Deltek

Deltek Vantagepoint® 3.5

Basics

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Contents

Basics

Vantagepoint is designed to be simple to learn and simple to use. After reviewing the basics, you will know your way around Vantagepoint and be ready to use it to track new business opportunities and deliver projects on time and on budget.

This section of the help covers basic tasks: logging in, navigating through tabs and grids, saving your work, and so on.

See Concepts for in-depth details about the transactions, processes, and activities that are vital to the work that you perform in Vantagepoint.

Getting Started with Vantagepoint

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

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

Video: See related video below

Follow these general steps:

1. Log in to Vantagepoint. The Activation menu displays at the left side of the Startup page.
2. Complete each Activation step in the same order as the menu. No other users can log in to Vantagepoint until Activation is completed.
3. Log out after you complete the final step, Activate Organizations.
4. Log back in using the Setup username. The Setup menu displays at the left side of the page.
5. Complete each Setup step in the same order as the menu.
6. Let other users log in and begin their activities.

To take advantage of advanced features and to tailor Vantagepoint to the specific needs of your enterprise, you will most likely choose to perform additional setup and integration steps, outside of Activation and Setup. You will perform these steps in the Settings area and in other areas of the Vantagepoint software.

Cloud Administration Help

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

Video

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

Initial Log In

The first time that you use Vantagepoint, you must enter a valid user ID and password. Your welcome email message includes a link to the login page.

To log in:

1. Use your Vantagepoint URL to display the login page.
2. In the **User ID** field, enter **SETUP**.
3. In the **Password** field, enter the password included in your welcome email message.
4. In the **Database** field, select the database that you want to use.
5. In the **Language** field, select the language that you want to use.
   This field displays when more than one language is enabled in Vantagepoint, so that you can select the language in which you want the application to display. This list includes all languages that are enabled. When you select a language here, the application refreshes to display in that language.
   If the **Language** field does not display, the application uses the language that is specified by your system administrator in **Settings** » **General** » **Options**.
6. Click **Log In**.
   The Vantagepoint Getting Started page displays the Activation menu.

Activation

During activation, you make important decisions about how to configure your database.

Activation is a one-time process, and the settings that you make are permanent. Complete each step in the order shown on the Activation menu on the Getting Started page.

Video

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

Activate Modules, Accounting Periods, and Fiscal Years

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

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

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

To activate modules:

1. Click **Activate Modules**.
2. On the Modules tab, review the list of modules to confirm that it includes all the modules that your enterprise is licensed to use. If any applications are missing, contact Deltek Operations for help.
3. If you are licensed to use the PSA module and you are integrating Vantagepoint with QuickBooks, select **Yes** for the **Will your PSA instance integrate with QuickBooks Online** setting below the modules list.
4. If you are licensed to use the Accounting module or PSA module, click the Fiscal Period tab.
5. On the Fiscal Period tab:
   - If you are licensed to use the Accounting module, enter your starting accounting period and fiscal year.

     This is the first accounting period and fiscal year in which you will enter history or process data in Vantagepoint.

     Assume, for example, that you are setting up Vantagepoint in April 2018, and your fiscal year runs from January to December. You may choose to enter historical data for January through March of 2018, so that you can track data and produce reports for the entire fiscal year. In this case, you would enter January 2018 as your first accounting period and 2018 as your first fiscal year. Alternatively, you may decide to enter history for the entire prior year, in which case you would enter January as your first accounting period and 2017 as your first fiscal year.

     After you begin using Vantagepoint, you will maintain a calendar of accounting periods, opening and closing periods as the year progresses. To learn more about this process, see the Accounting Periods and Processing Cycles help topic.
   - If you are licensed to use the PSA module and you are integrating Vantagepoint with QuickBooks, enter the fiscal year and accounting period in which you will start tracking new project labor and expenses.

     You must enter the first and last days of a calendar month for the fiscal year start and end dates and the accounting period start and end dates.
6. Click **Save** and then click **Done Activating Modules**.

Activate Defaults

Use the Activate Defaults page to specify the industry and country in which your enterprise operates and define your coding system for projects.

Video: See related video below

During the Activation process, you can identify up to three levels of project numbering, although many firms use only one (for example, project only) or two (for example, project and phase). For example, you might identify each of your projects using a seven-character code such as 45622.01, in which the first five characters are the main project and the final two represent additional work. The two parts are separated by a period, called a delimiter.

If you already have a project numbering structure, you should probably continue using it. If you are considering a change, consult with your project management and finance teams to be sure that any changes that you make address their needs.

The project number is just one element of the work breakdown structure (WBS) that your enterprise could use. To learn more about the overall work breakdown structure, see the Work Breakdown Structure help topic.

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

To activate your defaults:

1. On the Activation menu, click **Activate Defaults**.
2. From the **Industry** drop-down list, select the one that best matches the work that your enterprise performs and select your country from the **Country** drop-down list.
   Based on the industry that you specify, some settings and terminology in Vantagepoint automatically change to reflect common industry practices. For example, if you choose Architecture and Engineering Services, Vantagepoint uses a chart of accounts that is common to the A/E industry and uses terms such as "project," "project manager," and "client" throughout the user interface.

   These settings and terminology are just a starting point. After you complete the Activation process, you can review these default settings and terms and further tailor Vantagepoint to your needs. For example, you can use the Labels and Lists page in Setup to change the names of specific fields or change the options that are available in drop-down lists. Or you can use the Time page in Setup to modify the default settings for employee timesheets.
3. Click **Use Industry Defaults**.
   In most cases, the WBS tab displays. This is where you specify the structure of your project numbers.

   If the Resource Planning module is activated but the Accounting module is not activated, the WBS tab does not display. Go to step 6.
4. Click **WBS Structure**.
5. Set up the work breakdown structure for the way that your enterprise manages projects.

   If you are using QuickBooks integration with Vantagepoint, you can set up work breakdown levels in Vantagepoint, but any project data from Vantagepoint that is passed to QuickBooks is passed at the work breakdown level 1 (project) only and not lower levels.

6. Click **Done Activating Defaults**.

Video

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

Activate Email

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

You can have Vantagepoint send emails to employees and others for administrative and approval processes, including to remind an employee of a task to complete or send someone a report to review.

You may also want to route all of your employees' questions about Vantagepoint to a single email address, monitored by your system administrator or another internal product expert.

To activate your email addresses:

1. On the Activation menu, click **Activate Email**.
2. In the **Default Sender Email** field, enter the email address that will display as the "sender" of these automated email messages.
3. Check the **Add DeltekAdmin_ prefix to the Default Sender Email Address** option to add an extra layer of security to the emails that Vantagepoint sends automatically. Selecting this option adds the prefix DeltekAdmin_ to the sender's email address, which makes it an email address that cannot receive replies. This practice also prevents spoofing, because only valid emails can come from this appended email address.
4. Enter the help email address in the **Default Help Desk Email** field.
   This address is used to send automated messages to the Vantagepoint Help Desk.
5. Click **Done Activating Email**.

Activate Currencies

Use the Activate Currencies page to identify the monetary currencies that your enterprise uses and to set up exchange rates between currencies.

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

If you enable the multiple currencies feature, your database automatically changes so that it can track multiple currencies and exchange rates. Additional fields display in the user interface to prompt you to enter currency-related information. After these database changes are made, you cannot reverse them. However, you can choose to not enable the multiple currency feature now, but enable it later, after you complete the Activation and Setup process.

Video: See related video below

To set up one or more currencies:

1. On the Activation menu, click **Activate Currencies**.
2. Select **Yes** or **No** for the question **Do you need to track more than one currency**.

   If you are using QuickBooks integration, you can use only one currency, so this question does not display.
3. Use the remaining fields on the Currency tab to enter information about your main currency, including the number of decimals to use and its name.
   The main (or functional) currency is the currency of the primary economic environment in which your enterprise operates. For example, an enterprise located in France normally uses the Euro as its main currency. For more information about the different currency types used in Vantagepoint, see Currency Types.
4. Complete one of the following steps:
   - If you use only one currency, click **Done Activating Currencies** to complete and exit the currencies activation. You do not need to complete steps 5-10.
   - If you use multiple currencies, click **Enable Multicurrency**, confirm your choice, and continue with steps 5-10.
5. Click the Multicurrency tab and click **+ Add Currency**.
6. Enter each currency that you use and click **Save**.
7. Click the Exchange Rates tab and click **+ Add Exchange Rate**.
8. Select a pair of currencies, enter an effective date, and enter an exchange rate.
   You do not need to enter information for one pair of currencies (for example, US Dollars to Yen) and also enter information for its inverse (Yen to US Dollars). In fact, doing so can cause incorrect results. Instead, enter information for one exchange (for example, US Dollars to Yen) and let Vantagepoint automatically calculate the inverse (Yen to US Dollars). For more information about how exchange rates work in Vantagepoint, see Exchange Rates Overview.

   Repeat this process for multiple currency pairs. You can also switch back and forth between these tabs, entering currencies and setting up exchange rates.
9. Click **Save**.
10. Click **Done Activating Currencies**.

Video

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

Activate Organizations

Use the Activate Organizations page to provide information about the structure of your enterprise, including your companies and your "organizations" or business units.

Video: See related video below

To set up the structure for your organizations:

1. On the Activation menu, click **Activate Organizations**.
2. If you are licensed to use the PSA module and you are activating Vantagepoint with QuickBooks integration, enter the name of your company on this page and continue with step 11 below. Otherwise, continue with step 3.
3. In response to the question **Do you have multiple companies?**, select **Yes** or **No**.

   If you select **Yes**, you set up your main company now, and then set up additional companies after the Activation and Setup process is complete.
4. If your enterprise is made up of separate organizations, select **Yes** for **Do you have Profit Centers or Business Units that require their own income statements**; otherwise, answer **No**.
   Vantagepoint provides the framework for tracking multiple "organizations" in your company. These separate organizations are business units that incur expenses and/or generate revenue. For example, if your company is divided into regions and offices, you might create a separate organization for each region and office and maintain information for each of these segments of your business. To learn more about how this works, see the Organization Reporting Overview help section.
5. Enter the name of your main company.
6. Select the number of levels required by the structure of your organizations.
   Depending on the size and complexity of your enterprise, you can create a fairly simple structure or a more complex one. To learn more about organization levels, see the Organization Reporting Structure help topic.

   If you have multiple companies, your companies are automatically considered to be the first level. So, if you have multiple companies and also want to track branch offices and disciplines, you need a three-level organization structure.
7. Enter the singular and plural names for the levels in your organization.
8. Click **Activate** to update the database to reflect your organization structure.
   The Level Values and Combinations tabs display. Use these tabs together to identify the specific business entities that you want to track.
9. Click **Level Values** and enter all of the valid values for the organization that you want to define.
   For example, if you have two levels, Office and Studio, list all of your offices and all of your studios. Assign a two-character code to each of the values (for example, BA for Buenos Aires or BR for Branding).
10. Click **Combinations** and identify valid combinations of these values.

For example, if you have two levels, Offices and Studios, identify valid combinations, such as Paris/Branding, Paris/Consumer and New York/Tech. If your Paris office does not have a Tech studio, do not enter that combination.

11. If you want to review or change any of your prior activation settings, do so now, before you activate organizations, which is the last step in the activation process.
    After you click **Done Activating Organizations**, you cannot change any of the activation settings that you selected.
12. When you are satisfied that your activation entries are complete, click **Done Activating Organizations**.
13. Click and then click **Log Out**.

    Activation is now complete. Continue with the setup process to enter information about your projects, employees, and finances.

Video

Title	Description
Activate Organizations	Learn how to set up an organization structure that reflects how your enterprise is structured and to specify whether or not you need to track multiple companies.

Setup

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

Depending on the modules that you use, you may need set up modules in both applications. You set up most modules in the browser, but you set up Purchasing & Inventory in the desktop.

Video

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

Set Up Security

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

Each of the setup forms focuses on a different area.

Form	Description
Roles	Use the Roles form to establish security rights for each role. These rights determine a role's access to the modules, tabs, templates, reports, and records. In many cases, security rights

Form	Description
	are hierarchical, meaning that you make a basic choice, then further refine that choice.
Users	Use this form to create a user record, specify a username and password, assign a security role, and set up default report settings.
Password Policies	Use this form to specify the options and restrictions for passwords.

Set Up Time

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

Video: See related video

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how employee timesheets will work, including the increments in which time can be tracked, whether employees can enter overtime hours, and whether an employee signature is required. See the Timesheet Overview help topic for more information.
Time Periods	Use this form to set up timesheet periods. Employees must enter a timesheet for each timesheet period.
Non-Work Days	Use this form to identify the days of the week and the holidays on which employees are not expected to work.
Time Groups	Use this form to set up time groups to distribute timesheet administration responsibilities among different administrators. For example, you can use time groups to bring together employees who share the same job function, work in the same department, or work in the same office. After you set up a time group, you can assign employees to it.
Time Approvals	Use this form to determine if you will use an approval workflow to have leaders approve employee timesheets. You can choose among several workflow options. See the Approvals Center help area for more information about approval workflows.
Time Categories	Use this form to specify that certain common time categories, such as vacation and administration, should display automatically on timesheets, to save employees time. You can

Form	Description
	have a time category display on timesheets for all employees or for only those who belong to specific time groups.

Video

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

Set Up Expense

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

Video: See related video

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how employee expense reports will work, including whether employees can enter advances on their expense reports and whether an employee signature is required. See the Expense Reports help topic for more information.
Expense Groups	Use this form to set up expense groups to distribute expense report administration responsibilities among different administrators. For example, you can use expense groups to bring together employees who share the same job function, work in the same department, or work in the same office. After you set up an expense group, you can assign employees to it.
Expense Categories	Use this form to specify that certain common expense categories, such as hotels, meals, and airfare, should display automatically on expense reports, along with the correct accounting and billing information. You can have an expense category display on expense reports for all employees or for only those who belong to specific expense groups. See the Expense Categories help topic for more information.
Payments	Use this form to determine the format of employee expense checks and remittance advices, as well as the bank account that they will be drawn upon unless a different bank is chosen.

Form	Description
Expense Approvals	Use this form to determine if you will use an approval workflow to have leaders approve employee expense reports. You can choose among several different workflow options. See the Approvals Center help area for more information about approval workflows.

Video

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

Set Up Cash Management

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

Each of the setup forms focuses on a different area.

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

Set Up Accounting

Use the Accounting page to set parameters for accounting postings.

Video: See related video

Accounting has multiple menu options, each focused on a different area. The fields are pre-populated with default entries based on the options you selected during activation. We recommend you keep the default settings in each area, but you may need to change items that need to be specialized for your enterprise.

Review the default settings in each area and update any fields as needed. You can modify any fields and implement advanced features later in Vantagepoint Settings after the setup process is complete.

Menu Item	Description
Summary	This form shows you the work that you have done on the other forms.
Options	Use this form to choose how to indicate the levels of the work breakdown structure (WBS) at which you can enter project compensation amounts and contract detail amounts in the Projects hub.
Time Analysis	Use this form to set up the Time Analysis report, which lets you review how your employees are using their time. You can view employee time from several perspectives, using comparisons of direct time, indirect time, and total time worked. An analysis of indirect time helps you monitor paid time off and control non-billable time. See the Time Analysis help topic for more information.
Labor Posting	Use this form to set up direct and indirect labor accounts associated with specific labor types, such as Employee, Management, and Principal. When an employee charges time to a regular or indirect project, the labor cost is charged automatically to the appropriate account. Use the Override Labor Accounts section to set up exceptions to these rules. See the Labor Types Settings Overview help topic for more information.
Absence Accrual	Use this form to identify the absence accruals (vacation, sick leave, and so on) that your enterprise tracks for its employees. For each absence accrual, you specify if you want to show the accrual balance on employee timesheets and if you want to set up an absence request approval process and, if so, the employee who is the approval administrator. You also set up a project of range of projects for each accrual. See the Accruals Processing Overview help topic for more information.
Overhead Allocation	Use this form to define how the costs accumulated in overhead projects (such as vacation pay, sick time, rent, utilities, office supplies, and administration) will be distributed to regular, revenue-producing projects. See the Overhead Allocation help topic for more information.

Video

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

Set Up General Ledger

Use the General Ledger Setup form to set up accounts.

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

Set Up Currency

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

Each of the setup forms focuses on a different area.

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

Set Up Billing

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

Video: See related video

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how clients will be billed, including invoice numbering, whether retainers and retainage are tracked, and whether you use an approval process for invoices. See the Retainers, Retainage Overview, and Invoice Approval Overview help topics for more information.
Fee	Choose whether or not to use scheduled billing. Scheduled billing allows you to invoice fee-based projects based on scheduled invoice dates and percent complete or dollar amounts. See the Scheduled Billing topic for more information.
Invoice Format	On this form, select whether or not to show your company name, byline, and address on billing invoices.
Invoice Accounts	During final invoice processing, invoice transactions are charged to general ledger revenue accounts. Use this form to specify the default revenue account for each section of your invoice. For example, specify the revenue account associated with fee billings. Also use this tab to enter the label that will appear above each invoice section.
Taxes	Use this form to set up the taxes that you need to calculate and include on invoices. For each tax, specify the tax rate, the invoice sections to which it should be applied (labor, expense, fees, and so on), and the general ledger account to which the tax is charged.

Video

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

Set Up Rate Tables

Use the Rate Tables Setup forms to ...

Each of the setup forms focuses on a different area.

Form	Description
Billing Labor Rates	Use this form to assign hourly billing rates to employees for billing their labor. These rates are used in the Billing application to calculate invoice amounts for a project if you select **Rate Table** as the labor rate method and a billing labor rate table in the project's billing terms. You can set up rate tables for specific clients or industries.
Billing Labor Categories	Use this form to set up labor categories with hourly rates for standard staff roles such as principal, project manager, or supervisor (different types of work).
Billing Labor Overrides	Use this form to set up a billing rate or labor category for employees whose labor will be billed with a different labor rate or labor category for a particular project. Add the override table to the project's billing terms. The billing rate or labor category from the override table overrides the employee's billing rate or labor category that is specified in the labor rate table or the labor category table assigned to the project's billing terms. You can also use these tables to specify a maximum cost rate for an entire labor category, rather than by individual employees.
Billing Expense Accounts	Use this form to assign a multiplier (markup) to individual general ledger expense accounts for calculating billable expenses and consultant expenses on billing invoices for projects. These multipliers are used in the Billing application when invoices are generated for a project whose billing terms has **By account** selected for the expense rate method or the consultants rate method and an expense account table is specified. The multiplier for a general ledger account in a billing expense account table overrides the multiplier used for all expenses as specified in the **Multiplier** field in the Expense section and the Consultants section on the Rates tab in Billing Terms.
Billing Expense Categories	Use this form to create billing expense categories that allow you to bill a group of related expenses as one item on a billing invoice for a project. You can set up different billing expense category tables as needed, for example, a table to be used for a specific project. Add expense categories to each table and the multiplier (markup) to use for each expense category for calculating invoice billing amounts. Then add the general ledger accounts for each expense category. For a project to use an expense category table for billing invoices, the project's billing terms must have the expense rate method set to **By Category** and an expense category table specified.

Form	Description
Billing Expense by Vendor	Use this form if you want billing invoices for a project or class of projects to calculate vendor expenses on a billing invoice based on a multiplier (markup) for the specific vendor rather than on the overall multiplier specified for all expenses in a project's billing terms. You can set up different billing expense by vendor tables for different projects or classes of projects. For each table, add vendors and a multiplier for each vendor. For a project to use an expense by vendor table for billing invoices, the project's billing terms must have the expense rate method set to **By Vendor** and an expense by vendor table specified.
Cost/Pay Labor Rates	Use this form to set up labor rates to override the cost and/or pay labor rates entered for employees in the Employees hub. When you create a cost/pay labor rate table, you specify whether the rate table applies to cost rates, pay rates, or both. For each employee that you add to the table, enter a labor rate and an effective date for the rate if appropriate. Each employee in a labor rate table can have one row that does not specify an effective date; use this row to indicate a default rate to use if no other row has an applicable effective date. You can assign a cost/pay labor rate table to projects, employees, or both
Cost/Pay Labor Categories	Use this form to override cost or pay rates for specific projects for specific labor categories. Labor categories are standard staff roles on project (for example, principal-in-charge, project manager, or supervisor). The table can override cost rates, pay rates, or both.

Set Up Resource Planning

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

Video: See related video

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have completed on the other forms.
Plan Settings	Use this form to make basic decisions about how you will use Resource Planning, including whether you will plan consultant and non-consultant expenses, and what overhead rate you will apply to planned projects. Select **Yes** for the **Enable Expense Planning** option if you want to be able to enter plan data for expenses. You can enter plan data for direct, indirect, and reimbursable expenses.

Form	Description
	Select **Yes** for the **Enable Consultant Planning** option if you want to be able to enter plan data for consultants. You can enter plan data for direct and reimbursable consultants. In the **Starting Day of the Week** field, select the first day in your work week. Enter the default target labor cost multiplier. The target multiplier represents how much revenue is anticipated for each labor cost dollar spent on a project. It is commonly used as the basis for evaluating the EAC labor cost multipliers as projects move forward. In the **Overhead %** field, enter the default overhead percentage for plans, as a whole number. For example, enter **10** for 10 percent. A user with the necessary security rights will still be able to enter different percentages for individual projects. If the Resource Planning module is activated but the Accounting module is not activated, select the character (a period, for example) that you want to use as the delimiter between WBS levels in project numbers.
Rates	Use this form to specify whether planned amounts should be based on cost rates, billing rates, or both. Later, you will need to provide additional information about cost and labor rate methods, tables, and multipliers.
Resource Settings	Use this form to specify: ▪ **Utilization Thresholds**: These are the low and high utilization percentages within which an employee is considered fully utilized. **Example:** You set the lowest percentage to 95 and the highest percentage to 105. If an employee's target utilization is 80 percent, that employee is considered properly utilized for a given period if their utilization is between 76 percent (.95 x 80) and 84 percent (1.05 x 80). The employee is under-utilized if their utilization is below 76 percent and over-utilized if it is above 84 percent. ▪ **Scheduled Thresholds**: These are the low and high scheduled percentages within which an employee is considered fully scheduled. **Example:** You set the lowest percentage to 95 and the highest percentage to 105. If an employee's available hours for a week is 40, that employee is considered properly scheduled if they are scheduled for between 38 hours (.95 x 40) and 42 hours (1.05 x 40). The employee

Form	Description
	is under-scheduled if their scheduled hours are less than 38 and over-scheduled if the hours are more than 42. ▪ **Soft and Hard Booking**: This is an option to tentatively plan, or "soft book" assignments, then "hard book" them when they are confirmed. The soft and hard book feature enables you to distinguish between tentative or placeholder resource assignments and those confirmed or approved assignments that you consider a permanent part of the plan. When you generate planning reports, you can filter those reports to include or exclude assignments based on booking status if you include the **Booking** column on the report.
Labor Categories	Use this form to define a master list of labor categories and related standard billing rates. Labor categories are standard staff roles on projects (for example, Principal, Project Manager, or Supervisor). In the Employees hub, you can associate each employee with a default labor category. You can use labor category rates to invoice new projects. If you use the Resource Planning module, you can use these rates to set up plans for new projects. (If Vantagepoint is set up to use both multiple companies and multiple currencies, this form is not available.)
Non-Work Days	Use this form to identify the days of the week and the holidays on which employees are not expected to work. When Vantagepoint spreads planned hours for you in Resource Planning, non-work days and holidays are allocated no hours, but planners can still assign planned hours to them.

Video

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

Set Up Project

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

Each of the setup forms focuses on a different area.

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

Set Up CRM

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

Videos: See related videos below

This page walks you through the four main CRM setup steps and suggests videos and other learning resources for each of the steps.

You will perform the CRM setup steps throughout Vantagepoint, not just on this page.

Step	Description
Make a plan	Before you do anything, gather key stakeholders to discuss your goals for using Vantagepoint CRM and how you will achieve those goals. Discuss the data that you will bring into Vantagepoint from others sources, the terminology that you will use, and the workflows that you will establish. See the CRM Overview help topic for more information.
Set up your processes	Set up the framework for your CRM system, including establishing workflows, establishing terminology, and choosing the values that are available from drop-down lists. If you plan to integrate Vantagepoint CRM with Salesforce, set up the integration process. See the Workflow Configuration Overview help topic for more information.
Set up your hubs	The "hubs" area of Vantagepoint is the place where you store key data about your projects, employees, and more. As part of setting up CRM, you enter data about the firms (vendors and clients) with which you work, your contacts, projects you are pursuing, and your marketing efforts. You will probably import this data into Vantagepoint from information sources that you already maintain. See the Hubs help topic for more information.

Step	Description
Empower your users	Identify the employees who will use Vantagepoint CRM and give them appropriate security access to the CRM applications. See the Security Configuration Overview for more information.

Videos

Title	Description
Get Started with CRM for Administrators	Learn how to navigate through the hubs and set up labels and lists. The video also introduces the import process, which automates the data entry process.
Use Hubs for CRM	Learn about the hubs used by CRM users, and how to enter data into hubs manually, import data from outside sources, and quickly find or add a record.
Import Data for CRM	Learn how to separate CRM contacts from personal contacts, locate duplicates and remove them, and import contacts from outside sources.

Set Up Labels and Lists

Use the Labels and Lists Setup form to set up the terminology used in the CRM application and the values that will be available from drop-down lists.

Video: See related video below

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Labels	During the Activation process, you identified the primary industry in which your enterprise operates. Based on this industry choice, your Vantagepoint database was updated to use industry-specific terminology. Now, on the Labels form, you can further customize terminology. For example, you might change the term "Employees" to "Team Members," "Associates," or "Specialists."
Lists	Throughout Vantagepoint, your users will make choices from drop-down lists. For example, your business development staff will select a value from the **Proposal Status** field to identify the current state of a proposal. Here, on the Lists form, you can review the values that are pre-set for these drop-down lists. (In the case of **Proposal Status**, for example, these values are **In Progress**, **In Review**, and **Submitted**.) You can change the default values to better reflect

Form	Description
	your business needs, add new values, and remove values you do not want.

Video

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

Set Up General

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

Each of the setup forms focuses on a different area.

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

Set Up Integrations

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

Video: See related video below

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

Form	Description
Ajera	Use this form to set up integration between Vantagepoint and Ajera. This tab has just one check box, **Enable Ajera Synchronization**.

Form	Description
API Authorization	Use this form if you are licensed to use the Resource Planning module and want to use any APIs to import data from other applications into the Vantagepoint database. Click **Generate Secret** to generate the Client ID and Client Secret.
GovWin IQ	Use this form to set up integration between Vantagepoint and GovWin IQ, a Deltek service that helps companies find government contract opportunities.
Collaboration	Use this form to set up integration withCollaboration. Before you perform this step, you must obtain a Client ID and Client Secret from Deltek.
Maconomy	Use this form to configure APIs to connect your Maconomy instance to Vantagepoint. This allows you to integrate Maconomy information with Vantagepoint and synchronize user-defined fields and workflow data.
VAT Registrations	Use the VAT Registrations form to configure the subscription license for Vantagepoint to use the vatlayer API system to validate European Union VAT numbers.
Salesforce	Use this form to set up integration between Vantagepoint and Salesforce, including the rules that will control which data is shared between the two applications, when it is shared, and how data is mapped between the two applications.
QuickBooks	Use this form to turn on the QuickBooks integration, connect Vantagepoint with QuickBooks Online, run the initialization to copy records from QuickBooks Online to Vantagepoint for the first time, map records, set up the time interval for automatic updating to occur between Vantagepoint and QuickBooks Online, and complete other settings. For more information, see Set Up QuickBooks Integration.

Video

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

Set Up QuickBooks Integration

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

To open the utility, select **Utilities** » **Integrations** » **QuickBooks** in the Vantagepoint Navigation pane. You can use this utility when you log in to Vantagepoint with your setup credentials to initially activate and set up Vantagepoint, or use it when you log in after the initial setup to complete or modify the QuickBooks integration setup. The same QuickBooks form, tabs, and settings are included in the utility whether you use it during the initial Vantagepoint setup or after the initial setup.

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

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

- Create an Intuit Developer Account
- Create an Intuit App for Vantagepoint

Then complete the settings on the tabs in the QuickBooks integration utility.

Tab on the QuickBooks Form	Description
Integration Setup	Use the settings on this tab to: ▪ Enable QuickBooks integration. ▪ Connect Vantagepoint with QuickBooks Online. ▪ Schedule how often to automatically update the data between the two products. ▪ Enter advanced and default settings.
Accounts Mapping	Use this tab to review and map the general ledger accounts that are linked between Vantagepoint and QuickBooks Online.
Tax Code Mapping	Use this tab to review and map the tax codes that are linked between Vantagepoint and QuickBooks Online.
Employee Mapping	Use this tab to link an employee record with a corresponding vendor record so you can pay an employee in QuickBooks Online for expenses entered in an expense report in Vantagepoint.

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

User Interface Fundamentals

When you are new to Vantagepoint, it is a good idea to become familiar with the terminology, icons, and toolbar options that you see throughout the application.

Videos

Title	Description
Hub Navigation Tips and Tricks	Learn tips for successfully navigating hubs, including how to add a hub record, use list view (select columns and use filters), and perform a simple search. The video also discusses hierarchies.
What is Vantagepoint?	View a detailed introductory video about the Vantagepoint application.

Access to Vantagepoint Based on Role

A security role that your system administrator sets up controls your access to Vantagepoint forms, tabs, and fields. It also defines the individual records that you can display, and it specifies whether or not you can add and change those records or only view them.

The Vantagepoint help system describes all available forms, tabs, and fields, and provides instructions for performing all tasks. However, because of restrictions defined for your security role, some components of the user interface described here may not be available to you, and you may not be able to perform some of the procedures included in the help.

If you have questions about your Vantagepoint access rights, contact your system administrator.

Terminology

If you are new to Vantagepoint, you may find it helpful to become familiar with the terms that are used throughout the application and documentation.

Contents

Field	Description
Browser and Desktop Applications	The Vantagepoint user interface provides most functionality in a web-based browser interface. The payroll, purchasing, asset management and inventory applications are provided through a desktop (Smart Client) interface. The default interface is the browser application. In cases where functionality is accessed through the desktop application, this is indicated in the help topics.
Navigation Pane	The Navigation pane is located on the left side of the Vantagepoint screen. It provides access to all of the applications in Vantagepoint. When you click an application in the Navigation pane, the application opens on the right side of the screen. Use the **Find Application** search tool to quickly locate an application instead of scrolling through a long list of applications. The applications that are

Field	Description
	available to you depend on the security role assigned to you. For more details, see Find an Application. To hide or display the Navigation Pane, click in the Vantagepoint toolbar.
Records	A record is a collection of data pertaining to an individual item (such as a project, employee, or contact). Information about the record is collected on various forms. For example, each project is a record that contains data from the Overview, Team, and other tabs in the Projects hub. Depending on your security role, you can modify, copy, or delete an existing record. You can add new records at any time if you have security rights. You create and maintain records in the hubs.
Tabs	Vantagepoint applications are organized in a tabular format. The tabs in an application may contain fields and/or grids on which you enter or modify information.
Dialog Boxes	Dialog boxes display as pop-up windows in the Vantagepoint application. Dialog boxes may contain fields and grids for entering information. Dialog boxes display when you click certain Navigation menu options as well as certain toolbar and field-level icons.
Fields	Fields display on tabs and dialog boxes. Use fields to enter and maintain data for a record or transaction. Some fields are display-only; you cannot enter or edit data in these fields. These fields are grayed out on your screen.
Grids	Grids display on tabs and dialog boxes. A grid is essentially a collection of fields arranged using columns and rows. Use grids to enter, maintain, and view data for a record or transaction. Grids make it easy for you to sort and organize data. You can sort data in most grids by clicking a grid column heading to establish a sort order (ascending or descending). Click the column heading again to reverse the sort order.
Options	Options are selections or choices that appear on a menu or form. Options usually display in drop-down lists.
Settings	In addition to standard system setup options, Vantagepoint offers a variety of ways for you to change the look and feel of the application, such as renaming tabs and labels, adding new tabs, and reformatting your Dashboard. See Settings to learn more.

Main Areas of Vantagepoint

Get acquainted with the basic areas of Vantagepoint.

Area	Description
Notification Center (browser)	The Notification Center provides a central location for you to view notifications and take action on required action items.
My Stuff (browser)	Use My Stuff to access your daily activities, including your calendar, timesheets, expense reports, and approval requests.

Area	Description
Dashboard (browser)	The Dashboard is your "portal" into Vantagepoint, allowing you to create a personalized view of your business world.
Hubs (browser and desktop)	The Hubs are where you enter and manage your business-related data, including basic information about activities, contacts, projects, employees, and firms.
Resource Management (browser)	Resource Management is designed to guide resource and project managers in constructing and monitoring plans for projects.
Billing (desktop)	Billing lets you bill labor, expenses, fees, and units in all industry-standard formats. It also lets you process, modify, accept, and print invoices and generate billing-related reports.
Transaction Center (desktop)	The Transaction Center is where you enter and post various types of transactions, including disbursements, expenses, invoices, and vouchers.
Accounting (desktop)	Accounting is where you perform accounting processes, including accounts payable, accounts receivable, budgeting, and employee expense processing.
Payroll (desktop)	Payroll is where you process employee pay and generate related documents, such as Form W-2.
Purchasing (desktop)	Purchasing allows your firm to automate its procurement processes for items, services and capital items.
Asset Management (desktop)	Asset Management works with the Equipment hub to track and process depreciation or amortization for asset items that you capitalize.
Inventory (desktop)	Inventory lets your firm manage and track all of its items, both inventory items and non-inventory items.
Reporting (desktop)	Reporting offers you a wide range of reports that present information about all aspects of your business.
Utilities (browser and desktop)	Utilities are maintenance activities that you use to keep your Vantagepoint implementation running optimally.
Settings (browser and desktop)	Settings is where you make decisions about how you want Vantagepoint to work for your firm, including choosing the features and settings you want to use.

Logins and Passwords

Each time that you log in to Vantagepoint, you must enter a valid user ID and password.

Vantagepoint may end your session and require you to log back in if the application remains idle for a period of time (the default is 20 minutes). When you log back in, you are returned to where you were working when your session expired.

How to...

Review log in and log out procedures, and how to retrieve a forgotten password or user ID.

Log In

Each time that you want to use Vantagepoint, you must enter a valid user ID and password.

If the application is idle for a period of time (approximately 20 minutes), the session is closed and you need to log back in. When you log back in, you are returned to where you were working when your session expired.

To log in:

1. Use your Vantagepoint URL to display the login page.
2. Select one of the following actions:
   - If you are logged in to Windows with your network login credentials and you want to log in to Vantagepoint using Windows Authentication, select the **Windows Authentication** check box when you log in.
   - If you are not using Windows Authentication, enter your user ID in **User ID** and your password in **Password**.
3. If more than one database is available, click ▼ in **Database** to select a different database.
4. In **Language**, select the language that you want to use while you work in Vantagepoint.

   The drop-down list displays all the languages that Vantagepoint supports.
5. Click **Log In**.

Log In Using Multi-factor Authentication

If your system administrator has enabled multi-factor authentication, when you log in to Vantagepoint you must provide a six-digit code from an authentication application, in addition to your valid user ID and password.

Multi-factor Authentication must be enabled by your system administrator in Security Settings. For this additional step to appear when you log in, it must also be enabled for your user account.

For the multi-factor authentication application, Deltek recommends Google Authenticator, which has been tested with Vantagepoint. Although this application is recommended, you can also use other authentication applications.

To log in with Multi-factor Authentication enabled:

1. Use your Vantagepoint URL to launch Vantagepoint and display the Vantagepoint login screen.
2. Select one of the following actions:

  - If you are logged in to Windows with your network login credentials and you want to log in to Vantagepoint using Windows Authentication, select the **Windows Authentication** check box when you log in.
  - If you are not using Windows Authentication, enter your user ID in **User ID** and your password in **Password**.
3. If more than one database is available, click ▼ in **Database** to select a different database.
4. In **Language**, select the language that you want to use while you work in Vantagepoint.

   The drop-down list contains all languages that Vantagepoint supports.
5. Click **Log In**. (If you are logging in from the Vantagepoint desktop application, click **OK**).
6. On the Vantagepoint Multi-factor Authentication form (or on the Multi-factor Authentication dialog box in the desktop application), enter the six-digit code from your authentication application on your mobile device in the **Enter Your Verification Code** field.
   - If this is your first time logging in with multi-factor authentication enabled, do the following:
     1. Click **Set Up Multi-factor Authentication**.
     2. Open the authentication application on your mobile device and scan the QR code that displays on the Set Up Multi-factor Authentication dialog box (or the Multi-factor Authentication dialog box in the desktop application) in Vantagepoint.

        This adds the Vantagepoint account in your authentication application and generates a six-digit code in your authentication application that you use to log in to Vantagepoint this one time.
     3. On the Set Up Multi-factor Authentication dialog box, click **Done with Setup**.

     You only need to set up multi-factor authentication once. On your next log in, you must open the authentication application on your mobile device and generate a new six-digit code.
7. In the browser application, click **OK**; in the desktop application, click **Log In**.

Log In Using Windows Integrated Security

If your enterprise uses Windows Integrated Security with Vantagepoint, you can log in once for both Windows and Vantagepoint.

Prerequisites: You must be logged in to Windows with your network login credentials.

To log on to Vantagepoint **using Windows Integrated Security:**

1. Open Internet Explorer and start Vantagepoint.
2. If more than one database exists, select the database that you want to use.
3. In **Language**, select the language that you want to use while you work in Vantagepoint.

   The drop-down list contains all languages that Vantagepoint supports.
4. Click **Log In**.

Log Out

You must log out when you are finished working in Vantagepoint.

To log out:

Click on the toolbar and select **Log Out**.

The application and all associated windows close.

Replace a Forgotten Password

If you forget your password, you can replace it with a new password on the login page.

Prerequisite: This procedure requires that your employee information includes an email address.

To replace a forgotten password:

1. Use your Vantagepoint URL to display the login page.
2. Click **Forgot your password or user ID?**.
3. On the Log In Assistance dialog box, enter your User ID.
4. Click **Send**.
   - If the user ID is valid and has an associated email address, an email message that contains a temporary password is sent to that address. Follow the directions in the email message to reset your password the next time that you log in.
   - If the user ID is not valid or does not have an associated email address, an error message displays. Click **OK** to return to the login page, and contact your system administrator for assistance.

Retrieve a Forgotten User ID

If you forget your user ID, you can retrieve it from the login page.

Prerequisite: This procedure requires that your employee information includes an email address.

To retrieve a forgotten user ID:

1. Use your Vantagepoint URL to display the login page.
2. Click **Forgot your password or user ID?**.
3. On the Log In Assistance dialog box, select **I forgot my user ID**.
4. In **Email**, enter the email address that is associated with your employee information.
5. Click **Send**.
   - If the email address that you entered is associated with one valid user ID, an email message with the user ID is sent to that address.

- If the email address that you entered is not associated with a valid user ID, or is associated with more than one user ID, an error message displays. Click **OK** to return to the login page, and contact your system administrator for assistance.

Fields and Options

Use Login Assistance to update or retrieve your password and user ID.

Deltek Vantagepoint Login Screen

Use this screen to enter your user ID and password and log in to Vantagepoint.

Display the Deltek Vantagepoint Login Screen

You display this screen when you launch Vantagepoint.

Use your Vantagepoint URL to launch Deltek.
The Vantagepoint Login Screen displays.

Contents of the Deltek Vantagepoint Login Screen

Use the fields on this screen to log in to Vantagepoint.

Field	Description
User ID	Enter your Vantagepoint User ID.
Password	Enter your Vantagepoint password.
Forgot your password or User ID?	Click this link to retrieve your User ID and password information.
Database	If more than one database is available, select the database that you want to open.
Language	This field displays when more than one language is enabled in Vantagepoint. Select the language in which you want the application to display. This list includes all languages that are enabled. When you select a language here, the application refreshes to display in that language. If the **Language** field does not display, the application uses the language that is specified by your system administrator in **Settings** » **General** » **Options**.
Log In	Click this button to log in to Vantagepoint.

Deltek Vantagepoint Multi-factor Authentication Screen

If multi-factor authentication is enabled for your account, you must enter a six-digit code from an authentication application in addition to your password.

Display the Deltek Vantagepoint Multi-factor Authentication Screen

You display this screen from the login screen.

Prerequisite: Multi-factor Authentication must be enabled by your System Administrator in Security Settings. For this additional step to appear when you log in, it must also be enabled in your user account.

1. Use your Vantagepoint URL to display the login page.
2. Select one of the following actions:
   - If you are logged in to Windows with your network login credentials and you want to log in to Vantagepoint using Windows Authentication, select the **Windows Authentication** check box when you log in.
   - If you are not using Windows Authentication, enter your user ID in **User ID** and your password in **Password**.
3. If more than one database is available, click ▼ in **Database** to select a different database.
4. Click **Log In**.
   Vantagepoint displays the multi-factor authentication screen.

Contents of the Deltek Vantagepoint Multi-factor Authentication Screen

Use these fields to set up multi-factor authentication and enter a six-digit code generated from your authentication application each time that you log in to Vantagepoint.

Field	Description
Enter Your Verification Code	Enter the six-digit code that is generated from your authentication application on your mobile device.
Set Up Multi-factor Authentication	If this is your first time logging into Vantagepoint with multi-factor authentication enabled, click this link to set up the new account for Vantagepoint in an authentication application on your mobile device. In the browser application, the Set Up Multi-factor Authentication dialog box shows a QR code that you can scan with an authentication application on your mobile device to add the new account. In the desktop application, the Multi-Factor Authentication dialog box extends to show the QR code.
QR Code	In the Vantagepoint browser application, the Set Up Multi-factor dialog box displays when you click **Set Up Multi-factor Authentication**. Scan this QR code with the authentication application on your mobile device.

Field	Description
	In the Vantagepoint desktop application, the dialog box extends to show the QR code.
Log In	In the browser application, click this button to log in to Vantagepoint.

Log In Assistance Dialog Box

You can retrieve your Vantagepoint User ID or reset your password if you forget either one.

Display the Log In Assistance Dialog Box

Display this dialog box from the login screen.

1. Open the Vantagepoint login screen.
   The **Forgot your password or User ID?** link displays if you are not using Windows Authentication and email settings are configured.
2. Click the **Forgot your password or User ID?** link.

Contents of the Log In Assistance Dialog Box

Use this dialog box to change your password and/or user ID.

Field	Description
I Forgot My Password	Select this option to reset your Vantagepoint password. Vantagepoint checks the email address associated with the user account. ▪ If there is a valid user ID and email address for this account, click **OK** to receive an email message with a temporary password that will allow you to access your account. Follow the directions in this email message to reset your password the next time that you log in. ▪ If there is not a valid user ID and email address for the account, an error message displays and you need to click **OK** to return to the login screen.
I Forgot My User ID	Select this option to receive a reminder for your assigned user ID. When you select this option, the **Email Address** field is activated. Enter the email address that is associated with your user ID, and click **OK**. ▪ If the email address is valid, you will receive an email message with the user ID information. Follow the directions in this email message and use this Vantagepoint user ID the next time that you log in. ▪ If the email address is not valid, an error message displays. You can enter a different email address in the **Email Address** field or contact your system administrator for help.

Field	Description
Using Database	This field displays information about the current database.
Send	Click **Send** to send the temporary password and/or user ID to your email address for this account.

Vantagepoint Toolbar (Browser)

Use the main Vantagepoint toolbar to perform actions that apply globally. For example, you can specify your personal settings, view action items, view online help, or log off.

Contents

Field	Description
	Click this option to hide or display the Navigation pane.
Company	The current company displays on the toolbar. If your security role gives you access to more than one company, you can change your active company at any time. Click the company name to select the company that you want.
Period Ending <*date*>/Prior Period Ending <*date*>	This applies if you have the Accounting or Resource Planning module installed. The ending date for the accounting period that you are working in displays on the toolbar. When you log in to the Vantagepoint browser application, you are automatically logged in to the latest open accounting period by default. If you have multiple companies in Vantagepoint, you are automatically logged in to the latest open accounting period for the active company that you logged in to. You can change the accounting period by clicking the period ending date on the toolbar. This opens the Period Selection dialog box. A **Period Ending** label displays on the Vantagepoint toolbar above the period ending date when the period that you are working in is the latest accounting period. A **Prior Period Ending** label (with a brown background) displays on the toolbar above the period ending date when you are working in an accounting period that is **not** the latest accounting period. Example: The latest accounting period is December 2018. When you are working in the December 2018 accounting period, the label on the toolbar is **Period Ending**. When you are working in accounting periods prior to December 2018, such as November 2018, the label on the toolbar is **Prior Period Ending**. For more information, see Changing the Accounting Period.

Field	Description
Hey Deltek!	This feature is available if **Enable Hey Deltek! Natural Language Interaction Feature** is selected in **Settings** » **General** » **Options**. Click to work with Vantagepoint using natural language and common commands.
5 **Notification Center**	The Notification Center button displays the number of active action items and notifications for your current instance. Click the button to view your list action items and notifications. You can open an item from this list.
Options	Use options on this menu to do the following: ▪ **My Preferences**: Set the date format, select decimal and digit grouping symbols, and connect your Vantagepoint account to Collaboration Business or to GovWin IQ. ▪ **Log Out**: Log out of Vantagepoint and return to the login page.
?**Help**	Use the options on this menu to do the following: ▪ **Help**: Display the online help. ▪ **About**: Display the Vantagepoint version number, the database to which you are connected, and the user ID that you used to log in. Other information provided includes lists of installed components and applications, software licensing and copyright information, and additional miscellaneous system information.

Vantagepoint Toolbar (Desktop)

Certain options are always available in the toolbar at the top of the screen, wherever you are the Vantagepoint desktop application.

Field	Description
Hide/Show Navigation	Toggle between these buttons to hide and display the Navigation menu.
Back Arrow	Click this button to return to the application that you were previously working on.
Forward Arrow	Click this button to return to the application that you were working on before you used the Back Arrow.
Browser	Click this button to open the Browser application.
Collaboration	Click this button to launch Collaboration. If your firm's Collaboration Business token is entered in Collaboration **Account Key** on the General System Settings form, and if you log on to

Field	Description
	Collaboration on the Misc tab of the User Options dialog box, you are automatically logged on when Collaboration displays. If your firm's Collaboration Business token is not entered in Collaboration **Account Key**, or if you have not logged on to Collaboration on the User Options dialog box, you must log on to Collaboration yourself after it displays. If you use Microsoft® Internet Explorer® 8, Collaboration displays in a separate browser window. If you use Internet Explorer 9 or later, it displays within Vantagepoint. If the toolbar does not contain a Collaboration option, your system administrator has disabled the option in the web.config file.
Search	Click this button to open the hubs Search dialog box, where you can choose an hub and search in it for a particular record.
My Preferences	Click this button to access the My Preferences dialog box, where you can choose your individual preferences for how Vantagepoint looks and behaves.
Help	Click this button to select from the following options on the Help menu: ▪ **Contents**: Display the Vantagepoint online help. ▪ **Data Dictionary**: Display the data dictionary, which provides information about the data tables, columns, and indexes in the Vantagepoint database. ▪ **Help Desk**: Display the Send Email dialog box. Use this dialog box to compose and send a message to a designated Help Desk mailbox. You can send email messages directly to Deltek Customer Care or, if your company has an internal Help Desk mailbox, to your internal Vantagepoint experts. ▪ **Customer Care Connect**: Go to the Deltek Customer Care Connect site. You must have a username and password to access the site. ▪ **Knowledge Base**: Go to the Deltek Customer Care Connect site and open the Knowledge Center, which provides solutions and answers for thousands of user-submitted issues and questions. You must have a username and password to access the site. ▪ **Contact Us**: Go to the Deltek Customer Care Connect site, where you can submit a support case or chat with a support analyst. You must have a username and password to access the site. ▪ **About**: Display the Vantagepoint version number, the database to which you are connected, and the user ID that you used to log in. Other information provided includes lists of installed components and applications, software licensing and copyright information, and additional miscellaneous system information.

Field	Description
Log Off	Click this button to log out of the Vantagepoint desktop application and return to the login dialog box. From there you can log on again, perhaps using a different accounting period or database, or exit Vantagepoint.

Custom Labels

You can modify Vantagepoint to use key terms that are familiar to your firm and employees. You can replace the default Vantagepoint labels with those that are used in your firm (for example, replace the default "Client" with "Customer").

If you enter a custom label, it is used throughout the Vantagepoint user interface and online help in place of the default label. For details, see the Labels & List Settings help topic.

Video

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

Notification Center

The Notification Center indicates your action items and notifications in the Vantagepoint browser application.

The Notification Center provides a central location for you to view notifications and take action on required action items. To open the Notification Center, click the orange notification icon (for example, ) at the top right of the main Vantagepoint toolbar in the browser application. The count on this button is dynamic and indicates how many active action items and notifications you have. The Notification Center and its activity count is refreshed every 5 minutes.

Two types of notifications are reported in the Notification Center: **Action Items** and **Notifications**.

If you enable Collaboration Business integration, the collaboration notifications do not display in the Notification Center. They display as a separate number in the toolbar.

Action Items

Action items require you to take action. They are grouped into types, for example, activity reminders or approval workflows, with the number of items for each type indicated. Each item in the list includes a hyperlink which opens the associated dialog box or application when you click the link. Action items are not cleared from the Notification Center list and its corresponding count until you complete the expected action. Action items include:

- Activity reminders for upcoming activities on your calendar
- Approvals for draft billing invoices
- Approvals for items going through an approval process, such as timesheets, expense reports, AP invoices, purchase orders, and so on for which you are currently assigned

- Timesheets that are due

Notifications

Notifications are informational items that may need your attention. These items are not grouped; each is listed separately. The most current items are displayed at the top of the list. Notification items are cleared when you click and view them or when you dismiss them directly from the list. Notifications include:

- .CSV file export notifications
- Draft billing invoices notifications
- User-initiated and scheduled workflow notifications
- Approval workflow notifications
- System and company alerts
- Shared calendar notifications
- GovWin IQ integration import errors, Talent Management sync errors, CSV import errors, and Salesforce import errors.

How to...

These help topics provide step-by-step instructions for tasks you can perform in the Notification Center.

Open the Notification Center

You open the Notification Center from the Vantagepoint menu bar.

To open the Notification Center:

1. Click  in the menu bar.

   The number on the button indicates how many active notifications are available.
2. To close the Notification Center, click anywhere outside the Notification Center dialog box.

Open an Activity Reminder

You can open reminders for scheduled activities from the Notification Center.

To open an activity reminder:

1. Open the Notification Center.
2. Click the **Activity Reminders** link in the Actions Items list.

The Reminders dialog box displays, where you can review and manage activity reminders and information.

Delay an Activity Reminder

You can delay reminders for scheduled activities from the Reminders dialog box.

To delay an activity reminder:

1. Open the Notification Center.
2. Click the activity reminders item to display the Reminders dialog box.
3. Select a reminder in the reminder list.
   The details of the selected reminder are displayed above the reminder list.
4. Select a delay time value from the first drop-down from the top left.
5. To delay only one reminder, select **Snooze** from the second drop-down from the top left. To delay all reminders by the same time, select **SnoozeAll** instead.
   The activity indicator count in the Notification Center icon decreases by the number of activities you delay. The count goes back up when the delay period ends.

Dismiss an Activity Reminder

You can dismiss reminders for scheduled activities from the Reminders dialog box.

To dismiss an activity reminder:

1. Open the Notification Center.
2. Click the activity reminders item to display the Reminders dialog box.
3. Select a reminder in the reminder list.
   The details of the selected reminder are displayed above the reminder list.
4. To dismiss the selected reminder, select **Dismiss** from the drop-down found at the top right. To dismiss all reminders, select **DismissAll** instead.
   The activity indicator count in the Notification Center icon decreases by the number of activities you dismiss.

Open an Action Item

You open action items from the Notification Center.

Action items are grouped into different assignment types. Each type displays as a single line that indicates how many of the type are awaiting your action. The most recent action items display at the top of the list.

To open an action item:

1. Open the Notification Center.

Action items display at the top of the Notification Center.

2. Click the action item.

   The item opens an application in either the Vantagepoint browser or desktop application. For example, if you click a link for an expense report action item, **My Stuff** » **Approval Center** opens automatically in the browser application. If you click a link for an action item for an AP invoice approval awaiting approval, **Accounting** » **Approvals Review** opens automatically in the desktop application.

   Note that the desktop application only opens in Internet Explorer. If you are using a different browser, a message displays indicating that the desktop application requires Internet Explorer.

Dismiss an Action Item

You dismiss action items from the Notification Center by completing the expected action.

To dismiss an action item:

1. Open the Notification Center.
2. Click the action item.
   The item opens in the corresponding Vantagepoint browser or desktop application.
3. Complete the expected action.
   Action item types can include draft invoice approvals, approval workflow assignments, and timesheet due alerts. Possible actions for each type are:
   - Draft invoice approvals: Approve or reject the invoice. Draft invoices can also be cleared if they are unsubmitted in interactive or batch billing operations.
   - Approval workflow assignments: Approve, reject, suspend, or move the approval assignment. An approval workflow assignment item can also be cleared when someone else closes the approval assignment.
   - Timesheet due alerts: Submit your timesheet.

   The item is removed from Notification Center when the action has completed successfully.

Open a Notification

You open notification items from the Notification Center.

To open a notification:

1. Open the Notification Center.
2. Click an item in the Notifications list.

   Depending on the type of notification, clicking some items launches the Notification Details dialog box while clicking other items opens the record. When a record is displayed, the notification is removed from the list and the count in the Notification Center icon decreases.

If you have multiple companies in Vantagepoint and you receive a notification that would navigate you to an approval record in a different company, you are prompted to either change companies or stay where you are without navigating to the record.

3. Click **Close** to close the notification and remove it from the list.
   The count in the Notification Center icon updates accordingly.

Dismiss a Notification

You can dismiss your notifications from the Notification Center.

To dismiss a notification:

1. Open the Notification Center.
2. Do one of the following:
   - To dismiss all notifications, click the **Dismiss All** link at the top right of the Notifications list.
   - To dismiss a single notification, click next to the item.
   - Click the notification to open the Notification Details dialog box.

   The notifications are removed from the list and the count on the Notification Center icon decreases.

Fields and Options

Use the individual dialog boxes in the Notification Center to view your action items and notifications.

Notification Center Dialog Box

Use the Notification dialog box to display your action items and notifications.

Display the Notification Center Dialog Box

You display the Notification Center dialog box from the Vantagepoint menu bar.

Click  to open the Notification Center.

The number on the button indicates the current number of notifications.

Contents of the Notification Center Dialog Box

The Notification Center dialog box lists your activity reminders, actions items, and notifications.

Contents

Field	Description
Action Items	This section lists any activity reminders at the top of the list, followed by action items that require a response. The activity reminders are grouped together on one line. Click the activity reminders item to display the Reminders dialog box, where you can view, delay, or dismiss the reminders. Action items are grouped into approval assignment types. Each type displays as a single line that indicates how many of the type are awaiting your action. The most recent action items display at the top of the list. Click the link in the action item to open it in the corresponding Vantagepoint browser or desktop application.
Notifications	This section lists any notifications. These items are informational and do not require a response. Click a notification to either navigate directly to the corresponding Vantagepoint browser or desktop application or open the Notification Details dialog box, where you can view details and navigate to the original record.
Dismiss All	Click this link at the top of the list to dismiss all notifications.
	Click this icon next to a notification to dismiss it.

Notification Details Dialog Box

Use the Notification Details dialog box to view information about your notifications.

Display the Notification Details Dialog Box

You display the Notification Details dialog box from the Notification Center.

1. Open the Notification Center.
2. Click an item in the Notifications list.

Contents of the Notification Details Dialog Box

The Notification Details dialog box provides information about a notification.

Contents

Field	Description
Summary	The Summary fields provide a high-level summary at the top followed by notification details in the field below.
Navigate to Record	Click this button to navigate to the record that initiated the notification.
Close	Click this button to close the notification.

Reminders Dialog Box

Use the Reminders dialog box to view, delay, or dismiss reminders for scheduled activities.

Display the Reminders Dialog Box

The Reminders dialog box displays if you have chosen to receive reminder popups via My Preferences and when you have an upcoming activity. You can also manually display the Reminders dialog box from the Notification Center to review activity reminders.

You must be logged on to Vantagepoint to access the Reminders dialog box.

1. On the header section, click 

to open the Notification Center.

   The number on the button indicates the current number of notifications.
2. Under the Actions Items list, select **Activity Reminders** to open the Reminders dialog box.

Contents of the Reminders Dialog Box

The Reminders dialog box displays activity reminders for scheduled activities.

Contents

Reminder Controls Section

Use these reminder controls to set alternative times for reminders, to snooze individual or all activities, and to dismiss the current or all activities in the list.

Field	Description
Snooze	Two drop-downs are available to manage snooze options for your activity reminders. ▪ First drop-down from the top left: Select a time value to be applied as the snooze or delay time for the activity reminder. Alternatively, if you want to use a time increment that is not listed in the drop-down, then manually enter a time increment (for example, 45 minutes) to the left of the drop-down arrow. ▪ Second drop-down from the top left: Select **Snooze** to snooze a selected activity reminder, or select **Snooze All** to snooze all activity reminders in the reminder list. Click Vantagepoint displays another pop-up reminder for the selected activity at the specified time.
Dismiss	Select **Dismiss** from the drop-down menu to dismiss the selected activity reminder from the reminder list or **Dismiss All** to dismiss all activity reminders in the reminder list.

Reminders Grid

The Reminders dialog box is composed of a detail area and a list of all the activity reminders. Each reminder row contains descriptive information about the activity.

Field	Description
Reminder Detail	The reminder detail is an area found above the reminder list. This area displays the following information and options: ▪ Activity subject: Displays the subject of the selected activity from the reminder list. ▪ ✓: Click this option to mark the activity as completed. ▪ Primary firm: Displays the primary firm associated with the activity. ▪ Activity notes: Displays the first few lines of the notes that were made for the activity. ▪ **...more**: Click this option to display the Activity dialog box for the activity. The Activity dialog box displays the activity hub record details. Use this dialog box to view, schedule, copy, delete, and modify activities related to the scheduled reminder.
Completed	Click the grey checkmark to the right of the activity's subject if you want to mark the activity as completed and remove it from the list. The checkmark turns green, a strikethrough appears on the activity, and after a short delay the activity is removed.
Reminder List	The reminder list displays a list of activity reminders. Select an activity reminder to display additional details above the list in the reminder detail area. Scroll down the list to check other activity reminders. A row item in the list displays the following information about the activity reminder:

Field	Description
	▪ Activity subject: Displays the subject of the selected activity, such as Initial Consultation or Follow-up Visit. Click the blue title text to open the activity. ▪ Activity type: Displays the type of activity. ▪ Duration and Day: Displays the duration of the activity and the day when the activity is scheduled. ▪ Date: Displays the date when the activity is scheduled. ▪ Location: Displays the location for the activity if available.
Reminder Counter	The reminder counter displays the number of activity reminders available in the reminder list. The reminder counter is located at the bottom right of the dialog box.

Activity Dialog Box from Reminders

Use this dialog box to schedule, copy, delete, and modify activities related to a scheduled reminder. These activities are added to your hub records on the Activities tab within each hub, on the Dashboard, and on the Calendar.

Display the Activity Dialog Box from Reminders

Display this dialog box directly from a reminder.

On the Reminders dialog box, click **more...** on the activity reminder to view or modify the activity's information.

Contents of the Activity Dialog Box from Reminders

Use this dialog box to enter or update activity information.

Contents

This dialog box may contain a Files and Links tab where you can upload, view, and store files that are related to the activity record. You can also add URLs, email addresses, and links to files and graphics. See the Add Files and Links to a Record online help topic in Hubs Basics for more information.

The main fields on this dialog box provide an overview of the activity's details. To access the activity's detailed information or to edit the activity, click icon next to any one of the fields. This opens an associated field, lookup, or dialog box and allows you to enter or edit details as needed. For example, click next to the **When** field to open the When dialog box where you can enter or change the activity's start and end dates, reminders, classifications, and so on.

Alternatively, you can click the **Actions** » **Edit** menu option to edit the activity's details.

Contents

When

This set of field information contains information about an activity's start and end dates, reminders, recurrence patterns, whether or not the activity is an all day event and if it is private, and how the activity should be shown (Busy, Tentative, or Free) in Calendar.

Field	Description
Activity Subject	Enter a brief description of the activity or select a subject from the drop-down list. Typically, this is a short descriptive statement, such as **Initial Consultation** or **Follow-up Visit**. Your system administrator defines the activity subject values using the Activity Subject Code Table in Settings.
Start Date	Select the start date and start time for the activity.
End Date	Select the end date and end time for the activity.
Reminder	Select this option and the timeframe if you want to receive a reminder at a specified time prior to the start of the activity. You can choose to receive email activity reminders, pop-up activity reminders, or both. You can change the way you receive activity reminders at any time. To change the way you receive activity reminders, click **My Preferences** on the toolbar and select the General tab. In **Remind Me About Activities**, specify the type of reminders you wish to receive.
All Day Event	Select this option if the activity will last for an entire day. When you select this option, the activity start time displays as 8:00 AM and the activity end time displays as 5:00 PM. However, you can change these times, if necessary.
Private	Select this option if you want the activity to be classified as private. Details for a private activity can be viewed only by the attendees of the activity. If you are an attendee of a private meeting, the actual subject line displays on the Activity dialog box and you can open the activity and edit it based on your calendar access rights.
Repeats	If the activity is recurring, specify the type of recurrence as well as the end date for the recurrence: ▪ **None**: There is no recurrence (default). ▪ **Daily**: Select this option to repeat the activity on a daily basis. The Daily options allow you to specify the number of days as well as every day or only weekdays. ▪ **Weekly**: Select this option to repeat the activity on a weekly basis. The Weekly options allow you to specify the actual week and days of the week for the activity. ▪ **Monthly**: Select this option to repeat the activity on a monthly basis. You can specify the actual date, week, and month for the activity to repeat.

Field	Description
	■ **Yearly**: Select this option to repeat the activity on a yearly basis. You can specify the actual year, date, week, and month for the activity to repeat.
Show Time As	Select an option that indicates how participants' time is classified, such as **Busy** or **Tentative**, on their calendar for the duration of the activity.
Location	Enter the location where the activity will occur.
Type	Select a descriptive type for the activity, such as **Meeting** or **Teleconference**. The type of the activity determines whether it displays in the calendar. To define activity type options, use the Activity Type List in **Settings** » **Labels and Lists** » **Lists**. See your system administrator for information about adding values to this list.
Priority	Select a priority ranking that indicates the relative importance of individual activities: High, Medium, or Low.
Notes	Enter any notes related to the activity. You can use the text editor to enter text directly in this field. After a note is entered and saved, a displays in the grid row to indicate a note for the activity. If no notes are entered, a displays instead. Click the icon in the grid row to open the Notes dialog and enter details.

Stakeholders

Use the Stakeholders fields to assign the attendees and firms that are related to the activity. Stakeholder refers to any person or business entity that is involved in an activity. Stakeholders can include your company's employees as well as external contacts, clients, vendors, and their associated firms.

Field	Description
Attendees	The Attendees grid lists all the attendees and their associated firms who are scheduled to participate in the activity. Attendees include both contacts and employees. Click **+ Add Attendees** to specify the attendees to assign to this activity. As a rule, the first contact you add to the attendees list is the primary contact; however, you can change the primary designation at any time. By default, the person who creates the activity is the Owner. You can also change the owner to a different employee if you wish. Click the ▾ arrow and select **Make Primary** or **Make Owner** to change the status as needed.
Firms	A firm is any type of business or entity external to your company, including clients, vendors, government agencies, trade associations, and competitors. Click **+ Add Firms** to specify the firms to assign to this activity. If this is the primary firm associated with the activity, click the ▾ arrow and select **Primary**. If the status changes and the firm is no longer primary, you can click the arrow and remove the primary status or select another firm as the primary. Only one firm can be designated as primary.

Associations

Use the Associations fields to select project and marketing campaign hub records that you want to associate with the activity. If your administrator has created user-defined hubs with activities, then lookups to those hubs also appear in this section.

Field	Description
Project	Click the ▾ arrow and select the project that is associated with the activity. You can type part of the project name or number to quickly find it in the list. Click the blue, underlined name to display the info bubble that contains information about the project.
Marketing Campaign	Click the ▾ arrow and select the marketing campaign that is associated with the activity. You can type part of the name or number to quickly find it in the list. Click the blue, underlined name to display the info bubble that contains information about the marketing campaign.
User Defined Hubs	Your administrator may have created one or more user defined hubs to track information that could not be tracked in a standard hub. Click **+ Add** link to add a user defined hub record to an activity.

Learn More About...

These topics provide additional information about key concepts that are applied in the Notification Center.

Action Items in the Notification Center

This topic provides action item configuration details for system administrators.

Action items are grouped into types, for example, activity reminders or timesheets due, with the number of items for each type indicated. Action items are not cleared from the Notification Center list and its corresponding count until the expected action is complete. Action items are:

- **Activity reminders**

  Activity reminders are reminders for upcoming calendar events. These events can be created from the Activities hub, from the Activities tab in many other hubs, or from the Calendar. Clicking the link in the activity reminders item displays the Reminders dialog box, where they can be viewed, delayed, or dismissed.

- **Items going through an approval process**

  These are items such as timesheets, expense reports, and accounts payable invoice approvals that have an approval workflow set up for them in **Settings** » **Billing** » **Accounts Receivable**.

  These items appear in the action item list because the employee is assigned to the current approval step. These approval workflow action items are **not** based on any notification alerts that the system administrator sets up in the approval workflow . Any notifications set up in this way display in the Notification list in the Notification Center.

  Approval action items include:

- Requests for price quotes
- Purchase requisitions
- Purchase orders
- Purchase order - change orders
- Purchase orders - releases
- Item requests
- AP invoice approvals
- Absence requests
- General ledger budgets
- Expense reports
- Timesheets

- **Draft billing invoices that require approval**

  Action items for draft billing invoices display in the action item list if the system administrator enables approvals for billing invoices in **Settings** » **Billing** » **Options**. An action item displays for the employee who is assigned to approve/reject a draft billing invoice (the employee is entered in the **Employee to Approve/Reject** field for an action item for invoice approvals in the Actions grid in **Settings** » **Billing** » **Invoice Approval Process**) in the desktop application.

- **Timesheet due alerts**

  Timesheet due alerts are sent if the Timesheet Due alert has been set up and activated by a system administrator in **Settings** » **Time** » **Alerts**. These alerts are **not** part of the alerts that the system administrator sets up for timesheet approvals. Those alerts display as approval action items.

Notifications in the Notification Center

Notifications are informational items that need your attention. These items are not grouped; each is listed separately.

These items display in the Notifications section:

- **User-initiated and scheduled workflows**

  These are actions that the system administrator inserts for user-initiated workflows and scheduled workflows as a **Notification Center Alert** in Workflow Settings.

- **Approval workflows**

  These are notification alerts that the system administrator sets up in **Settings** » **Workflow** » **Approval Workflows**. An action item also displays in the Action Items section of the Notification Center if the employee is assigned to the current approval step.

- **Application alerts**

  Time, Expense, Accounting, Billing, Resource Planning, and Purchasing & Inventory each have an Alerts form in Settings where the system administrator can configure related alerts.

- **Draft billing invoices**

  Notifications for draft billing invoices display in the list if the system administrator has set up approvals for billing invoices in **Settings** » **Billing** » **Options**. A notification displays for the employee who is entered in the **Employee to Alert** field for an action item for invoice approvals in the Actions grid in **Settings** » **Billing** » **Invoice Approval Process**, in the desktop application.

- **Shared calendar notifications**

  These notifications are triggered when an employee shares their calendar with the active user.

- **Error notifications**

  These error types are delivered to the Notifications list by their corresponding applications:

  - GovWin IQ integration import errors
  - Talent Management sync errors
  - CSV import errors
  - Salesforce import errors

Approvals in the Notification Center

This topic provides details about action items and notifications that can be generated by approval workflows.

Both action items and notifications can be generated to the Notification Center for items such as timesheets, expense reports, and accounts payable invoice approvals that have an approval workflow set up for them under **Settings** » **Workflow** » **User Initiated Workflows**. This topic does **not** apply to billing invoice draft approval items.

- **Action Items**:Action items are automatically generated for the employee who is currently assigned to an approval step. This occurs regardless of the notifications that a system administrator sets up in Approval Workflow Settings.
- **Notifications**: The notification alerts that the system administrator configures in Approval Workflow Settings display in the Notifications section of the Notification Center.

This means that it is not necessary to configure approval assignment notifications for the **Currently Assigned** approval role in Approval Workflows Settings. However, if the system administrator does configure any notifications for this role, then there will be two notifications for the employee in the Notification Center when they are assigned to the current approval step, one in the Action Item section because they are assigned to the current approval step and one in the Notification section based on the action item set up on the approval workflow.

Dismissing the item in the Notification section has no impact on the corresponding item in the Action Items section because the employee may still be required to take action on the record. To clear the action item, the employee must take the expected action on the assigned approval record or suspend it. Note that it is also possible for an employee's assignment record to be closed by another assignee if they have approval rights.

Employee Card

The employee card allows you to easily view employee information when you are in various applications throughout Vantagepoint without having to leave an application to open the Employees hub.

For example, in Resource View you can open the employee card and view relevant information about employees as you consider them for assignments to projects. When you open the employee card in Timesheets, you can view your absence request and utilization ratios.

You open the employee card (the Employee Card dialog box) by clicking an employee name in various applications. For example, you can click the employee name at the top of the Timesheet form in **My Stuff** » **Timesheet** to open the employee card.

The contents of the employee card vary, based on the application from which you open it. The employee information that is most relevant for an application displays in the employee card. Additionally, the employee information that you see in the employee card is determined by your security role's record access rights for the Employees application and field-level security.

If you have multiple companies in Vantagepoint, any company-specific information on the employee card is from the employee's home company.

You cannot customize the employee card using Screen Designer.

How to...

You view employee information from the Employees hub on the employee card.

View Employee Information

From some applications, you can open the employee card to quickly review relevant employee information to help you make decisions about entering information in those applications.

The applications from which you can open the employee card are: Timesheets, Expense Reports, Approval Center, Resource View, Project View, and the Plan form in the Projects hub.

To view employee information on the employee card:

1. Open one of the applications listed above, and select a record.
2. In the application, navigate to an employee's name, wherever it is located, and click it.

   For example, in Timesheets, the employee name is in the upper left corner of the Timesheets form. In Resource View, the employee name is located in the grid in the Resource Level column.
3. On the Employee Card dialog box (the employee card), use the tabs to review general information, skills and credentials, projects that the employee is associated with, and other employee information.

   The information that you see on the employee card varies, based on the application from which you open it. The employee information that is most relevant for an application displays on the employee card. Additionally, the employee information that you see on the employee card is determined by your security role's record access rights for the Employees application and field-level security.

4. On the Employee Card dialog box, select **Actions** » **Go to Employees Hub** to open the Employees hub and see the complete information for the employee, if your security role gives you access.
5. To close the Employee Card dialog box, click **X** in the upper right corner.

View Absence Accrual Information

You can view absence accrual information from Timesheet, Expense Report, and Approval Center. The accrual information includes hours earned and taken and balances for absence accruals such as sick leave and vacation.

Prerequisites:

- You can view absence accrual information only if an absence accrual has been selected to show on timesheets. (A system administrator selects the **Show on Timesheets** check box for an absence accrual on the Absence Accrual Setup tab in **Settings** » **Advanced Accounting** » **Time Analysis** in the desktop application.)
- You can view absence accrual information from a timesheet or expense report for yourself and for other employees if you have security access to other employee's timesheets and expense reports.
- If you are designated as an approver of timesheets and/or expense reports, you can view absence accrual information for employees when you approve their timesheets and/or expense reports in Approval Center.

To view absence accrual information from Timesheet, Expense Report, or Approval Center:

1. In the Navigation pane, select **My Stuff** and then select **Timesheet**, **Expense Report**, or **Approval Center**.
2. On the Timesheets, Expense Reports, or Approval Center form, select a record to view.
3. Click the employee name on the form to open the Employee Card dialog box.
   - On a timesheet and expense report, the employee's name is in the upper left corner of the form.
   - On the Approval Center form, an employee's name for a timesheet or expense report approval record displays in the **Employee Name** field in a row in the grid.
4. On the Employee Card dialog box, click the Absence Hours tab to view absence accrual information.
5. To close the Employee Card dialog box, click **X** in the upper right corner.

View Utilization Ratios

You can view utilization ratios from Timesheet, Expense Report, and Approval Center. These ratios are important for employees who work on billable projects. Each ratio compares an employee's direct (billable) hours with other types of hours, such as standard hours and benefit hours.

Prerequisites

- A system administrator determines which utilization ratios and time periods for the ratios that you can view. These settings are on the Ratios tab in Time Settings.
- You can view utilization ratios for yourself from your timesheets and expense reports. You can view utilization ratios for other employees in Timesheet and Expense Report if your security role gives you access to view and edit other employee's timesheets and expense reports.
- If you are designated as an approver of timesheets and/or expense reports, you can view utilization ratios for employees when you approve their timesheets and/or expense reports in Approval Center.

To view utilization ratios from Timesheet, Expense Report, or Approval Center:

1. In the Navigation pane, select **My Stuff** and then select **Timesheet**, **Expense Report**, or **Approval Center**.
2. On the Timesheets, Expense Reports, or Approval Center form, select a record to view.
3. Click the employee name on the form to open the Employee Card dialog box.
    - On a timesheet and expense report, the employee's name is in the upper left corner of the form.
    - On the Approval Center form, an employee's name for a timesheet or expense report approval record displays in the **Employee Name** field in a row in the grid.
4. On the Employee Card dialog box, click the Ratios tab to view the utilization ratios.
5. To close the Employee Card dialog box, click **X** in the upper right corner.

View Employee Assignments

You can view employee assignments that have ETC (Estimate to Complete) hours remaining from Resource View, Project View, and the Plan form in the Projects hub.

To view employee assignments:

1. Open the Resource View, Project View, or the Plan form, and select a record.
2. In the application, navigate to an employee's name, wherever it is located, and click it.

    For example, in Resource View, the employee name is located in the grid in the Resource Level column.
3. On the Employee Card dialog box, click the Assignments tab to view assignments for the employee.
4. To close the Employee Card dialog box, click **X** in the upper right corner.

Fields and Options

View employee information on the tabs and fields on the Employee Card dialog box. Define the range of calendar period columns on the Change Forecast Range dialog box.

Employee Card Dialog Box

From this dialog box, which displays in various applications, you can easily view employee information without having to leave the application to open the Employees hub.

The employee information that you see on the employee card is determined by your security role's record access rights and field-level security.

If you have multiple companies, any company-specific information on the dialog box is from the employee's home company.

Display the Employee Card Dialog Box

This dialog box displays from various applications.

Use the instructions in the following table to display the Employee Card dialog box from a specific application.

Application	Instructions
Timesheet	1. In the Navigation pane, select **My Stuff** » **Timesheet**. 2. Open a timesheet. 3. Click the employee's name at the top of the timesheet.
Expense Report	1. In the Navigation pane, select **My Stuff** » **Expense Report**. 2. Open an expense report. 3. Click the employee's name at the top of the expense report.
Approval Center	1. In the Navigation pane, select **My Stuff** » **Approval Center**. 2. On the Approval Center form, select an approval record type in the field beside the Approval Center heading. 3. In the grid on the Approval Center form that displays the records to approve, click the employee's name in the **Employee Name** field.
Projects hub — Plan form	1. In the Navigation pane, select **Hubs** » **Projects** » **Plan**. 2. Select a project.

Application	Instructions
	3. Click the Labor tab. 4. Click and then click beside an entry in the **Level/ Resource** field to expand the entry (work breakdown structure) so an employee's name is visible. 5. Click the employee's name.
Resource View	1. In the Navigation pane, select **Resource Management** » **Resource View**. 2. Search for resources. 3. In the resource view grid, click an employee name in the **Resource/Level** column.
Project View	1. In the Navigation pane, select **Resource Management** » **Project View**. 2. Select a project. 3. Click and then click beside an entry in the **Level/ Resource** field in the grid to expand the entry (work breakdown structure) so an employee's name is visible. 4. Click the employee's name.

Header Section of the Employee Card Dialog Box

The header area of the Employee Card dialog box (above the tabs) provides basic employee information from the Employees hub.

Contents

If you have multiple companies in Vantagepoint, the employee information in the header of the dialog box is from the employee's home company.

Field	Description
Employee's image	The employee's image displays to the left of the employee name if an image was uploaded in the Employees hub.
Employee name and suffix	The employee's preferred name, last name, and suffix displays to the right of the image. If the employee has no preferred name, first name, last name, and suffix displays.
Professional suffix	If a professional suffix was entered for an employee, it displays under their name. This indicates educational degrees or professional licenses or accreditation, such as **PhD** or **AIA**.
Job title	The employee's job title displays below the professional suffix.

Field	Description
Organization	If you have configured Vantagepoint to use organizations, the employee's organization displays below the employee's job title.
Location	The employee's work location displays below the organization.
Actions	Click ▼, and select **Go to Employees Hub**. This opens the employee's record in the Employees hub if your security role has access.

Profile Tab of the Employee Card Dialog Box

On this tab, view an employee's contact information, work history, current work status, education, citizenship information, and basic timesheet and expense report information.

If you have multiple companies in Vantagepoint, the employee information on this tab is from the employee's home company.

The information on the Profile tab comes from a number of different tabs in the Employees hub. Review the following help topics for the Employees hub for descriptions of the fields that you see on the Profile tab:

- Summary pane
- Overview tab
- Personal and Contact Details tab
- Professional tab
- Accounting tab
- Time & Expense tab (Information from the Time & Expense tab is included on the Profile tab only when you open the Employee Card dialog box from Timesheet, Expense Report, or Approval Center.)

Skills & Credentials Tab of the Employee Card Dialog Box

View an employee's skills and credentials.

The information on this tab is from the Professional tab in the Employees hub. See the Professional Tab topic for descriptions of the fields that you see on the Skills & Credentials tab.

Assignments Tab of the Employee Card Dialog Box

View an employee's assignments that have ETC (Estimate to Complete) hours remaining.

This tab displays on the Employee Card dialog box when you open it from Resource View, Project View, or the Plan form in the Projects hub. Information on this tab is particularly useful for a project manager who is working in Project View and wants to quickly see the current and future assignments that an employee has for other projects.

Field	Description
Forecast Range	Click **Forecast Range** or click next to **Forecast Range** to open the Change Forecast Range dialog box and define the range of calendar period columns you want to display in the grid.
Show Capacity	Click **Show Capacity** to select the type of values that you want to display in the calendar period columns. Options are: ▪ **Planned hours**: Shows the planned hours for the calendar period. ▪ **Schedule percentage**: Shows the planned hours for the calendar period / Total available hours for the calendar period. On the **Totals** row of the grid, cell background color indicates schedule status: gray (properly scheduled), yellow (under-scheduled), red (over-scheduled). ▪ **Utilization percentage**: Shows the Billable planned hours for the calendar period / Total available hours for the calendar period. (Billable hours are hours planned for projects that are assigned the Regular charge type.) On the **Totals** row of the grid, cell background color indicates utilization status: gray (properly utilized), yellow (under-utilized), red (over-utilized).

Assignments Grid

Field	Description
Level	This column displays the work breakdown structure (WBS) elements for which the employee has ETC hours. Click ▶ and ▼ to expand or collapse the WBS levels. Click a WBS element to display a tooltip containing the WBS element name and ID, contract start and end dates, project manager, client, project name and ID/ number (if the WBS element is not the top-level element in the WBS), status, and any notes entered for the WBS element. Click the **Open in Project View** link in the tooltip to close the Employee Card dialog box and display the resource plan for the project in Project View. If displays in this field next to a WBS element, that WBS element is inactive.
ETC Before	This column displays the total ETC hours that exist for dates after the JTD date and before the start date of the first calendar period column in the forecast range. (Generally, the JTD date is the date of the latest historical labor record in the database, but your system administrator can specify a different date.) On the **Totals** row, this column displays the sum of the employee's ETC hours for dates before the start date of the first calendar period column in the forecast range. If the day following the JTD date falls within the date range for the first calendar period column, no ETC hours exist for dates prior to the forecast range, so this column does not display.

Field	Description
Calendar period columns	The calendar period columns display planned hours for the employee by day, week, or month. The forecast range you specify in the Change Forecast Range dialog box determines the time frame each calendar period column represents. For example, if you select **Weeks** in **SCALE**, **8** in **DURATION**, and **July 1, 2017** in **START WEEK**, the grid displays eight calendar period columns, each column represents a week, and the first calendar period column is for the week that contains July 1, 2017. Using the options in **Show Capacity** above the grid, you can also display utilization percentages and scheduled percentages for employees in these columns on the **Totals** row. The values in calendar period columns are calculated and displayed as follows, based on your selection in **Show Capacity**: ▪ **Planned hours**: Planned hours for the calendar period for the WBS element. The **Totals** row displays the total planned hours for the employee for the calendar period. ▪ **Schedule percentage**: The **Totals** row displays the schedule percentage for the employee: Planned hours for the calendar period / Total available hours for the calendar period. Cell background color indicates schedule status: gray (properly scheduled), yellow (under-scheduled), red (over-scheduled). WBS rows display planned hours. ▪ **Utilization percentage**: The **Totals** row displays the utilization percentage for the employee: Billable planned hours for the calendar period / Total available hours for the calendar period. (Billable hours are hours planned for projects assigned the Regular charge type.) Cell background color indicates utilization status: gray (properly utilized), yellow (under-utilized), red (over-utilized). WBS rows display planned hours. For the WBS level rows, bold values in the calendar columns indicate that the hours for the period are hard booked, and italic values indicate they are either all soft booked or a mix of soft-booked hours and hard-booked hours.
ETC After	This column displays the total ETC hours that exist for dates after the end date of the last calendar period column in the forecast range. On the **Totals** row, this column displays the sum of the employee's ETC hours for dates after the end date of the last calendar period column in the forecast range.

Projects Tab of the Employee Card Dialog Box

View information about the projects that an employee has worked on.

This tab displays each project's name, primary client, start and end dates, and the actual hours that the employee worked on a project. The complete information for the projects that an employee has worked on is on the Projects tab of the Employees hub.

The **Actual Hours** column on the Projects tab of the Employee Card dialog box displays the total number of job-to-date (JTD) hours that the employee charged to a project. These hours also display in the **Hours** tab on the Projects tab of the Employees hub. Hours charged to lower-level elements of the WBS are rolled up to the top level to get the total hours. These hours are automatically updated when you use the API or the Historical Labor import to bring in hours charged to projects.

Ratios Tab of the Employee Card Dialog Box

View an employee's utilization ratios.

These ratios are important for employees who work on billable projects. Each ratio compares an employee's direct (billable) hours with other types of hours, such as standard hours and absence hours.

The Ratios tab is included on the Employee Card dialog box when you open the dialog box from Timesheet, Expense Report, and Approval Center (for timesheet and expense report approvals).

The tab contains a grid with rows for the ratios and columns for different timeframes for the ratios. A system administrator determines the ratios and timeframes that display in the grid. These settings are on the Ratios tab in Time Settings. If none of the ratios or timeframes is selected to display, the Ratios tab does not display on the Employee Card dialog box.

When the Employee Card dialog box is opened from a timesheet:

- The utilization ratios are calculated specifically for the timesheet period of the timesheet from which you open the Employee Card dialog box.
- Any ratio that involves direct hours is based on the date range for the timesheet period of the timesheet from which you open the Employee Card dialog box.
- Any ratio that involves standard hours is based on the current accounting period.

When the Employee Card dialog box is open from an expense report or an approval record:

- Any ratio that involves direct hours is based on the date range of the current timesheet period.
- Any ratio that involves standard hours is based on the current accounting period.

Grid Rows

Possible ratios that display in rows in the grid are:

Field	Description
Direct / Total	This ratio represents the percentage of total hours that are direct (billable) hours. This is also known as the gross chargeable ratio.
Direct / (Total – Absence)	This ratio represents the percentage of total hours less absence hours that are direct (billable) hours. This is also known as the net chargeable ratio.
Target	This ratio represents the expected percentage of direct (billable) hours for the employee as defined on the Accounting tab of the Employees hub.

Field	Description
Direct / Standard	This ratio represents the percentage of standard hours that are direct (billable) hours. Standard hours are based on the non-working days and holidays that a system administrator defines on the Non-Work Days tab in Time Settings.
Direct / (Standard – Absence)	This ratio represents the percentage of standard hours less absence hours that are direct (billable) hours. Standard hours are based on the non-working days and holidays that a system administrator defines on the Non-Work Days tab in Time Settings.

Grid Columns

Possible timeframes for the ratios that display in columns in the grid are:

- **Current**
- **Month-to-Date**
- **Quarter-to-Date**
- **Year-to-Date**

To sort the rows in the grid by one of the grid columns—in ascending or descending order—click a column heading, and then click ˅ or ˄ to the right of the column heading.

Absence Hours Tab of the Employee Card Dialog Box

On this tab, view your or another employee's absence accrual hours, such as hours earned and taken and the current balances for absence accruals such as sick leave and vacation.

The Absence Hours tab is included on the Employee Card dialog box when you open the dialog box from Timesheet, Expense Report, and Approval Center (for timesheet and expense report approvals). If no absence accruals are specified to show on timesheets (the **Show on Timesheets** option is **not** selected for any absence accruals on the Absence Accrual form in **Settings** » **Accounting** » **Absence Accrual**), the Absence Hours tab does not display on the Employee Card dialog box.

To view other employee's absence accrual information, you must have appropriate security access to view their timesheets.

Grid Rows

Each row in the grid on this tab contains the employee's absence accrual hours that are entered on the Accounting tab in the Employees hub, but only if an absence accrual has been selected to show on timesheets.

Grid Columns

The absence accrual values in this grid are always the most up-to-date values, regardless of timesheet period that you have open.

Field	Description
Absence Accrual	This field displays the name of the absence accrual, such as vacation or sick leave.
Starting Balance	This field displays the total hours that the employee has accrued but has not taken at the beginning of the current year.
Current Year Earned	This field displays the total number of hours that the employee has earned year-to-date.
Current Year Taken	This field displays the total number of hours that the employee has used year-to-date.
Unposted Time	This field displays the total absence hours on employee timesheets from the current timesheet that are being charged but have not yet been posted. This applies only to the timesheets entered from the Timesheets application, not the timesheet transactions that are entered in the Transaction Center.
Current Balance	This field displays Starting Balance + Current Year Earned - Current Year Taken - Unposted Time.

To sort the rows in the grid by one of the grid columns, in ascending or descending order, click a column heading, and then click ˅ or ˄ to the right of the column heading.

Change Forecast Range Dialog Box from the Employee Card

Use this dialog box to define the range of calendar period columns to display in the grid on the Assignments tab of the Employee Card dialog box.

Display the Change Forecast Range Dialog Box from the Employee Card

You display this dialog box from the Assignments tab of the employee card.

The Assignments tab displays only when you open the employee card from certain applications.

1. Open the employee card from an application such as Resource View, Project View, or the Projects hub in planning mode.
2. On the Resource View or Project View form, click an employee name in the grid.
3. On the Employee Card dialog box, click the Assignments tab.
4. On the tab, click **Forecast Range** or click next to **Forecast Range**.

Contents of the Change Forecast Range Dialog Box from the Employee Card

Use the fields on this dialog box to define the range of calendar period columns to display in the grid on the Assignments tab of the Employee Card dialog box.

Contents

Field	Description
Scale	Select whether you want the calendar periods to be days, weeks, or months.
Duration	Select the number of calendar periods to include in the forecast range. Each calendar period column contains planning data for one day, week, or month, based on what you selected in the **Scale** field. For example, if you select **Weeks** in **Scale** and select **8** in **Duration**, the forecast range spans eight weeks, and eight calendar period columns display. Each calendar period column contains planning data for one week. The options available in the **Duration** field vary depending on the scale you selected.
Start Date/ Week/ Month	Based on what you entered in the **Scale** field, select the first day, week, or month in the forecast range. The starting period must be after the JTD date, or if the columns are for weeks or months, the starting period must contain at least one day after the JTD date. After you select the original start day, week, or month, the forecast range automatically shifts forward as time passes. When the first calendar period is no longer in the future, the first calendar period column changes to the next day, week, or month and other calendar period columns shift accordingly to preserve the same forecast range.

Learn More About

Review topics that have conceptual information about the employee card.

Role Security and the Employee Card

A user's security role determines how much information the user sees on the employee card for an employee.

The employee card allows you to view employee information without having to leave an application to open the Employees hub. For more information about the employee card, see Employee Card.

Record Access Security

In the Application Record Access grid on the Record Access tab of the Roles form (in **Settings** » **Security** » **Roles**), the entry that you make in the **Record Level View** field for the Employees hub determines which information that members of a security role can see on the employee card:

- All information that is viewable on the employee card, for those employees that you specify in the **Record Level View** field.

- Limited information on the employee card, for those employees who are not specified in the **Record Level View** field.
- The employee's name and organization (if you use organizations).
- Limited information on the Profile tab: the employee's full name, email address, labor category, hours per day, and utilization target.

Other Security That Affects the Employee Card

Access Rights to Menu Items

On the employee card, an **Actions** drop-down menu lets you open the Employees hub or Resource View if your security role gives you access to these applications. Access rights to applications (menu items) are entered on the Access Rights tab of the Roles form in Security Settings.

When you open the employee card from Timesheet, Expense Report, Resource View, or Project View, you can open the Employees hub from the **Actions** menu if your role gives you access rights to the Employees hub.

When you open the employee card from Project View or on the Plan form in the Projects hub, you can open Resource View from the **Other Actions** menu, if your role gives you access rights to Resource View.

Field-Level Security

In Screen Designer, you can specify the fields in the Employees hub that you want to hide from users based on their security role. The Employees hub fields that you hide are also hidden on the employee card.

Info Bubbles and Help

Vantagepoint provides graphical elements that display information about certain fields and features within the application. It also provides online help that provides more detailed information about a field or function.

How to...

Vantagepoint provides quick access to application and system information.

View an Info Bubble

Many of the Vantagepoint tabs and fields include info bubbles, which are small text boxes that contain additional information about the active field, record, data, or user interface object.

To view an info bubble:

- If text in a field displays as a link (blue), click it to view additional related information in an info bubble dialog. The info bubble may include the following types of links:
  - **More...**: Click this link to open the link's respective record in another browser window. To open this record, your security role must have the appropriate access rights to the

record that the link will open. Your system administrator must use the Screen Designer to hide any fields that a role should not be able to access. See the Screen Designer help topics for additional information.

- **Open**: Click this link to open the respective record. Close this dialog box to return to the original view.

- If ⓘ displays near a set of fields or a chart, click that icon to display additional information about the data. This may include calculations and details about where the data is used.
- If a field label displays with a dotted underline, click the label to display additional information about the field.
- To display a description of various user interface objects, hover over the object. (If you are using a tablet or other mobile device, tap the object to display the tooltip.)

Display Help Topics

You can access help topics throughout Vantagepoint.

To display help topics:

Do one of the following:

- Click ? on the toolbar and click **Help** on the menu. Use the Contents pane or the list of links at the end of the overview topic to display additional information.
- Click ? in the upper-right corner of a dialog box to see help specific to that dialog box.

Display Vantagepoint Version Number and Other System Information

You can display, in the About dialog box, the Vantagepoint version number, the database to which you are connected, and the user ID that you used to log in. Other information provided includes lists of installed components and applications, software licensing and copyright information, and additional miscellaneous system information.

1. Do either of the following:
   - In the browser application, click **?** on the Vantagepoint toolbar.
   - In the desktop application, click **Help** on the Vantagepoint toolbar.
2. Click **About**.

Fields and Options

The fields and options in these dialog boxes provide access to application and system information.

About Dialog Box

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

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

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

If you use the Microsoft Outlook add-in, the following items display on the System Info tab that you use to initially connect Outlook to Vantagepoint:

- The file name for the Microsoft Outlook add-in manifest URL that you need when you initially add the add-in in Outlook.
- The file name for the Microsoft Outlook add-in Login URL that you need to enter on the login screen after uploading the manifest file.

Display the About Dialog Box

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

1. Do either of the following:
   - In the browser application, click **?** on the Vantagepoint toolbar.
   - In the desktop application, click **Help** on the Vantagepoint toolbar.
2. Click **About**.

Send Email Dialog Box for Help Desk

Use this dialog box to compose and send an email message to a designated help desk email address.

The **To** field on the dialog box prefills with the email address that you entered in the **Default Help Desk** field on the Email tab in **Settings** » **General** » **Options** in the desktop application. You could enter the email address of the Vantagepoint system administrator at your company or Deltek Customer Care.

The message box in the email prefills with user and software information.

You can change the prefilled email address and message as needed.

To display this dialog box, click the help **?** icon on the main toolbar in the desktop application, and then click **Help Desk**.

Drop-Down Lists and Lookups

When you enter data on Vantagepoint forms, you often can display a drop-down list or a lookup and select the value for the field or grid column.

The ▼ symbol displays in fields and grid cells that have a drop-down list. In some cases, you can also hover over the field, click , and enter or select the value. Most drop-down list values are configurable by your administrator.

Lookups in the Browser Application

Lookups are available in certain fields and give you the ability to search for and select records from either the database or values that were defined by your enterprise.

Lookup lists are available when the search filter ▼ displays in a field. Some lookups may search entries from your database while others are options that are defined by your system administrator. In either case, you can enter search criteria to narrow your search and eliminate the need to scan through large numbers of records.

Click the search filter ▼ in a field to display a list of records that meet the filtering criteria and which your security role is allowed to access. For some fields, this list may include visual cues that provide a quick indication of a record's status. For example, project, firm, or contact lookups display inactive record icons in a lighter, grayed-out font while active records display in a normal color. In addition, some types of lookups include a different icon to indicate another type of status or a status that must be changed before you can select the record.

For example, following are the different visual cues that may display in a Contact lookup:

Icon	Type	Usage
	Active	The contact is currently active.
	Inactive	The contact is dormant or not active.
	Lead	If your firm uses CRM Plus and enables the Lead Qualification Process in Settings, the Lead icon displays to indicate that the contact is a new lead for your firm. If you select a lead from a lookup, you are prompted to qualify the lead to make it a contact. Click **Yes** to open the Lead Qualification dialog box and qualify the contact before associating it to the project record on the Associations tab.

Each application area may have its own set of indicators. Refer to a specific area for additional information.

For information on configuring lookups, see Lookups in the Desktop Application.

Lookups in the Desktop Application

Use a Lookup to locate a record or group of records in an application or find a record to enter in a field.

In a Lookup, you can enter search criteria that narrows your search and eliminates the need to scan through large numbers of records. A Lookup searches across all records of a single type (all projects, all employees, all contacts, and so on). You can search for records that share certain characteristics. For example, use a Lookup to search for all of your contacts who are located in New York, or all of your projects of the same type. You can also use a Lookup to find a single record, such as a particular employee's Employees hub record.

Lookups are available wherever you see in the upper-right corner of a field. Click the icon to display a lookup dialog box.

Search Types

On a lookup dialog box, there are three basic search types to choose from when you use a Lookup:

- **Standard**: Use the Standard Lookup for searches using basic criteria such as names, numbers, and types.
- **Advanced**: Use the Advanced Lookup to enter additional criteria that limits the data retrieved by the search.
- **SQL Where Clause**: The SQL Where Clause Lookup lets you perform more complex searches, using your own SQL WHERE clauses.

Clear Button

Before you start a search, click the **Clear** button on the lookup dialog box so that information from the previous search is not included in the new search.

Multicompany

If you have multiple companies in Vantagepoint **Active Company** is one of the Search By criteria you can use for projects, employees, and organizations. Using this criterion returns only those records that belong to the currently active company. If you create a global saved search using the **Active Company** criterion, you can use it for all companies.

Configure Lookups and Report Labels

Use the Options form in the browser application (**Settings** » **General** » **Options**) to configure desktop lookups.

On the Lookup/Report Labels form in **Settings** » **General** » **Lookup/Report Labels** in the desktop application, you can customize labels for lookups and reports.

Get Total Rows

The **Use Lookup Limits** check box and the **Maximum Number of Records** field on the Options form (**Settings** » **General** » **Options**) in the browser application control the number of records that display at one time in the results grid on a lookup dialog box. When you select the check box and enter a maximum number of records to display, the following items display on a lookup dialog box after you click the **Search** button:

- **Show Results (x-xx)** displays above the results grid on the right side of the lookup dialog box. It helps you know your place in the list of records since you cannot see or scroll through them all at one time. Use the right or left arrow beside this text to scroll through and view the next or previous set of retrieved records in the lookup grid.
- **Get Total Rows** text displays in the lower right corner of the lookup dialog box. Click the text to display the total record count for the search results. The **Get Total Rows** text is replaced with **Total Rows** text when you click it.

Search Results Paging

On the Options form (**Settings** » **General** » **Options**) in the browser application, if the **Use Lookup Limits** check box is selected and the number of records per page is identified in the **Maximum Number of Records** field, then the search results are displayed in pages in the search results grid. For search results to be displayed in pages, the number of records must exceed the number identified in the **Maximum Number of Records** field.

With search results paging enabled, left and right navigation buttons are available at the top of the search results grid. You can use these buttons to switch from page to page. If the **Allow Lookup Limit Override** check box is selected on the General tab of **Settings** » **Security** » **Roles** in the desktop application for your role, then the button is available beside the navigation buttons. The button disables the paged search results and instead displays the search results in a list.

Adding New Hub Records on the Fly

Some lookup fields support the option to add a new hub record without going to the Hubs area in the Navigation pane.

This feature enables you to create a new hub record without leaving the form you are currently working on.

Adding new hub records on the fly is supported in the following lookup field types found in different Vantagepoint forms:

- Firm
- Contact
- Project
- Marketing Campaign
- Employees

In the lookup field that supports adding a new hub record on the fly, the **+ New <hub record>** option is available in the drop-down menu of the lookup field. Click the **+ New <hub record>** option to display the corresponding hub dialog box where you can fill in the hub details and save the new record.

For example, in the Marketing Campaigns form, go to the Projects tab. Click **+ Add Project** to add a new row in the Projects grid. Click the drop-down for in the **Name** field and select **+ New**

Project in the drop-down menu, the Projects dialog box displays where you can now add details on the in pursuit project you are creating.

If the **+ New <hub record>** option is not displayed in the drop-down menu for supported lookup fields, it means that you do not have the appropriate access right to create new records for the hub that the lookup is associated with.

The fields and options that are available in the hub dialog box are also found in the corresponding hubs form. Refer to the corresponding hub form topics for field and option descriptions:

- Firms Dialog Box: Firms Form
- Contacts Dialog Box: Contacts Form
- Projects Dialog Box: Projects Form
- Marketing Campaigns Dialog Box: Marketing Campaigns Form
- Employees Dialog Box: Employees Form

Actions Bar

Use the Actions bar in the upper-right corner of various Vantagepoint pages to perform actions that apply to the current page. For example, you can edit or copy the current record, or add a touchpoint.

Following are the more common options on the Actions bar and Other Actions menu; refer to the appropriate area of the online help for specific information.

Contents

Field	Description
Edit	Select this option to open the form and make changes to the summary and overview information for the currently selected record.
Save	If you are in Edit Mode, use this option to save your changes.
Cancel	If you are in Edit Mode, use this option to cancel your changes.
Copy	Select this option to copy and modify the current record to create a new record. Be sure to specify a unique name for the new record. When you copy a record with attached documents, Vantagepoint does not copy the documents to the new record.
Export	Select this option to export records to a .CSV file format. You must be in List View to export records. The export function is disabled if you are in Detail View. You have the option of selecting a subset of records or all records for export to the .CSV file.
Design	If your security role gives you access, select this option to open the Screen Designer, which you can use to add tabs, grids, fields, and field properties. The Screen Designer is composed of two sections: a canvas area (on the left) that lets you view the design changes that you make to the form, and a

Field	Description
	list of tabs, fields, and properties (on the right) that can be defined and added to the screen. Click the **×** in the upper right corner of a field or tab to remove it from the form.
Add Touchpoint	Select this option to add a touchpoint (a simple activity such as a meeting or a phone call) for the currently displayed record.
Delete	Select this option to delete the current record. When you delete a record, you permanently remove it from the database. The deletion cannot be undone. Verify that the record is no longer in use before you delete it.
Print Report	Select this option to print the associated report directly from this form or to open a dialog box on which you can specify print options before generating the report. See Print a Hub Report for more information.

Error Dialog Boxes

An Error dialog box displays when you encounter an error while using Vantagepoint.

The dialog box contains a brief summary of the error and some options that you can use for further assistance.

Click **View** to display details of the error, or click **Copy** to copy the error message to the clipboard to send the details to Deltek for support.

Rich Text Editor

Use the rich text editor to enter or review a comment, note, or description on various Vantagepoint forms. In some cases, a note field itself provides rich text editing and formatting. In others, you can click an icon near the field to display the editor in a separate dialog box when you want a larger text entry/viewing area or when you want to apply formatting to the text.

Contents

Field	Description
Text entry area	Enter the text of the comment, note, or description. Click the drop-down arrow in the upper-right corner to display or hide the toolbars that provide editing and formatting options: ▪ Bold, italic, underline, strikethrough ▪ Numbered lists ▪ Bulleted lists ▪ Text indent, alignment, and direction ▪ Formatting styles ▪ Paragraph formats

Field	Description
	▪ Font types and sizes ▪ Text color and background color ▪ Paste as plain text ▪ Remove formatting
Save, Cancel, and Close	Click **Save** to close the dialog box and display the text in the comment, note, or description field. (To actually save the text to the database, you may also have to save the record of which the comment, note, or description field is a part.) Click **Cancel** to close the dialog box and discard any text entries or formatting changes you made in that dialog box. If the comment, note, or description is not editable, a **Close** button displays in place of **Save** and **Cancel**.

Supporting Documents and Files

You can upload supporting documents, files, and images for use with records. For example, you could upload a file that contains copies of sales receipts for line items on an expense report. Or, you could upload a variety of images to include within a proposal that will be sent to a client.

Supported File Types

Supported file types that you can upload include images, PDFs, Microsoft Word documents, and Microsoft Excel spreadsheets. Password-protected documents are not supported.

Upload Documents and Files

You can upload supporting documents and files in the following areas:

- AP vouchers, accounts payable disbursements, unit transactions, and units by projects transactions that are entered in Transaction Entry.
- Credit Card Reconciliation in Cash Management in the desktop application.
- Expense reports that are entered in My Stuff.
- Interactive Billing
- Purchasing
- AP Invoice Approvals
- Inventory Item Requests
- Hubs
- Proposals

View Documents and Files

The following are other areas where you can view the contents of uploaded supporting documents on the Supporting Document dialog box:

- Vendor Review and Create Voucher from PO
- Project Review

- Item Review
- Expense Line Item Approval
- Credit Card Review

Upload Examples

There are various methods for uploading a supporting document. For example, to upload a supporting document for an AP Voucher, you use the Supporting Documents dialog box. After uploading the document, a paperclip icon displays in the Vouchers grid to indicate that a supporting document was uploaded for the line item.

Or, to upload receipts that are in support of an expense report, click the **Attach Receipts** button or use the **Other Actions** » **Upload Receipts** menu option to open the Expense Reports Receipts dialog box and then browse to and select the receipt file. After you save, the receipt is listed in the grid with an icon indicating an attached file.

Files Administration Utility

Use the Files Administration utility to search for and view any of the supporting documents and files that are uploaded. This utility also confirms that the uploaded files are synchronized between the Vantagepoint and FileStream databases. See **Utilities** » **Files Administration** in the desktop application.

Vantagepoint **On-Premises**

If you use the Vantagepoint on-premises product, you can upload supporting documents only if your administrator has configured the Transaction Document Management (TDM) feature and FileStream. The *Deltek Vantagepoint Technical Installation Guide* provides your administrator with detailed instructions.

If you use the Vantagepoint Cloud product, the Deltek Cloud Ops Team sets up and maintains TDM and FileStream for you.

Configuring Supporting Documents and Files

If you are a system administrator using the Vantagepoint on-premises product, you must configure Transaction Document Management (TDM) with FileStream before users can upload supporting documents, files, images, and merge templates for use with records throughout Vantagepoint.

For example, when using supporting documents, a user could upload a file that contains copies of sales receipts for line items on an expense report, or upload images for use in a proposal. The files types that are supported include image files, PDF files, Microsoft Word documents, and Microsoft Excel spreadsheets. All documents that are uploaded via TDM are converted to a PDF file type and then stored in the FileStream database at the time of upload. Vantagepoint does not support the upload of password-protected documents.

For more detailed information on configuring Supporting Documents for Vantagepoint, see the *Vantagepoint Technical Installation Guide* .

If you use the Vantagepoint Cloud product, the Deltek Cloud Ops Team maintains TDM and FileStream for you.

Personalizing the User Interface

You can personalize the Vantagepoint interface according to your preferences. For example, you can specify date and number formats or set up search preferences for Reporting.

Setting Up Preferences

You can use the **My Preferences** option to personalize the Vantagepoint interface according to your preferences.

In **My Preferences** you can do the following:

- Set date and number formats.
- Enable and disable activity reminders.
- Indicate if you want to sort projects in project search lists by name or number.
- Change your Vantagepoint password.
- Specify a default qualified status for contacts.
- Specify a default country for new records.
- Specify what you see when you start Vantagepoint.
- Set up approval delegation.
- Add or update an image.
- Enter credentials for linking to a third-party application.

The options that display are based on your application's configuration and security access rights.

How to...

You can change your password, establish your own settings for date and number formats, set activity reminders, and more.

Change Your Password

Passwords help ensure system security. You can change your password at any time.

To change your password:

1. On the toolbar, click and select **My Preferences**.
2. On any tab of the My Preferences dialog box, click **Change Password**.
3. In **Old Password** on the Change Password dialog box, enter your current password.
4. In **New Password**, enter your new password.
   If your system administrator established password policies, your new password is accepted only if it meets those requirements.

5. In **Confirm Password**, enter your new password again.
6. Click **OK**.
   The next time that you log in, you must use the new password.

Set Startup Preferences

You can choose the startup page that displays when you launch Vantagepoint.

To select your startup page:

1. On the toolbar, click and select **My Preferences**.
2. Select the Startup tab of the My Preferences dialog box.
3. Choose your default startup preference: the Welcome page, the last application that you used, or a specific application.
4. Click **Save**.
   The specified page will display each time that you log in to Vantagepoint.

Set Date and Number Formats

You can specify your own formats for dates and numeric fields.

To set date and number formats:

1. On the toolbar, click and select **My Preferences**.
2. On the General tab of the My Preferences dialog box, use **Date Format** to select a format for displaying dates.
3. In **Decimal Symbol**, select the symbol (period or comma) for separating decimal digits from non-decimal digits in numbers.
4. In **Digit Grouping Symbol**, select comma or period as the symbol for grouping digits in numbers.
5. Click **Save**.
   The formats that you select are applied throughout Vantagepoint. You may need to refresh the current page to see your selections reflected.

Set Search Preferences for Reporting

You can select your search preferences for Vantagepoint Reporting.

To set search preferences for Reporting:

1. On the toolbar, click and select **My Preferences**.
2. Click the Reporting tab of the My Preferences dialog box.
3. In **Reporting Quick Search**, select the type of search filter that you want to use when you conduct a search in the Reporting application.

You can specify saved searches, which have specific result sets, or individual records:

- **Saved Search**: Select this setting to have the Reporting application display the Saved Search filter. When you are working in Reporting and enter data for this filter, only the saved searches that match the filter are displayed.
- **Records**: Select this setting to have the Reporting application display the Record filter. When you are working in Reporting and enter data for this filter, only the individual records that match the filter are displayed.

In either case, when you are in the Reporting application, you can use the **Search** link at the bottom of the drop-down list to select a saved search or individual records.

After you save your preferences, the search option becomes a filter on both the Favorites tab and Reports tab in Reporting.

4. Click **Save**.
   The setting that you select is applied throughout Vantagepoint. You may need to refresh the current page to see your selections reflected.

Set Reminder Preferences

You can create preferences for how you receive reminders for your scheduled activities. These reminders can be delivered via email or a pop-up alert.

To set a reminder:

1. On the toolbar, click and select **My Preferences**.
2. Select the General tab of the My Preferences dialog box.
3. In **Remind me about activities**, select one of the following types of reminders:

Option	Description
No	Reminders are displayed in the notification center only and you do not receive a pop-up or email message.
By email	Reminders arrive by email message only.
By pop-up	Reminders arrive by pop-up only.
By email and pop up	Reminders arrive by both email message and pop-up.

4. Click **Save**.

Set Default Qualified Status and Country

You can specify defaults for qualifying contacts and for the country that displays when you create a new record in the Firms, Contacts, or Projects hubs.

The **Default Qualified Status** and **View Leads in Contact Fields** options display if you use CRM Plus and the Lead Qualification process is enabled in Settings.

To choose the qualified status and country:

1. On the toolbar, click ⚙ and select **My Preferences**.
2. Select the Defaults tab of the My Preferences dialog box.
3. In **Default Qualified Status**, select the default status for new contacts created in the Contacts hub.
   - Select **New Lead** to create new contacts in the "lead" phase without any associated firm or other records.
   - Select **Qualified Contact** to create all new contacts as qualified.
4. To include leads in all contact lookups, select the **View Leads in Contact Fields** check box .
   If this option is not selected, leads are hidden from the user in those areas.
5. In **Default Country**, select the country to display when you create a new firm, contact, or project.
6. Click **Save**.

Set Report Preferences

To make the report generation process quicker, select default settings for your reports.

To select report preferences:

1. On the toolbar, click ⚙ and select **My Preferences**.
2. Select the Reporting tab of the My Preferences dialog box.
3. Specify your default report references, including the font, unit of measure, margins, and page size.
4. Click **Save**.

Delegate Approval Responsibilities

You can assign another person, called a delegate, to temporarily perform approvals, such as approving billing invoices or timesheets, in your absence.

When you delegate responsibility for approvals to another person, that person receives the same approval alerts that you would normally receive and has the same access to approve and reject. You (the delegator) continue to receive alerts (along with the delegate) so that you are aware of any approvals processed in your absence. The delegate can approve various types of records on your behalf, but only if their role security allows access to the menu items from which to approve records as well as access to specific records, such as projects and employees.

To assign a delegate:

1. On the toolbar, click and select **My Preferences**.
2. Select the General tab of the My Preferences dialog box.
3. Select the **Delegate Approvals to** check box.
4. In the field to the right of the check box, select the employee who will perform approvals in your absence.
5. Click **Save**.
6. When you want to resume performing approvals, clear the **Delegate Approvals to** check box on the My Preferences dialog box.

   The delegate stops receiving approval alerts and no longer receives approval assignments on your behalf.

Upload a Personal Photograph or Other Image

You can upload a photograph of yourself or another personal image to display on the My Preferences dialog box. You can also select an image from the library of images that is supplied with Vantagepoint.

Supported image file types are .GIF, .JPG, .JPEG, .PNG, and .BMP.

To upload a personal photograph or other image:

1. Click on the toolbar and select **My Preferences**.
2. Click the Image tab of the My Preferences dialog box.
3. Hover over the image box and click **Update Image**.
4. On the Update Image dialog box, select one of the following actions:
   - To upload your own image file, click **Upload**, select the image file, and click **Open.**
   - To select an image supplied with Vantagepoint, click **Library**, select an image, and click **Select**.
   - To remove the current image, click **Remove**.

   If you assigned a new image, Vantagepoint automatically scales the image to fit in the frame.
5. You can resize and crop the image, if needed. Any portion of the image outside the frame is cropped when you save the image. If necessary, do either or both of the following:
   - Drag the slider beneath the image frame to resize the image and increase or decrease the portion of the image that is within the frame.
   - Drag the image to change the portion of the image that is within the frame.
6. Click **Save**.

Connect to Collaboration

If your firm has implemented integration of Vantagepoint with Deltek Collaboration, use the My Preferences dialog box to connect to Deltek Collaboration.

If you are associated with the integrated Collaboration account, you can connect to that account on the My Preferences dialog box in Vantagepoint and then access Collaboration spaces for projects. You can also create Collaboration tasks for touchpoints related to projects.

To connect to Deltek Collaboration**:**

1. On the toolbar, click and select **My Preferences**.
2. On the General tab of the My Preferences dialog box, click **Connect** next to **Deltek** Collaboration.

   If your firm has not implemented the Collaboration integration, this option is not available.
3. On the Log In dialog box, enter the email address and password that you use to access Collaboration and click **Log In**.
   The connection is established and related information displays on the My Preferences dialog box.
4. Close the My Preferences dialog box.
   You remain connected until you click **Disconnect** on this dialog box.

Connect to GovWin IQ

If your firm has implemented integration with GovWin IQ, use the My Preferences dialog box to connect to GovWin IQ from Vantagepoint.

If you have login credentials for GovWin IQ and the required access in Vantagepoint, you can create in pursuit projects in Vantagepoint by importing opportunities from GovWin IQ.

To connect to GovWin IQ:

1. On the toolbar, click and select **My Preferences**.
2. On the General tab of the My Preferences dialog box, click **Connect** next to **GovWin IQ**.

   If your firm has not implemented GovWin IQ integration, this option is not available.
3. On the GovWin IQ dialog box, enter the email address and password that you use to access GovWin IQ, and click **OK**.
   The connection is established and related information displays on the My Preferences dialog box.
4. Close the My Preferences dialog box.
   You remain connected until you click **Disconnect** on the My Preferences dialog box.

Fields and Options

Use the fields and options on the My Preferences dialog box to personalize some aspects of Vantagepoint based on your preferences. .

My Preferences Dialog Box

Use this dialog box to select settings to personalize Vantagepoint.

These settings apply only to you.

Display My Preferences Dialog Box

You display this dialog box from the main Vantagepoint toolbar.

On the main Vantagepoint toolbar, click ⚙ and select **My Preferences**.

General Tab of My Preferences Dialog Box

Use this tab to define the general settings used throughout the Vantagepoint application.

Contents

Field	Description
Date Format	Select a format for displaying dates.
Decimal Symbol	Select the symbol (period or comma) for separating decimal digits from non-decimal digits in numbers.
Digit Grouping Symbol	Select the symbol (comma or period) for grouping digits in numbers.
Remind Me About Activities	You can create preferences for how you receive reminders for your scheduled activities. These reminders can occur via email and/or a pop-up alert, and you can specify the frequency with which you receive activity reminders. This option is only available if you own CRM.
Automatically retrieve my record in Employee Hub and Self Service	Select this option to have your employee record display automatically when you open the Employees hub or Self Service.
Delegate Approvals To	Select this option to temporarily assign another person, called a delegate, to perform approvals in your absence. This option is only available if Accounting is enabled. The delegate can approve various types of records in Vantagepoint on your behalf, but only if their role security allows access to the

Field	Description
	Vantagepoint menu items from which to approve records as well as access to specific records, such as projects and employees. The delegate receives approval alerts and can approve and reject records for you. You (the delegator) continue to receive alerts (along with the delegate) so that you are aware of any approvals processed in your absence. At a future time, you can reverse this and resume the task of performing the approvals yourself. When you select this option, the Employees lookup is enabled. Select the employee who will serve as the delegate for you.
Project Search List Sort Order	Under **Project Search List Sort Order**, select the sort order for projects in the project search results list: ▪ **Project Name**: Sort by project name, with the project name displayed in a larger and bolder font above the project number. ▪ **Project Number**: Sort by project number, with the project number displayed in a larger and bolder font above the project name.
Change Password	Passwords help ensure system security. Click this button to open the Change Password dialog box and change your password.

Defaults Tab of My Preferences Dialog Box

Use the Defaults tab of the My Preferences dialog box to specify defaults for qualifying contacts and for the country that displays when you create a new record in the Firms, Contacts, or Projects hubs.

Contents

Field	Description
Default Qualified Status	This option displays if you use CRM Plus and the Lead Qualification process is enabled in Settings. Use this option to specify the default value for the **Qualified Status** when a new contact is created in the Contacts hub. Options include: ▪ **New Lead**: Select this option for all new contacts to be created with a qualified status of **New Lead**. This indicates that the contact is in the "lead" phase without any associated firm or other records. As you work with the contact and your relationship evolves through the lead qualification process, you can change the contact's status in the Contacts hub to **Qualified Contact**. Business developers are likely to select New Lead as the default. ▪ **Qualified Contact**: Select this option for all new contacts to be created as qualified contacts. This option is selected by default and allows you to bypass the qualification process if your role does not typically work with prospects.

Field	Description
View Leads in Contact Fields	This option displays if you use CRM Plus and the Lead Qualification process is enabled in Settings. Select this check box to include leads in all contact lookups. If this option is not selected, leads are hidden from the user in those areas.
Default Country	When you create a new firm, contact, or project record, the default country that you select in this field is used as long as there is no other place from which to draw the information. You can override this default in other areas of the application. For example, if you specify a country for a project that you create in the Projects hub, that country overrides the default that you enter here.

Startup Tab of My Preferences Dialog Box

Use the Startup tab to specify what you see each time that you log in to Vantagepoint: the Welcome page, the last application that you used, or a specific application.

Contents

Field	Description
Open Application Used Last	Select this option to automatically open the last application that was in use.
Open Welcome Page	Select this option to open the Welcome page.
Open This Application	Select this option to specify the application that will open when you log in. The applications that display for selection are based on your security role's access rights. If the specified application is subsequently removed from your security role's access rights, the Welcome page displays instead.

Reporting Tab of My Preferences Dialog Box

Use the Reporting tab to specify your preferences for how reports display and print.

Contents

Field	Description
Default Font	Select the default font for reports.
Unit of Measure	From the drop-down list, select **Inches** or **Millimeters** as the unit of measure to use for measurement fields. You can also modify the unit of measure in Reporting.
Reporting Quick Search	Specify the type of search filter that you want to use when you conduct a search in the Reporting application. You can specify saved searches, which have specific result sets, or individual records:

Field	Description
	▪ **Saved Search**: Select this setting to have the Reporting application display the Saved Search filter. When you are working in Reporting and enter data for this filter, only the saved searches that match the filter are displayed. ▪ **Records**: Select this setting to have the Reporting application display the Record filter. When you are working in Reporting and enter data for this filter, only the individual records that match the filter are displayed. In either case, when you are in the Reporting application, you can use the **Search** link at the bottom of the drop-down list to select a saved search or individual records. After you save your preferences, the search option becomes a filter on both the Favorites tab and Reports tab in Reporting.

Margins

Field	Description
Top	Enter the margin for the top of the page. Use the unit of measure (inches or millimeters) that you specified in the **Unit of Measure** field. If your unit of measure is inches, use decimals for fractions of an inch (for example, 0.75 or 1.20).
Bottom	Enter the margin for the bottom of the page. Use the unit of measure (inches or millimeters) that you specified in the **Unit of Measure** field. If your unit of measure is inches, use decimals for fractions of an inch (for example, 0.75 or 1.20).
Left	Enter the margin for the left of the page. Use the unit of measure (inches or millimeters) that you specified in the **Unit of Measure** field. If your unit of measure is inches, use decimals for fractions of an inch (for example, 0.75 or 1.20).
Right	Enter the margin for the right of the page. Use the unit of measure (inches or millimeters) that you specified in the **Unit of Measure** field. If your unit of measure is inches, use decimals for fractions of an inch (for example, 0.75 or 1.20).

Page

Field	Description
Size	Specify the page size for reports. The corresponding **Width** and **Height** fields display the width and height of the page size that you select in this field. The measurements display in either inches or millimeters, based on which one you specified in the **Unit of Measure** field. If you select **Custom**, enter the width and height that you want in the corresponding dimension fields.
Dimensions (Width and Height)	These fields display the width and height of the page size that you select in the **Size** field. The measurements display in either inches or millimeters, based on your selection in the **Unit of Measure** field.

Field	Description
	If you set the **Size** option to **Custom**, use these fields to enter the width and height that you want.

Credentials Tab of My Preferences

Use this tab to enter credentials for connecting to Deltek Collaboration or to GovWin IQ.

If neither of the options described below is available, this tab does not display.

Contents

Field	Description
Connect: Deltek Collaboration	Click this button if you want to automatically log in to Deltek Collaboration and access the spaces in which you are a member. This option is available if Collaboration credentials (Client ID and Client Secret) have been entered in **Utilities** » **Integrations** » **Collaboration**.
Connect: GovWin IQ	Click this button to connect to GovWin IQ so you can import opportunities as in pursuit projects. This option is available if GovWin IQ credentials (Client ID and Client Secret) have been entered in **Utilities** » **Integrations** » **GovWinIQ**.

Image Tab of My Settings Dialog Box

You can upload an image (for example, a logo or a contact photograph) to Vantagepoint so that you can assign it to an project, firm, contact, or employee. Alternatively, you can select an image from the library of images supplied with Vantagepoint. You can also remove an existing image. If you do not assign an image, a default image is used.

Supported image file types are .GIF, .JPG, .JPEG, .PNG, and .BMP.

For you to be able to change an image, your security role must have the access rights to update the record.

Contents

Field	Description
Upload Image	Complete one of the following to upload an image: ▪ To upload your own image file, click **Upload**, select the image file, and then click **Open.** ▪ To select a supplied image, click **Library**, select an image, and then click **Select**. ▪ To remove the current image, click **Remove**. If you assigned a new image, Vantagepoint automatically crops and scales the image and displays it in the **Image** field.

Field	Description
	Use the slider control below the **Image** field to expand or contract the image as needed. The image resizes accordingly and the cropping frame illustrates what will display for the record's image. The results of your actions display in **Cropped Image**.

Update Image Dialog Box

You can upload an image for any hub that displays an image for the selected record (for example, a firm logo or a contact photograph). You can upload a personal photograph or other image to display on the My Preferences dialog box. You can also select an image from the library of images supplied with Vantagepoint. If you do not assign an image, Vantagepoint uses a default image.

Supported image file types are .GIF, .JPG, .JPEG, .PNG, and .BMP.

After you upload or select an image, Vantagepoint automatically scales the image to fit the frame.

If your security role does not have access rights to update a hub record, you cannot change the image for that record. You also cannot change the image for a hub record that is not active. For records that are not active, the image is dimmed, and the record status displays across the bottom of it in place of the **Update Image** option.

Display the Update Image Dialog Box

You display the Update Image dialog box from the My Preferences dialog box or from any hub that displays an image for the selected record.

1. Do one of the following:
   - To update the image for a hub record, display that record in the hub.
   - To update your personal image, click on the toolbar, select **My Preferences**, and then select the Images tab of the My Preferences dialog box.
2. Hover over the image box and click **Update Image**.

Contents of the Update Image Dialog Box

Use this dialog box to upload images to Vantagepoint.

Contents

Field	Description
Upload	Click this option to upload your own image file. Click **Open** after you select the file.
Library	Click this option to select an image supplied with Vantagepoint. Click **Select** after you select the image.

Field	Description
Image frame	After you upload or select an image, the image displays in the image frame. You can resize or crop the image if needed. Any portion of the image outside the frame is cropped when you save the image. To resize or crop an image, do either or both of the following: ▪ Drag the slider beneath the image frame to resize the image and increase or decrease the portion of the image that is within the frame. ▪ Drag the image to change the portion of the image that is within the frame. Note that if you are using Internet Explorer or Safari, you cannot crop outside of the image area.
Remove	Click this option to remove the image file.
Save	Click this option to save your changes. If you removed an image, the stock blue and white picture displays instead. If you cropped the image, only the cropped image is saved. If you save a cropped image and decide that you do not like the results, display the dialog box and upload the original image again.

Change Password Dialog Box

Passwords help ensure system security. Use the Change Password dialog box to create or change your password.

Display the Change Password Dialog Box

You display this dialog box via My Preferences.

1. On the toolbar, click and select **My Preferences**.
2. On the Startup tab of the My Preferences dialog box, click **Change Password**.

Contents of the Change Password Dialog Box

Use these fields to change your password.

Contents

Field	Description
Old Password	Enter your current password in this field or, if you do not currently have a password, leave it blank.
New Password	Enter your new password. If your system administrator established password policies, your new password is accepted only if it meets those requirements.

Field	Description
Confirm Password	Enter your new password again and then click **OK** to save your changes.

Change the Active Company

The company that you select at login is the active company. If Vantagepoint is set up to use multiple companies and if your security role gives you access to more than one company, you can switch to a different active company after you log on to Vantagepoint.

To change the active company:

Make the change from the browser or desktop application:

- From the browser: On the toolbar, click the name of the currently selected company and select the company that you want from the drop-down list.
- From the desktop: Select **Utilities** » **Change Company**.

Customize the UI

Your system administrator can customize Vantagepoint UI screens, dashboards, and menus.

To customize the Vantagepoint **UI:**

Do one or more of the following:

To customize	Do this
Vantagepoint labels to replace them with labels specific to your enterprise.	Use the **Labels & Lists** in the browser application. See the Labels & Lists Settings help topic for details.
Tabs, fields, and grids in hubs	Use **Screen Designer** in both the browser and desktop applications. See the Screen Designer help topic for details.
Browser dashboards to bring together all of the information and tools that you rely on most.	Use **Dashboard Designer i**n the browser application. See the Dashboard Designer help topic for details.
The desktop Navigation menu to add new menu items, rearrange existing menu items, or delete menu items.	Use **Navigation Menu Designer** in the desktop application. See the Navigation Menu Designer help topic for details.

User-Defined Tab

This is a user-defined tab in the Vantagepoint browser application that was added by your system administrator.

Because it is a non-standard tab, there is no help topic for it. However, your system administrator may have added helpful information directly on the tab itself. To access this information on the tab:

- Click ⓘ beside a field or divider line to read more information about the field or the section that is defined by the divider line.
- Read other informational or instructional text that is directly on the tab.

For information on how to add i-buttons for fields and divider lines and how to add informational text directly on tabs, see the following topics for system administrators:

- Add a Tooltip to a Tab in a Hub
- Add a Label to a Tab in a Hub

Common Tasks

This section describes basic tasks that can be launched from various areas in Vantagepoint.

Exporting Data to a .CSV File

In various places throughout Vantagepoint, you can export data from a grid into a .CSV (comma-separated values) file.

The export process takes all the data from a grid in Vantagepoint and outputs it to a .CSV file that you save in Microsoft Excel, or in another spreadsheet application that supports .CSV files. You can modify the contents of the file (filter the data, format the contents, and so on) to produce useful reports and analysis.

Export Data to a .CSV File

You can export data from a Vantagepoint grid to a comma-separated values (.CSV) file.

To export data from a grid to a .CSV file:

1. Open an application that has a grid with the **Export as CSV** icon on the grid toolbar.

   Examples of grids that have the export capabilities:

   - The grids that display hub records when you open a hub and switch the form view to list view by clicking in the top right corner of the hub form

     To export from list view, your user ID must be mapped to an employee record. You are notified via the Notification Center as soon as the .CSV file is ready to be downloaded. The .CSV file is stored in the FileStream database until you download it.

     If you are exporting more than 100 records, the following Vantagepoint applications automatically leverage the process server when exporting records from list view:

Projects hub, Employees hub, Firms hub, Contacts hub, User Defined hubs, Activities, and Users.

- The invoices grid on the Invoice History tab in **Billing** » **Interactive Billing**
- The Vendor Balances grid in **Cash Management** » **Vendor Payments**

2. On the grid toolbar, click .
3. On the Export as CSV dialog box, select an option:

Option	Description
Request Export	If you are exporting from list view, click this option. The export is scheduled and you are notified via the Notification Center when the .CSV file is ready to be downloaded.
Export All	If you are not exporting from list view, click this option. The .CSV file is available in the download bar at the bottom of the screen.

4. Open the file in the in Excel, or another third-party application that supports .CSV files, and then edit the file.

Export as CSV Dialog Box

Use this dialog box to export data from a grid in Vantagepoint into a .CSV (comma-separated values) file.

Display the Export as CSV Dialog Box

This dialog box displays in various applications throughout Vantagepoint.

1. Open an application that has a grid with the Export as CSV icon on the grid toolbar.

   Examples of grids that have the export capabilities:

   - The grids that display hub records when you open a hub and switch the form view to list view. To switch to list view, click in the top right corner of the hub form.
   - The invoices grid on the Invoice History tab in **Billing** » **Interactive Billing**.
   - The Vendor Balances grid in **Cash Management** » **Vendor Payments**.

2. On the grid toolbar, click

Contents of the Export as CSV Dialog Box

Use these options to export data from a Vantagepoint grid into a comma-separated values (.CSV) file.

The export process takes all the data from a Vantagepoint grid and outputs it to a .CSV file. You can then use Microsoft Excel, or another spreadsheet application that supports .CSV files, to open the file and filter, summarize, and format the exported data for reports or analysis.

Contents

The contents of the dialog box are dependent on where you clicked the Export as CSV icon /

Field	Description
Request Export	If you exported from list view, click this button to schedule the export from the grid. You will be notified via the Notification Center when the .CSV file is ready to be downloaded. The following Vantagepoint applications automatically leverage the process server when exporting records from list view: Projects hub, Employees hub, Firms hub, Contacts hub, User Defined hubs, Activities, and Users.
Export	If you did not export from list view, click this button to export the contents of the grid into a .CSV file.
Cancel	Click this button to close the dialog box without exporting the grid contents to a .CSV file.

Import Records from .CSV Files

If you have access to the Import and Export utilities in the browser application, you can run an import process that adds multiple records from .CSV (comma-separated values) files into Vantagepoint. This allows you to quickly add multiple records into the application.

Video: See related video below.

When you run the import process, a new record is added in Vantagepoint for each record in the .CSV file that does not already exist in the database. For this to occur, information between the two applications is mapped according to type of record (contact, employee, and so on). Vantagepoint runs a check to ensure there are no duplicate records in the database.

The import can include any standard or custom data that you enter on any tabs in the area, with the exception of fields in grids. Data that you enter in the grids cannot be imported.

Tablets and other devices that use the iOS operating system cannot upload files through the browser. As a result, you must run the import process using a different device, such as a laptop or an Android tablet.

Video

Title	Description
Import Data for CRM	Learn how to separate CRM contacts from personal contacts, locate duplicates and remove them, and import contacts from outside sources.

How to...

You can import record data from a .CSV file into Vantagepoint.

Prepare the .CSV File

Before you import data into Vantagepoint using an import in the browser application, prepare a comma-separated values (.CSV) file that contains the data that you want to import.

From the browser application, you can only import data from a .CSV file. The imports available in the desktop application enable you to import from some other file types.

To prepare the .CSV file:

1. Export the record information from the source application (for example, Deltek Costpoint or Microsoft Outlook) into a .CSV file.
2. Open the .CSV file in Microsoft Excel or another compatible application and verify that the first row in the file is a header row that contains field names, not data.

   The import process assumes that the first row contains field names, not actual data. It uses those field names during the field mapping step of the import process.
3. Delete from the file any records that you do not want to import into Vantagepoint.
4. Review the remaining file contents for accuracy and correct formatting. See Importing Data from .CSV Files for more information.
5. Save the file.

Map the .CSV Fields to Fields in Vantagepoint

Before you can import data from a .CSV file, you must map the .CSV fields to Vantagepoint fields.

To map the .CSV fields to fields in Vantagepoint**:**

1. In the Navigation pane, select **Utilities** » **Imports & Exports** » **Imports** and select the area in which you want to import the record.
   See Mapping Information for .CSV Imports for specific field mapping information.
2. On the Import from CSV dialog box, browse to the .CSV file that you want to import and click **Next**.
   The first time that you display this dialog box, Vantagepoint attempts to provide default field mappings based on the field names in your .CSV file and the field names in Vantagepoint. Review those default mappings and change any that are incorrect. Thereafter, your previous field mappings display by default.
3. For each .CSV field in the **Source File Field** column that you want to import into Vantagepoint, select the corresponding Vantagepoint field in the **Deltek Field** column. If the .CSV file contains fields that you do not want to import, select **Do not import** for those fields.

Check for Duplicate Records

You can specify how you want the import process to handle a contact if it already exists in Vantagepoint.

To check for duplicate records:

1. In the Navigation pane, select **Utilities** » **Imports & Exports** » **Imports** and select the area in which you want to import the record.
2. On the Import from CSV dialog box, browse to the .CSV file that you want to import and click **Next**.
   Complete one of the following:
   - Select **Do not import duplicate records** if you do not want to import any information for a contact who already exists.
   - Select **Update duplicate records** if you want the import process to update fields in Vantagepoint for a contact who already exists in Vantagepoint. If a field in the existing record is blank or contains information that is different from information in the mapped field in the .CSV file, the field in the existing record is updated with the information from the .CSV file.

   The import process checks for an existing record. Duplicates are identified by matching on one of the following:
   - First name, last name, and firm
   - Preferred name, last name, and firm
   - Email address

   If one of the names and the firm match or if the email address matches, the record in the .CSV file is considered a duplicate.

Run the Import Process

To import data into Vantagepoint from a .CSV (comma-separated values) file, click the link for the import on the Imports tab on the Imports and Exports form.

Prerequisites:

- Before you start this procedure, you must generate a .CSV file containing the data that you want to import. A common practice is to download data to Microsoft® Excel® and save the spreadsheet as a .CSV file. Review the file carefully to make sure the data it contains is correct.
- Tablets and other devices that use the iOS operating system cannot upload files through the browser. As a result, you must run the import process using a different device, such as a laptop or an Android tablet. If you are using an iOS device, the import option is disabled on the Imports tab.

To run the import process:

1. In the Navigation pane, select **Utilities** » **Imports & Exports** » **Imports**.

2. On the Import From CSV dialog box, click **Browse**, navigate to and select the .CSV file, and click **Open**.
3. Click **Next**.
   The Import From CSV dialog box displays a list of fields from your .CSV file and a default mapping to fields in Vantagepoint. If **Do not import** displays in **Deltek Field**, Vantagepoint was unable to determine how to map that .CSV field.
4. Do one of the following:
   - Select **Do not import duplicate records** if you do not want to import any information for a record that already exists in Vantagepoint.
   - Select **Update duplicate records** if you want the import process to update an existing record if a field in that record is blank or contains information that is different from information in the mapped field in the .CSV file.
   - Select **Delete existing records and import** if you want the import process to delete from Vantagepoint all records of the type you are importing and then import the contents of the .CSV file. This option is useful if the .CSV file always contains all the current records.

   For certain imports, some or all of these options are not available.
5. Review the default field mappings to verify that all fields in the .CSV file, listed in **Source File Field**, are mapped to the correct field in Vantagepoint. If a default mapping is incorrect or if **Do not import** displays in **Deltek Field** and you want to import the data in that .CSV field, select the correct field in **Deltek Field** on that grid row.

   If the .CSV file contains fields that you do not want to import into Vantagepoint, make sure that **Deltek Field** contains **Do not import** for those fields. The import process only imports data from fields that you map to a Deltek field.
6. To start the import process, click **Import**.

   Depending on the number of records to be imported, the import process can take a while. You can continue working in Vantagepoint while you wait for it to finish.

   The import process does the following:
   - If you selected **Delete existing records and import**, it deletes from Vantagepoint all existing records of the type you are importing.
   - It adds records for any records in the import file that do not currently exist in Vantagepoint.
   - If you selected **Update duplicate records**, it updates mapped fields in Vantagepoint based on the information in the .CSV file for any records that already exist in Vantagepoint.
7. If the import process is unable to import one or more records (because of required data that is missing from the .CSV file, for example), a message displays at the top of the Vantagepoint page. If that occurs, click the **Download the CSV file** link in the message to review the records that were not imported and the reasons why the imports failed.

Review Import Errors

You can review errors that occur with the import process.

To review the import errors:

1. To start the import process, click **Import**.
   If the import process is unable to import one or more records (because of required data that is missing from the .CSV file, for example), a message displays at the top of the Vantagepoint page.
2. Click the **Download the CSV file** link in the message to review the records that were not imported and the reasons why the imports failed.

Fields and Options

These forms and dialog boxes are available in Utilities.

Import From CSV Dialog Box

After you prepare a .CSV (comma-separated values) file that contains data that you want to import into Vantagepoint, use the Import From CSV dialog box to map the fields in your .CSV file to the corresponding fields in Vantagepoint and to run the process to import the data from the .CSV file.

Display the Import from CSV Dialog Box

You display this dialog box from the Imports tab of the Imports & Exports form.

1. In the Navigation pane, select **Utilites** » **Imports & Exports** » **Imports**.
2. On the Imports form, click the link for the type of import that you want to perform.

Contents of the Import from CSV Dialog Box

Use the fields and options on this dialog box to select the .CSV file that contains the data you want to import, to map the fields in the .CSV file to Vantagepoint fields, and to start the import process.

The Import From CSV dialog box first prompts you to select your .CSV file.

Field	Description
Browse	Click **Browse**, navigate to and select the .CSV file, and click **Open**.
Next	Click **Next** to go to the next step in preparing for the import process.

After you select the .CSV file and click **Next**, the Import From CSV dialog box displays a different set of controls so you can map the fields in the .CSV file to Vantagepoint fields and start the import process.

Field	Description
Do not import duplicate records	If you do not want the import process to update any information for a record that already exists in Vantagepoint, select this option.
Update duplicate records	If you want the import process to update fields in Vantagepoint for a record that already exists, select this option. If a field in the existing record is blank or contains information that is different from information in the mapped field in the .CSV file, the field in the existing record is updated with the information from the .CSV file.
Delete existing records and import	if you want the import process to delete all existing records in Vantagepoint of the type that you are importing and then import the contents of the .CSV file, select this option. This option is useful if the .CSV file always contains a complete set of the records of that type. This option is only available for some of the imports.
Source File Field	This column contains the field names from your .CSV file. Vantagepoint assumes that the first row of the .CSV file is a header row and that the values in that row are the field names.
Deltek Field	Use the fields in this column to select the Vantagepoint field that corresponds to each of the .CSV file fields that you want to import. The drop-down list contains all standard and custom fields for which you can import data. Grid fields are not listed; you cannot import data for those fields. If the .CSV file contains fields that you do not want to import, select **Do not import** for those fields. The first time you display this dialog box, it attempts to provide default field mappings based on the field names in your .CSV file and the field names in Vantagepoint. Review those default mappings and change any that are incorrect. Thereafter, your previous field mappings display by default.
Sample Value	This column displays the value for each field from the first data row in your .CSV file.
Records to be imported	This field displays the number of records that your .CSV file contains.
Import	To start the import process, click this button. The import process does the following: ▪ If you selected **Delete existing records and import**, it deletes all existing records of the type you are importing that are currently in Vantagepoint.

Field	Description
	▪ It adds a record in Vantagepoint for each record in the .CSV file that does not already exist. ▪ If you selected **Update duplicate records**, it updates mapped fields in Vantagepoint based on the information in the .CSV file for any records that already exist in Vantagepoint.
Cancel	To close the dialog box without running the import process, click this button. If you mapped fields, you will have to do the mapping again if you decide to run the import at a later time.

Find an Application on the Navigation Pane

Use the Find Application search field to quickly locate applications on the Navigation pane.

Your role security determines your application access and therefore determines which applications are returned in the search.

To find an application:

At the top of the Navigation pane, enter partial or whole text in the **Find Application** field. Vantagepoint returns only the applications that match the entered text. Submenus are not included in the search results.

Results are shown first as parent section headings in blue text, with individual applications listed underneath in white text. For example, **Hubs** appears as the parent heading with each hub application (**Activities**, **Boilerplates**, **Collaboration**, and others) listed underneath.

Open an Application in a New Browser Tab

From any application in Vantagepoint, you can display another instance of the application in a separate browser tab.

If needed, you can open multiple instances of an application to work in parallel on different records. For example, you can open several instances of the Expense Reports application to complete expense reports for several different business trips.

To open another instance of an application in a new browser tab:

1. In the Navigation pane, click an application to open it.
2. Use the keyboard to press the **Ctrl** key, and then click the application.
   Vantagepoint displays another instance of the application in a separate browser tab.

Use List View

You can view a record in either detail view or list view. Detail view displays a single record and is the default view when you initially open records in many application areas. List view presents fields in columns in a grid, rather than on separate tabs, so that you can view multiple records at the same time and quickly evaluate record data.

After you select a view, Vantagepoint defaults to displaying this view each time that you open the application.

Video: See related video below

To use list view:

1. Open an application.
   In most cases, detail view displays the first time you open a form and includes all tabs and fields for the record. The detail view is the format that is described in help topics in the Help system and is the view in which you can edit a record.
2. Click to change to list view.

   A group of fields display in columns in a grid, and multiple records display on the grid. The control at the top of the page indicates the number of records displayed in the list view

   Much of the information for Vantagepoint is entered and displayed in grids on various forms. For information about using grids, see Working with Grids.
3. While in list view, you can:
   - Modify a record's information.
   - Click to maximize the grid to a full screen display. This expanded view reduces the need to scroll through long lists of records. Click it again to return to the standard grid display.
   - Click on the grid toolbar to add, remove, or change the order of the columns in the grid.
   - Click to export the grid contents to a .CSV file.
   - Click on the grid toolbar to filter the grid contents based on values in one or more of the columns.
   - Drag and drop columns to change their order.
   - Click the **Grid Options** icon ( ) at the end of a row to edit, copy, or delete a list view record.
   - Click **Other Actions** on the Actions bar to export the contents of the grid or to delete multiple selected records.
   - Scroll through the list to locate the desired record.
   - Select one, multiple, or all records. The **Select All** option is useful when printing reports.
   - Print one or more records.

   The **Search** field is not available while in list view.

4. To switch back to detail view for a record, either hover over the row and click at the beginning of the row, or select the row in the grid and click in the upper-right corner of the form.

Video

Title	Description
Hub Navigation Tips and Tricks	Learn tips for successfully navigating hubs, including how to add a hub record, use list view (select columns and use filters), and perform a simple search. The video also discusses hierarchies.

Working with Grids

Much of the information for Vantagepoint is entered and displayed in grids on various forms. A grid is a table, with columns and rows, where you enter, change, and view data for a record or transaction. Grids display on the tabs of many forms and on some dialog boxes. For example, when you enter a new in-pursuit project for a contact, you add it to a grid that contains all of the previously entered in-pursuit projects for the contact record.

Grids make it easy for you to sort and organize data. You can pin the view of grid data, customize the view or order of columns, print a report of a grid's data, and export data from a grid to a spreadsheet.

Saving Your Work in a Grid

When you add a row to a grid or make a change to the information in an existing row, your work is saved automatically when you tab or click off of that row.

Grids with Many Rows

To more efficiently and quickly locate a specific row in a grid with many rows, use the grid's search option instead of scrolling. When you scroll through a grid with many rows, Vantagepoint may load only some of the rows initially, so that the tab displays quickly. If you continue to scroll through the grid, the scrolling action sometimes pauses to load the next set of rows as you approach the bottom of the scroll bar. The same thing may happen if you have scrolled down in the grid and then start scrolling up and approach the top of the scroll bar.

More About Grid Rows

Other icons with special purposes may also display in grid rows. For example:

⁝⁝: The Grid Options icon appears in many of the Vantagepoint grids when you hover your cursor at the end of a record's row. Click this icon to perform specific tasks (such as, edit, email, print, or others) or to refine the properties of a specific record in a grid. Depending on which application and record you are working in, the grid options will vary. The two most common grid options found in grids are **Copy** and **Delete**.

Collaboration: If your firm implements the integration with Collaboration, the Collaboration icon may display in touchpoint grid rows, and you can click that icon to add a task in Collaboration for that touchpoint.

About Parent/Child Grids

Parent/child grids are found in many applications, forms, and settings areas throughout Vantagepoint. A parent/child grid is a type of grid structure that consists of a primary (parent) grid and a related secondary (child) grid. When using parent/child grids, the value that you select in the parent grid determines the values that will be available in the child grid. Also, the title of the child grid will change to reflect the parent grid option that you selected.

Both parent and child grids have the full complement of tools available for sorting, filtering, adding, and removing records within a grid. In some cases, when deleting records from parent/child grids, you are required to remove records from both the parent and the child grids.

Example of Parent/Child Grid

The Billing Labor Categories Table form in **Settings** » **Rate Tables** » **Billing Labor Categories** has two grids:

- **Categories**: Use this parent grid to add labor categories (such as Principal, Engineer, or Project Manager) to the rate table. Select a labor category row to determine which labor category is used in the **Employee Overrides** grid. The selected labor category description is then appended to the Employee Overrides grid name. If no employees are listed in the grid for the labor category listed, click **+Add Employee** to display the Employee lookup, and then add one or more employees with the labor category to the grid list.
- **Employee Overrides in Category**: Use this child grid to add employees who should be billed at a different rate or a different category for a particular project. The Employee Overrides grid is based on the labor category that you selected in the parent grid. The labor category that you selected in the Categories grid determines the billing rate for the listed employees.

How to...

Use grids to work with records on various forms.

Add a Record to a Grid

Some grids allow you to add a new record directly to the grid. This saves time and also updates the record's respective hub or application.

To add a record to a grid:

1. Open a record.
2. Click the tab that contains the grid that you want to display.
3. Click **+ Add** below the grid to add a new row.
   Use the blank fields in each column to enter the new record's information.

Filter the Grid Results

When there are a large number of records in a grid, you can filter the results to further refine the list of records that displays.

To filter the rows in a grid:

1. Click above the upper-right corner of the grid.
2. To filter the grid based on values in one or more columns, do the following for each of those columns:
   - If the blank filter field above the column has an operator drop-down list, select an operator (for example, **= Equals** or **{ } Empty**).
   - In the blank field, enter or select a filter value.

   The grid updates to display the records that fit the criteria that you enter. The displays at the top of each column where a filter is applied.
3. To hide all filter fields, click above the upper-right corner of the grid.
   This also clears all filters and updates the grid to display the unfiltered contents. The filters are also cleared automatically if, for example, you select a different hub record, or you navigate to a different Vantagepoint application.

Copy a Grid Row

You can copy and modify an existing record on a grid to create a new record.

To copy a grid row:

1. Open a record.
2. Click the tab and then the grid row that you want to copy.
3. Mouse over the right end of the grid row so the **Grid Options** icon displays. Select **Copy**.
   A copy of the selected grid row displays on the row beneath the original. Modify this record's information and save to create a new record.

Delete a Grid Row

You can delete a record from a grid.

To delete a grid row:

1. Open a record.
2. Click the tab and then the grid row that you want to delete.
3. Hover over the right end of the grid row so the **Grid Options** icon displays. Select **Delete**.
   Vantagepoint prompts you to confirm the delete before removing the record from the grid.

Sort Grid Row Order

Use column headings to sort the information in a grid in ascending or descending order.

If a grid displays a sort icon (˅ or ˄) next to one of the column headings, you can change the default order of the rows in that grid. The column in which the sort icon appears is the current sort column, and the direction the icon points indicates whether the rows are sorted in ascending (˄) or descending (˅) order based on the values in that column.

You can change the sort order in two ways:

1. To reverse the sort order without changing the current sort column, click the column heading for that column. The sort icon changes to indicate the new order.
2. To sort the rows based on the values in a different column, click the column heading for that column. The sort icon displays next to the heading for the new sort column.

Maximize the Grid View

For better visibility, you can maximize the grid view to fill the browser window. This will cover the entire interface until you minimize the view to return to the previous display.

To maximize the grid view:

1. Open a record.
2. Click the tab and then the grid row that you want to maximize.
3. Click the **Maximize** option on the grid.
   Vantagepoint expands the grid to fill the browser window.
4. Click the **Minimize** option to return to the standard display.

Select Columns for a Grid

You can select the columns that are displayed in a grid from a number of Vantagepoint applications and reporting forms (for example, Timesheets, Expense Reports, Reporting, and Resource Management). Use the Select Columns dialog box to add, remove, and reorder columns in a grid.

The columns available for each grid include both standard fields and user-defined fields that are used in the corresponding Vantagepoint application.

To select columns for a grid:

1. Click at the upper-right corner of a grid or click **+ Manage Columns** on the Columns grid of the Columns tab or Columns & Groups tab. The Select Columns dialog box opens.
2. To add one or more columns, do one of the following:
   a) Click a column name in **Available Columns** to move the column to the **Selected Columns** list.

b) To add all the available columns to the **Selected Columns** list, click **Add All**.

3. To remove a column from the grid, do one of the following:
   a) Click ✕ to the right of a column in the **Selected Columns** list, to move the column back to the **Available Columns** list.
   b) Click **Remove All** to remove all the columns from the **Selected Columns** list and move all of them back to the **Available Columns** list.
4. To rearrange a column on the grid, click-and-drag the ⠿ icon on a column row to move the column up or down in the Selected Columns list.
5. If you want to return the column selections to the default settings, click **Restore Defaults**.
6. Click **Save**.

Change the Order of Grid Columns

In many grids, you can change the order of the columns directly on the grid or via the dialog box for selecting columns. There are some applications in which you must use the selecting columns dialog box to reorder columns on a grid. For example, list reports on the My Stuff > Reporting section.

To change the order of the columns:

Do one of the following:

- If you can select the columns that you want to display:
  1. Click ⚙ to display the dialog box for selecting columns.
  2. In the list of currently selected columns, hover over the first column row that you want to move.
  3. Click-and-drag the ⠿ icon to move the column up or down in the list.
  4. Repeat these steps for each column that you want to move.
  5. Click **Save** to close the dialog box and apply the changes.
- If you cannot select the columns that display:
  1. Hover over the heading for the first column that you want to move.

     In some browsers, the mouse pointer changes shape to indicate that you can move the column. For example, this behavior occurs in Resource Management Reporting when using the IE browser. (If the pointer does not change, that column is not movable.)
  2. Click-and-drag the column to the correct location.
  3. Repeat these steps for each column that you want to move.

Change the Width of a Grid Column

In many grids, you can change the width of individual columns

To change the width of a column:

1. Hover over the heading for that column.
   The boundaries between that column heading and its neighbors display. (If the boundaries do not display, the option to change column width is not available.)
2. Move the mouse pointer over one of the boundaries.
   The mouse pointer changes to a double arrow.
3. Drag that boundary to increase or decrease the width of the column.

Export Data to a .CSV File

You can export data from a Vantagepoint grid to a comma-separated values (.CSV) file.

To export data from a grid to a .CSV file:

1. Open an application that has a grid with the **Export as CSV** icon on the grid toolbar.
   Examples of grids that have the export capabilities:
   - The grids that display hub records when you open a hub and switch the form view to list view by clicking in the top right corner of the hub form

     To export from list view, your user ID must be mapped to an employee record. You are notified via the Notification Center as soon as the .CSV file is ready to be downloaded. The .CSV file is stored in the FileStream database until you download it.

     If you are exporting more than 100 records, the following Vantagepoint applications automatically leverage the process server when exporting records from list view: Projects hub, Employees hub, Firms hub, Contacts hub, User Defined hubs, Activities, and Users.
   - The invoices grid on the Invoice History tab in **Billing** » **Interactive Billing**
   - The Vendor Balances grid in **Cash Management** » **Vendor Payments**
2. On the grid toolbar, click .
3. On the Export as CSV dialog box, select an option:

Option	Description
Request Export	If you are exporting from list view, click this option. The export is scheduled and you are notified via the Notification Center when the .CSV file is ready to be downloaded.
Export All	If you are not exporting from list view, click this option. The .CSV file is available in the download bar at the bottom of the screen.

4. Open the file in the in Excel, or another third-party application that supports .CSV files, and then edit the file.

Pin the Grid Columns

Some grids include the option to "pin" one or more columns. This keeps the columns visible as you scroll across the grid to view additional columns.

A thumbtack icon appears in columns that you can pin. (You cannot pin columns in grids in the Planning application.)

To pin the columns in a grid:

1. At the upper-right corner of a grid, click .
2. On the Grid Settings dialog box, use the **Add** and **Remove** options to determine the columns that display in the grid:

To do this:	Complete this action:
Move a column to the **Selected Columns** list.	Click the column name in the **Available Columns** list.
Add all the available columns to the **Selected Columns** list.	Click **Add All**.
Move a column back to the **Available Columns** list.	Click × to the right of the column in the **Selected Columns** list.
Move all the columns from the **Selected Columns** list back to the **Available Columns** list.	Click **Remove All**.

3. To arrange the columns, click-and-drag the icon on a column row to move the column up or down in the **Selected Columns** list.
   The order of the columns in this list determines the order in which the columns display on the grid.
4. To lock columns, click the in each column that you want to lock.
   The thumbtack turns (black). Pinned columns move to the left side of the grid and remain open as you view the grid.
5. To unlock a column, click again (gray).
6. Click **Apply** when complete.

Fields and Options

These help topics describe individual dialog box fields and options in grids.

Grid Toolbar

Use the grid toolbar to maximize or minimize the records list, filter records in a grid, refresh the screen, export records to .CSV file format, and select columns to display on the grid. The options available on the grid toolbar may vary depending on the application that you are using.

Field	Description
	Click this icon to expand the grid to a full screen display. This expanded view reduces the need to scroll through long lists of records. Click this icon again to return to a standard grid display. For more information, see Maximize the Grid View.
	Click this icon to display the column filter options. Use the filter options to restrict the grid contents. For more information, see Filter the Grid Results.
	The Refresh option is available on the Favorites, Running, and Archived tabs of the Reporting form. Click this icon to refresh the screen and grid and to retrieve and display the current list of reports. Normally, Vantagepoint displays the current list. However, if you start the archive process for a report and click the Archived Reports tab before that process is finished, the list does not show the newly archived report. When you click **Refresh**, Vantagepoint updates the list.
	Click this icon to export the grid contents to a .CSV file. Expand the WBS structure you want to include prior to clicking the Export icon. For more information, see Exporting Data to a .CSV File.
	Click this icon to add, remove, or change the order of columns in the grid. The columns available for the grid include both standard fields and user-defined fields that are used in the corresponding Vantagepoint application area. For more information, see Select Columns for a Grid.

Grid Options

Use the Grid Options tool to perform specific tasks (such as, edit, email, print, or others) or to refine the properties of a specific record in a grid. Depending on which application and record you are working in, the grid options will vary. The two most common grid options found are copy and delete.

Field	Description
⋮	The Grid Options icon appears in many of the Vantagepoint grids when you hover your cursor at the end of a record's row. Click the Grid Options icon to select an option from the drop-down list. For more information about the grid options specific to Reporting or the Transaction Center, see Favorites Tab of the Reporting Form and Contents of the Transaction Entry Main Form .

Grid Settings Dialog Box

Use the Grid Settings dialog box to select the columns to be displayed in a grid.

Display the Grid Settings Dialog Box

You can display this dialog box to select the columns to be displayed display in a grid.

1. Open an application.
2. Click ⚙ in the upper right corner of the grid.
3. For Timesheets and Expense forms only, select either **Left Grid Column Selections** or **Right Grid Column Selections**.

Contents of the Grid Settings Dialog Box

Use the Grid Settings dialog box to select the columns to be displayed in a grid.

Contents

Field	Description
Available Columns	This list contains all of the columns that are available to display in the grid that have not already been selected to display. After you select a column from this list, it is moved to the **Selected Columns** list on this dialog box. To add a column to the grid, click the column in the **Available Columns** list. The column is moved to the **Selected Columns** list. Click **Add All** to add all available columns to the **Selected Columns** list.
Selected Columns	This list contains all of the columns included by default or that you selected from the **Available Columns** list to display in the grid pane. The column selections apply only to you. Other users can choose to display a different set of columns. For more information about selecting columns, see Select Columns for a Grid. The order of the columns from top to bottom in this list is the order that they will appear from left to right in a grid. To change the order, click ⠿ to the left of the column name that you want to move, and drag to move the column. To remove a column from the grid, click the **×** to the right of the column in the **Selected Columns** list. The column is moved back to the **Available Columns** list. Click **Remove All** to move all selected columns back to the **Available Columns** list.
Save	After you select the columns that you want, click **Save** to close the dialog box and update the grid.
Cancel	To close the dialog box without changing the columns in the grid, click **Cancel**.
Restore Defaults	If you change the columns in the grid and then later decide to restore the columns to the default selection originally provided, click **Restore Defaults**.

Saving Your Work

There are different methods for saving your work; in some cases, you click a save icon or Action menu item, and in others, Vantagepoint saves your work automatically.

Explicit Saves

When you enter new or changed data, some forms, individual tabs, and dialog boxes require you to explicitly save your work by clicking a Save button or selecting Save from an Actions menu. Vantagepoint displays a message at the top of the page to confirm that your work was saved.

If you cancel the form or dialog box without saving, any unsaved work is discarded.

If you try to select another record, go to another tab, or close a form without saving when a save is required, Vantagepoint displays a message asking if you want to save.

Automatic Saves

In many forms, particularly when you enter additional information for a previously saved record, Vantagepoint saves your work automatically. You do not have to explicitly initiate the save process. For a non-grid field, the automatic save occurs when you move the focus off of the field by clicking or tabbing, or when you press Enter. In a grid, the save occurs when you move the focus off of the grid row by clicking or tabbing, or when you press Enter from one of the grid fields.

For example, when you enter contacts on the Our Team tab in the Projects hub, the only required field is **Name**. If you select a contact in **Name** and move the input focus off of that grid row (by clicking elsewhere on the Our Team tab, for example), Vantagepoint automatically saves that contact as part of the team information for the in pursuit project.

When an automatic save occurs, Vantagepoint displays **Saving...** and a processing icon beneath the record title.

If Your Work Cannot Be Saved

If Vantagepoint tries to save and you have not made an entry in a required field (identified with a red asterisk near the field or grid column name) or an entry is not valid for some reason, Vantagepoint displays a message that describes the problem and highlights in red the field that caused the save to fail so you can correct it.

The message gives you the option to continue without saving, in which case your unsaved work is discarded, or you can cancel the message and correct the invalid or missing entry.

Printing Records

You can print reports from several areas in the Vantagepoint application.

Print Records from the Reporting Dialog Box

You can print a report directly from an application. You can access your favorite reports, create new reports, and view both current and archived reports.

Prerequisite: Open the record that you want to print.

To print a record:

1. On the Actions bar, select **Print Report** or **Other Actions** » **Print Report**.
   The Reporting dialog box opens in the Reporting application.
2. Use the tabs on the Reporting dialog box to specify the information to include on the report.
   You can find, view, and filter reports. You can work with all reports, or specify favorite, archived, or currently running reports.

Tab	Functionality	Related Information
Favorites	View reports that you have saved to your Favorites folder.	Favorites Tab of the Reporting Form Create a Favorite Report Run a Favorite Report
Reports	View, search, and filter all available reports to which you have access.	Reports Tab of the Reporting Form Create a New Report Run a Report
Running	View, search, and filter all reports that are currently running and to which you have access.	Running Tab of the Reporting Form
Archived	View, search, and filter all reports that are archived and to which you have access.	Archived Tab of the Reporting Form

Print a Report

After you run a report, you can print it from the report preview or save it as a PDF.

Prerequisites: From Reporting, Run a report. From other applications, click **Print**.

To print a report:

1. Click **Print** on the generated report's toolbar.
2. On the Print dialog box, select the **Page Size** and **Page Orientation** for the report.
3. Click **Print** to generate a printed version of the report.
4. On the Print dialog box, click the link to view a PDF of your generated report or click **Done**.

Download a Report

After you run a report, you can download one or more pages of the report to a specific file format, such as a Word or CSV file.

Prerequisites: From Reporting, run a report. From other applications, click **Print**.

To download a report:

1. Click Download on the generated report's toolbar.
2. Select the type of file:

Option	Description
Microsoft Word Document	Vantagepoint generates the report as a Microsoft Word document with the .DOC file extension. You can then use Word formatting options to modify the appearance of the report. If you generated the report in landscape orientation, set the page orientation in Word to landscape to preserve the report layout.
Microsoft Excel Spreadsheet	Vantagepoint generates the file in a format that you can open and work with in Excel. The file extension is .XLS. Use this option if you want to add your own calculations to the report in Excel.
PowerPoint	Generates the file in a PowerPoint format. The file extension is .PPTX.
Tagged Image File Format (TIFF)	Vantagepoint generates the report as a Tagged Image File with the .TIF file extension.
MHTML (web archive)	Generates the report as a web page archive file. The file extension is .MHTML.
CSV (comma delimited)	Vantagepoint generates the report as text file that contains a set of data items separated by commas. The file extension is .TXT and can be opened in a text editor or spreadsheet application, such as Excel. The .CSV files are often used for exporting and importing to and from various applications.
XML Document	Vantagepoint generates the report as an XML file with an .XML file extension.
Data Feed	Generates a text file of the report data with an .ATOMSVC file extension

3. To open the report file after it generates, select the file and click **Open**.

   Vantagepoint opens the file in the application that is associated with the specified file type on your computer.

Changing the Accounting Period

You select the accounting period in which you want to work (the active period) in Vantagepoint.

Changing the Accounting Period in the Vantagepoint Browser Application

This applies if you have the Accounting or Resource Planning module installed.

When you log in to the Vantagepoint browser application, you are automatically logged in to the latest open accounting period by default. If you have multiple companies in Vantagepoint, you are automatically logged in to the latest open accounting period for the active company that you logged in to. The period ending date for the accounting period displays on the Vantagepoint main toolbar. You can click the period ending date to change the period.

A **Period Ending** label displays on the Vantagepoint toolbar above the period ending date when the period that you are working in is the latest accounting period.

A **Prior Period Ending** label (with a brown background) displays on the toolbar above the period ending date when you are working in an accounting period that is **not** the latest accounting period.

Changing the Accounting Period in the Vantagepoint Desktop Application

In **Utilities** » **Change Period** in the desktop application, you specify whether or not you want the latest open period to be the default active period that opens each time you log in to the Vantagepoint desktop application. If you choose **not** to have the latest open period open automatically when you log in, you choose the accounting period to work in each time you log in to the desktop application.

In the desktop application, you can change the period that you are working in at any time in **Utilities** » **Change Period**. The period that you are working in displays in the Vantagepoint title bar at the top of the screen.

Processing in Closed or Prior Accounting Periods

If you switch to a closed or prior accounting period in the browser or desktop application, your ability to process data in that period is restricted if **Allow Processing in Closed Periods** or **Allow Processing in Prior Periods** is not selected for your security role.

How to...

You can change the accounting period that you are working in (the active period) in the Vantagepoint browser application.

Change the Accounting Period

After you log in to the Vantagepoint browser application, you can change the accounting period that you are working in.

For instructions on how to change the accounting period in the desktop application, see Change Period in the Desktop Application.

To change the accounting period in the browser application:

1. On the Vantagepoint main toolbar, click the period ending date or the prior period ending date.
2. In the Period Selection dialog box, select the period that you want to work in and click **Select**.

The period end date for the accounting period that you selected now displays in the Vantagepoint main toolbar to indicate this is the active period that you are now working in.

Fields and Options

Use the Period Selection dialog box in the browser application to change the accounting period that you are working in.

Period Selection Dialog Box

Use this dialog box in the browser application to select the accounting period that you want to work in (the active period) in the browser application.

Display the Period Selection Dialog Box

You display this dialog box in the browser application.

You must have the Accounting or Resource Planning module installed.

On the main toolbar in the Vantagepoint browser application, click the period ending date or prior period ending date.
The Period Selection dialog box is displayed.

Contents of the Period Selection Dialog Box

Use the fields and options on this dialog box in the browser application to choose the accounting period to work in (the active period) in the browser application.

Contents

Field	Description
Period Selection List	In this list of accounting periods, click the row for the period that you want to work in and click **Select**. The list of accounting periods displays the following information for each accounting period: fiscal period (month/year), period start date, period end date, and whether or not the period is closed. If you switch to a closed or prior accounting period, your ability to process data in that period is restricted if **Allow Processing in Closed Periods** or **Allow Processing in Prior Periods** is not selected for your security role.

Scheduling Processes

You can schedule a process or job to run at a later time or set them to recur at regular intervals in the future.

For example, you can set Vantagepoint to download currency exchange rates daily, run the Campaign Summary Report every December 30th, or run utilities to update hub records at a later time.

How to...

You schedule a process or a report to run at a later time in the Schedule dialog box .

Schedule a Job

From some applications, you can click a **Schedule** button to set when you want to run a process server job (for example, downloading currency rates or running a report) .

To schedule a job:

1. From the application, click the **Schedule**, **Schedule Download**, or **Schedule to Post** button.
   The Schedule dialog box displays.
2. On the Distribution tab, you can select a process queue, enter a description for the job, choose to add the job to a profile, or set alerts and notification when the job is completed successfully.
3. If you are scheduling a report to run, specify the following on the Distribution tab:
   - Select if you want to run the report in the current period or in the prior period.
   - Choose to create an archived copy of the report and enter the number of hours that you want the archived report saved. You can also choose to export the report and specify a file format.
4. On the Recurrence tab, indicate if the job is a recurring activity and set how often you want it to recur.

Depending on your level of access, you can find the scheduled jobs in **Utilities** » **Process Server** » **Queue Manager**, where you can view process details and statuses, modify related settings, or cancel processes.

For more information, see: Process Queue Manager Utility.

Fields and Options

The Schedule dialog box is available in Reporting, Transaction Center, Settings, and Utilities.

Schedule Dialog Box

Use the Schedule dialog box to schedule a process or report to run at a later time.

This dialog box is available in applications for which you can use process servers, such as Reporting, Utilities, Transaction Center, Workflows, Batch Billing, and Payment Review. The fields and options that display on the dialog box vary depending on which application you are using. You can access the Schedule dialog box in the following ways:

- Click **Schedule** on the actions bar of the form.
- Click **Options** ⁝ » **Schedule** on the Schedule Workflows form.
- Click **Schedule Download** on the Daily Exchange Rates form.
- Click **Schedule** on the Email Remittance dialog box.
- Click **Schedule to Post** on the Transactions Grid.
- Click **Create Invoices** on the actions bar of the Batch Billing form.
- Click **Schedule** on the Refresh Billing Extensions form.
- Click **Schedule** on the Update Billing Status form.
- Click **Schedule** on the Project Closeout form.
- Click **Schedule** on the Refresh Summary Tables form.
- Click **Yes** on the Batch Deletes confirmation dialog box.

Distribution Tab of the Schedule Dialog Box

Use the Distribution tab to select a processing queue, submit a profile, place a process on hold, or set up an alert so that you receive an email when a process runs.

The fields and options on this dialog box vary, depending on where you open the dialog box in Vantagepoint.

Contents

Field	Description
Start After	Select the date and time after which you want to run the job.
Process Queue	Select the queue for which you are submitting the job.
Queue Status	This field displays the status of the queue, such as Running, Hold, or Waiting.
Description	This field displays the name of the profile, which you can change.
Submit to a Profile	Select this option to add this job to an existing or new profile. A profile is a group of jobs that can be organized and submitted as a single job to a process queue.

Field	Description
Place Process On Hold	Select this option to place a job on hold. If you select this option and another user clicks **Run** for the same job, the job will not be sent to the process server. The job must be released before it can be run, even when a "start after" date and time has been specified. This option is useful for providing a visual reminder about a job that needs to be run at a future point in time. It is also useful for processes that need further authorization from the Vantagepoint administrator, or for reasons of resource availability or data security.
Email Me When Done	Select this option to have Vantagepoint send you an email message (alert) to indicate whether or not the submitted job completed successfully. Vantagepoint uses the email address specified in the Employees hub record of the employee who is currently logged in. This option is useful if you have certain types of jobs for which an alert is desired, but not necessarily for all types. For example, you may want to be notified when reports are done printing but not want to receive a process alert for any other process.
Send Me a Notification When Done	Select this option to have Vantagepoint add an item to the Notification Center to indicate if the submitted job was completed successfully. To view the Notification Center, click the number that displays in the menu bar. For example,  indicates that there are 5 notifications. This option is useful if you have certain types of jobs for which an alert is useful, but not necessarily for all types. For example, you may want to be notified when reports are done printing but not want to receive a process alert for any other process.
Create Report Archive	If you want to create an archive copy of the report, select this option and then enter the number of hours that you want to save the archived report in the **Archive Hours** field that is displayed. The option to archive reports is only available if you are using the Standard Edition or Enterprise Edition of Microsoft SQL Server.
Export Report as Files	Select this option if you want to export the report in a file and save it for reuse (printing, emailing, and so on). Depending on the file type, your browser settings determine how the file is opened. For example, if the file type is an Adobe Acrobat Portable Document Format (PDF), the PDF may open in a browser tab or in Adobe Acrobat.
Email Report	Select this option to distribute a report as an email attachment or to send a link to the report in an email message
Refresh Data	Select this option to update Vantagepoint data cubes from specific fields for which changes have been made since the last refresh. This option is available if the Vantagepoint Intelligence module is enabled.
Refresh Dimensions,	Select this option to update Vantagepoint data cubes based on changes in dimensions, measures, key performance indicators (KPIs), and calculated

Field	Description
Measures, KPIs, and Calculated Measures	measures made since the last refresh. This option is available if the Vantagepoint Intelligence module is enabled.
Refresh System Labels	Select this option to run a complete refresh of all fields, dimensions, and measures to update and recalculate Vantagepoint data cubes. This option is available if the Vantagepoint Intelligence module is enabled.
Full Refresh	Select this option to run a full refresh al data cubes, dimensions, measures, KPIs, and calculated measures. This option is available if the Vantagepoint Intelligence module is enabled. This option is not available if you are using a SaaS. Contact your administrator to request a full refresh of analysis cubes.
Refresh User Defined Fields	Select this option to include user-defined fields when analysis cubes is refreshed. This option is only enabled if you select the **Full Refresh** option and the Vantagepoint Intelligence module is enabled.

Recurrence Tab of the Schedule Dialog Box

Use this tab when you want to set up a job to run regularly, according to a specific time schedule (for example, on the first Monday of every month).

The fields and options on this dialog box vary, depending on where you open the dialog box in Vantagepoint.

Contents

Field	Description
Recurring Activity	Select this check box if you want the job to run automatically, according to a specific time schedule (for example, on the first Monday of every month). When you select this check box, the **How often does this recur** field and a Schedule section displays on the tab. Depending on your level of access, you can find the scheduled jobs in **Utilities** » **Process Server** » **Queue Manager**, where you can view process details and statuses, modify related settings, or cancel processes. For more information, see: Process Queue Manager Utility.
How often does this recur	If you selected the **Recurring Activity** check box, select how often you want the job to run: **Daily**, **Weekly**, **Monthly**, or **Yearly**. What you enter in this field determines the fields that you must complete in the Schedule section.
Always run in the following period	Select this check box, and then select **Current** or **Prior** to have the recurring job always run in the current or prior period.

Schedule Section

The contents of this section are based on what you selected in the **How often does this recur** field:

- If you selected **Daily**, you can choose to have the job run every specified number of days (for example, every seven days) or to have the job run every weekday (Monday through Friday).
- If you selected **Weekly**, you can choose how often you want the job to run and on what day of the week. For example, you could choose to have the job run every two weeks on Monday.
- If you selected **Monthly**, you can choose to have the job run on a specified day and specified number of months. For example, you could choose to have the job run on the 15th of every month. Or, on a specified day and week and specified number of months. For example, you could choose to have the job run on the third Wednesday of every two months.
- If you selected **Yearly**, you can choose to have the job run on a specific month and day of the year. For example, you could choose to have the job run every January 1st.

Field	Description
Ends On	Specify an end to the recurring scheduled job. Select **No End Date** to have it run indefinitely, or select **End Date**, and enter a specific end date.

Send Emails

From certain applications, you can send email messages that include records, reports, links to data, and text. For example, after you generate a report, you can send it to fellow employees while you are still working in the Reporting application.

How to...

You can send emails from various applications to individual employees, members of a security role, or contacts outside your firm.

Send an Email Message

When you enter an email message, you can include records, reports, links to data, and other details.

To send an email message:

1. Access the Email dialog box.
2. In the Recipient Options section, use **Select Attendees From** to refine the list of recipients who will receive the email message or notification.

Available settings depend on the application in which you are working and how your system is configured. For example, if you select **Role**, the list populates with all available security roles and all users in the role that you select will receive the email message.

After you make a selection, you can specify additional options to create a mixture of recipients. For example, after you specify a security role, you can also select contacts; both members of the selected security role and the contacts you specify receive the email message or notification.

3. Use the **Email Recipient** grid to select the recipients for the email message.
   The options that display in this list are based on the selection you made in step 2. For example, if you set **Select Attendees From** to **Project Roles**, the list includes all security roles that are designated as Project Roles. When you then select a specify role, such as Project Manager, Supervisor, or Primary Contact, the individuals that are included in that role receive the email message.

   The **+TO**, **+CC**, or **+BCC** fields display the recipients of the email based on entries from steps two and three.

   You can also manually enter an email address for one or more individuals. To send to more than one person, enter all addresses and separate them by either commas, semicolons, or by pressing the spacebar on your keyboard.
4. In **Subject**, enter the subject for the email or notification.
   If you are sending a report, the subject is autopopulated with the name of the report. You can edit this field.
5. In Message, enter the text for the message that will be sent when the email or notification is triggered.
   You can add text or field codes that act as placeholders for data. Click ▾ in the upper right of the memo field to enable the Text Editor.
   - **Regular Text**: You can enter text directly in this field and use the Text Editor to format it.
   - **Field Codes**: Click **Insert Field** to open the Insert Field dialog box and then select fields to insert from a list of all fields in the selected application. For each field, Vantagepoint inserts a code as a placeholder and when the email or notification is sent, the field codes are replaced with data from that field for that record.
6. If you are attaching a file to the email, use **File Type** to select the type.
   The allowed file types are: Adobe PDF, Rich Text Format (RTF), Microsoft Word Document, Microsoft Excel Spreadsheet, Tagged Image File Format (TIFF), Comma-separated Values File (CSV), XML, HTML, and HTML with link to report archive.
7. If the file type includes a link, the **Archive Hours** field displays and you can enter a number of 0 or greater.
   This is a number field with no decimals. You must schedule a report in order to archive it from this dialog box. You set the thousands separator on the My Preferences dialog box.
8. If you are sending an email message from Reporting, you can click **Preview File** to generate and preview the report before you send it.
9. If you This will bring up a dialog that behaves exactly as New Search's Save Options button, when the user clicks on it, it will bring up this dialog
10. On the Email dialog box, click **Send**.

Fields and Options

Review the fields and options that are available for sending email messages.

Email Dialog Box

Use the Email dialog box to send an email message to one or more team members, to distribute a report as an email attachment, or to send a link to the report in an email message.

This dialog box is available in many applications, such as Reporting, Workflow, Billing, Transaction Center, Payment Review, and anywhere the capability to email is enabled.

The fields and options that display on the dialog box vary depending on which application you are using. For example, in Reporting you can use the Email Report dialog box to distribute a report to your team members as either an email attachment or the email could include an actual link to the report within the email message.

Display the Email Dialog Box

The Email dialog box is available in several applications.

Some of the ways you can access the Email dialog box are:

- Select **My Stuff** » **Reporting** » **Favorites** tab. In the Favorites grid, click ⋮ to the right of the report row, and then select the **Email** option.
- Select **My Stuff** » **Reporting** » **Reports** tab, click **Email** on the Actions bar of the form.
- Select **Settings** » **Workflow** » **User Initiated Workflows** or **Scheduled Workflows**. On the Actions grid, select **Add Actions** » **Email Alert**.
- Select **Billing** » **Interactive Billing** and then use the Invoice History tab.
- On the Schedule Dialog Box, select **Email Report**.

Contents of the Email Dialog Box

Use the Email dialog box to send an email message. The options that display on this dialog box depend on the application you are working in.

Recipient Options Section

Use this section to define the list of recipients that will receive the email or notification. The options that display depend on your configuration and the application you are working in. You can select groups of recipients in the **Select Attendees From** field, use the **Email Recipient** list to select individual users, or enter specific email addresses in the **TO**, **CC**, or **BCC** fields.

Field	Description
Select Attendees From	Use this list to select a group of recipients that will receive the email or notification. For example, if you select **Role**, the Email Recipient list populates with all available security roles. When you select a role, all users within that role will receive the email or notification. Or, if you select **Employees**, the list changes to display all employees. After making a selection, you can specify a second option to create a mixture of recipient records. For example, after you specify a security role and the associated recipients, you can also select contacts to receive the email message or notification. ▪ **Users**: Select this setting to display a list of enabled users. Select one or more user names. These users will receive the email message or notification. ▪ **Roles**: Select this setting to open the Role Search dialog and select one or more security roles. All users in the designated roles will receive the email message or notification. ▪ **Contacts**: Select this setting to open a list of contacts from the Contacts hub. All selected contacts will receive the email message. ▪ **Employees**: Select this setting to open a list of active employees from the Employees hub. Select one or more names from this list; all selected employees will receive the email message. ▪ **Project Role**: Select this setting to open the list of security roles that are available for the project. You can only select one project role at a time. All users in the selected role will receive the email message. ▪ **Employee Fields**: This setting applies only when you open this dialog box from **Settings** » **Workflow** » **User Initiated Workflows** or **Settings** » **Workflow** » **Scheduled Workflows**. Select this setting to open a selection dialog box, on which you can choose one or more fields that are associated with the workflow type. For example, for the Projects hub there are Project Manager, Supervisor, Principal, and other key employees and user defined employee fields. When you use **Employee Fields**, Vantagepoint duplicates each field with one of the versions being denoted as (Old). In this case, Project Manager, and Project Manager Old will be in the list. This designation allows you to choose either the original (old) project manager or new project manager for situations when the workflow is being triggered due to a change in project manager assignment. When the event is triggered, the email or notification will be sent to the employees that are associated with the record's selected fields. ▪ **Approval Roles**: This setting applies only when you open this dialog box from **Settings** » **Workflow** » **Approval Workflows**. Select this setting to open an approval role selection dialog box where you can select multiple

Field	Description
	approval roles. The approval roles listed in the dialog box will be associated with the approval workflow type. For example, for Absence Requests, there will be Supervisor, Timesheet Group Admin, Organization Approval Role, and user defined fields from the Employees hub. When the approval event is triggered, then the email or notification will be sent to the employees that are associated with the record's selected approval roles.
TO, CC, BCC	Click these buttons to automatically add the recipients that were selected in the **Select Attendees From** field or **Recipient List** to the respective email fields. For example, if you are using Workflows, specify **Roles**, and then select three security roles, when you click **+TO** the names of those three roles will automatically display in the **TO** field. You can also click these buttons to open the respective email fields and manually enter email addresses: ▪ **TO**: Use this field to send emails to primary recipients. You can enter the email address directly in this field and to send email to multiple addresses, enter all of them in this field with semicolons (;) as separators between them. ▪ **CC** and **BCC**: To send copies to recipients other than the primary recipients, enter one or more email addresses for CC and BCC recipients. If you want to send copies to multiple addresses, enter all of them in the field, with semicolons (;) as separators between them. If you add one or more records of individuals that do not have an associated email address, you receive a message that alerts you to the issue and provides prompts to correct the error.

Message Options

Use these options to enter the content for the email, including any pre-defined placeholders for the text fields that you want to include.

Field	Description
Subject	Enter the subject for the email or notification.
Insert Field	Click this option to open the Insert Field dialog box and select fields to insert from a list of all fields in the hub from which you opened the configuration dialog box. For each field, Vantagepoint inserts a code as a placeholder, and when the message is sent, the field codes are replaced with data from that field for that record. If no data is selected for merging in the **Subject** or **Message** fields, Vantagepoint uses standard email functionality. Click **OK** to accept your entries, close the dialog box, and return to the email or Notification Configuration dialog box.

Field	Description
Message	Enter the text for the message that will be sent when you send the email or when the notification is triggered. You can add text or field codes that act as placeholders for data. ■ **Regular Text**: You can enter text directly in this field. To apply formatting to the text, click ▾ to open the Text Editor and use its options. ■ **Field Codes**: Click **Insert Field** to open the Insert Field dialog box and then select fields to insert from a list of all fields in the selected application. For each field, Vantagepoint inserts a code as a placeholder and when the email or notification is sent, the field codes are replaced with data from that field for that record.
Insert Field	Click this option to open the Insert Field dialog box and select fields to insert from a list of all fields in the hub from which you opened the configuration dialog box. For each field, Vantagepoint inserts a code as a placeholder. When the message is sent, the field codes are replaced with data from that field for that record. If no data is selected for merging in the **Subject** or **Message** fields, Vantagepoint uses standard email functionality. Click **OK** to accept your entries, close the dialog box and return to the email or Notification Configuration dialog box.
File Type	Select the type of file to attach to the email: Adobe PDF, Rich Text Format (RTF), Microsoft Word Document, Microsoft Excel Spreadsheet, Tagged Image File Format (TIFF), and Comma-separated Values File (CSV), XML, HTML, HTML with link to report archive. When you select HTML with a link to a report archive, Vantagepoint inserts the following in the email or notification body: Please click the link to view the [reportlink] report. This report will be available for viewing for [savetime]. The user can type in the body to change the message. [reportlink] and [savetime] are replaced with the link and time when it is sent.
Preview File	Click this option to run and export the report to the selected format for the purpose of previewing the file.
Archive Hours	This field displays if the selected file type includes a link. You must schedule a report in order to archive it from this dialog box.

Saving Options for Processing Applications

For accounting processing applications, you can save options for future use.

You can save processing options in the following applications:

- **Accounting** » **Revenue Generation**
- **Accounting** » **Consultant Accruals**
- **Billing** » **Batch Billing**

- **Billing** » **Employee Realization**
- **Utilities** » **Updates** » **Update Billing Status**
- **Utilities** » **Updates** » **Refresh Billing Extensions**

How to...

You can select a saved search, save a new search, or restore the original default settings of all options on the form.

Create Saved Options

You can save a set of customized options for processing runs.

Open one of the following applications:

- **Accounting** » **Revenue Generation**
- **Accounting** » **Consultant Accruals**
- **Billing** » **Batch Billing**
- **Billing** » **Employee Realization**
- **Utilities** » **Updates** » **Update Billing Status**
- **Utilities** » **Updates** » **Refresh Billing Extensions**

To save a new set of options:

1. On the application form, select the options for processing runs.
2. Click ▼ next to **Saved Options** and select **+ Save Current Options**.
3. On the Saved Options dialog box, enter a name for the option settings you are saving.
4. To save the search for users with specific security roles, click ▼ in the **Save For** field and select one or more user roles from the list.
5. Optional. In the **Description** field, enter comments.
6. To save the options as the default set, select the **Make Preferred** check box.
7. Click **Save**.

Restore Default Options

You can restore the original default setting for all options.

To restore saved options to default settings:

On the processing application form, click ▼ next to **Saved Options** and select **Restore Defaults**.

Delete a Saved Option

You can delete existing saved options.

To delete a saved option:

1. On the application form, click ▼ next to **Saved Options** and select **+ Save Current Options**.
2. Click 🗑 next to the option you want to delete.

Fields and Options

Use the Save Options dialog box to edit your application processing options.

Save Options Dialog Box

Use this dialog box to save your processing options.

Display the Save Options Dialog Box

You display the dialog box from the application form.

On the application form, click ▼ next to **Saved Options** and select **+ Save Current Options**.

Contents of the Save Options Dialog Box

Use the fields on this dialog box to select the options for your processing application.

Contents

Field	Description
Name	Enter the name for this set of options.
Save for	Use the drop-down list to select one or more of the following: ▪ **Myself**: You can use the search. This option is automatically selected for all saved searches. ▪ **Specific roles**: Users with the specific security roles that you select can use the search. You can always save searches for your own use, but you can also save searches for other users if your security role is set up to allow that. You can select multiple roles from the list.
Description	Enter comments or other information.

Field	Description
Make Preferred	Select this check box to define the current options as the default setting. These options will be the default setting when the application is opened for the roles it is associated with.

About Deltek

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