Deltek Vision® 7.x 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 charged hours to this WBS level with JTD totals and a drill-down option to the Labor Detail report.

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).

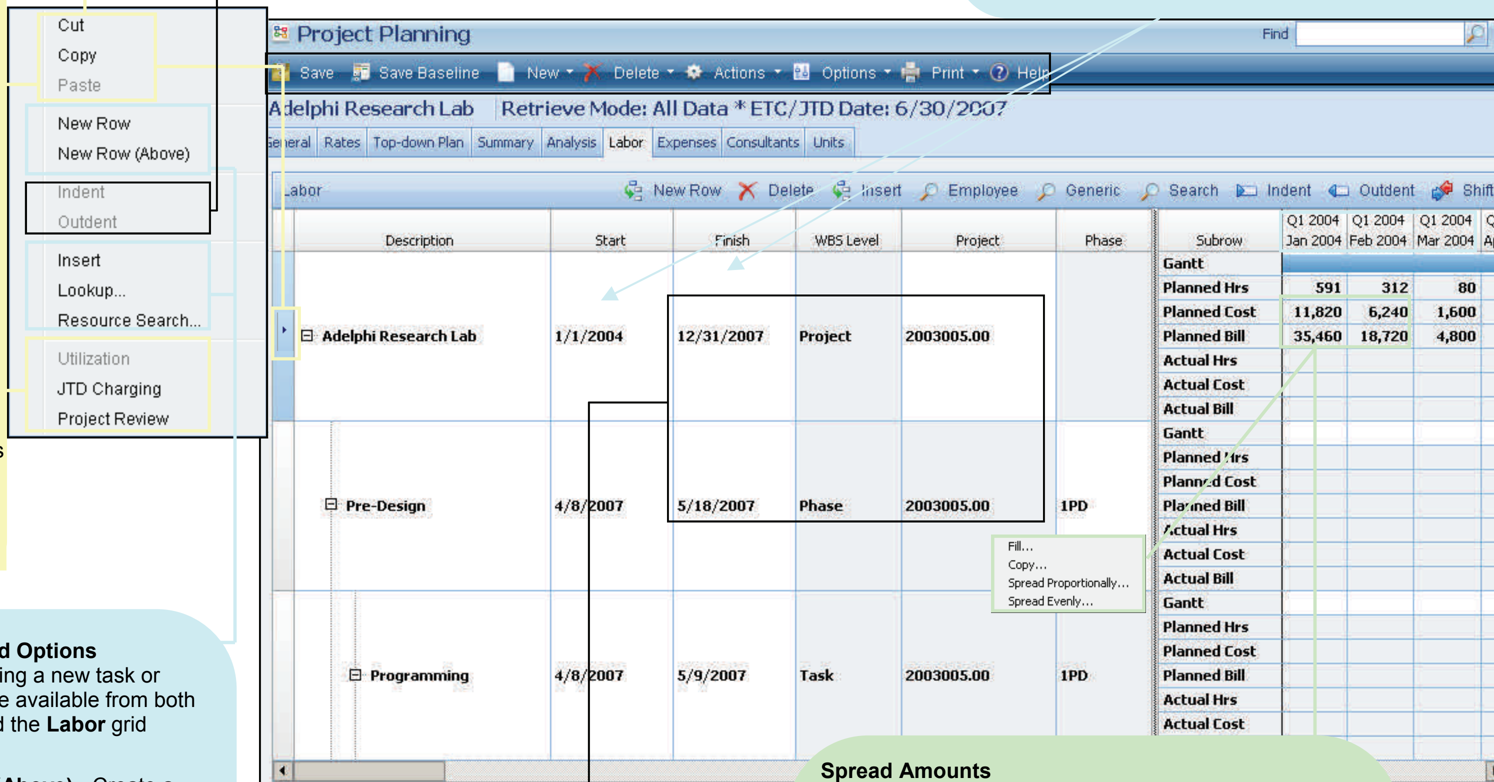
Insert - Insert a resource (employee) as a row in the plan. The employee is associated with the WBS element in the row above the insertion point.

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

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

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.



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.

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

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, change a Navigator plan to a Vision 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, set the ETC/JTD date basis, select a plan retrieval mode, or collapse dates on grids.

Help - Click to open the Vision Project Planning Help.

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