

Deltek Vision® Navigator 1.5

Frequently Asked Questions (FAQ)

June 27, 2013

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This edition published June 2013.

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Overview

The information in this document is provides general product details on the use and configuration of the Deltek Vision Navigator product.

We revise this document regularly to provide the most up-to-date technical information. Visit the Knowledge Center tab of the Deltek Customer Care Connect site to determine if your copy is the latest copy, and to download the most recent copy if necessary.

This guide covers the following areas:

- Basics for using Navigator
- How Navigator works with Vision Resource Planning
- Navigator's General Functionality



See the *Deltek Vision Navigator Installation Guide* and the *Deltek Vision Navigator Integration Guide* for detailed information on installing and integrating the Navigator product.

Frequently Asked Questions

General Questions

What is Navigator?

Navigator is a revolutionary new tool that is accessible from almost any browser and tablet device. Divided into two workspaces, Employee and Project Management, Navigator includes features that benefit multiple organizational roles.

The Employee workspace allows timekeeping functionality, where users can enter, update, and submit their own timesheets. The Project Management workspace gives project managers the tools required to plan, review, and execute projects – in a streamlined and consolidated manner. In addition, Navigator simultaneously benefits the organization through facilitating the collection of more accurate and complete project information, as well as providing the ability to closely monitor projects.

Does Navigator replace Vision Resource Planning?

No, Vision Resource Planning gives you more advanced capability for planning, reporting, and resource management. Navigator can be a good first step to full project and resource planning. Even when companies have the Vision Resource Planning module, Navigator can still be used for planning and reviewing projects. All Navigator data is visible and editable within the resource management component of the Vision Resource Planning module. In addition, a mechanism is provided for converting project plans between Vision and Navigator so that project managers have flexibility in choosing where they would like to create and maintain their project plans.

Can employees other than project managers benefit from using the Navigator Project Management workspace?

Absolutely. It can be used by anyone in an organization who wants to monitor a project or contribute to the planning process. In addition, Navigator is an ideal tool for departmental/organizational managers who monitor their project managers and their organization's projects.

Is there a cost for Navigator?

Navigator is delivered as part of Core Vision functionality so all Vision clients current on maintenance and on Deltek Vision 7.0 SP1 or later will have access to the most recent version of Navigator. The server requirements are as follows:

- Windows Server 2008 or Windows Server 2008 R2 are supported platforms
- Microsoft .NET Framework 4.0 must be installed on the Deltek Vision web/application server
- You must be a local administrator on the Deltek Vision web/application server to run the setup
- Vision Navigator must be installed on your Deltek Vision web/application server

Does Vision's role security apply to Navigator?

Yes. Security is seamless between the two applications, and the access rights that are configured within Vision Security are applied to each Navigator workspace.

Vision Security Configuration includes a Navigator tab that allows the System Administrator to configure a role's access rights to the Vision Navigator application. This includes the ability to log in to Navigator, and access the Project Management and Employee workspaces and their various features.

In addition, this tab allows you to define record level access for Navigator projects and plans. Use the **Record Level View** and **Record Level Update** fields to access lookups that enable you to build queries that grant or restrict different levels of access for Navigator projects and plans.

Vision Resource Planning and Navigator

Is Vision Resource Planning required for the Project Management workspace within Navigator to work?

No, Vision Resource Planning is not required for Navigator. Navigator will enable project managers to plan, budget, and assign resources throughout the work breakdown structure of the project, and no functionality is disabled as a result of the Vision Resource Planning module not being licensed.

For those companies that want robust planning functionality, project planning reporting capabilities, and full resource management functionality, the Vision Resource Planning module is required. Even with Vision Resource Planning, you can still use Navigator for planning and reviewing projects. All Navigator data is visible and editable within the Resource Management component of the Vision Resource Planning module. In addition, a mechanism is provided for converting project plans between Vision and Navigator so that Project Managers have flexibility in choosing where they would like to create and maintain their project plans.

Are project plans that are created in Vision Resource Planning visible/available in Navigator?

Yes, project plans created and/or maintained in Vision Resource Planning are visible in Navigator, but they are read-only and cannot be edited in Navigator. You can only maintain the plan's information in one application at a time. For project plans that are maintained in Vision Resource Planning, Navigator is still a valuable tool for reviewing and monitoring that project and its related data. However, because Navigator does not support all of the functionality that is available in Vision Resource Planning, planning data in Navigator may be aggregated and represented in a slightly different way than it is in Vision.

If I own the Resource Planning module, will I still want to use Navigator?

Owning the Vision Resource Planning module does not preclude an organization from using Navigator - the two tools complement each other quite well. Vision Resource Planning offers functionality around resource management and reporting that Navigator does not include. In addition, the project planning component of Vision Resource Planning offers a broader feature set than Navigator does when it comes to more complex project plans. It will be common for organizations with Vision Resource Planning to have some projects planned in Navigator and others planned in Vision Resource Planning. It will often be a case by case, project manager by project manager decision. In addition, it is important to understand that the intention with Navigator is to go well beyond just the planning needs of project management. Navigator is also intended to be a tool where project managers can review the status of all aspects of their project and use it to execute components of the project as well - such as collaborating with the project team via the integration with Kona.

If I own Vision Resource Planning, will I be able to see and edit Navigator planning data via Resource Management?

Yes. All Navigator planning data behaves and is exposed just like planning data from Project Planning. Therefore, it is fully visible and editable in Resource Management after you convert the plan from Navigator to Vision Resource Planning.

Why would a Project Manager choose to create/maintain a project plan in Vision rather than in Navigator?

Vision Resource Planning is capable of supporting more complex and sophisticated project plans than Navigator. For this reason, when a project manager requires additional functionality in their plans, they must use Vision Resource Planning. The following list provides a general overview of the functionality that is supported in Vision Resource Planning but not in Navigator.

- Work breakdown structure that does not match the project's work breakdown structure
- More than 3 levels of work breakdown structure
- Multiple accordion calendar scales
- Resource assignments at levels within the work breakdown structure other than the lowest level

How is the work breakdown structure in a Navigator plan created/maintained?

Navigator uses the work breakdown structure from the Vision project record as a way to minimize the effort Project Managers need to invest when building a project plan. The work breakdown structure is controlled by the project record's structure and cannot be manipulated in Navigator. However, any changes to the work breakdown structure in the project record will be reflected in the Navigator plan.

What Navigator functionality is disabled if I don't have Vision Resource Planning?

There is no functionality in Navigator that is disabled or "grayed out" if you do not own the Vision Resource Planning module.

Navigator's General Functionality

What languages are supported?

Currently, Navigator only supports English. Future versions will be translated to all languages supported by Vision.

Are Multicurrency and Multicompany supported?

Yes, both configurations are supported in Navigator.

Can Navigator be used for Opportunities?

Currently, there must be a project record in Vision for Navigator to be used to create a project plan. At this time, you cannot create project plans for Opportunities within Navigator. However, there are plans to add the ability to create plans in Navigator without an associated project in a future release.

How will the Project Budget Worksheet interact with Navigator?

Currently, there is no interaction between the project budget worksheet and Navigator. Navigator is an alternate way to build a project budget using the planning functionality.

Can I plan Expenses with Navigator?

Support for expenses will be added in a future release.

If I own Vision Resource Planning, can I plan labor in Navigator and then plan expenses in Project Planning?

No. A plan must exist in its entirety in either Vision or Navigator. If there is a need to plan expenses in that plan (including labor), it will need to be maintained in Vision Project Planning. Support for expenses will be in a future release of Navigator.

Vision Timesheet and Navigator

Can I maintain Timesheet information in Navigator?

Yes. Navigator works with the Vision Timesheet application to allow you to enter your own timesheets and submit them for processing. Your system administrator configures your timesheet access rights that control the activities that you can perform in the application. The same access rights that are entered in Vision Timesheet apply to Navigator.

Can I use special categories that are entered in Vision Timesheet on my Navigator Timesheet?

Yes. Your Vision system administrator configures the special categories that you can use for entering standard labor charges, such as vacation, sick time, or holiday leave. These same special categories display on your Navigator timesheet each time you open the application.

Can I enter overtime hours in Navigator?

Yes, if overtime is configured in Vision Company Timesheet Configuration, you can enter overtime for the current labor charge.

Can I approve timesheets in Navigator?

No. While timesheets can be submitted using Navigator, all approvals must be completed in Vision.

Vision Consultants and Navigator

Can I maintain consultant information in Navigator?

Yes.

The Planning tab of Vision Navigator is now divided into Labor and Consultants. When you open the Planning tab, the Labor charts and grid are the default view. However, there is a new option that allows you to select which information you want to view: Labor or Consultants.

When you select Consultants, the new Consultants charts and grid display. You can view consultant details on the charts, and then assign consultants to the current Navigator plan on the grid. Consultants can be planned at the following levels: WBS1, WBS2, or the lowest level. The default for this setting is configured on the Plan Settings tab in Vision » Configuration » Planning. However, you can override this setting for each individual plan on the Plan Settings dialog box in Navigator.

What dashparts and charts are available?

The new Consultants feature includes both dashparts that display on the Navigator Dashboard, and charts that display on the Consultant tab.

- **Consultant Progress** — The Consultant Progress dashpart and chart displays the progress of each Consultant on a project by showing their JTD against their planned balance.
- **Consultant Plan Summary** — The Consultant Plan Summary dashpart displays the contract, planned, and job-to-date (JTD) amounts by reimbursable consultants and direct consultants.

How do I add consultants to a plan?

The Consultants grid allows you to plan the consultants for a project. Similar to the Labor tab, this grid automatically displays the project's pre-determined WBS structure that is defined in Vision Planning after the project is created in the Vision Project Info Center.

The dates on the Consultants grid are read-only and are populated directly from the Labor tab. When you use this grid, you can access a lookup to select the types of consultants that will be working on your project. Then, you can select specific names and add planned amounts to budget each of the assigned consultants.

Since Navigator plans are at Billing, how do I account for mark-ups on Consultants?

When reimbursable consultant invoices are to be marked up on invoices to clients, a Project Manager needs to be able to see and manage both the contract amount with the consultant and the billing amount with the client. In Navigator Plan Settings, you can identify when a project has a markup on reimbursable consultants and then identify the type of markup. When this is configured, a Cost/Bill toggle will appear on the Navigator screen. At this point, all planned values will be entered at Cost (based on the contract amount with the consultant) and Navigator will calculate the bill amounts. Note that the markups only apply to reimbursable consultants, direct consultants will be entered on the same screen but the value will be the same at cost and billing. You can then toggle between cost and bill depending on the information that is needed at the time.

Differences Between Project Budget Worksheet, Navigator, and Vision Resource Planning

The table below highlights the primary functional differences between Project Budget Worksheet, Navigator, and Vision Resource Planning. Some of the features and functionality for Navigator are planned for a future release.


Feature/Functionality	Budget Worksheet	Navigator	Resource Planning
Budget/Plan Labor, Consultants, and Expenses at WBS Levels	✓	✓ ¹	✓
Labor Code Based Budgeting	✓		✓
View Key Project Metrics (budget/plan, ETC, EAC, JTD)	✓	✓	✓
Utilize as Budget Source in Reports	✓	✓	✓
Graphical Views of Key Project Metrics		✓	
Budget/Plan Labor by Generic Resource/Employee		✓	✓
Budget/Plan Labor and Expenses Over Time		✓ ¹	✓
Budget/Plan at Both Cost and Billing	✓	✓ ²	✓
View and Schedule Resources Based on Availability/Utilization		✓	✓
View Resource/Employee Utilization Across Entire Organization		✓	✓
View and Schedule Resources Based on Skills		✓	✓
Alert Notifications When Resources are Scheduled		✓	✓
Resource Utilization		✓	✓
Project Planning Reporting		✓	✓
Project Plans with more than 3 levels of WBS			✓
Project Plans with Multiple Accordion Calendar Scales			✓
Project Plans Mapped to Multiple Projects			✓

Feature/Functionality	Budget Worksheet	Navigator	Resource Planning
Project Plans with WBS Different from Project WBS			✓
Assign Resources in Project Plans at WBS Levels Other Than Lowest Level			✓
Utilize From Any Browser		✓	
Utilize From Tablet Devices		✓	
Collaborate via Kona		✓	

- ✓ - currently support
- ✓ - targeted to be supported in future release
- ✓ - supported with a Vision Resource Planning license

Notes

- 1 – Currently, Navigator only allows for planning labor and consultants. Future releases will include planning for expenses.
- 2 – Cost and Billing is only visible for Consultant planning.



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