Deltek Vision® 6.1 Project Planning Quick Reference Chart
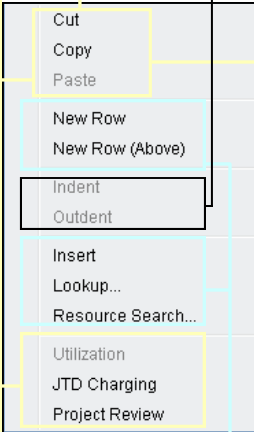
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Shortcut Menu
Right-click in the grey area to the left of the **Description** column for any given row to access the shortcut menu.

Cut, **Copy**, and **Paste** existing rows from the open plan to build your new plan, and assign resources.

Utilization - Displays the current resource utilization schedule for the selected employee from the plan's **Start Date** to the plan's **End Date**.

JTD Charging - Displays all employees who have charged hours to this WBS level with JTD totals and a drill-down option to the Labor Detail report.

Outdent and Indent
Select a row in the grid and click **Outdent** (left button) to move a subset row to the highest level. Select a row and click **Indent** (right button) to make the selected row a subset of the left-justified item above it. Subset rows can be opened or closed using the plus and minus sign.

Set Start and Finish Dates
You specify a start and end date for each WBS element in the **Start** and **Finish** columns. By default, a new task's **Finish** date is determined by the **Start Date** or **End Date** on the Plan's General tab (depending on how the plan was created - from Project, from Opportunity, or from scratch). The **Finish** date is updated based on hours you enter in the **Planned Hrs** fields on the accordion grid. Right-click in the **Finish** column to select **Match finish date(s) to planned values** and rollback a **Finish** date to match the hours entered for the task. When you add hours in the **Planned Hrs** fields on the accordion grid, the **Finish** date updates, providing that the hours are entered for a date beyond that currently entered in the **Finish** column.

Project Planning Grid Options
Options such as creating a new task or inserting resources are available from both the shortcut menu and the **Labor** grid options.

New Row/New Row (Above) - Create a new row in the plan to correspond to a project WBS element (project, phase, task, labor code).

Insert - Insert a resource (employee) as a row in the plan. The employee is associated with the WBS element in the row above the insertion point.

Lookup - Retrieve the Employee Lookup in the Labor tab, and an Account Lookup in the Expenses or Consultants tab.

Resource Search - Within Project Planning, you can assign multiple employees and/or generic labor categories, perform a skill search, or search for employees based on experience.

Map the Plan
You can map your plan's data to the Vision Accounting and Info Center applications. In mapping a plan, you integrate its elements with your project and accounting WBS elements (project, phase, task records, and labor codes) to support reporting actual hours and actual costs in your plan.

Project Planning Toolbar
Save - Saves the current plan.

Save Baseline - Saves the current plan as a snapshot for comparison purposes. You can have just one baseline version for any plan. Saving a new baseline overwrites the previous baseline data.

New - Select an option to create a new plan either from scratch, or by copying an existing plan, project, or opportunity.

Delete - Delete the plan currently displayed in the form.

Actions - Select an option to import the project to or export it from MS Project, create a project from the plan, or to populate the Analysis tab's compensation fields from the Labor tab's.

Options - Select an option to configure the accordion calendar display, set default plan levels for WBS elements, configure row and column display on grids, select a plan retrieval mode, or collapse dates on grids.

Help - Click to open the Vision Project Planning Help.

Spread Amounts
Right-click in the **Planned Hrs** field for any period to spread hours across periods. (Right-click on the **Planned Cost** field from the Expenses or Consultants tabs to spread costs.) Options are:
Fill - Multiply the number of hours specified by the number of business days within the specified periods. For example, if you enter 6 **Hours per Business Day to Fill**, and there are 5 business days in the period, 30 displays in the **Planned Hrs** field for each period within the range.
Copy - Copy the same amount to all columns within the specified period range.
Spread Proportionally - Spread hours proportionally over a time period you specify. This feature takes into account the original hours in each period within the range specified, and spreads the hours according to that proportion.
Spread Evenly - Spread hours evenly to the designated periods.

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Screenshot content

Cut
Copy
Paste
New Row
New Row (Above)
Indent
Outdent
Insert
Lookup...
Resource Search...
Utilization
JTD Charging
Project Review

Project Planning   Find

Save   Save Baseline   New   Delete   Actions   Options   Print   Help

Adelphi Research Lab   Retrieve Mode: All Data * ETC/JTD Date: 6/30/2007

General | Rates | Top-down Plan | Summary | Analysis | Labor | Expenses | Consultants | Units

Labor   New Row   Delete   Insert   Employee   Generic   Search   Indent   Outdent   Shift

Description	Start	Finish	WBS Level	Project	Phase	Subrow	Q1 2004 Jan 2004	Q1 2004 Feb 2004	Q1 2004 Mar 2004	Q1 2004 A...
						Gantt				
						Planned Hrs	591	312	80	
						Planned Cost	11,820	6,240	1,600	
⊟ Adelphi Research Lab	1/1/2004	12/31/2007	Project	2003005.00		Planned Bill	35,460	18,720	4,800	
						Actual Hrs				
						Actual Cost				
						Actual Bill				
						Gantt				
						Planned Hrs				
						Planned Cost				
⊟ Pre-Design	4/8/2007	5/18/2007	Phase	2003005.00	1PD	Planned Bill				
						Actual Hrs				
						Actual Cost				
						Actual Bill				
						Gantt				
						Planned Hrs				
						Planned Cost				
⊟ Programming	4/8/2007	5/9/2007	Task	2003005.00	1PD	Planned Bill				
						Actual Hrs				
						Actual Cost				

Fill...
Copy...
Spread Proportionally...
Spread Evenly...

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