Deltek Vision® 7.4

Deltek Vision 7.4 Getting Started Guide

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Contents

Getting Started

Understanding the functionality and logic in Vision will help you get started with performing the tasks that you need to complete.

You will learn about the Vision applications, how to navigate through Vision, and how to use system-wide features. You will learn how to modify the interface to suit your needs and how to use records and reports. You will also be introduced to the Work Breakdown Structure (WBS).

As you read the help, keep in mind that your firm may customize aspects of the user interface. For example, the term "lead" is used in Vision to represent prospect contacts or unqualified contacts that may lead to future business. Your firm may use a different term to describe these people and companies.

Main Areas of Vision

Get acquainted with the basic areas of Vision.

Area	Description
Dashboard	The Dashboard is your "portal" into Vision, allowing you to create a personalized view of your business world.
Info Center	The Info Center is where you enter and manage your business-related data, including basic information about projects, employees, and accounts.
Calendar and Activities	The Calendar and Activities application provides you with options for scheduling and managing your daily activities, as well as maintaining information about your clients and contacts.
Proposals	Proposals streamlines production of SF330, SF254, SF255, and Custom proposals. It minimizes preparation time and improves communication among the proposal team.
Planning	Planning is designed to guide project managers and proposal writers in constructing and monitoring plans for opportunities and projects.
Billing	Billing lets you bill labor, expenses, fees, and units in all industry-standard formats. It also lets you process, modify, accept, and print invoices and generate billing-related reports.
Transaction Center	The Transaction Center is where you enter and post various types of transactions, including disbursements, expenses, invoices, and vouchers.
Accounting	Accounting is where you perform accounting processes, including accounts payable, accounts receivable, budgeting, and employee expense processing.
Human Resources	Human Resources is where you process payroll and benefit hours accruals, and maintain the ABRA Data Import Utility and the ADP interface.

Area	Description
Time & Expense	Use Time and Expense to record your time and expense report charges and then submit them for processing.
Purchasing	Purchasing allows your firm to automate its procurement processes for items, services and capital items.
Inventory	Inventory lets your firm manage and track all of its items, both inventory items and non-inventory items.
Reporting	Reporting offers you a wide range of reports that present information about all aspects of your projects, clients, employees, and accounts.
Utilities	Utilities are maintenance activities that you use to keep your Vision implementation running optimally.
Configuration	Configuration is where you make decisions about how you want Vision to work for your firm, including choosing the features and settings you want to use.

Optional Vision Modules

You have the option of purchasing and implementing additional modules.

Area	Description
Connect for Microsoft Outlook	Use this add-in software to perform some common Customer Relationship Management (CRM) tasks in Microsoft Outlook®. With Connect for Microsoft Outlook, you can manage Vision business appointments, email messages, clients, and contacts as well as Vision activities, vendors, and opportunities, all from Outlook.
Document Management	Document Management provides a Web-based document collaboration platform, where you can store, share, and collaborate on a set of documents for every project, employee, client, contact, opportunity, or other key Vision record.
Performance Management	The Performance Management module comes in two editions — one with graphical dashboarding and one without it: ▪ Performance Management Analysis Cubes — This module contains only Vision Analysis Cubes. Analysis Cubes provide you with the ability to create Vision custom reports with Microsoft® Excel® 2007 or other report writing software that uses Microsoft Analysis Services (a component of Microsoft® SQL Server™). ▪ Performance Management — This module contains Analysis Cubes, graphical dashboarding, and Visualization components. The graphical dashboarding feature is a visual data analysis tool with interactive graphics that

Area	Description
	enables you to display key metric values in a graphical format. This helps you more easily analyze performance, determine trends, and identify risks to your business. Visualization enables you to use graphical heat/tree maps to represent metrics for your projects, project plans, and opportunities.
Navigator	Use this application to manage complex projects through a streamlined application. Navigator offers real-time planning, budget, invoice, and reporting statistics that are optimized to follow best practices for project planning. At the same time, Navigator uses simplified analysis tools that allow you to quickly identify and act on project performance issues or risks.
Visualization	This is a legacy module that is no longer available as a standalone module. The Visualization feature in Vision Reporting enables you to utilize graphical heat/tree maps to metrics for your projects, project plans, and opportunities.

Starting Vision and Logging In

When you start Vision and log in, you can select a database and, if your firm uses the Multicompany feature, a company.

Multiple Languages

You can enable multiple languages for Vision, including French, German, and Spanish.

When you log in to Vision, you will see a list of all of the languages that your firm has enabled. Select the language that you want to use. For example, if you click the Espanol link on the login dialog box, Vision screens display in Spanish. If only one language is enabled, you will not see a list of languages.

You enable languages on the Module Activation form in Configuration.

Procedures

When you log in you select the database in which you want to work.

Start Vision and Log In

When you start Vision, you log in, select an accounting period, and then select an application.

Deltek recommends that you work in prior periods only to print reports for prior periods. Processing data in prior periods can lead to unexpected results.

To start Vision and log in, complete the following steps:

1. Click the Vision icon on your desktop or go to your firm's designated Vision site on the Internet (or your firm's Intranet).
2. On the Login dialog box, enter your Vision ID in the **User ID** field and enter your Vision password in the **Password** field.
3. From the drop-down list for the **Database** field, select a Vision database.
4. Optional. On the User Options dialog box, you can specify the application that you want to display automatically when you log on to Vision; select **Do not load startup application** to bypass this choice and go to the welcome page instead.
5. If your firm uses Vision in multiple languages, select the language that you want from the drop-down list for the **Language** field.
6. Click the **Log In** button.

   The Period Selection dialog box displays, unless you previously enabled the **Automatically default to current period at startup** option.
7. Select the accounting period in which you want to process data.
8. Select or clear the **Automatically default to current period at startup** option.

   If you select this option, Vision opens the current period each time that you log in and does not display the Period Selection dialog box.
9. Click **OK**.
   The Vision Navigation menu displays. Your startup application also displays, unless you chose **Do not load startup application.**
10. Use the Navigation menu to select an application or use the toolbar to open the Dashboard.

Select a Company at Startup

If your firm uses the Multicompany feature, you may be able to select a company when you log in. Your ability to do so depends on settings in Role Security Configuration.

When you select a company, it becomes the active company. The name of the active company displays in the title bar at the top of the screen.

To select a company at startup, complete the following steps:

1. Log in to Vision.
   - If you previously selected the **Automatically default to my home company at startup** option on the Company Selection dialog box, Vision makes your home company the active company and displays your dashboard.
   - If you did not previously select the **Automatically default to my home company at startup** option, Vision displays the Company Selection dialog box.
2. On the Company Selection dialog box, select a company.

   Vision displays your dashboard.

Switch to a Different Company

If your firm uses the Multicompany feature and your security role gives you access to more than one company, you can switch to a different company at any time. You can switch companies without logging off.

The company that you select becomes the active company. The name of the active company displays in the title bar at the top of the screen.

To switch to a different company, complete the following steps:

1. From the Vision Navigation menu, click **Utilities** » **Change Company**.
2. On the Company Selection dialog box, select the company.
3. If you want Vision to open with your home company when you log in, select the **Automatically default to my home company at startup** option.
4. Click **OK**.

Reset Your Password

You can reset your Vision password if you forget it.

To reset your password, complete the following steps:

1. Open the login screen.
   The **Forgot your password or User ID?** link displays if the Vision email settings have been established in **Configuration** » **System Settings** and you are not using Windows Authentication.
2. Click the **Forgot your password or User ID?** link.
   The Account Maintenance dialog box displays, with the user ID from the Login screen and information about the current database.
3. On the Account Maintenance dialog box, select the **Forgot Password For User ID** option. Vision checks the email address associated with the user account.
4. Select one of the following actions:
   - If there is one valid, active user ID and email address for this account, click **OK** to receive an email message at that address that contains a temporary password to access your account. Follow the instructions in this email message to reset your password the next time that you log in.
   - If the password cannot be reset, an error message displays. Click **OK** to return to the login screen.

Retrieve Your User ID

You can retrieve your user ID if you forget it.

To retrieve your user ID, complete the following steps:

1. Open the login screen.
   The **Forgot your password or User ID?** link displays if the Vision email settings have been established in **Configuration** » **System Settings** and you are not using Windows Authentication.

2. Click the **Forgot your password or User ID?** link.
   The Account Maintenance dialog box displays, with the user ID from the Login screen and information about the current database.
3. On the Account Maintenance dialog box, select the **Forgot User ID** option.
4. In the **Email Address** field, enter the email address that is associated with your Vision account, and click **OK**.
   - If a valid user ID is associated with the email address that you entered, you will receive an email message with the user ID information. Use this Vision user ID the next time that you log in.
   - If there is no valid user ID associated with the email address that you entered, an error message displays. You can enter a different email address in the **Email Address** field or contact your system administrator for help.

Screens

After you log in, you can use dialog boxes to retrieve your user ID, reset your password, or select fields for your dashboard or List View.

Account Maintenance Dialog Box

You can retrieve your Vision User ID or reset your password if you forget either one.

Location

To display the dialog box, complete the following steps:

1. Open the Deltek Vision login screen.
   The **Forgot your password or User ID?** link displays if you are not using Windows Authentication and email settings are configured.
2. Click the **Forgot your password or User ID?** link.

Contents

Field	Description
Forgot Password For User ID	Select this option to reset your Vision password. Vision checks the email address associated with the user account. ▪ If there is a valid user ID and email address for this account, click **OK** to receive an email message with a temporary password that will allow you to access your account. Follow the directions in this email message to reset your password the next time that you log in. ▪ If there is not a valid user ID and email address for the account, an error message displays and you need to click **OK** to return to the login screen.
Forgot User ID	Select this option to receive a reminder for your assigned user ID. When you select this option, the **Email Address** field is activated. Enter the email address that is associated with your user ID, and click **OK**.

Field	Description
	▪ If the email address is valid, you will receive an email message with the user ID information. Follow the directions in this email message and use this Vision user ID the next time that you log in. ▪ If the email address is not valid, an error message displays. You can enter a different email address in the **Email Address** field or contact your system administrator for help.
Using Database	This field displays information about the current database.

Select Fields Dialog Box

Use the Select Fields dialog box options to select the fields that will appear as a column in the List View or dashparts.

Location

To display the Select Fields dialog box, complete the following steps:

The Select Fields dialog box is found in Info Centers and Dashboards:

- Complete the following steps to display the Select Field dialog box from the Info Centers:

1. On the Info Center toolbar, click **List View**.
2. On the Info Center grid toolbar, click **Select Fields**.

- Complete the following steps to display the Select Field dialog box from the Dashboards:

1. On the dashpart, click the dashpart title drop-down list.
2. Click **Select Fields**.

Contents

Field	Description
Tab	This drop-down list displays the tabs that are available and associated with the info center or dsahpart.
Available Fields	This section displays a list of fields that can be added to the List View or dashpart. Select a field and click **Add** to include the field in the List View or dashpart. The added field will be moved to the **Selected Fields** section.
Selected Fields	This section displays a list of fields that are included in the List View or dashpart. A list of default fields are found in this section that can be removed if needed. Select a field and click **Remove** if you want to exclude the field from the List View or dashpart. You can also organize the order fields by selecting the field and clicking **Up** or **Down**.

Field	Description
Add	Click this button after selecting a field from the **Available Fields** section. The field you selected will be moved to the bottom of the list in the **Selected Fields** section.
Remove	Click this button after selecting a field from the **Selected Fields** section. The field you selected will be moved to bottom of the list in the **Available Fields** section.
OK	Applies the changes you have made and closes the Select Fields dialog box.
Cancel	Closes the Select Fields dialog box without saving the changes you made.

Dashboard

The Dashboard is your portal into Vision. Dashboard functionality allows you to combine information from different areas and display it all on a single Web page.

Your personalized Dashboard brings together all of the Vision information and tools that you rely on most. To access the Dashboard, you click  on the Vision toolbar.

You can also set Vision to open your Dashboard each time you log on. Select **Options** on the Vision Toolbar, click the Startup tab on the Options dialog box, and select **Dashboard** as your Startup Application.

Dashparts

Your Dashboard content is easily managed because it is divided into individual sections called dashparts. Dashparts provide access to specific records, web links, reports, activities, and applications. You can access any dashpart without affecting other dashparts.

The following dashpart types are available:

- Info Centers
- Applications
- Reports
- Activities
- Links
- Alerts
- System
- Web
- Vision Tip of the Day

You can configure your Dashboard to display only those dashparts used in your role and then arrange them on the screen to suit your preference.

For example, a project manager might choose to display Project and Client dashparts that display her current projects and clients; a Reports dashpart that includes frequently run reports; and an Activities dashpart that displays the current day's appointments and meetings.

Dashboard Functionality

Dashboard functionality makes it possible for you to do the following:

- Create multiple dashparts of the same type for your Dashboard.
- Create individual URL dashparts for your Dashboard.
- Retrieve records from a pre-selected list, or perform a query to find specific records.
- Rename your dashpart labels.
- Refresh your dashparts to save any changes.
- Drag and drop your dashparts anywhere on the Vision screen.
- Resize your dashparts.
- Print most of your dashparts from the Vision screen.
- Hide, reinstate, and delete dashparts.
- Change the color of a dashpart.

Navigation

When you are new to Vision, it is a good idea to become familiar with the terminology, icons, and toolbar options that you see throughout the application.

Vision Terminology

If you are new to Vision, you may find it helpful to become familiar with the terms that are used throughout the Vision application and documentation.

- **Navigation Menu** — The Navigation Menu is located on the left side of the screen. It provides access to all of the applications except for the Dashboard, which you access on the toolbar at the top of the Vision screen. When you click a Navigation menu option, a sub-menu displays. When you click a sub-menu option, the selected application opens on the right side of the screen.
- **Toolbars** — Toolbars are located at the top of each application record or form and at the top of each grid table in the Vision application. Toolbars make it possible for you to perform various functions on the application record, form, or grid table, such as creating, saving, deleting, or printing a record. Toolbar options vary from application to application and from grid to grid. The Vision toolbar, located at the top of the Vision screen, provides one-click access to various system-wide features.
- **Records** — A record is a collection of data pertaining to an individual item (such as a project, employee, or client). Information about the record is collected on various forms. For example, each project is a record that contains data from the General, Team, and other tabs in the Project Info Center. You can modify, copy, or delete an existing record. You can add new records at any time. You create and maintain records in the Info Center.

- **Tabs** — Vision applications are organized in a tabular format. The tabs in an application may contain fields and/or grids on which you enter or modify information.
- **Dialog Boxes** — Dialog boxes display as pop-up windows in the Vision application. Dialog boxes may contain fields and grids for entering information. Dialog boxes display when you click certain Navigation menu options as well as certain toolbar and field-level icons.
- **Fields** — Fields display on tabs and dialog boxes. Use fields to enter and maintain data for a record or transaction. Some fields are display-only; you cannot enter or edit data in these fields. These fields are grayed out on your screen.
- **Grids** — Grids display on tabs and dialog boxes. A grid is essentially a collection of fields arranged using columns and rows. Use grids to enter, maintain, and view data for a record or transaction. Grids make it easy for you to sort and organize data. You can sort data in most grids by clicking a grid column heading to establish a sort order (ascending or descending). Click the column heading again to reverse the sort order.
- **Options** — Options are selections or choices that appear on a menu or form. Options usually display in drop-down lists.
- **Configuration** — In addition to standard system setup options, Vision offers a variety of ways for you to change the look and feel of Vision, such as renaming tabs and labels, adding new tabs, and reformatting your Dashboard. See the Configuration section of the help to learn more.

System-wide Icons

Use standard icons in Vision for common tasks such as searching for records or selecting dates.

Icon	Description
Drop-down List	Drop-down lists are available for fields that contain a **Drop-down Arrow** beside the field. Click to display the drop-down list, which offers valid option settings for completing a data entry field.
Search	The **Search** icon indicates that you have access to a lookup dialog box for the field. A lookup makes it possible for you to search for projects, employees, clients, and so on, based on criteria that you enter. Click to open the lookup.
Calendar	The **Calendar** icon displays in fields that require you to enter a date. Click to display a graphical calendar that you can use to select the date.
Add-on-the-Fly	The **Add-on-the-Fly** icon displays in certain relational entry fields in the Info Center. Click to open a blank Info Center record and create a new record while you keep the original record open. The new record is added to your database and to the relational entry field in the original record.
Ellipsis	The **Ellipsis** icon indicates that additional data is available for the data entry field. Click to view or enter the additional data.

Icon	Description
Notes	Click to open the Text Editor. The Text Editor makes it easy to enter large amounts of text in a **Notes**, **Memo**, or **Comments** field. You can also use the Text Editor to add formatting to the text.
Phone Format	The **Phone Format** icon displays in fields that require you to enter a phone number. Click to open the Phone Format dialog box and set the appropriate phone number format for your country.

Vision Toolbar

Certain options are always available in the toolbar at the top of the screen wherever you are in Vision.

Field	Description
Hide/Show Navigation	Toggle between these buttons to hide and display the Navigation menu.
Back Arrow	Click this button to return to the application you were previously working on.
Forward Arrow	Click this button to return to the application you were working on before you used the Back Arrow.
Dashboard	Click this button to open the Dashboard application.
Navigator	Click this button to open the Vision Navigator application in a new Internet browser window. If the current project is associated with a Navigator plan, the plan automatically opens in Navigator. If Navigator is not installed or configured, an error message displays.
Kona	Click this button to launch Kona. If your firm's Kona Business token is entered in **Kona Account Key** on the General System Settings form, and if you log on to Kona on the Misc tab of the User Options dialog box, you are automatically logged on when Kona displays. If your firm's Kona Business token is not entered in **Kona Account Key**, or if you have not logged on to Kona on the User Options dialog box, you must log on to Kona yourself after it displays. If you use Microsoft® Internet Explorer® 8, Kona displays in a separate browser window. If you use Internet Explorer 9 or later, it displays within Vision. If the toolbar does not contain a **Kona** option, your system administrator has disabled the option in the web.config file.
Search	Click this button to open the Info Center Search, where you can choose an Info Center and search in it for a particular record.
Options	Click this button to access the User Options dialog box, where you can choose your individual preferences for how Vision looks and behaves.

Field	Description
Help	Click **Help** » **Contents** to open the help system.
Log Off	Click this button to log out of Vision and return to the log in dialog box. From there you can log on again, perhaps using a different accounting period or database, or exit Vision.

User Options

You can personalize some aspects of Vision, such as your display settings and startup options.

User Options make it possible for you to do the following:

- Set startup options.
- Specify display settings.
- Change your system and support passwords.
- Determine lookup, search, and retrieval options.
- Enable and disable activity reminders.
- Set reporting and printer preferences.

See the User Options section of the help for step-by-step procedures.

Help Options

The **Help** button at the top of the Vision screen gives you access to the help system and to a number of other ways to get answers to your questions.

When you click **Help**, Vision displays a drop-down list with the following information.

Option	Description
Contents	Select this option to open the Vision online help.
Help Desk	Select this option to open the Send Email dialog box. Use this dialog box to compose and send a message to a designated Help Desk mailbox. You can send email messages directly to Deltek Customer Care or, if your firm has an internal Help Desk mailbox, to your internal Vision experts.
Learning Portal	This option is only available if the **SaaS/Hosted Instance** check box is selected on the General tab of the Weblink utility. Select this option to go to the learning portal where you can access video resources on using the application.
Customer Care Connect	Select this option to go to the Deltek Customer Care Connect site. You must have a username and password to access the site.
Knowledge Base	Select this option to go to the Deltek Customer Care Connect site and open the Knowledge Center, which provides solutions and answers for thousands of user-submitted issues and questions.

Option	Description
	You must have a username and password to access the Customer Care Connect site.
Contact Us	Select this option to go to the Deltek Customer Care Connect site, where you can submit a support case or chat with a support analyst. You must have a username and password to access the site.
Data Dictionary	Select this option to open the Data Dictionary, which provides information about all of the data tables, columns, and indexes in the Vision database.
About	Select this option to view the application, client and database information, installed components, terms, and system information of Vision.

You have two more options for accessing help in Vision:

- **Help Button on the Application Toolbar** — Each application form in Vision has a toolbar. Click the **Help** button on the toolbar to display a help topic that is specific to the application that is currently open.
- **Help Button on a Dialog Box** — Most dialog boxes in Vision provide a **Help** button. Click this button to display a help topic that is specific to the dialog box that is currently open.

Procedures

Icons, toolbar options, and user options help you navigate Vision.

Navigate in Vision Help

Options for finding, viewing, and printing information from Vision help.

Option	Description
Contents	Use the Table of Contents to navigate to books and topics in the help system.
Search	Click the **Search** button to search throughout the online help system for terms that you enter.
Print	Click the **Print** button to print the help topic that is currently open.
Back	Click the **Back** button to navigate back to topics you have previously viewed.
Scroll Arrows	Click the **Scroll Arrows** to scroll backward or forward through the help topics in the Table of Contents.

Set Up User Options

When you configure Vision, you establish settings that apply only to you. These settings are stored under your username.

To set up User Options, complete the following steps:

1. On the Vision title bar, click **Options**.
2. Complete the fields on the General, Startup, Reporting, Activity, and Misc tabs.

   Use the **Startup Application** options on the Startup tab to specify what you see when you start Vision — a blank page, your Dashboard, or an application in Vision (which you select).
3. Optional. Click the **Display Settings** button on the General tab to open the Display Settings dialog box and set user interface settings such as the colors used on forms and menus.
4. Optional. Click the **Change Password** button on any tab to open the Change Password dialog box and enter a new password for your Vision user account.
5. Click **OK**.

Open an Application in a New Browser Window

From the Navigation menu, you can open an application or form in a new browser window. This allows you to have multiple applications or forms open at the same time.

Any record that displays as a hyperlink in a field or grid can also be opened this way.

To open an application in a new browser window, complete the following steps:

1. Right-click one of the following:
   - An item in the Vision Navigation menu
   - A hyperlink in a field or grid
2. Select the **Open in New Window** option.

Hide the Vision Navigation Menu

Hide the Navigation menu at any time to expand the size of the Vision screen.

To hide the Navigation menu, complete the following steps:

1. Click the **Hide Navigation** button above the Navigation menu.
2. To redisplay the menu, click the **Show Navigation** button.

Deltek Announcements Pane

The Deltek Announcements pane appears below the Navigation menu on the main Vision screen.

The pane displays Deltek announcements to keep you informed about the latest Deltek products and releases. Click an image in the Announcements pane to open the Deltek Announcements web page for more detailed information. When you close the Announcements pane, it will re-appear in a week.

For non-Deltek First Vision Essentials cloud customers, a system administrator can control the visibility of the Announcements pane by modifying the settings in the Vision web.config file. See the *Deltek Vision Technical Administration Guide* for more information.

System-wide Features

Certain navigation, data entry, and searching features are used consistently throughout Vision so that you can move seamlessly from one area of Vision to another.

Records

A record is a collection of data pertaining to an individual entity such as a project, employee, or client. You enter information about the record on forms and dialog boxes. For example, each project record contains data that you specify on the tabs of the Project Info Center form.

You can add a new record at any time, and you can modify, delete, or copy an existing record whenever you choose.

You maintain records in the Info Center. To access records or add new ones, click **Info Center** on the Vision Navigation menu and then click the record type that you want to access.

Record Types

The primary Info Center record types are the following:

- Clients
- Contacts
- Leads
- Marketing Campaigns
- Opportunities
- Employees
- Projects
- Units
- Vendors
- Text Library
- Accounts

Other records that you may work with in Vision include:

- Plans
- Proposals
- Vouchers
- Invoices

Record Management

The Info Center section of the help explains how to:

- Add records
- Copy records
- Delete records
- Edit records
- Link records
- Link external files to records
- Merge records
- Print records
- Schedule activities

Required Fields

Most forms, tabs, dialog boxes, and grids contain required fields. You must enter data in required fields in order to proceed.

These fields are highlighted in yellow when empty, and become white after you have entered data.

Relational Fields

You can link information from one area of the database to another, creating relationships between various data elements.

If a data entry field is relational, the data you enter in the field displays as a hyperlink with blue, underlined text. You can click the hyperlink to jump to the related record in your database.

Right-click a hyperlink to open the related record in a new browser window.

Activity Reminders

The Activity Reminders feature alerts you to any upcoming activity, such as a meeting or conference call in which you are a participant. You can receive reminders by email message or via a screen popup message.

You must be using Vision to see a popup reminder. You do not need to be logged in to Vision to receive an email reminder.

To enable activity reminders, click **Options** on the Vision title bar, click the Activities tab on the Options dialog box, and enable email reminders, popup reminders, or both.

Alerts

Alerts are a Vision workflow function designed to remind you of calendar events or project tasks to be assigned or approved.

You can also use alerts for tasks related to timesheets, expenses, and project budgets.

Depending on the type of alert, Alerts Configuration allows you to determine such options as:

- When alerts are sent
- How the alerts are sent (email messages or Dashboard notices)
- Under what conditions the alerts are sent (time sheet overdue, due in x days)
- Contents of the email (subject and message body) when alerts are sent via email messages

Alerts Configuration is described in detail in the Configuration section of the online help.

Text Editor

The Text Editor is a word processor that provides the tools necessary for creating and editing simple text documents with the Vision application. These documents can be included in various text fields throughout Vision

To access the Text Editor, click the **Notes** icon in any **Notes**, **Memo**, **Comments**, **Description**, or **Proposal** field. Although you can enter text directly in these fields, to format the text—for example, to change a font size from 8 to 10 point, or change a font style from regular to bold—you use the Text Editor.

The Text Editor uses many of the same features and commands found in other standard word processors. If you have used other word processors, such as Microsoft Word, the menu and toolbar options will be familiar to you.

Vision saves your Text Editor files in a Rich Text Format (with a .RTF extension). You can use the Text Editor to copy and paste text from any standard Windows application into the **Notes**, **Memo**, **Comments**, **Description**, and other fields. However, some Windows programs and Web pages have unique formatting and graphics options that Vision may not support. You may have to reformat text that you copy and paste from other systems.

See the Text Editor section of the Help to learn more.

Working with Grids

A grid is a table, with columns and rows, where you enter, change, and view data for a record or transaction. Grids display on the tabs of many forms and on some dialog boxes.

Grids make it easy for you to sort and organize data. You can pin the view of grid data, customize the view or order of columns, print a report of a grid's data, and export data from a grid to a spreadsheet.

Procedures

Standard grid mechanisms are available throughout Vision.

Customize Grids

Tweak the appearance of grids to suit your personal preferences.

To customize a grid, complete the following step:

Select one of the following actions:

- To reduce the size of a column or to hide it, place your cursor on the vertical line between two columns and slide the line left or right.
- To rearrange the order of columns, highlight a column name and drag it left or right.

Vision automatically saves all changes.

Pin Grid Columns in Place

Some grids include the option to "pin" one or more columns. This keeps the columns visible as you scroll across the grid to view additional columns.

A thumbtack icon appears in columns that can be pinned.

You cannot pin the Planning grids in the Vision Planning application.

To pin the columns on a grid, complete the following steps:

1. Click the in each column that you want to lock.

   The thumbtack turns . Pinned columns move to the left side of the grid and remain open as you view the grid.
2. Drag and drop pinned columns to place them in the order that you prefer.
3. Click again to unlock a column.

Print Grid Information

You can print a snapshot of the contents of a grid.

If your firm uses the Deltek First Vision Essentials cloud version of Vision, the **Print** option is not available. You can preview reports onscreen and then print the reports from the Preview window.

To print a grid's contents, complete the following steps:

1. Click (the drop-down arrow) on the grid header.
2. Click **Print**.
3. Use the options on the Print Preview window to control the display of the data.
4. On the Print Preview window, click **File** » **Print** to print the grid information on your default printer.

Group Rows on a Grid

Some of the grids in Vision include an **Enable Grouping** option, which lets you select a column in the grid and use it to group the rows on the grid.

For example, you can group the employees on a project by role then, within role, by team status.

Groupings are not saved when you leave the application.

To group rows on a grid, complete the following steps:

1. Click (the drop-down arrow) on the grid header.
2. Select **Enable Grouping**.
   A field displays with the following instruction:
   Drag a column header here to group by that column.
3. Drag and drop a column header into the field to establish the first-level sort.
4. If necessary, drag a second column header over to meet the first column header, to establish the second-level sort.
5. Continue dragging column headers until you have all of the sorting levels that you need.
6. Drag column headers within the sorting tree to rearrange their order.

Export Grid Data to Excel

Export the data in a grid to a Microsoft Excel spreadsheet.

To export grid data, complete the following steps:

1. Click (the drop-down arrow) on the grid header.
2. Select **Export to Excel**.
   A Microsoft Excel spreadsheet opens, populated with the data from the grid.

Searching for Records

To locate records in the Vision database, use Lookups, the Info Center Search, or Quick Find.

A Lookup is dialog box that you use to locate a record, or to locate a group of records that share certain characteristics. You use a Lookup to search across all records of a single type (all projects, all employees, all clients, and so on). To narrow the search, you can enter search criteria.

An Info Center Search lets you search across all record types in the Info Center. Use it to find any record in your Vision database (project, employee, opportunity, and so on) that has certain characteristics.

A Quick Find search lets you locate a record by entering part of a valid key code, such as an employee's last name or a client number.

Lookups

Use a Lookup to locate a record, or to locate a group of records that share certain characteristics. A Lookup searches across all records of a single type (all projects, all employees, all clients, and so on).

For example, use a Lookup to search for all of your contacts who live in New York, or all of your projects of the same type. You can also use a Lookup to find a single record, such as a particular employee's Employee Info Center record.

On a Lookup, you can enter search criteria that narrows your search, thereby eliminating the need to scan through large numbers of records.

The search criteria available depends on the Info Center. For example, the Opportunity Info Center uses searches such as "Opportunity Number" or "Opportunity Name" while the Employee Info Center uses searches such as "Employee Last Name" and "Employee Number."

Lookups are available wherever you see  in the upper-right corner of a field. Click the icon to display a Lookup.

Search Types

There are four basic search types to choose from when you use a Lookup:

- **Standard** — Use the Standard Lookup for searches using basic criteria such as names, numbers, and types.
- **Advanced** — Use the Advanced Lookup to enter additional criteria that limits the data retrieved by the search.
- **SQL Where Clause** — The SQL Where Clause Lookup lets you perform more complex searches, using your own SQL WHERE clauses.

Multicompany

If you use the Multicompany feature, **Active Company** is one of the Search By criteria you can use for projects, employees, and organizations. Using this criterion returns only those records that belong to the currently active company. If you create a global saved search using the **Active Company** criterion, you can use it for all companies.

Configure Lookups

On the Lookups tab in General System Setup, you establish settings that control how lookups work, such as how many records can be retrieved by a lookup at one time and how search results display on your Dashboard.

Get Total Rows

The **Use lookup limits** check box and the **Maximum number of records** field on the Lookups tab in **Configuration** » **General** » **System Settings** control the number of records that display at one time in the results grid on a lookup dialog box. When you select this check box and enter a maximum number of records to display, the following items display on a lookup dialog box after you click the **Search** button:

- **Show Results (x-xx)** displays above the results grid on the right side of the lookup dialog box. It helps you know your place in the list of records since you cannot see or scroll through them all at one time. Use the right or left arrow beside this text to scroll through and view the next or previous set of retrieved records in the lookup grid.
- **Get Total Rows** text displays in the lower right corner of the lookup dialog box. Click the text to display the total record count for the search results. The **Get Total Rows** text is replaced with **Total Rows** text when you click it.

Displaying Records in Dashparts

When you create system dashparts for the Dashboard, you use a lookup to select the records to display in the dashpart. The **Use Dashboard lookup limits** check box and the **Maximum number of Dashboard records** field on the Lookups tab in **Configuration** » **General** » **System Settings** control the number of records that display at one time in the dashpart grid. When you select this check box and enter a maximum number of Dashboard records to display, **<< Previous X Records** and **Next X Records >>** hyperlinks display in the bottom left and right corners of the dashpart dialog box. (**X** is the maximum number of records you can view at a time.) Click these hyperlinks to scroll through and view all retrieved records in the grid.

Search Results Paging

On the Lookups tab of **Configuration** » **General** » **System Settings**, if the **Use Lookup Limits** check box is selected and the number of records per page is identified on the **Maximum number of records** field, then the search results are displayed in pages in the search results grid. For search results to be displayed in pages, the number of records must exceed the number identified in the **Maximum number of records** field.

With search results paging enabled, left and right navigation buttons are available at the top of the search results grid. You can use these buttons to switch from page to page. If the **Allow Lookup Limit Override** check box is selected on the General tab of **Configuration** » **Security** » **Roles** for your role, then the button is available beside the navigation buttons. The button disables the paged search results and instead displays the search results in a list.

Clear Button

Before you start a search, click the **Clear** button so that information from the previous search is not included in the new search.

Info Center Queries

On the Advanced Lookup, you can perform Info Center queries based on a field in another Info Center. This means that you can build a query from multiple Info Centers without creating a SQL Where Clause.

These lookup options are listed with "Lookup -" preceding their labels in the **Search Type** field. When you select one of these options, the **Field** option becomes active. Use the **Field** drop-down list to select a field type.

Searches are available for both standard and user-defined fields.

Procedures

You can search for records in a variety of ways.

Perform a Standard Lookup

Use the Standard Lookup for searches that search on basic criteria such as names, numbers, and types.

To search using the Standard Lookup, complete the following steps:

1. Click to display the Lookup.
2. From the **Display Type** drop-down list, select **Standard**.
3. From the **Search By** drop-down list, select the type of criteria you plan to search by (for example, Client Number or Employee Name).
4. Enter any data in the **Search Text** field that narrows your search, such as an employee's last name or the beginning of a project number.
5. Optional: Select **Active Only** to display only those records whose status is currently Active.
6. Optional: Select **Pending Accounting Review** to display only those records that are pending review.
7. Click **Search**.

   A list of all records matching your search criteria displays.
8. Complete one of the following actions:
   - Click **Select All** to select all records.
   - Highlight only those records you want to display by pressing the CTRL key and clicking **Select**.
9. Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.
10. Click the **Organize** button if you want to save the search criteria for use in the future.

Perform a Direct Lookup

Direct Lookups are located throughout Vision. They look and function much the same as the Standard lookup, but provide fewer search options.

To search using the Direct lookup, complete the following steps:

1. Click to display a Lookup.
2. From the **Search By** drop-down list, select the type of criteria you plan to search by (for example, Client Number or Employee Name).
3. Enter any data in the **Search Text** field that narrows your search, such as an employee's last name or the beginning of a project number.

   You can enter multiple search strings and separate them by a semicolon to search for multiple records. For example, Apple; Smith; Jones.
4. Click **Search**.

   A list of all records matching your search criteria displays.
5. Complete one of the following actions:
   - Click **Select All** to select all records.
   - Highlight only those records that you want to display by pressing the CTRL key and clicking **Select**.
6. Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.

Perform a Quick Find

Quick Find searches let you access a record by entering part of a valid key code, such as an employee's last name or a client number. You can also use Quick Find to enter data.

If the information that you enter matches only one record in the Vision database, the record is displayed. If the information that you enter produces more than one result, a box displays listing all matching records and you click the record that you want to open.

When you perform a Quick Find search in the Info Center, the **Active Only** option setting is applied automatically so that Vision only searches for records with a status of Active.

To perform a Quick Find search, complete the following steps:

1. Click in the **Search** field of a record.
2. Enter a single character, a string of characters, or a word, and then press ENTER.
   - If you enter a single character, Vision searches for every record beginning with that character.
   - If you enter more than one character, Vision searches for every record that contains that string of characters.
   - For whole word searches, enter a space before and after the word to search for only that word.

Use Quick Find to Enter Data

Use the Quick Find feature to enter data in any field where the magnifying glass icon is displayed.

To enter data using the Quick Find feature, complete the following steps:

1. Select any field with a  icon.
2. Enter a single character (for example, the letter "a" or the number 3) or a string of characters ("ab" or "13") and then press ENTER.
   - If you enter a single character, Vision searches for every record beginning with that character.
   - If you enter more than one character, Vision searches for every record that contains that string of characters.
   - For whole word searches, enter a space before and after the word to search for only that word.
3. Click the record that you want to access.
   If the information that you enter matches only one record in the Vision database, the record is displayed.
4. Click ENTER to insert the record name in the field.

Perform a SQL Where Clause Lookup

Use the SQL Where Clause Lookup to perform complex searches. You create a SQL WHERE clause to use in searching the Vision database.

To search using the SQL Where Clause lookup, complete the following steps:

1. Click to display the Lookup list.
2. From the **Display Type** drop-down list, select **SQL Where Clause**.
3. In the **Where Clause** field, build a SQL WHERE clause using SQL operators.
4. Optional: Select **Display Search Text.**
5. Optional: Select **Active Only** to display only those records whose status is currently Active.
6. Optional: Select **Pending Accounting Review** to display only those records that are pending review.
7. Click **Search.**
   A list of all records matching your search criteria displays.
8. Complete one of the following actions:
   - Click **Select All** to select all records.
   - Highlight only those records you want to display by pressing the CTRL key and clicking **Select.**
   - Use the **left arrow** and **right arrow** buttons to navigate through the records that you selected.
9. Click the **Organize** button if you want to save the search criteria for use in the future.

Perform an Advanced Lookup

Use the Advanced lookup to enter additional criteria that limits the data retrieved by the search. You can also perform Info Center queries based on a field in another Info Center.

To search using the Advanced lookup, complete the following steps:

1. Click to display the lookup.
2. In the **Display Type** field, select **Advanced.**
3. In the **Search By** field, select the type of criteria that you plan to search by (for example, Client Number or Employee Name).
4. Click the **Search Field** column and select the name of the field that you want to search.
   If you choose a Memo type field, the lookup also searches the relevant HTML and includes HTML code in the search results.
5. Click the **Operator** field and select a comparative operator, such as "Is Mine" or "Is Not Mine."
6. Click the **Search List** field, and then click to display the Search List dialog box, which lists records corresponding to the **Search Type**.
7. On the Search List dialog box, highlight the records that you want and click **Select.**
8. Click the **Cond** field on the Advanced lookup and select **AND** or **OR** as the condition for the search.
9. Optional: Use parentheses to group multiple levels of expressions for a given search.

To do this, enter parentheses in the left and right parenthesis grid columns. If the number of parentheses on the left does not match the number on the right, you are prompted to fix the expression before you search or save the search.

10. Optional: For a Project lookup, you can use the **Project Level** drop-down list to specify the work breakdown (WBS) level to search. If you select **Any Level**, Vision searches all WBS levels.
11. Optional: Use the Search Criteria grid drop-down options to print grid information or export data to Excel.
12. Use the **Move Up** and **Move Down** options to arrange the order of your search criteria on the grid.
13. Use the **Insert**, **Copy**, and **Delete** buttons to modify your search criteria.
14. Select **Display Search Text**.
    Vision replaces the search results grid with a text box that contains a color-coded, indented version of the current search. You can see the entire search and how nested levels of the search (based on parentheses) relate to each other. This check box is automatically cleared the next time that you click **Search**.
15. Optional: Select **Active Only** to display only those records with a current status of active.
16. Optional: Select **Pending Accounting Review** to display only those records that are pending review.
17. Click **Search**.
    A list of all records matching your search criteria displays in the results grid.
18. Select one of the following actions:
    - Click **Select All** to select all records.
    - Highlight only those records that you want to display by pressing the CTRL key and clicking **Select**.
    - Use the **left arrow** and **right arrow** buttons to navigate through the records you selected.
19. Click the **Organize** button if you want to save the search criteria for use in the future.
20. Optional: If you use lookup limits, click the **Get Total Rows** text below the lookup results box to display the total record count for the search.

    On the Lookups tab in General System Settings, you turn on lookup limits and enter a maximum number of records to display at one time in the results grid in a lookup dialog box.

    When you use lookup limits, to change the set of records that display in the results grid of a lookup dialog box, click the right or left arrow beside the **Show Results (x-xx)** text that displays above the results grid on the right side.
21. Click **Clear** before you start a new advanced search so that information from this search is not included in the new one.

Save a Search

After you create and use a search on a lookup, you can save the search for use at another time.

Use the **Organize** button on a Lookup to save, delete, or rename a search. The types of searches that you can save depend upon your role's security settings, as defined in **Configuration** » **Security** » **Roles**.

Prerequisite: You must run a search before you save it.

To save a search after you run it, complete the following steps:

1. Click to display the lookup.
2. Click the **Organize** button.
3. In the **Folder Name** field, enter a new folder name, or select an existing one from the drop-down list.
4. In the **Save Name** field, enter a new search name, or select an existing one from the drop-down list.
5. Click **Save**.

Use a Saved Search

Re-run a saved search to get the current set of search results.

To use a saved search, complete the following steps:

1. Click to display the lookup.
2. Click the folder icon next to the **Search** field.
   The Saved Searches display opens, listing both global saved searches and your personal saved searches.
3. Double-click the saved search that you want to retrieve.
4. If necessary, make changes to the search.
5. Click **Search**.

Launch a Saved Search from a URL

You can launch a saved search directly from a URL.

To launch a saved search from a URL, complete the following steps:

1. Open a browser window.
2. Type the path to Vision on your server.
3. Append the following string:

   DeltekVision.application?navtreeID=<menu id>&keyValue= <arguments>

Delete or Rename a Search

Delete unused searches to avoid cluttering up your saved search folders. Rename a saved search to make its purpose clearer.

To delete or rename a saved search, complete the following steps:

1. Click to display the lookup.
2. Click next to the **Search** field.
3. Select one of the following actions:
   - Right-click the search that you want to delete and select **Delete**. When Vision asks you to confirm the deletion, click **Yes**.
   - Right-click the search that you want to rename, select **Rename**, and enter the new name.

Operators

Use operators to help refine searches.

Comparative Operators

When you perform an Advanced lookup or a SQL Where Clause lookup, you can use a number of comparative operators, such as "equals," "less than," "greater than," and "starts with."

For example, the following WHERE clause, in which the comparative operator is >, meaning "greater than," searches for all projects where the project number is greater than 97000.00:

(PROJ.prProject>'97000.00')

You use different operators with different data types: string, date, number, memo, check box, and employee.

Operator	Data Type	Expression	SQL Where
equals	string	Project Name equals "Project Red"	PR.Name = 'Project Red'
in list	string	Project Name in list "Project Red"	PR.Name = 'Project Red'
starts with	string	Project Name starts with "Project Red"	PR.Name LIKE 'Project Red%'
equals	date	Incident Date equal 08/14/06	DATEDIFF(dd,'2006-08-14', ProjectCustomTabFields.custIncidentDate) = 0
greater than	date	Incident Date greater than 08/14/06	ProjectCustomTabFields.custIncidentDate > '2006-08-14'
less than	date	Incident Date less than 08/14/06	ProjectCustomTabFields.custIncidentDate < '2006-08-14'

Operator	Data Type	Expression	SQL Where
equals	number	Prior Years with this Firm equals 10	EM.PriorYearsFirm= 10
greater than	number	Prior Years with this Firm greater than 10	EM.PriorYearsFirm> 10
less than	number	Prior Years with this Firm less than 10	EM.PriorYearsFirm< 10
contains	memo	Test Memo contains Studio	EmployeeCustomTabFields.custtestmemo LIKE '%Studio%'
not contains	memo	Test Memo not contains Studio	EmployeeCustomTabFields.custtestmemo Not LIKE '%Studio%'
empty	memo	Test Memo empty	EmployeeCustomTabFields.custtestmemo is Null
not empty	memo	Test Memo not empty	EmployeeCustomTabFields.custtestmemo is not null
checked	checkbox	N/A	N/A
not checked	checkbox	N/A	N/A
equals	employee	N/A	N/A
in list	employee	N/A	N/A
starts with	employee	N/A	N/A

SQL Operators

Use a number of operators, such as "LIKE," "IN," and multiple comparative operators when you perform a SQL Where Clause lookup.

When you combine fields from the same grid where some of the operators are "not" type operators, the SQL Where Clause will only be built correctly when the "not" type operators follow the non "not" type operators.

<table>
<tr><th>Operator</th><th>Description</th></tr>
<tr><td>Comparative</td><td>
<table>
<tr><th>Operator</th><th>Meaning</th></tr>
<tr><td>=</td><td>Is equal to</td></tr>
<tr><td>NOT=</td><td>Is not equal to</td></tr>
<tr><td>>=</td><td>Is greater than or equal to</td></tr>
<tr><td><=</td><td>Is less than or equal to</td></tr>
<tr><td><</td><td>Is less than</td></tr>
<tr><td>></td><td>Is greater than</td></tr>
</table>
Comparative operators are used in WHERE clauses to select projects based on numeric or character values. For example, the
</td></tr>
</table>

Operator	Description
	following WHERE clause, in which the comparative operator is >, searches for all projects where the project number is greater than 97000.00: (PROJ.prProject>’97000.00’) WHERE clauses are not case-sensitive. For example, you can enter APPLE or apple or Apple as a value, and the WHERE clause will find any possible upper- or lower-case combination of that name. You can use the following comparative operators in a WHERE clause:
LIKE	LIKE compares a string of characters. When you use the LIKE operator, you can use wildcard characters rather than enter the entire value. Vision automatically adds a % to the end of every character string. For the LIKE operator, you can use the % and _ (underscore) wildcard characters. ▪ % retrieves a string of zero or more characters of any value. (The % wildcard is similar to the * wildcard in DOS.) ▪ _ retrieves a single character of any value. (The _ is similar to the ? wildcard in DOS.) For example, if you want projects and tasks for all client names ending in CH, you can enter % CH in the Value field. The WHERE clause retrieves all projects whose client name ends with CH. In the following WHERE clause, LIKE ’r; apple%’ searches for all projects where the project manager’s name starts with the letters Apple: (PROJ.prProjMgr LIKE ’r; apple%’)
IN	Use the IN operator when you are looking for information contained in a group of values. For example, if you are searching for only overhead and promotional jobs (types H and P), you can use the syntax: (PROJ.prType IN H,P) instead of: (PROJ.prType=’H’) OR (PROJpr.Type=’P’)
AND OR	The logical operators AND and OR combine multiple conditions in a WHERE clause. For example, you can query for all projects WHERE the project manager is LIKE Apple AND the client number is 1234: (PROJ.prProjMgr LIKE ’r; APPLE%’)

Operator	Description
	AND (PROJ.prClient='1234') This clause retrieves all projects for client 1234 for which Apple is the project manager. The following WHERE clause retrieves all tasks for projects that have Apple as the manager of the project, and any other specific tasks that have Apple as the manager of the task: (PROJ.prProjMgr LIKE 'r; APPLE%') OR (TASK.prProjMgr LIKE 'r; APPLE%')

Is Me and Is Not Me Operators

Use the "Is Me" and "Is Not Me" operators to search for records that do or do not belong to you when you perform an Advanced lookup.

This operator works only with search fields based on employee numbers, such as **Employee Number**. It does not work with search fields based on names, such as **Employee Last Name**.

For example, enter "Supervisor Number" in the **Search Type** field and "is me" in the **Operator** field to search for records on which you are identified as the supervisor.

These operators can be useful for establishing global searches and record level security.

Is Mine and Is Not Mine Operators

Use the "Is Mine" and "Is Not Mine" operators to search for records that do or do not belong to you when you perform an Advanced lookup.

"Is Mine" and "Is Not Mine" operators are used for all Organization-based search fields, with the exception of names.

For example, if you have two levels of organization, office and discipline, you can perform searches that automatically match the organization of the employee logged in at the time.

Some examples are "organization is mine", "office is mine" and "discipline is not mine."

These operators can be useful for establishing global searches and record level security.

Configuration

You can modify many parts of Vision to suit your firm's particular needs. This process is called Configuration.

For example, you can establish security options, activate modules, select templates and code tables, add your own tabs to forms, and rename fields.

You must be a system administrator to change most system-wide configuration settings. See the Configuration section of the online help to learn more about configuration options.

Reports

Vision offers a wide range of reports. The reports come with a set of default formatting options, which you can keep or modify.

You can use Vision Reporting to:

- Generate reports about projects, employees, clients, and financial performance.
- Generate reports for viewing on screen or for printing. You can print a report right away or schedule it to run at a later time.
- Set report options that determine how information is displayed on the report, which columns are included, and how the data is sorted and grouped.
- Select data with which to populate reports.
- Save sets of report options, which include all settings on all report options tabs, for use in future reporting sessions.
- Save sets of selection criteria, which determine the data that is included on a report, for use in future reporting sessions.
- Create and save favorite report formats. After you have created a favorite, it takes just one click to generate a favorite report with current data — Vision automatically applies all options settings, including formatting options, and retrieves the appropriate records.
- Put links to favorite reports on your Dashboard.
- Drill down for the detail underlying certain types of data on a report.
- Export Vision data directly to an Adobe ® PDF file, a Microsoft ® Excel ® spreadsheet file, or a Rich Text Format (RTF) file .

Report Types

You can access the following types of reports in the Reporting application:

- Accounting Reports
- Accounts Receivable Reports
- Billing Reports
- Client Reports
- Configuration Reports
- Consolidated General Ledger Reports
- Contact Reports
- Data Export Reports
- Employee Reports
- General Ledger Reports
- Inventory Reports
- Lead Reports
- Marketing Campaign Reports

- Opportunity Reports
- Payroll Reports
- Performance Management Reports
- Project Reports
- Project Planning Reports
- Purchasing Reports
- Text Library Reports
- Unit Reports
- Vendor Reports

See the Reporting section of the online help to learn more about reporting options and processes.

Work Breakdown Structure

A work breakdown structure (WBS) divides each of your projects into distinct, manageable work elements in a way that balances management needs with the need to collect an appropriate and effective level of project data.

A simple three-level WBS may be organized as follows:

- Level 1 - Project
- Level 2 - Phase
- Level 3 - Task

A WBS is used by various groups in a company, such as marketing, business development, project management, and accounting. A well-planned WBS is integral to successful project proposals, planning, scheduling, budgeting, and reporting.

Your Vision work breakdown structure impacts the:

- Value you get from the data you store.
- Ability to leverage past work to generate new business.
- Ability to improve job performance based on past experience.
- Ease and quality of knowledge sharing among groups in your company.
- Quality of service and level of reporting and billing customization that you can provide to your clients.

There are four key components to the Vision WBS, which work together to provide a comprehensive tracking and reporting system for cost and revenue information. Before you begin to set up your firm's work breakdown structure in Vision, your firm must understand how each of the four components work together to provide a structure that gathers and reports information to meet your firm’s internal and external reporting needs.

The four components are:

- Organizational (or profit center) structure
- WBS or project structure
- Labor code structure for labor cost

- Chart of accounts structure for expenses

See the discussion of the WBS in the Concepts section of the help to learn more about the work breakdown structure, including guidelines that you can use to plan your own WBS.

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