
8. **Optional.** Parenthesis can be used to group multiple levels of expressions for a given search. To use parenthesis, you must manually enter in parenthesis into the left and right parenthesis grid columns. If the number of parenthesis on the left does not match the number on the right, you will be prompted to fix the expression prior to searching, applying or saving saved searches.
9. Use the **Move Up** and **Move Down** buttons to arrange the order of your search criteria.
10. Use **Insert**, **Copy**, and **Delete** to modify your search criteria as needed.
11. **Optional**—select **Display Search Text**. If this option is selected, the search results grid will be replaced with a text box containing a readable, color coded, indented version of the current Advanced search. This display allows you to see the entire Advanced search and how nested levels of the search (based on parenthesis) relate to each other. This checkbox will automatically be unchecked the next time you click the **Search** button.
12. Select **Active Only** to display only those records whose status is currently Active.
13. Select **Pending Accounting Review** to display only those records that are pending review.
14. Click **Search**. A list of all records matching your search criteria appears.
15. For an Advanced search, you can implement the **Organize** button to use the criteria for future searches (please see page 7-53 for an explanation of the **Organize** function).

16. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** and **Shift** keys at the same time and then clicking **Select**. The first record that matches your criteria appears.
17. Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.

Get Total Rows Function

Select **Get Total Rows**: to display the row count in a completed search. This function is available when the **Use Lookup Limit** option is selected in General System Settings.

Displaying Records

- Click on the **Next X Rows >>** hyperlink to view the next group of rows (X represents the number you choose in the General System Settings).
- Click on the **<< Previous X Rows** hyperlink to view previous rows (X represents the number you choose in the General System Settings).

This function is available when the **Use Lookup Limit** option is selected in General System Settings.

The Clear Button

Be sure to click the **Clear** button before starting a new Advanced search so that information from the previous search is not included in the new search.

Sub Tables

Sub tables corresponding to certain Search Types are displayed in the **Sub Table** field. You can use this information to manually order sub tables together so that they will be combined in a single EXISTS clause. When searches of like sub tables are not entered sequentially in the Advanced grid, then a separate EXISTS clause will be created for each search type.

Info Center Queries

From the Advanced lookup, you can perform Info Center queries based on a field in another Info Center. For example, you can query for all Employees whose Supervisor has a title of CEO.

Using this option means that you can build a query from multiple Info Centers without creating a SQL Where Clause.

These lookup options are listed with "Lookup -" preceding their labels in the Search Type field. After selecting one of these options, the Field option becomes active. Use the Field drop-down list to select the desired field type.

Searches are available for both standard and user-defined fields.



Please refer to the Configuration Roles section of the Vision Help system for more information about Info Center queries.

Is Me and Is Not Me Operators

You can use the "is me" and "is not me" operators specifically for Report Favorites and saved searches. These operators work only with search fields that are employee numbers, such as **Employee Number** or **Supervisor Number**. It does not work with search fields based on names, such as **Employee Last Name**.

To use this option, enter "Supervisor Number," for example, in the **Search Type** field and "is me" in the **Operator** field.

Is Mine and Is Not Mine Operators

"Is mine" and "is not mine" operators are used for all Organization-based search fields, with the exception of names. For example, if you have two levels of organization—office and discipline—you can perform searches that automatically match the organization of the employee logged in at the time.

Some examples are "organization is mine" "office is mine" and "discipline is not mine". This functionality is similar to the "is me" operator for employee numbers and can be very useful for setting up global searches and record level security.

SQL Where Clause Lookup

The SQL Where Clause lookup lets you create more complex selection criteria by creating your own SQL WHERE clause.

Vision then uses that SQL WHERE clause to query the database and find records that meet your selection criteria.



Please refer to the Lookup Lists section of the Vision Help system for more information about using the SQL Where Clause lookup, including the SQL operators that allow data to be filtered.

The Organize Function

Advanced and SQL Where Clause searches provide an **Organize** button that lets you save, delete and rename search criteria without re-entering all the necessary data.

Save a search

Searches are saved by selecting a folder from the **Folder Name** field, or creating a new folder. Then, you enter a name for your search in the **Save Name** field.

The types of searches you can save depend upon your "role" within your organization. Your role must be determined before you can save a search.



Please go to the Configuraton section of the Vision Help system to learn how Roles are assigned.

Retrieve a saved search

To retrieve a saved search, complete the following steps:

1. Click the open folder icon located in the top-right corner of each record. The Save Searches display opens.
2. Double-click on the saved search that you wish to retrieve.

Modify a saved search

You can also delete and rename your saved searches.

To delete a saved search, complete the following steps:

1. Click the drop-down arrow for the **Searches** field on the Lookup dialog to display the Organize Options dialog.
2. Right click on the search that you want to delete and select **Delete**. Vision asks you to confirm the deletion.
3. Click **Yes** to confirm. Vision deletes the saved search.
4. To delete multiple saved searches, repeat steps two and three before closing the dialog.
5. Click **Close** to exit the Organize Options dialog for searches.

To rename a search, complete the following steps:

1. Click the drop-down arrow for the **Searches** field on the Lookup dialog to display the Organize Options dialog.
2. Right click on the search that you want to rename select **rename**.
3. Enter the new name.
4. To rename multiple saved searches, repeat steps two and three before closing the dialog.
5. Click **Close** to exit the Organize Options dialog for searches.

Launch saved searches from a URL

You can launch a saved search directly from a URL. To do so, complete the following steps:

1. Open a browser window.
2. Type the path to Vision on your server.
3. Append the following string:

launchapp.aspx?initialpage=<appname>&keyValue=Search|<folder name>|<sub folder name>|<searchname>



Please see your system administrator for further assistance.

8

Records

A record is a collection of data pertaining to an individual item (such as a project, employee, or client). Information about the record is collected using various forms. For example, each project is a record, containing data from the General, Accounting, and Team tabs. An existing record can be modified, deleted, and copied at any time. Also, new records can be added at any time. Records are maintained through the Info Center.

Record Types

There are eleven Info Center record types:

Clients	Marketing Campaigns	Projects	Text Library
Contacts	Opportunities	Units	Accounts
Leads	Employees	Vendors	

Record Management

Most records are managed in the Vision Info Center. They are fully integrated and designed to work together to make it easier for you to find and use the data you need. You can:

- Add records
- Copy records

- Delete records
- Edit records
- Link records
- Link external files to records
- Merge records
- Print records
- Schedule activities

Other records you might work with in Vision include:

- Plans
- Proposals
- Vouchers
- Invoices

Please refer to the Info Center help section to learn more about record management.

Scroll Through Records

You can scroll through multiple open records using the **arrow** buttons, located to the left of the **Find** field.

The **far-left** button brings you to the first selected record, and the **far-right** button brings you to the last record.

Use the **left arrow** and **right arrow** buttons to search the open records in the order they were selected.

Use Quick Find to Enter Data

You can use the Quick Find feature to enter data in any field where the magnifying glass icon is displayed.



Please refer to chapter 7 to learn how to use Quick Find.

9

Configure Vision

Configure Vision

There are many parts of Vision that you can modify to suit your particular needs. For example, you can establish your system settings and security options, activate modules, select templates and code tables, add your own tabs to forms, and rename labels.

Configuration is located on the Vision Applications menu. From there, your system administrator can modify Vision to meet your firm's individual needs.



Please refer to the Configuration section of the Vision Help system to learn more about these features.

User Options

Vision's User Options dialog is where you determine how Vision looks. It provides easy access to frequently-used data such as selecting a startup application, reporting and formatting options, and changing your password.



See chapter 4 for more details.

10 Reports

The Vision reporting application offers you a wide range of reports that present information about all aspects of your projects, clients, employees, and accounts. The reports come with a set of default formatting options, which you may keep or modify.

You can use Vision Reporting to:

- Generate reports for previewing onscreen or for printing. You can print a report right away or schedule it to run at a later time.
- Set report options, which determine how information is displayed on the report, which columns are included, and how the data is sorted and grouped.
- Select data with which to populate reports.
- Save sets of report options, which include all settings on all options tabs. Similarly, you're able to save sets of selection criteria. Both types of named, saved sets are available in any future reporting session, making the reporting process easier and quicker.
- Create and save favorite report formats. Once you have created a favorite, it takes just one click to generate a favorite report with current data—Vision automatically applies all options settings, including formatting options, and retrieves the appropriate records. You can even access any of your favorites from your dashboard.
- Drill down for detail on certain types of data.
- Export Vision data directly to an Adobe® PDF file, a Microsoft® Excel® spreadsheet file, or a Rich Text Format (RTF) file through the Data Export reports.

Report Types

The following types of reports can be accessed from the reports application, located on the Vision Applications Menu:

- Client Reporting
- Contact Reporting
- Lead Reporting
- Marketing Campaign Reporting
- Opportunity Reporting
- Employee Reporting
- Project Reporting
- Unit Reporting
- Vendor Reporting
- Text Library Reporting
- Payroll Reporting
- Purchasing Reporting
- Accounts Receivable Reporting
- Billing Reporting
- General Ledger Reporting
- Accounting Reporting
- Project Planning Reporting
- Performance Management Reporting
- Data Export Reporting

Each type lets you organize favorites, as well as schedule, refresh, preview, email, and print a report.

Saved Settings and Favorites

The Reporting application lets you use two time-saving features, called Saved Settings and Favorites.

Saved Settings

Saved Settings are a saved selection of report options, which includes all settings on all options tabs. You can also save sets of selection criteria. Both types of saved sets can be named and used during any reporting session to quickly generate a report.

Favorites

A Favorite is a saved report format, consisting of the report name, a set of saved report options, and a set of saved selection criteria. After a favorite is created, it takes just a click to generate the report with current data.



Please refer to the Vision Help system to learn more about Reporting.

11 Work Breakdown Structure (WBS)

A work breakdown structure (WBS) divides each of your projects into distinct, manageable work elements in a way that balances management needs with the need to collect an appropriate and effective level of project data. A WBS is used by various groups in a company, such as marketing, business development, project management, and accounting. A well-planned WBS is integral to successful project proposals, planning, scheduling, budgeting, and reporting.

Your Vision work breakdown structure impacts the:

- Value you get from the data you store.
- Ability to leverage past work to generate new business.
- Ability to improve job performance based on past experience.
- Ease and quality of knowledge sharing among groups in your company.
- Quality of service and level of reporting and billing customization that you can provide to your clients.

There are four key components to the Vision WBS, which work together to provide a comprehensive tracking and reporting system for cost and revenue information. Before you begin to set up your firm's work breakdown structure within Vision, your firm must understand how each of the four components work together to provide a

structure that gathers and reports information to meet your firm's internal and external reporting needs.

The four components are:

- The organizational (or profit center) structure
- The WBS or project structure.
- The labor code structure for labor cost.
- The chart of accounts structure for expenses.



Please refer to the WBS section of the Vision Help system to learn more about the work breakdown structure.

12 Getting Additional Help

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of client services has grown out of this close contact. A summary of these services follows.

If You Need Assistance

If you need assistance installing, implementing, or using Vision, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal. (See Customer Care Connect Site below for more information.)
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services

- Receive alerts of new Deltek releases and hot fixes



If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. From Vision, click **Help** on the Vision toolbar and click **Customer Care Connect** on the menu.
Or
From outside Vision, go to <https://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and **Password**.
If you do not have a username and password for the Customer Care Connect site, contact your firm's Vision Administrator.
If you forget your username or password, click the **Account Assistance** button on the Login page to get help.
3. Click **Log In**.

Additional Documentation

In addition to Vision Help and this guide, Deltek provides other documentation in PDF format to help you install and use Vision. The documentation available for this release of Vision is listed below. Except where noted, each of the guides and quick reference cards is available for download from the Deltek Customer Care Connect site at <https://support.deltek.com>.

- **Deltek Vision Release Notes** — The release notes contain information about all the new features in the current release, as well as software issues resolved and database changes implemented.
- **Deltek Vision Concepts Guide** — This guide describes the concepts underlying the basic accounting, project control, and customer relationship management (CRM) functions of Vision.
- **Deltek Vision Technical Installation Guide** — This guide contains detailed instructions for installing all the technical components of Vision, including the servers, the database, and Vision itself.
- **Deltek Vision Implementation Guide** — This guide contains information about configuring and setting up the Vision applications.
- **Deltek Vision Creating a Reverse Proxy for SQL Reporting Services Using IIS 7.0 Application Request Routing (ARR)** — This guide contains instructions for configuring a reverse proxy using Microsoft's Application Request Routing (ARR) extension for IIS 7.0, which allows the direct forwarding of requests through the Vision Web server to the reporting services Web service with responses back to your Internet clients.

- ***Deploying Vision at a Hosting Provider*** — This guide contains instructions for deploying Vision at a hosting provider.
- ***Deltek Advantage to Deltek Vision Migration Guide*** — This guide contains information about migrating from Advantage to Vision, including the steps in the migration process and an overview of Vision features.
- ***Deltek Award to Deltek Vision Migration Guide*** — This guide contains information about migrating from Award to Vision, including the steps in the migration process and an overview of Vision features.
- ***Deltek CRM and Proposals to Deltek Vision Migration Guide*** — This guide contains information about migrating from CRM and Proposals to Vision, including the steps in the migration process and an overview of Vision features.
- ***Deltek FMS to Deltek Vision Migration Guide*** — This guide contains information about migrating from FMS to Vision, including the steps in the migration process, detailed discussions of the key migration decisions, and procedures for verifying the converted data. (This guide is provided by Implementation Services prior to the migration. It is not available on the Deltek Customer Care Connect site.)
- ***Deltek Sema4 to Deltek Vision Migration Guide*** — This guide contains information about migrating from Sema4 to Vision, including the steps in the migration process and an overview of Vision features. (This guide is provided by Implementation Services prior to the migration. It is not available on the Deltek Customer Care Connect site.)
- ***Deltek Vision Configure Vision Analysis Cubes*** — This guide describes the prerequisites and steps required to configure your database server when using Vision Analysis Cubes.
- ***Deltek Vision Configure Vision Analysis Cubes for Internet*** — If you want users to access Vision Analysis Cubes and Microsoft® Excel® via the Internet (from outside the corporate firewall), you must follow the configuration steps in this guide after you complete the configuration steps in the *Configure Vision Analysis Cubes* guide. This guide describes the two methods for exposing data for Internet users.
- ***Deltek Vision Custom Reports and Microsoft SQL Server® Reporting Services*** — This guide provides instructions for creating, delivering, and generating Vision custom reports with Microsoft SQL Server Reporting Services and its report writing tools.
- ***Deltek Vision Performance Management Canvases Technical Installation Guide*** — Performance management canvases enable you to use Vision Project Cubes and General Ledger Cubes data sets and analysis services to create role-based graphical canvases. These canvases offer a customized graphical component for the Vision Dashboard. This guide describes the installation steps that are required to use performance management canvases with Vision.
- ***Deltek Vision Document Management Installation Guide*** — This guide contains detailed information on the prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.
- ***Deltek Vision Mobile Application Suite (MAS) Installation Guide*** — This guide provides instructions for enabling MAS on your Vision server, installing

prerequisite software components, and installing and configuring the MAS software. This guide also provides a list of all the mobile devices that you can use with MAS.

- ***Deltek Vision Synchronization Server Installation and Maintenance for Nokia Intellisync Mobile Suite 8.0 SP2 or higher*** — This guide contains an overview of the Vision Synchronization Server feature, as well as technical installation, setup, and maintenance information.
- ***Deltek Vision Server Synchronization Implementation Guide*** — This guide provides planning and best practices information for clients who are implementing the Deltek Vision Server Synchronization application.
- ***Deltek Vision Specification and Business Rules for Synchronization*** — This document lists the fields mapped in each of the three areas of Vision (contacts, appointments, and tasks/to-dos) for which you can use server synchronization to bi-directionally synchronize between Vision and your third-party groupware. This guide covers business rules and requirements, describes limitations, and discusses scenarios to watch for when mapping data.
- ***Deltek VisionXtend Guides*** — These guides explain how to use the Deltek VisionXtend platform to integrate Vision with other applications, access Web services, implement data validation routines, and establish workflow procedures using the Microsoft .NET Framework. The following VisionXtend guides are available:
 - Deltek VisionXtend Extending Data Validation Business Logic for Expense Reports
 - Deltek VisionXtend Extending Data Validation Business Logic for Timesheets
 - Deltek VisionXtend Invoking a Custom Method to Process Workflow Actions
 - Deltek VisionXtend Invoking a Web Service to Process Workflow Actions
 - Deltek VisionXtend Test Client Application for Vision Web APIs/Web Services
 - Deltek VisionXtend Web Services and API for Deltek Vision
- ***Deltek Vision Quick Reference Cards*** — The Vision quick reference cards provide snapshots of specific business processes or Vision forms with tips for entering data and using application toolbars. The following quick reference cards are available:
 - Accounts Payable (Create a Voucher from a Purchase Order)
 - Create Client from Vendor Utility
 - Dashboard
 - Desktop and Microsoft Office Integration
 - Expense Report
 - Mobile Timesheet and Expense Report for Hand-Held Devices
 - Navigation Tree Designer
 - Project Planning
 - Purchasing (Create a Standard Purchase Order)

- Resource Management (Generic Resource Assignments)
- SF330 Proposals
- Template Based Email
- Timesheet
- User Options
- Visualization

Index

A

Activity Reminders 6-34
Additional Help 12-65
Advanced lookup 7-49
Alerts 6-35

B

Binoculars icon 6-30

C

Configure Vision overview 9-57
Configuring lookup lists 7-43
Consulting 12-65
Copy button 6-30
Customize table grids 6-33

D

Data access methods 6-30
Delete button 6-30
Deltek Vision Support 12-65
Deltek Web site 12-65
Direct lookup 7-46
Drop-down lists 6-30

F

Favorites 10-61
Form and dialog-level help 5-28
Forms 6-30

G

Getting Started overview 1-1
Global icons 4-16

H

Help Topic Features 5-26

I

Insert button 6-30
Internet Explorer 4-21
Is Me operator 7-51

L

Log on 3-8
Lookup list options 7-44
Lookup lists overview 7-41

M

Main menu 4-18
Memo field 6-32
Multiple records matches 7-44

O

Organize function 7-53

P

Planning wbs 11-63

Project Info Center wbs 11-63

Q

Quick Find searches 7-44

R

Records overview 8-55
Report types 10-60
Reports overview 10-59
Required fields 6-31

S

Save a search 7-53
Saved Settings 10-61
Scroll through records 8-56
Select a menu choice 3-11
Select an accounting period 3-10
Slide bars 6-30
SQL Where Clause Lookup 7-52
Standard lookup 7-47
System-wide features 6-29

T

Table grids 6-30
Technical support 12-66
Text Editor 6-39

U

User Options 9-57
User Preferences 4-19
Using Vision 4-13
Utilities 6-36

V

Vision Applications 2-3
Vision Help System 5-23
Vision Terminology 4-15

W

WBS 11-63
Windows Authentication 3-9
Work breakdown structure (WBS) 11-63