Deltek Vision 6.1 Visualization Quick Reference Card

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Visualization Maps are graphical representations of key metric values for your projects, project plans, and opportunities. The maps can help you analyze performance, determine trends, and identify risks to your business. Each map is a set of rectangular blocks, and each block in a map represents an individual project, project plan, or opportunity, or a group of projects, plans, or opportunities. The sizes and colors of the blocks represent performance against the metrics you select.

To access Visualization, complete these steps:

1. Click **Reporting » Visualization** on the Vision Applications menu.

2. To create a map, select the type you want to create (Project, Opportunity, or Project Planning) and specify options and record selection criteria.

   To view a map, select it and click **Preview** on the Reporting toolbar. (You can also add maps to your Dashboard and access them there.)

Grouping

Select the primary grouping category in **Grouping**. In this example, the primary grouping is by project type (Sports/Recreation, Office Buildings, and so on).

You can add other grouping categories to create a grouping hierarchy. Here, Vision displays blocks for each project within larger blocks for each project type. To add the **Project Short Name** category to create the inner grouping, you right-click on the **Project Type** field and click **Add Category** on the pop-up menu.

Use the Grouping tab of the Options dialog box to select the grouping categories that you want to have available in the Visualization window.
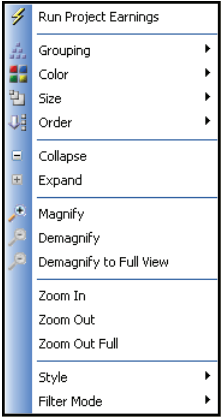
Right-Click Menu

Right-click a block or group to display a menu that enables you to

- Drill down to supporting detail.
- Collapse or expand a group.
- Zoom in on or magnify the block or group.

Right-click anywhere in the map to

- Select a map style.
- Change how Vision displays the map when you filter out blocks.

Color

Select the metric that you want to represent by block colors.

Here, the deepest blue blocks have the highest **JTD Revenue** amounts and the deepest red blocks have the lowest .

You can select any metric for which you selected **Color By** on the Metrics tab of the Options dialog box.

Size

Select the metric that you want to represent by block sizes.

Here, the largest blocks have the highest **JTD Spent @ Cost** amounts.

You can select any metric for which you selected **Size By** on the Metrics tab of the Options dialog box.

Size Slider

Drag the left and right filter handles on this slider to filter out blocks with low or high values for the metric selected in **Size.**

Save and Load Settings

As you work with a map, you can save a version of it so you can restore that version without having to recreate it.

To save the current map settings, click **Save Settings**. To display a saved version, click **Load Settings** and select the set of saved settings you want.

Tool Tips

To view the metric values for a block, position the mouse pointer on the block. Vision then displays the values for that block in an information tool tip so you can read them easily.

Color Slider

Drag the left and right filter handles on this slider to filter out blocks with low or high values for the metric selected in **Color.** You can also use the slider to change map colors.