Deltek for Professional Services 1.1

Introduction to Deltek for Professional Services for Deltek Resource Planning Users and Administrators

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Contents

Overview

Deltek for Professional Services (DPS) includes the planning tools that you are familiar with from Deltek Resource Planning, but the new features in DPS take your planning options to a much higher level. The planning functionality from Deltek Resource Planning is now a part of the Resource Planning module in DPS. Fully implemented, DPS has several modules (Accounting, Resource Planning, CRM, and so on). However, your upgrade to DPS converts Deltek Resource Planning from a standalone application into DPS with only the Resource Planning module activated.

The purpose of this guide is to introduce you to what this “flavor” of DPS includes and to summarize the following to help you move forward with your implementation of DPS:

- Changes to the functionality that you had in Deltek Resource Planning.
- New project planning features.
- New settings and utilities for system administrators.
- Important first steps for implementing DPS.

Included throughout the guide are links to related DPS help topics that provide more information. Keep in mind that the help is written for a complete DPS implementation. As a result, the help topics may contain some information that does not apply to your partial implementation. Note also that the links take you to help files on Deltek cloud servers, so you must be connected to the internet to use the links.

About DPS

DPS was envisioned, designed, and constructed to be a fully cloud-based product that is easy to use while still providing a fully featured solution for project services companies. It is also the next step on the upgrade path for several existing Deltek products, including Vision and Deltek Resource Planning.

The development of DPS involves both a new technology base to support delivery in the cloud and a reimagined user interface that accentuates data visibility and data usability online, rather than the old data entry and reporting approach.

Technology innovations and user interface design for Deltek Resource Planning were essentially the pilot program that led to DPS, and as past Deltek Resource Planning users, you will find much that is familiar in the look and feel of DPS.

That said, however, it is important to note that this product evolution is still occurring. While nearly all of the functionality from the older Deltek products is available in DPS, some of it is in the new browser-based environment and some still based on the older technology (hereafter referred to as the “desktop environment”). With each future release, more functionality will move to the browser environment until the transition is complete.

You will find nearly all planning applications in the new browser environment. The most notable exception is that project planning reports are only available in the desktop environment. The table below gives you an overview of how the functionality is currently split between the two environments. (Note that some functionality currently exists in both environments.)

The Navigation menu in the browser environment lists only the applications in that environment.

The Navigation menu in the desktop environment lists all applications for both environments. If you select an option for an application that only exists in the browser environment, that application displays in your browser.

Functionality	DPS Browser	DPS Desktop
Dashboard	**Yes**	**Yes**
Favorite reports	**Yes**	**Yes**
User preferences	**Yes**	**Yes**
Employees hub	**Yes**	No
Projects hub	**Yes**	No
Project planning	**Yes**	No
Resource management (including the resource and project reporting that was available in Deltek Resource Planning)	**Yes**	No
Planning reports	No	**Yes**
Employee reports	No	**Yes**

Functionality	DPS Browser	DPS Desktop
Administration reports	No	**Yes**
Utilities: ▪ Options related to integration of other products with DPS ▪ Imports and exports	**Yes**	No
Utilities: All other utilities	No	**Yes**
Settings: General system settings	**Yes**	**Yes**
Settings: System labels	No	**Yes**
Settings: Security roles	No	**Yes**
Settings: ▪ Users ▪ Password policies ▪ Field selection lists ▪ Resource planning settings ▪ Accounting settings ▪ Rate tables ▪ Screen Designer ▪ Dashboard Designer	**Yes**	No
Settings: ▪ Company settings ▪ Lookup and report labels ▪ Calculated fields ▪ Custom report options ▪ Currencies ▪ System alerts ▪ Workflows ▪ Labor codes	No	**Yes**

Resource Planning Module

Overview

The Resource Planning module provides the following:

- Resource management: Project View, Resource View, and resource management reporting.
- Project planning: labor, expenses, and consultants planning, plus the ability to enter contract amounts for contract-to-plan comparisons.
- Opportunity planning: labor hours only.
- Hubs for employees and projects, with limited data. (If you activate the CRM module, DPS has an Opportunities hub also, along with a more fully featured Projects hub.)
- Resource planning dashboard.
- Resource planning alerts.
- Planning reports.
- Settings for configuring the module.
- Utilities that the administrators can use for maintaining and modifying the module. Included in the utilities are the imports for bringing data into DPS from other applications.

Changes Based on Your Requests

Of the changes most often requested by Deltek Resource Planning users, the following have been implemented in this version of DPS:

- **Calculated amounts:** You can now set up rate tables for both employees and generic resources to support the calculation of labor amounts from planned hours for project plans. You can also set up rate tables for expenses and consultants. If you want to calculate labor amounts based on employee provisional rates, you can import or enter those provisional rates.
- **Ability to update employee attributes:** In the Employees hub, you can make changes to employee information, and you can add new employees.
- **Export process for plan data:** Using the new export utility, you can export plan data for one or a selected set of projects to a .CSV file for use in other applications.
- **Ability to manage generic resources:** The Resource Planning module includes a form for adding and maintaining generic resources within DPS.
- **Stable resource management reports:** DPS includes fixes for a number of problems that limited the effectiveness of resource management reports in Deltek Resource Planning.

New Data Not Supported by Costpoint Integration

Customers with Deltek Costpoint who used Costpoint Integration to transfer planning-related data to Deltek Resource Planning can continue to do that with DPS. Note, however, that Costpoint Integration does not provide all of the data required to support some of the new features available in DPS.

The Costpoint Integration does not supply the following:

- **Historical amounts for labor, expenses, and consultants**

  Alternatives: Use the .CSV imports available in the browser environment, or use the API to create a separate integration for importing this data.

- **Different cost and billing currencies**

  Alternative: If you use multiple currencies, set up currencies on the Currency Configuration form in the desktop environment (**Settings > General > Currency**), and use the Project Plan import in the browser environment to specify the currencies that apply to individual projects.

- **Firms**

  If you plan expenses or consultants, you can do so for specific vendors. While Costpoint Integration supports creation of client firms when you use it to import projects into DPS, it does not support the import of vendor firms for planning expenses or consultants.

  Alternatives: Use the .CSV import available in the browser environment, or use the API to create a separate integration for importing firm records for vendors.

- **Chart of accounts**

  Alternative: Use the Accounts form in the browser environment (**Settings > Accounting > Chart of Accounts**) to enter the accounts you need in order to enter planned amounts for expenses and consultants.

- **Generic resources**

  Alternatives: In the browser environment, use the .CSV import for generic resources, or add the generic resources using the Generic Resources form (**Settings > Resource Planning > Generic Resources**).

- **Employee provisional rates**

  Alternatives: Use the Employees .CSV import to import the rates for new and existing employees, or enter the rates on the Accounting tab of the Employees hub (**Hubs > Employees**). If you use the import process, include the provisional rates in the import file, and map those fields to the corresponding DPS provisional rate fields (**Provisional Billing Rate**, **Provisional Cost Rate**, and so on).

- **Rate tables**

  Alternative: Use the rate table forms in the browser environment (**Settings > Rate Tables**) to set up the rate tables.

- **New citizenship fields**

  Alternatives: In the browser environment, use the .CSV import for employee citizenship information, or enter the information for employees individually on the Personal and Contact Details tab of the Employees hub (**Hubs > Employees**).

Resource Management

The Project View, Resource View, and resource management reporting in DPS are nearly the same as they were in Deltek Resource Planning.

Links to these applications display under **Resource Management** in the DPS Navigation menu.

Opportunity planning is also the same as in Deltek Resource Planning. As before, you can only plan labor hours for opportunities, and you can only access opportunity plans in Project View or Resource View. The option for setting up the plan structure for an opportunity is under **Resource Management** in the Navigation menu. If the CRM module is not activated, you also use that option to add new opportunities. (Adding an opportunity automatically adds an empty plan for that opportunity.) When you win a contract, you have the option to transfer the plan structure from the opportunity to the new project's plan, as you did in Deltek Resource Planning.

To view related help topics: Resource Management.

Notable Changes

Among the changes to resource management functionality are the following:

- **Integration with project planning:** A project in DPS has a single plan. Resource assignments and planned/ETC hours that you enter for a project in Project View, Resource View, or in the project planning grids in the Projects hub all update the same plan.
- **Plan check out and check in:** To avoid problems that can result if more than one person is working in a plan at the same time, you can only update a plan if it is checked out to you. When you click on a plan row in Project View or Resource View, DPS attempts to check out the plan to you. If someone already has the plan checked out, you cannot update it until it is checked in. In addition, DPS does not check out a plan for you that has unpublished changes, as those changes may indicate that someone is in the process of changing the plan but is not yet ready for the new version to be shared.

  If a plan is checked out to you and you switch to a different plan, DPS automatically checks in the previous plan for you.
- **New rescheduling option:** A new **Replace All Child Plan & Assignments Dates with New Parent Dates** check box displays in the Reschedule dialog box when you select **Change Duration**. By default, the **Change Duration** options will only change the dates on child rows if they match the original plan dates or will be outside the new plan dates. Select this check box to make all the child rows synchronize with the new plan dates and, optionally, to redistribute their hours and amounts.
- **Dashboard location:** You now access the dashboard containing the Upcoming Generic Assignments dashpart using the **Dashboard** option under **My Stuff** on the Navigation menu.
- **Saving custom searches for other users:** In Deltek Resource Planning, you could create and save custom searches. However, you were the only person who could use a custom search that you created. In DPS, you can also save a custom search and make it available to all users, all users with the same security role as you, or a group of users that you select individually. To use this feature, click **+ Save Options** above the **Search Name** field in the Custom Search dialog box. (Exception: In Resource View, you can only create custom resource searches for your own use.)
- **Column filtering in grids:** Deltek Resource Planning enabled you to apply filters to one or more displayed columns on a resource management report. The report only included

records that satisfied all the filters. In DPS, this filtering capability is also available for most grids. As you do for resource management reports, click in the upper-right corner of a grid to display the column filter fields.

Project Planning

The heart of the Resource Planning module is the project planning feature. You can enter planned labor hours, and DPS calculates planned amounts based on rate information that you provide. You can also enter planned amounts for expenses and consultants.

Most of the project planning occurs in the Projects hub, but you can also use Project View and Resource View to make changes to labor assignments and planned hours in project plans.

Projects Hub

If the Resource Planning module is activated but none of the other core modules (Accounting, CRM, CRM Plus, or Time and Expense) is activated, DPS includes a streamlined Projects hub in the browser application.

That streamlined hub has the full suite of DPS project planning functionality, with features scaled back to only provide the functionality needed to support planning activities. In some cases, entire tabs are hidden because they are not related to resource planning.

The Projects hub has two modes: Project mode and Plan mode.

Project Mode

In Project mode, you can drill down into the WBS hierarchy, and you can view basic project information, project performance charts, and team members (firms, employee, and contacts associated with the project). All of this information must be imported into DPS from source applications in which you maintain it. To ensure that project information in DPS stays in sync with the information in the source application, you cannot add projects, make changes to the WBS, or edit data for any standard fields.

However, you can do the following in Project mode:

- You can view projects in Detail View and in List View, and you can export project information from List View.

  Detail View presents all data for the currently selected project, while List View displays selected data for all of the projects in your current search list. To switch from Detail View to List View, click in the upper-right corner of the Projects form. To switch back to Detail View, click in the same location. (Detail View and List View are available in all hubs and in some other DPS forms.)

- You can use the Files & Links tab to upload, view, and store files that are related to the current project record. You can also add URLs, email addresses, and links to files and graphics.
- You can use Screen Designer to create custom user-defined tabs and fields for the hub.
- If you use Screen Designer to create user-defined fields, you can enter and edit data in those custom fields.
- You can delete a project that you no longer want in DPS for planning purposes. Doing so removes that project from DPS, including its planned and job-to-date actual hours and amounts. You can also delete parts of the WBS for a project that you do not want to maintain planning information for. Deleting a project in DPS does not affect the information in the application that was the source of that imported project data.

Plan Mode

In Plan mode, you have access to the full project planning capabilities of DPS. The remainder of this section summarizes those capabilities.

Accessing a Plan

To display and update a project plan in the Projects hub:

1. On the Navigation menu in the browser environment, click **Hubs > Projects**.
2. Use the search field at the top of the Projects form to select the project.
3. Click **Plan** on the Project/Plan toggle to switch to Plan mode:

   

4. If you want to update the plan, click **Other Actions > Check Out**.

Checking Plans Out and In

To make changes to a plan in DPS, that plan must first be checked out to you.

In Resource View and Project View

In the two resource management views, Resource View and Project View, a plan is automatically checked out to you when you perform any action that could result in a change to a plan, assuming that the plan is not currently checked out to someone else. This enables you to move efficiently from one assignment to another without having to explicitly check out the affected plan each time.

For example, if you click on a WBS row for a resource assignment in Resource View, the corresponding project plan is automatically checked out to you. As long as you continue to work on assignments for that plan, it remains checked out to you, but if you move to rows for a different project, the first plan is automatically checked in and the newly selected plan checked out.

A plan that you have checked out in Resource View or Project View is automatically checked in when you navigate away from that plan.

In Projects Hub

When you are working in Planning mode in the Projects hub, you must use the **Check Out** option on the Other Actions menu to explicitly check out a plan that you want to update. The primary reason for this approach, rather than automatically checking out the plan as in Resource Management, is to enable you to review a project plan without checking it out and thus locking it for an extended period of time, preventing another user from updating it.

As in Resource View and Project View, checking in a plan that you have checked out in the Projects hub occurs automatically when you navigate away from that plan. For example, DPS automatically checks the plan in when you switch from Planning mode to Project mode, select a different project, log out of DPS, navigate to a different URL, use the browser's **Refresh** option, or close the browser.

Checking In a Plan Manually

Though a plan is automatically checked in when you switch to a different project or go elsewhere in DPS, there may be situations in which you need to manually check in a plan. For example, another user could accidentally leave a plan checked out when they leave for the day, and you need to update that plan. Or a power outage could prevent DPS from automatically checking in plans that were checked out at the time of the outage.

To check in plans in such cases, select **Check In Plans** on the Actions menu in Project View, in Resource View, or in Plan mode in the Projects hub. The Check In Plans dialog box lists all currently checked out plans so you can select the ones you want to check in. You can check in the plans that are checked out to you, and, if your security role is an Administrator role, you can also check in plans that are checked out to others. Be aware, however, that if you check in a plan that is checked out to someone else, they may lose unsaved changed as a result. For that reason, it is recommended that you first try to contact that person before checking in the plan.

Planning Grids

You interact with the planning grids in Plan mode in the Projects hub very much as you do with the grids in Project View and Resource View.

- Hover over or click a WBS row for which you want to add an assignment, click **+** in the Level/Resource column, and select the resources.
- Click a resource row to display fields for entering planned hours or amounts for that resource.
- Hover over a row and click ⋮ at the end of a row to display a menu of options for that row (for example, **Add Assignments**, **Reassign**, or **Reschedule**).
- Hover over a WBS row and click to display charts for that portion of the WBS. For example, clicking for a plan row on the Labor tab of the hub displays the Labor Plan Summary chart and Labor Timeline chart.
- Click in the upper-right corner of the grid to select the columns you want to show in the grid. The available columns differ depending on the grid and on how the Resource Planning module is set up.
- Display options for the grids are normally located immediately above the grids. For example, on the Labor tab you have the option to display either planned hours or planned amounts in the calendar columns. The available options differ depending on the grid.

Plan Settings

In the Plan Settings dialog box, you indicate whether you want to plan the project based on cost or billing, and you specify the rate information that DPS uses to calculate planned amounts. To open that dialog box, click **Other Actions > Plan Settings** on the Actions bar while in Plan mode

- On the General tab, select a budget type to indicate how you want to plan the project and display planned amounts: at cost, at billing, or both. If you plan both at cost and billing, you can switch between displaying cost-based amounts and billing-based amounts in the planning grids and in the charts available in the Projects hub.
- On the Labor tab, select rate methods and, if applicable, rate tables for calculating planned amounts from planned hours for both employees and generic resources. If you selected the Cost and Billing budget type, you can specify separate methods for calculating cost and billing amounts.
- On the Expenses and Consultants tabs, select the level of the WBS at which you want plan expenses or consultants, and select a method and, if applicable, a rate table for calculating the reimbursable expense or consultant billing markup.

To view related help topics: [Plan Settings Dialog Box]

Planning Labor

On the Labor tab of the Projects hub in Plan mode, assign employees or generic resources to lowest WBS level elements and enter planned/ETC hours for them. DPS calculates the corresponding planned amounts based on the rate methods you selected in the Plan Settings dialog box.

On the Labor tab, you can do the following:

- Enter hours for a resource in individual calendar columns, enter a lump number of ETC hours for an individual resource assignment and let DPS spread those hours over the assignment date range, or enter a lump number of hours for a WBS element and let DPS spread those hours over all resource assignments for that WBS element.
- Change the period represented by each of the calendar columns in the grid (for example, monthly periods or weekly periods).
- Switch between showing planned hours and planned amounts in the calendar columns.
- Switch between showing planned amounts at cost and at billing (if you selected the Cost and Billing budget type in the Plan Settings dialog box).
- Display the Labor Plan Summary chart and Labor Timeline chart for any WBS element at any level of the WBS.
- Reschedule plan dates for WBS rows or assignment dates for resource assignment rows.
- Reassign all or part of an assignment to another resource

To view related help topics: [Labor Tab of the Projects Form]

Planning Expenses and Consultants

On the Expenses tab, assign expense accounts to WBS elements at the level of the WBS that you selected in the Plan Settings dialog box, and enter planned amounts for them. Do the same for consultants on the Consultants tab.

On the Expenses and Consultants tab, you can do the following:

- Enter an assignment for an expense or consultant account only or for a combination of an account and a specific vendor or consultant.
- Enter an amount in **Planned Cost** for an individual expense or consultant assignment, or enter a lump sum amount in **Planned Cost** for a WBS element and let DPS spread that amount over the assigned expenses or consultants for that WBS element.
- Switch between showing planned amounts at cost and at billing (if you selected the Cost and Billing budget type in the Plan Settings dialog box).
- Display the Expense Plan Summary chart and Expense Progress chart (or Consultant Plan Summary chart and Consultant Progress chart) for any WBS element at any level of the WBS.
- Reschedule plan dates for WBS rows.
- Change an assignment to another expense account or vendor/consultant

To view related help topics:

- [Expenses Tab of the Projects Form]

- Consultants Tab of the Projects Form

Entering Contract Amounts

On the Contract tab, you can enter contract amounts for comparison with planned amounts and JTD actual amounts. You can also choose to include columns for contract amounts on some planning reports.

You can enter the following contract values:

- Labor
- Direct expenses (indirect expenses for promotional or overhead projects)
- Direct consultants
- Reimbursable expenses
- Reimbursable consultants

Based on your entries, DPS calculates and displays these additional contract-related values:

- Compensation (Labor + Direct expenses)
- Reimbursable allowance (Reimbursable expenses + Reimbursable consultants)
- Total contract (Labor + Direct or indirect expenses + Direct consultants + Reimbursable expenses + Reimbursable consultants)
- Percent of total contract (Total contract for the WBS element / Total contract for the project)

You enter the amounts at the lowest level of each branch of the WBS, and DPS rolls up those amounts to the higher levels.

If the Cost and Billing budget type is selected and the project uses different project (cost) and billing currencies and **Use Billing Currency not Project Currency** is selected on the Accounting System Settings form, you can enter both cost and billing contract amounts.

To view related help topics: Contract Tab of the Projects Form

Saving a Baseline Plan

If you plan to make extensive changes to a plan or for any other reason you want to preserve a specific version of a project plan, you can save it as the baseline plan. The baseline acts as a snapshot of the plan at a certain point in time and is useful for comparison purposes. Some planning reports give you the option to include data both from current plans and baseline plans.

To save the current plan, click **Other Actions > Save Baseline**.

You can have only one baseline version for any plan. When you save a new baseline plan, the previous baseline plan is replaced with the current plan.

Publishing a Plan

As you are working on a plan in Plan mode in the Projects hub, you may need to check that plan out and back in multiple times through a number of work sessions before you get it the way you want it. While the plan is “in progress,” even if you do not have the plan checked out, your unpublished changes do not display in Resource View or Project View and are not included on planning reports. Only the latest published version of a plan is available in those views and reports. In addition, a plan with unpublished changes cannot be edited in Resource View or Project View.

When you are ready to make the updated plan “public,” check out the plan and click **Other Actions > Publish**.

The **Publish** option is available anytime you check out a plan that contains changes that have not yet been published.

Additional Hubs

Employees Hub

In Deltek Resource Planning, you maintained employee records in the Employees & Users area of Configuration. In DPS, you go to the Employees hub (**Hubs > Employees** on the Navigation menu in the browser environment) to view and maintain information for the employees for whom you enter planning data.

You can view and update employee records that you import into DPS using the .CSV imports, the Costpoint Integration, or the API, and you can also use the hub to add new employee records individually.

If you import your employee data from another application, adding, changing, or deleting employee records in DPS does not affect the information in that application.

To view related help topics: Employees Hub

Opportunities Hub

As in Deltek Resource Planning, if the Resource Planning module is the only activated module, no Opportunities hub is available. In that case, if you want to set up a plan for an opportunity, you use the **Opportunities** option under **Resource Management** on the Navigation menu in the browser environment to add the opportunity, or you use the Opportunities import or the API to import the opportunity.

However, if the CRM module is also activated, DPS includes a fully featured Opportunities hub. If that hub is available, you can add and maintain opportunities there, and only use the menu option under Resource Management to set up the plan structures for opportunities. (In this implementation, the Projects hub, in Project mode, also has expanded functionality.)

To view related help topics:

- Opportunity Plan Structure
- Opportunities Hub

Dashboards

You have two dashboards available, the dashboard on the Dashboard tab in the Project hub (Project mode), and the main DPS dashboard (**My Stuff > Dashboard** on the browser environment Navigation menu).

The Projects hub dashboard displays project-level data in two charts:

- **Project Plan Summary:** The Project Plan Summary chart provides a summary of the project's labor, expense, and consultant job-to-date (JTD) and estimate-to-complete (ETC) billing amounts at the project level. This dashpart provides one detailed view that shows how the project is trending against the contract amount as of the current date. Or, if you are planning at cost, you can view the estimate-at-completion (EAC) overhead against the contract amount to determine the potential profit for the project.

- **Project Progress:** Use the Project Progress dashpart to view the overall percent complete for project labor, expenses, and consultants, which enables you to quickly assess where you stand on the project through the JTD date.

Note that even if you drill down in the WBS to a lower level, these charts and the data in the summary pane on the left side of the Projects form still display data for the project as a whole.

The Resource Planning dashboard available under **My Stuff** contains the Upcoming Generic Assignments dashpart that was available in Deltek Resource Planning. Currently, DPS provides no other system dashparts, and the Dashboard Designer does not yet support custom dashparts for the Resource Planning module. This lack of dashboard support will be remedied in a later DPS release.

The Dashboard Designer does, however, support the creation of custom dashparts to display project data. (The Dashboard Designer is discussed in more detail later in this document.)

To view related help topics:

- Dashboard Tab of the Projects Form
- Dashboard

Resource Planning Reports

Standard Planning Reports

DPS offers this set of standard planning reports:

- **Labor Resource Forecast:** This report displays the forecasted hours, costs, and billing amounts by project plan, employee, and generic labor categories.
- **Labor Resource Planned and Actuals:** Use this report to review both planned and actual labor hours for projects. This report can help you determine if the project is on schedule, understand the reasons why or why not, and improve performance on similar projects in the future.
- **Project Planning Analysis:** Use this report to compare actual performance to your plan. For each plan, the report displays the planned, job-to-date, and estimate-to-complete hours and amounts. The report also displays revenue amounts.
- **Project Planning Performance:** Use this report to review project plan schedules and all aspects of plan performance: history, forecasts, hours, costs, and profitability.
- **Project Planning Schedule:** This report displays project plan schedules, based on the task levels in the plan. You can display a Gantt chart for each plan.
- **Resource Utilization by Organization:** Use this report to review employee utilization data and perform such tasks as the following:
  - Identify employees who are under- or over-scheduled, or under- or over-utilized.
  - Analyze resource assignments by organization, with or without full-time equivalent values included.
  - Identify resource assignments for specific types of plans.
  - Review all "soft-booked" hours for a period of time.

To view related help topics: Project Planning Reports

Additional Reports

In addition to the Resource Planning reports, the following types of reports are also available in the Reporting application:

- Employee reports
- Data Export reports
- Administration reports

Generating Reports

To display or print a standard planning report:

1. On the Navigation menu in the desktop environment, click **Reporting > Resource Planning**.
2. In the row for the report you want to generate, click in the Options column and click **…** at the end of that grid cell.
3. On the Options dialog box, select report options, sorting/grouping options, and report columns.
4. Click **Preview** on the toolbar for the Project Planning Reporting form.
5. In the preview window, review or print the report.

General Reporting Features

Among the features offered by the DPS Reporting application are the following:

- Pick from a wide variety of record selection and layout options.
- Select multiple sorting and grouping options.
- Select the columns that you want on the report.
- Save a set of report options as a favorite report for yourself only, for use by those with the same security role, or for use by anyone with access to the Reporting application. Among the benefits of this is that you can launch your favorite reports from either the Reporting application in the desktop environment or from the Favorite Reports form (**My Stuff > Favorite Reports**) in the browser environment.

To view related help topics: Reporting

System Alerts and Warning Indicators

DPS provides system alerts and warning indicators to help you monitor and manage both the planning process itself and the progress of projects against the plan.

System Alerts

The following are the available types of system alerts. Your system administrator enables and configures the alerts that your company wants to use.

- Baseline Change
- Budget Milestone
- EAC Exceeds Baseline

- Plan Creation, Modification, or Deletion
- Resource Assignment
- Resource Utilization
- WBS Level Added or Deleted from Plan

When a system alert is triggered and you are specified as a recipient of the alert, you may receive an email or a notification through the Notification Center or both. If you receive a notification, you can access it by clicking the Notification Center icon on the DPS toolbar: 9. The number on the icon indicates the number of active activity reminders and notifications you have.

To view related help topics:

- Notification Center
- Alerts Configuration

Warning Indicators

Indicators (or) appear next to a project in the project search list when certain conditions exist for that project that may require attention. You can hover over the indicator to display the description of the condition.

For example, if the labor billing EAC is higher than the associated contract amount at the project level, displays to the right of the project in the search list. If you hover over the indicator, the following displays: **Labor EAC Billing is higher than Contract**.

Indicators also display in the planning grids on the Expenses and Consultants tabs of the Projects hub under certain circumstances:

- A blue flag () displays in the **Planned Billing** column to notify you when the WBS element's planned billing amount does not match the contract amount for that WBS element.
- A red flag () displays in the **JTD Billing** column to notify you when a WBS element's JTD billing amount exceeds the planned billing amount for that WBS element.
- A red flag () displays in the **JTD Cost** column to notify you when a WBS element's JTD cost amount exceeds the planned cost amount for that WBS element.

Each WBS element is checked for each of these conditions, and a flag can display for any row.

Imports and Exports

Along with some modification to the existing import options, DPS includes new options for importing data from .CSV files. It also provides an export process so you can extract plan data for use in other applications.

All of the changes and additions described below are also supported by the DPS API. However, none of them is currently supported by Costpoint Integration.

To access the imports or the export, click **Utilities > Imports & Exports** on the Navigation menu in the browser environment.

Changes to Existing Imports

DPS includes changes to the following import processes that were available in Deltek Resource Planning:

- **Employees:** You can now import employee provisional rates if you want DPS to calculate planned labor amounts for projects based on provisional rates.
- **Project Information:** If you set up DPS to use multiple currencies, you can now include currency codes for the project (cost) currency and billing currency for each project. Also, the name of this import has been changed to Project Plans.
- **Historical Hours:** Along with the actual hours charged to projects, you can now import the actual cost and billing amounts for those hours. Also, the name of this import has been changed to Historical Labor.

New Imports

DPS provides these imports that were not available in Deltek Resource Planning:

- **Firms:** Import firm information for your projects' clients, and if you are going to plan expenses and consultants, import information for the vendors and consultant firms for which you want to enter planned amounts.
- **Historical Expenses:** For comparison to planned cost and billing amounts for expenses, consultants, and units (survey crews or lab tests, for example), you can import the actual amounts that you have charged to projects. DPS uses the historical expense amounts to provide comparisons of planned amounts to actual amounts, and to calculate JTD and EAC values.

  If you import a transaction, and no plan assignment exists for the account (or account and vendor combination) for the WBS element to which the transaction is charged, the import creates a new assignment.
- **Historical Overhead:** Import the overhead amounts associated with imported historical labor. Without this overhead data, profitability calculations will not be as accurate.

  You import overhead for specific transaction dates, and the import process automatically assigns overhead amounts to a monthly period based on their transaction dates.

  This import process is for project overhead only; it is not intended to handle general and administrative (G & A) overhead. If you want to include G & A overhead, you must allocate it to projects and then import it.

To view related help topics:

- Firms Import Notes
- Historical Expenses Import Notes
- Historical Overhead Import Notes

Project Planning Export

You can now export planning data for projects to a .CSV file using the option on the Exports form (**Utilities > Imports & Exports > Exports**). You can use this feature to extract planning data and then import it into another application, such as Deltek Costpoint Budgeting and Planning, to get forecast information without maintaining planning data in two locations. You can also use Excel or another spreadsheet application that supports .CSV files to filter, summarize, and format the exported data for reports or analysis.

Note that the exported values are from the assignment levels of the planning structure: the resource level for labor and the account/vendor level for expenses and consultants. There is no option to export values summarized at higher levels. Also, each export process extracts all planning records for the selected projects; no option exists to extract only new or changed records.

When you start the export process from the Exports form, you do the following on the Export Planning Data dialog box:

- Select the project or projects for which you want to export data. You can use any of the standard project searches and any saved custom searches.
- Indicate if you want to export labor planning data, expense and consultant planning data, or both. Regardless of the options you select, contract values associated with the plans are always included.
- If you export labor data, indicate if you want the labor planning values summarized by day, week, or month.
- Select the individual fields you want to export for each type of data, and indicate if you want the export files to include column headings.

An alternative to using the export utility described above is to use the Get function in the API included with DPS to extract project planning data. The labor planning values returned by the API are always by day.

To view related help topics:

- Exporting Data to .CSV Files
- Export Form
- Export Planning Data Dialog Box

Other Utilities

In addition to the import and export processes, DPS provides a number of other utilities.

In the Browser Environment

If you want to use the DPS application programming interface (API) to import data from other applications into DPS, click **Utilities > Integrations > API Authorization** on the Navigation menu, and use the API Authorization form to generate the ID and secret that your applications will use to access DPS through the API.

To view related help topics: API Authorization Form.

In the Desktop Environment

Click **Utilities** on the Navigation menu in the desktop environment to access the miscellaneous utilities below. Many of these utilities perform batch data modifications, data cleanup processes, and other similar system administration tasks.

- User Activity
- File Reconciliation
- Data Import
- Project Closeout
- Batch Deletes
- Audit Purge
- History Loading
- Key Conversions
- Key Formats
- Process Server: Queue Manager
- Process Server: Profile Editor
- Files Administration

To view related help topics: Utilities (Desktop).

Settings (Configuration)

The Settings options in DPS roughly correspond to the Configuration options in Deltek Resource Planning, but some options have been relocated and a number of new ones added

Relocated Configuration Options

DRP Configuration Option	DPS Location
General: Calendar	**Browser:** Settings > Resource Planning > Non-Work Days
General: Planning	**Browser:** Settings > Resource Planning > Plan Settings Settings > Resource Planning > Resource Settings
Security: Security Roles	**Desktop:** Settings > Security > Roles
Employees & Users	**Browser:** Hubs > Employees Settings > Security > Users
Integrations & Imports: Integrations	**Browser:** Utilities > Integrations and Imports > Integrations
Integrations & Imports: Imports	**Browser:** Utilities > Integrations and Imports > Imports
Integrations & Imports: Communication	**Desktop:** Settings > General > General System: Email tab
Customization	**Browser:** Settings > Labels and Lists

New Settings

DPS provides the new settings listed below. Many of them were added to support the new project planning features. Fuller descriptions of the most significant new settings follow the lists.

In the Browser Environment

- **Resource Planning > Plan Settings:** Use the Plan Settings form to specify a variety of settings related to entering and viewing plans for projects and opportunities.

  For more details: Specify Plan Settings on page 29

  To view related help topics: Plan Settings Form

- **Resource Planning > Rates:** Use the Rates settings form to specify the budget type (Cost, Billing, or Cost and Billing) and the cost and billing rate calculation methods, tables, and multipliers to use as the defaults for new plans.
- *For more details:* Specify Rate Settings on page 30

  To view related help topics: Rates Form
- **Resource Planning > Grids:** Use the Grids settings form to select the columns that can be displayed in the project planning grids in the Projects hub.
- *For more details:* Specify Planning Grid Settings on page 31

  To view related help topics: Grids Form
- **Resource Planning > Generic Resources:** Use the Generic Resources settings form to add and maintain generic resources that you want to use as placeholders for employees when planning projects and opportunities. You can assign generic resources to organizations, link them to labor codes and labor categories, and specify sets of skills.

  For more details: Assign Labor Categories or Labor Codes to Generic Resources on page 28

  To view related help topics: Generic Resources Form
- **Rate Tables:** Use the Rate Tables settings form to set up tables of special billing and cost rates for labor and expenses. For individual project plans, you can then select the rate tables you want to use, and DPS uses those rates to calculate planned amounts.

  For more details: Set Up Rate Tables on page 27

  To view related help topics: Rate Tables
- **Accounting > Chart of Accounts:** Use the Accounts settings form to add or modify accounts in your chart of accounts. If Resource Planning is the only activated module, you only need to set up the expense accounts and consultant accounts for which you want to enter planned amounts for projects.

  For more details: Set Up Expense Accounts on page 26

  To view related help topics: Chart of Accounts Settings
- **Screen Designer:** Use Screen Designer to customize the hub forms. For example, you can move fields, hide fields, change field labels, add new user-defined fields, and so on. You can access Screen Designer either under **Settings** on the Navigation menu or by clicking **Other Actions > Design** in the hub itself.

  Note that in the Projects hub, you can only use Screen Designer to make additions or changes to fields and tabs that display in Project mode; you cannot use it to modify Plan mode components.

  To view related help topics: Screen Designer in the Browser Application
- **Dashboard Designer:** Use Dashboard Designer to create or modify dashboards to bring together all of the information and tools that you rely on most. Dashboard content is divided into individual dashparts, or blocks, that provide access to specific records, reports, activities, applications, and web links. Administrators can set up dashboards and specify the security roles or individual employees who can display each dashboard.

  To view related help topics: Dashboard Designer

In the Desktop Environment

- **General > General System:** Use the General System Settings form to define overall features of your implementation, such as email preferences, automatic numbering, and audit trail reporting.

  To view related help topics: General System Settings

- **General > Company:** Use the General Company Settings form to specify your company's name and address and other general information, such as a default phone format. If DPS is set up for multiple companies, these settings are for the currently active company. Select each company as the active company and specify settings for each one. If you use multiple currencies, use the Currency tab to enable currencies for your company or companies.

  To view related help topics: General Company Settings

- **General > Lookup/Report Labels:** Use the Lookup Report Labels form to create custom labels for lookup dialog boxes and reports.

  To view related help topics: Lookup and Report Labels

- **General > Calculated Fields:** Use the Calculated Fields form to create or modify calculated fields for use on reports. An administrator with access to this form can create calculated fields available to all users.

  To view related help topics: Calculated Fields

- **General > Custom Report Options:** If you need a reporting option that is not available as a standard option for a report, you can use the Report Custom Options form to add a custom option for the report. Custom options that you add display on the Custom Options tab of the Options dialog box for the report.

  To view related help topics: Custom Report Options

- **General > Currency:** Use the Currency Configuration form to specify the following for each of the currencies you will use in DPS: number of decimal digits, currency symbol, main currency unit label and plural label that you want DPS to use (for example, **Dollar** and **Dollars**), and the minor currency unit label and plural label (for example, **Cent** and **Cents**).

  To view related help topics: Currency Configuration for Multiple Currencies

- **General > Daily Exchange Rates:** If DPS is set up to use multiple currencies, use the Daily Exchange Rates form to set up exchange rates from one currency to another currency for specific dates.

  To view related help topics: Daily Exchange Rates

- **General > System Alerts:** Use the System Alerts Configuration form to activate the alerts that you want to use (for example, EAC Exceeds Baseline) and specify when each alert is to be sent, how it should be delivered (via email or through the Notifications Center), and who should receive it.

  To view related help topics: Alerts Configuration

- **Workflow > User Initiated Workflows:** Use the User Initiated Workflow form to specify DPS events that automatically trigger related actions, such as sending an alert or running a process. The events that you specify may occur in the hubs or in other applications. For example, you could set up a workflow that is triggered when you add a new employee and automatically sends an email to that employee's manager to notify him or her that the employee is set up in DPS.

To view related help topics: User Initiated Workflow

- **Workflow > Scheduled Workflows:** Use the Scheduled Workflow form to set up workflows that run at regular intervals via the process server. If, at the time that you schedule a workflow to run, the conditions you specify for the workflow are met, DPS performs the workflow actions (for example, sends an email alert, changes the value of a column, or initiates an activity).

  To view related help topics: Scheduled Workflow

- **Security > Roles:** Use the Roles form to set up security roles for groups of users that require the same access to DPS. You define access to DPS applications and records based on role and then, on the Users form in the browser environment, assign each DPS user to the appropriate role.

  For more details: Set Up Security on page 24

  To view related help topics: Roles Security Settings

- **Advanced Accounting > System:** The Accounting System Settings form is only available if DPS is set up to use multiple currencies. To have DPS calculate planned billing amounts in each project's billing currency, select **Use Billing Currency not Project Currency** on that form. To have DPS calculate both planned cost and planned billing amounts in each project's project (cost) currency, do not select that option.

  To view related help topics: Reporting Tab of Advanced Accounting System Settings

- **Advanced Accounting > Labor Codes:** If you plan to set up rate tables for labor codes for calculating planned labor amounts for generic resources, use the Labor Codes form to define the codes and their labels for each level of your labor code structure.

  For more details: Set Up Labor Codes on page 25

  To view related help topics: Labor Code Setup

What to Do After the Upgrade

Before you begin using DPS, evaluate the new features, decide on the features that you will use, and based on those decisions, complete the relevant key tasks described below.

Set Up Security

Use the Roles form in the desktop application to establish the DPS access rights that you want your security roles to have. Use the Users form in the browser application to add new users.

Your users and security roles come into DPS with the access rights you established for them in Deltek Resource Planning for Resource View, Project View, and the resource management reports. However, you will need to review those rights and, as appropriate, add rights for project planning and other new features. You may also want to add new users.

You should familiarize yourself with all available security options and identify those that apply to your situation. However, this table lists the most crucial settings for security roles.

Type of Access	Location on Roles Form	Notes
Access to menu options	General tab	Use the menu access options to determine what applications the role can use.
Access to cost rates and amounts	Accounting tab	Use the **Labor Cost Rates/Amounts** field to control the extent to which the security role can view cost rates and amounts.
Access to types of records	Record Access tab	Specify the types of records the role can access and what level of access (Full, Read Only, and so on) the role has to each type of record.
Access to planning options	Planning tab	These settings determine whether or not the role can make certain changes to plans, such as modify a saved baseline plan or change the budget type.
Access to application tabs	Access Rights tab	Select **Application Tabs** in **Functional Area** and **Project Plans** in **Application**, and select the tabs that you want the role to have access to when working with project plans. If no tabs are selected, the Plan mode in the Projects hub is not available to users with that role.

Type of Access	Location on Roles Form	Notes
Access to reports	Access Rights tab	Select **Reports** in **Functional Area**, select **Resource Planning** in **Report Type**, and select the planning reports that you want to make available to the role.

To display the Roles form:

On the Navigation menu in the desktop application, click **Settings > Security > Roles**.

To display the Users form:

On the Navigation menu in the browser application, click **Settings > Security > Users**.

To view related help topics:

- Roles Security Settings
- Users Settings

Set Up Labor Categories

Labor categories are general categories of labor, such as Principal, Project Manager, Senior Engineer, and so on. If you want to calculate planned labor amounts for employees or generic resources based on rates that you specify for labor categories, use the Lists form in the browser application to define those labor categories.

You can then set up rate tables that specify cost or billing rates by labor category, and you can assign employees and generic resources to labor categories.

To display the Lists form:

On the Navigation menu in the browser application, click **Settings > Labels and Lists > Lists**.

To view related help topics:

- Lists Form
- Settings Dialog Box for Lists

Set Up Labor Codes

Labor codes are classifications of the work that your employees perform, beyond the levels of the work breakdown structure (WBS). If you use labor codes, you have the option to set up rate tables that contain cost and billing rates by labor code and then use those rate tables to calculate planned amounts for generic resources. (DPS does not yet support Planning by labor code for employees.) Using labor codes is not required, however.

Like the WBS, the labor code structure can have multiple levels (up to 5, with a maximum of 14 total characters for all levels). For example, you might set up two-level labor codes to classify work by department (01 - Architecture, 02 - Civil Engineering,…) and service (for example, 100 – Predesign, 200 – Site Analysis,…), in which case, the 01.200 labor code would represent site analysis work done by the Architecture department. Unlike the WBS, however, the elements that you define for each labor code level apply across your enterprise. You cannot specify labor code values that are unique to a particular project.

If you want to calculate planned labor amounts for generic resources based on rates that you specify for labor codes, do the following to set up the labor codes:

1. Click **Utilities > Key Formats > Labor Codes** on the Navigation menu in the desktop environment. Use the Key Convert Labor Code Format form to define the number of levels in your labor codes and the number of characters in the code segments for each level.
2. Click **Settings > Labels and Lists > Labels** on the Navigation menu in the browser environment. Use the Labels form to specify a name for each level. For example, you might set the name of labor code level 1 to **Department** and level 2 to **Service**.
3. Click **Settings > Advanced Accounting > Labor Codes** on the Navigation menu in the desktop environment. Use the Labor Codes form to define the individual codes and their labels for each level of your labor code structure.

You can then set up rate tables that specify cost or billing rates by labor code, and you can assign labor codes to your generic resources. (See Set Up Rate Tables on page 27 and Assign Labor Categories or Labor Codes to Generic Resources on page 28.)

To view related help topics:

- Labor Code Setup
- Key Convert Labor Code Format Form
- Labels Form
- Labor Codes Form

Set Up Expense Accounts

If you want to include expenses and consultants in your project plans, use the Accounts form in the browser application to set up the accounts in which you track costs for expenses and consultants.

When you enter an amount for an expense or consultant in a project plan, you specify the account for that expense or consultant.

If you plan projects at billing, you can also set up billing rate tables by account and use those tables to calculate planned billing amounts. (See Set Up Rate Tables on page 27.

To display the Accounts form:

On the Navigation menu in the browser application, click **Settings > Accounting > Chart of Accounts**.

To view related help topics: Chart of Accounts Settings

Import Firms

If you want to include expenses and consultants in your project plans and you want to associate specific vendors with those planned amounts, do either of the following:

- Extract the required data from the application where you maintain your vendor information into a .CSV file, and use the Firms import process to import that information into DPS.
- Use the API that is included with DPS to integrate DPS with the application in which you maintain vendor information and automate the transfer of vendor information into DPS.

Note that you cannot make changes to firm data in DPS. If you need to make a change for a firm, include the new or changed data in an import file, and run the Firms import process again for the firm using the **Update duplicate records** option.

To run the Firms import:

On the Navigation menu in the browser application, click **Utilities > Imports & Exports > Imports**.

To view related help topics:

- Firms Import Notes
- API Reference

Set Up Rate Tables

If you want to calculate planned labor cost and billing amounts for employees and generic resources based on labor rate tables, set up those rate tables in the browser application. Likewise, if you plan expenses and consultants, you can set up rate tables to calculate billing amounts for expenses and consultants.

If you know that a rate is scheduled to change in the future, you can specify both the current rate and the upcoming rate in the same rate table, and enter an effective date for the upcoming rate. DPS automatically switches to the new rate on the effective date.

You can set up the following types of rate tables:

Type of Rate Table	Use This Type of Table To…
Billing Labor Rates	Set up cost or billing rates by individual employee.
Billing Labor Categories	Set up cost or billing rates by labor category. You can use labor category tables to calculate planned amounts for both employees and generic resources.
Billing Labor Codes	Set up cost or billing rates by labor code. If you have set up labor codes in DPS, you can use labor code tables to calculate planned amounts for generic resources. (DPS does not yet support the calculation of planned amounts based on labor code rates for employees.)
Billing Expense Accounts	Set up billing rates by expense or consultant account.
Billing Expense Categories	Set up billing rates by category of expense or consultant. When you set up a rate table, you define the categories and specify the accounts included in each category.

To set up rate tables:

On the Navigation menu in the browser application, click **Settings > Rate Tables**, and select the type of table you want to set up.

To view related help topics: Rate Tables

Assign Labor Categories to Employees

If you want to calculate planned amounts for employees based on rates in labor category rate tables and you did not assign labor categories to your employees when you imported them into Deltek Resource Planning, do either of the following:

- Use the Employment Details tab of the Employees hub to assign labor categories to your existing employees.
- Use the Employees import process, Costpoint Integration, or the API to update your existing employee records to include a labor category.

To display the Employees hub:

On the Navigation menu in the browser application, click **Hubs > Employees**.

To run the Employees import:

On the Navigation menu in the browser application, click **Utilities > Imports & Exports > Imports**.

To view related help topics:

- Employees Employment Details Tab
- Employees Import Notes
- API Reference

Assign Labor Categories or Labor Codes to Generic Resources

If you want to calculate planned amounts for generic resources based on rates in labor category rate tables and you did not assign labor categories to your generic resources when you imported them into Deltek Resource Planning, do either of the following:

- Use the Generic Resources form to assign labor categories to your existing generic resources.
- Use the Generic Resources import process, Costpoint Integration, or the API to update your existing generic resource records to include a labor category.

If you want to calculate planned amounts for generic resources based on rates in labor code rate tables, use the Generic Resources form to assign a labor code to each of your existing generic resources.

Note also that the Generic Resources form in DPS gives you these new options:

- You can associate generic resources with a specific supervisor.
- You can enter a list of specific skills for generic resources.

To display the Generic Resources form:

On the Navigation menu in the browser application, click **Settings > Resource Planning > Generic Resources**.

To run the Generic Resources import:

On the Navigation menu in the browser application, click **Utilities > Imports & Exports > Imports**.

To view related help topics:

- Generic Resources Form
- Firms Import Notes
- API Reference

Import or Enter Employee Provisional Rates

If you want to calculate planned labor amounts based on employees' provisional cost and billing rates, do either of the following for employees already in DPS and for any employees you add:

- Use the Employees import process to import the provisional rates from a .CSV file.
- Enter provisional rates for employees individually on the Accounting tab of the Employees hub.

You can specify provisional cost and billing rates for regular time and cost and billing overtime percentages.

To run the Employees import to import provisional rates:

On the Navigation menu in the browser application, click **Utilities > Imports & Exports > Imports**.

Include the provisional rates for new and existing employees in the import file, and map those fields to the corresponding DPS provisional rate fields (**Provisional Billing Rate**, **Provisional Cost Rate**, and so on).

To enter employee provisional rates:

On the Navigation menu in the browser application, click **Hubs > Employees**, and go to the Accounting tab.

To view related help topics:

- Employees Import Notes
- Employees Accounting Tab

Specify Plan Settings

In preparation for doing project planning in the Projects hub, select the default plan settings that you want on the Plan Settings form. If DPS is set up for multiple companies, you need to select some of these plan settings separately for each of your companies.

The following are the settings on the Plan Settings form that you did not have available in Deltek Resource Planning:

- **Amount Decimal Places:** Indicate if you want to enter and display planned amounts with no decimal digits or with the number of decimal places set for the type of currency used.
- **WBS Level Delimiter:** Select the character (a period, for example) that you want to use as the delimiter between levels in project numbers.
- **Enable Expense Planning:** If you want to make available the option to enter planning data for expenses, select this check box.
- **Enable Consultant Planning:** If you want to make available the option to enter planning data for consultants, select this check box.

- **Target Multiplier:** 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. This target multiplier is assigned automatically to all new plans, but if you do not use the same target multiplier for all projects, it can be changed for individual plans.
- **Overhead %:** Enter the default overhead percentage for plans, as a whole number. For example, enter **10** for 10 percent. With the necessary security rights, you can enter different percentages for individual and opportunities. The overhead percentage is used to calculate the ETC portion of overhead, which is in turn used to calculate EAC profit for a plan.
- **Expense Planning Level:** If you enable planning for expenses, indicate the level of the WBS at which you want to specify planned amounts. You can enter planned amounts at any of the available WBS levels, or you can enter them at the lowest level of each branch of the WBS. This default can be changed for individual plans.
- **Consultant Planning Level:** If you enable planning for consultants, indicate the level of the WBS at which you want to specify planned amounts. You can enter planned amounts at any of the available WBS levels, or you can enter them at the lowest level of each branch of the WBS. This default can be changed for individual plans.

To display the Plan Settings form:

On the Navigation menu in the browser application, click **Settings > Resource Planning > Plan Settings**.

To view related help topics: Plan Settings Form

Specify Rate Settings

Use the Rates settings form to specify the budget type and the cost and billing rate methods, tables, and multipliers to use as the defaults for new plans. If DPS is set up for multiple companies, you select these defaults separately for each company. The defaults can be changed for individual plans.

- **Budget Type:** Select a default budget type: planned cost amounts only, planned billing amounts only, or both.
- **Labor Cost Rates:** Select a default method for calculating planned labor cost amounts. For employees, you can use rate tables containing rates by employee or by labor category, or use employees' provisional cost rates. For generic resources, you can select rate tables with rates either by labor category or by labor code.
- **Labor Billing Rates:** If you select **Billing** or **Cost and Billing** in the **Budget Type** field, select a default method for calculating planned labor billing amounts. For employees, you can use rate tables containing rates by employee or by labor category, or use employees' provisional billing rates. For generic resources, you can select rate tables with rates either by labor category or by labor code. You can also specify a billing multiplier that applies to both employees and generic resources.
- **Expense Billing Rates:** If you enabled expense planning on the Plan Settings form and you select **Billing** or **Cost and Billing** in the **Budget Type** field, select a default method for calculating planned billing amounts for expenses. You can use rate tables containing rates by expense account or by expense category. You can also specify a billing multiplier.
- Consultant Billing Rates: If you enabled consultant planning on the Plan Settings form and you select **Billing** or **Cost and Billing** in the **Budget Type** field, select a default method for calculating planned billing amounts for consultants. You can use rate tables

containing rates by consultant expense account or by expense category. You can also specify a billing multiplier.

To display the Rates settings form:

On the Navigation menu in the browser application, click **Settings > Resource Planning > Rates**.

To view related help topics: Rates Form

Specify Planning Grid Settings

Use the Grids form of Resource Planning Settings to select the columns that can be displayed in the planning grids in the Projects hub in Plan mode.

Users who work with the project planning grids can choose the columns that they want to display, but only the columns that you select on the Grids form are available for them to select. You can exclude columns that you do not use or that you do not want users to display for other reasons.

To display the Grids settings form:

On the Navigation menu in the browser application, click **Settings > Resource Planning > Grids**.

To view related help topics: Grids Form

Import Historical Amounts

In Deltek Resource Planning, you could import actual hours charged to projects to track progress against planned hours, but you could not import the amounts associated with those hours. In DPS, however, project plans include both hours and amounts, and you can now import actual amounts along with the hours charged to projects. That enables you to compare actual to planned amounts and to calculate accurate estimate-at-completion (EAC) amounts and profitability. Thus, to take full advantage of the DPS project planning enhancements, it is important to import actual JTD labor cost and/or billing amounts for your current projects, as well as the overhead amounts associated with that historical labor. If you are going to plan expenses and consultants for those projects, you should also import historical expense and consultant amounts. If you do not import this historical data, EAC and profitability will be calculated from future planned amounts only and are unlikely to be accurate.

Important: If you will use the Costpoint Integration to import data from that product into DPS, be aware that the integration currently only supports importing historical hours. To import amounts, you must either extract the data from Costpoint into .CSV files and import it from those files into DPS, or you must use the API provided with DPS to create a more automated process for transferring historical amounts from Costpoint to DPS.

For projects for which you previously imported historical labor hours into Deltek Resource Planning, use the Historical Labor import in DPS to add the associated amounts. In each import record, set the hours to 0 in the field that you map to the DPS **Hours** field.

To import historical amounts, do the following on the Navigation menu in the browser application:

- **Labor:** Click **Utilities > Imports & Exports > Imports**, and select **Historical Labor**.
- **Expenses and consultants:** Click **Utilities > Imports & Exports > Imports**, and select **Historical Expenses**.

- **Overhead:** Click **Utilities > Imports & Exports > Imports**, and select **Historical Overhead**.

To view related help topics:

- Historical Labor Import Notes
- Historical Expenses Import Notes
- Historical Overhead Import Notes
- API Reference

Deltek is the leading global provider of enterprise software and information solutions for government contractors, professional services firms and other project- and people-based businesses. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. 20,000 organizations and millions of users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, recruit and develop talent, optimize resources, streamline operations and deliver more profitable projects. Deltek – Know more. Do more.®

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