

Deltek Vision® 6.1 SF330 Proposals

Quick Reference Card for Setup

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Before you can start creating an SF330 proposal, you must review the entries in four code tables and configure your proposal firms.

3. To add a new code to a code table, click the **Insert** option in the table header. To see whether a code already exists in the code table, click the table's **Description** column heading. The code table will sort its codes alphabetically by description.

Employee Role ▾ Move Down Move Up Insert

Description	Code	Default
Architect	8	<input type="checkbox"/>

Employee Skill/Discipline ▾ Move

Description	Code	SF330 Code
Administrative	01	02

Project Codes ▾

Description	Code	SF330 Code
254 Code	254	
Acoustics; Noise Abatement	001	A01

Vendor Role ▾

Description	Code
Acoustics	25

9. After updating code tables, you must configure **Firm Setup - Proposals**. This data is used in SF330 proposals. Create or update a record for each of your organization's office locations.

To open the form, select **Configuration, Organization, Firm Setup - Proposals** from the main menu.

1. Select **Configuration, General, Code Tables** from Vision's main menu. If your Vision main menu does not include **Code Tables**, see your system administrator about your access rights.

Configuration

- General
 - System Settings
 - Company Settings
 - User Defined Tabs
 - Lookup/Report Labels
 - Calculated Fields
 - Custom Report Options
 - Code Tables**

Code Tables	
Description	Table Name
Employee Role	CFGEmployeeRole
Employee Skill/Discipline	CFGEMSkill
Project Codes	CFGProjectCode
Vendor Role	CFGVendorRole

2. These excerpts from the Code Tables list show the four code tables to review. To open a table, click its **Description**.

4. The Employee Role code table is key to proper creation of the Section G matrix. In order for Vision to populate Section G correctly from Sections E and F, each employee's role on a project must be defined on the project's Team tab in the Project Info Center. This code table comes installed with three roles. You must add any other employee project roles your firm uses, before preparing your project records for use in an SF330 proposal.

5. Firms may have more disciplines than the standard set provided by the General Services Administration. Before setting up your office locations in **Firm Setup - Proposals**, you may wish to review and modify the discipline list by modifying the Employee Skill/Discipline code table.

6. If your firm has a license for the SF254/255 application, the Skill/Discipline and Project Codes tables each display an **SF330 Code** column. For each new code you add, assign it a **Code** and **Description**, but leave **SF330 Code** blank.

7. Firms may wish to use profile codes not in the standard set provided by the General Services Administration. Before selecting profile codes on the SF330 tab of **Firm Setup - Proposals**, you may have to modify the Project Codes code table.

8. Section F, Block 25 reflects the role a vendor team member has on a project. You must, therefore, add vendor roles to the Vendor Role code table.

9. After updating code tables, you must configure **Firm Setup - Proposals**. This data is used in SF330 proposals. Create or update a record for each of your organization's office locations.

To open the form, select **Configuration, Organization, Firm Setup - Proposals** from the main menu.

Configuration

- General
- Workflow
- Security
- Organization
 - General
 - Codes
 - Individual
 - Firm Setup - Proposals**

Apple & Bartlett, PC, Boston, MA

General Additional Info Associated Organizations SF330

Name Apple & Bartlett, PC

Office Location Boston, MA Parent ☐

Address 1 11 Center Square

Address 2 Suite 401

City Boston State/Province Massachusetts

10. The Firm Setup form opens to the General tab. In new records, **Name** and **Office Location** are highlighted in yellow, indicating required fields.

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Continued from reverse side

Apple & Bartlett, PC, Boston, MA

General Additional Info Associated Organizations SF330

Date Established 3/2/2000 31 Total Personnel

Ownership Type Professional Corp Linked Employees 16

Minority Status

Small Business ☐ Woman Owned ☐

Small Disadvantaged ☐ Interested in Foreign Work ☒

Parent Firm

12. Use the Additional Info tab to enter and update a proposal firm's historical and statistical data.
- Most fields on the Additional Info tab populate one or more areas of the SF330 form.

Apple & Bartlett, PC, Boston, MA

General Additional Info Associated Organizations SF330

Organizations

Organization	Organization f
BO:BO:AD	Boston Admin

13. If your company uses Vision Organizations, its Vision data is stored by Organization. Organizations are linked to Employee Info Center and Project Info Center records.
- For the SF330 application to retrieve this information, each organization whose data will be used in the SF330 proposal must be added to this Associated Organizations tab in the applicable firm record.
- A firm may have more than one associated organization, but an organization may be associated with only one firm. If you insert an organization that is already associated with another firm, Vision displays a message and prompts you to select a different organization.

Apple & Bartlett, PC, Boston, MA

General Additional Info Associated Organizations SF330

Annual Average Revenue - Last 3 Years

Federal Work 0

Non Federal Work 0

Total Work 0

14. Each field on the SF330 tab populates one or more areas of the SF330 form.