Deltek

Deltek Vantagepoint® 7.0

Getting Started

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Contents

Getting Started with Vantagepoint

When you first implement Vantagepoint, you use a set of Activation and Setup pages to walk you through your initial setup decisions.

If you are the Vantagepoint administrator for your enterprise, you are responsible for initial Activation and Setup tasks. When you complete the process, your enterprise can begin using Vantagepoint for daily activities.

Supported browsers: Vantagepoint supports the latest version of browsers such as Edge, Chrome, Firefox and Safari. Internet Explorer is not supported.

Video: See related video below

Follow these general steps:

1. Log in to Vantagepoint. The Activation menu displays at the left side of the Startup page.
2. Complete each Activation step in the same order as the menu. No other users can log in to Vantagepoint until Activation is completed.
3. After you complete the final step, Activate Organizations, log out.
4. Log back in using the Setup username. The Setup menu displays at the left side of the page.
5. Complete each Setup step in the same order as the menu.
6. Let other users log in and begin their activities.

To take advantage of advanced features, and to tailor Vantagepoint to the specific needs of your enterprise, you will most likely choose to perform additional setup and integration steps, outside of Activation and Setup. You perform these steps in Settings and in other areas of the Vantagepoint software.

Cloud Administration Help

If you are the Vantagepoint administrator for your company, you can use the cloud administration help system to learn more about your role and responsibilities.

Video

Title	Description
Implementation Overview	Learn about the implementation process and the steps that you take to get Vantagepoint up and running quickly.

Initial Login

The first time that you use Vantagepoint, you must enter a valid user ID and password. Your welcome email message includes a link to the login page.

Supported browsers: Vantagepoint supports the latest version of browsers such as Edge, Chrome, Firefox and Safari. Internet Explorer is not supported.

To log in:

1. Use your Vantagepoint URL to display the login page.
2. In the **User ID** field, enter **SETUP**.
3. In the **Password** field, enter the password included in your welcome email message.
4. In the **Database** field, select the database that you want to use.
5. In the **Language** field, select the language that you want to use.

   This field displays when more than one language is enabled in Vantagepoint, so that you can select the language in which you want the application to display. This list includes all languages that are enabled. When you select a language here, the application refreshes to display in that language.

   If the **Language** field does not display, the application uses the language that is specified by your system administrator in **Settings** » **General** » **Options**.
6. Click **Log In**.
   The Vantagepoint Getting Started page displays the Activation menu.

Activation

During activation, you make important decisions about how to configure your database. Activation is a one-time process and the settings that you specify are permanent. Complete each step in the order shown on the Activation menu, on the Getting Started page.

Video

Title	Description
Activation Overview	Learn how to prepare for the activation process, including the information that you should gather before you begin.

Activate Modules, Accounting Periods, and Fiscal Years

Use the Activate Modules page to verify the Vantagepoint applications that you plan to use and to set up your starting accounting period and fiscal year.

Before you complete these steps, Deltek recommends that you review fiscal period information with Deltek Professional Services or Deltek Support Services to avoid errors that are difficult to reverse.

If you initially implement Vantagepoint without the Accounting module or the PSA module, you do not specify a starting accounting period and fiscal year as described in the steps below; they are not needed in that situation. However, if you later activate one of those two modules, no one can log in to Vantagepoint until a user with an Administrator security role logs in and specifies a starting accounting period and fiscal year. An explanatory message displays, along with the option to open the Accounting Period Setup form. That form contains the same fields and on-screen prompts as the Fiscal Period tab of the Activate Modules page from the initial Vantagepoint activation process. After an administrator completes the required entries on the Accounting Period Setup form, they and other users can once again log in to Vantagepoint. (This situation can also occur if Deltek Professional Services provides your initial database as part of a Deltek Power Launch.)

To activate modules:

1. Click **Activate Modules**.
2. On the Modules tab, review the list of modules to confirm that it includes all the modules that your enterprise is licensed to use; if any applications are missing, contact Deltek Operations for help.
3. If you are licensed to use the PSA module and you are integrating Vantagepoint with a third party, set the **Will your PSA instance integrate with a third-party GL solution?** option to **Yes** below the modules list.
4. If you are licensed to use the Accounting module or the PSA module, click the Fiscal Period tab and complete the appropriate actions:

Module	Description
Accounting	If you are licensed to use the Accounting module, enter your starting accounting period and fiscal year. This is the first accounting period and fiscal year in which you will enter history or process data in Vantagepoint. Assume, for example, that you are setting up Vantagepoint in April 2023, and your fiscal year runs from January to December. You may choose to enter historical data for January through March of 2023 so that you can track data and produce reports for the entire fiscal year. In this case, you would enter January 2023 as your first accounting period and 2023 as your first fiscal year. Alternatively, you may decide to enter history for the entire prior year, in which case you would enter January as your first accounting period and 2022 as your first fiscal year. After you begin using Vantagepoint, you will maintain a calendar of accounting periods, along with opening and closing periods as the year progresses. To learn more about this process, see the Accounting Periods and Processing Cycles help topic.
PSA	If you are licensed to use the PSA module and you set the **Will your PSA instance integrate with a third-party GL solution?** option to Yes on the Modules tab, enter the fiscal year and accounting period in which you will start tracking new project labor and expenses. You must enter the first and last days of a calendar month for the fiscal year start and end dates and the accounting period start and end dates.

5. Click **Save** and then click **Done Activating Modules**.

Activate Defaults

Use the Activate Defaults page to specify the industry and country in which your enterprise operates and to define your coding system for projects.

Video: See related video below

During the Activation process, you can identify up to three levels of project numbering, although many firms use only one (such as project) or two (such as project and phase). For example, you might identify each project using a seven-character code such as 45622.01, in which the first five characters represent the main project and the final two represent additional work. The two parts of the code are separated by a period, called a delimiter.

If you already have a project numbering structure, you should probably continue using it. If you are considering a change, consult with your project management and finance teams to be sure that any changes that you make address their needs.

The project number is just one element of the work breakdown structure (WBS) that your enterprise could use. To learn more about the overall work breakdown structure, see the Work Breakdown Structure help topic.

To activate your defaults:

1. On the Activation menu, click **Activate Defaults**.
2. From the **Industry** drop-down list, select the one that best matches the work that your enterprise performs and then select your country from the **Country** drop-down list. Based on the industry that you specify, some settings and terminology in Vantagepoint automatically change to reflect common industry practices. For example, if you choose Architecture and Engineering Services, Vantagepoint uses a chart of accounts that is common to the A/E industry and uses terms such as "project," "project manager," and "client" throughout the user interface.

   These settings and terminology are just a starting point. After you complete the Activation process, you can review these default settings and terms and further tailor Vantagepoint to your needs. For example, you can use the Labels and Lists page in Setup to change the names of specific fields or change the options that are available in drop-down lists. Or you can use the Time page in Setup to modify the default settings for employee timesheets.
3. Click **Use Industry Defaults**.
   In most cases, the WBS tab displays. This is where you specify the structure of your project numbers.
4. Click **WBS Structure**.
5. Set up the work breakdown structure for the way that your enterprise manages projects.

   If you are using QuickBooks integration with Vantagepoint, you can set up work breakdown levels in Vantagepoint, but any project data from Vantagepoint that is passed to QuickBooks is passed at work breakdown structure level 1 (project) only and not lower levels.
6. Click **Done Activating Defaults**.

Video

Title	Description
Work Breakdown Structure Basics	Learn how to set up a work breakdown structure that reflects the project numbering system that you currently use.

Activate Email

Use the Activate Email page to enter email addresses that Vantagepoint uses to send automated messages to employees and others for administrative and approval processes.

For example, you might need to remind an employee about a timesheet task to complete or send someone a report to review.

You can route all of your employees' questions about Vantagepoint to a single email address, which is monitored by your system administrator or another internal product expert.

To activate your email addresses:

1. On the Activation menu, click **Activate Email**.
2. In the **Default Sender Email** field, enter the email address that displays as the "sender" of these automated email messages.
3. To add an extra layer of security to the email messages that Vantagepoint sends automatically, select the **Add DeltekAdmin_ prefix to the Default Sender Email Address** option.
   Selecting this option adds the prefix **DeltekAdmin_** to the sender's email address, which makes it an email address that cannot receive replies. This practice also prevents spoofing, because only valid email messages can come from this appended email address.
4. In the **Default Help Desk Email** field, enter the email address that is used to send automated messages to the Vantagepoint Help Desk.
5. Click **Done Activating Email**.

Activate Currencies

In Vantagepoint, your enterprise can track financial transactions and project performance using multiple global currencies. Use the Activate Currencies page to identify the monetary currencies that your enterprise uses and to set up currency exchange rates.

If you enable the multiple currencies feature, your database automatically changes so that it can track multiple currencies and exchange rates and additional fields in the user interface prompt you to enter currency-related information. After these database changes are made, you cannot reverse them. However, you can choose to not enable the multiple currencies feature now and instead enable it later, after you complete the Activation and Setup process. To learn more about how this works, see Multiple Currencies.

Video: See related video below

To set up one or more currencies:

1. On the Activation menu, click **Activate Currencies**.
2. For the question **Do you need to track more than one currency**, select **Yes** or **No**.

   If you are using QuickBooks integration, you can use only one currency and this question does not display.

3. Use the remaining fields on the Currency tab to enter information about your main (functional) currency, including the currency name and the number of decimals to use. The main (or functional) currency is the currency of the primary economic environment in which your enterprise operates. For example, an enterprise located in France normally uses the Euro as its main currency. For more information about the different currency types used in Vantagepoint, see Currency Types.
4. Complete one of the following steps:
   - If you use a single currency, click **Done Activating Currencies** to complete the process and exit currencies activation. You do not need to complete steps 5-11.
   - If you use multiple currencies, click **Enable Multicurrency**, confirm your choice, and continue with steps 5-11.
5. On the Multicurrency tab, click **+ Add Currency**.
6. Enter each currency that your enterprise uses and click **Save**.
7. On the Exchange Rates tab, click **+ Add Exchange Rate**.
8. Select a pair of currencies, enter an effective date, and enter an exchange rate. You do not need to enter information for one pair of currencies (for example, US Dollars to Yen) and also enter information for its inverse (Yen to US Dollars). In fact, doing so can cause incorrect results. Instead, enter information for only a single exchange (for example, US Dollars to Yen). Vantagepoint automatically calculate the inverse. For more information about how exchange rates work in Vantagepoint, see Exchange Rates Overview.
9. Repeat step 8 for each multiple currency pair.

   You can switch back and forth between tabs, entering currencies and setting up exchange rates.
10. Click **Save**.
11. Click **Done Activating Currencies**.

Video

Title	Description
Activate Multiple Currencies	Learn how to set up monetary currencies and enter exchange rates for them.

Activate Organizations

Use the Activate Organizations page to provide information about the structure of your enterprise, including your companies and your "organizations" or business units.

Video: See related video below

To set up the structure for your organizations:

1. On the Activation menu, click **Activate Organizations**.

2. If you are licensed to use the PSA module and you are activating Vantagepoint with QuickBooks integration, enter the name of your company on this page and continue with step 11; otherwise, continue with step 3.
3. In response to the question **Do you have multiple companies?**, select **Yes** or **No**.

   If you select **Yes**, you set up your main company now, and then set up additional companies after the Activation and Setup process is complete.
4. If your enterprise is made up of separate organizations, select **Yes** for **Do you have Profit Centers or Business Units that require their own income statements**; otherwise, answer **No**.
   Vantagepoint provides the framework for tracking multiple "organizations" in your company. These separate organizations are business units that incur expenses and/or generate revenue. For example, if your company is divided into regions and offices, you might create a separate organization for each region and office, and maintain information for each of these segments of your business. To learn more about how this works, see the Organization Reporting Overview help section.
5. Enter the name of your main company.
6. Select the number of levels required by the structure of your organizations.
   Depending on the size and complexity of your enterprise, you can create a fairly simple structure or a more complex one. To learn more about organization levels, see the Organization Reporting Structure help topic.

   If you have multiple companies, your companies are automatically considered to be the first level. So, if you have multiple companies and also want to track branch offices and disciplines, you need a three-level organization structure.
7. Enter the singular and plural names for the levels in your organization.
8. Click **Activate** to update the database to reflect your organization structure.
   The Level Values and Combinations tabs display. Use these tabs together to identify the specific business entities that you want to track.
9. Click **Level Values** and enter all of the valid values for the organization that you want to define.
   For example, if you have two levels, Office and Studio, list all of your offices and all of your studios. Assign a two-character code to each of the values (for example, BA for Buenos Aires or BR for Branding).
10. Click **Combinations** and identify valid combinations of these values.
    For example, if you have two levels, Offices and Studios, identify valid combinations, such as Paris/Branding, Paris/Consumer, and New York/Tech. If your Paris office does not have a Tech studio, do not enter that combination.
11. If you want to review or change any of your prior activation settings, do so now, before you activate organizations, which is the last step in the activation process.
    After you click **Done Activating Organizations**, you cannot change any of the activation settings that you selected.
12. When you are satisfied that your activation entries are complete, click **Done Activating Organizations**.
13. Click and then click **Log Out**.

Activation is now complete. Continue with the setup process to enter information about your projects, employees, and finances.

Video

Title	Description
Activate Organizations	Learn how to set up an organization structure that reflects how your enterprise is structured and to specify whether or not you need to track multiple companies.

Setup

During the Setup process, you define policies and processes for common Vantagepoint functions. Setup areas are located in both the Vantagepoint browser and desktop applications.

You set up most modules in the browser application. However, depending on the modules that you use, you may need to set up modules in the desktop application, as well.

Supported browsers: Vantagepoint supports the latest version of browsers such as Edge, Chrome, Firefox and Safari. Internet Explorer is not supported.

Video

Title	Description
Setup Overview	Learn how to prepare for the setup process, including the information that you should gather before you begin.

Set Up Security

Use the Security Setup forms to make decisions about how employee expense reports are tracked.

Each setup form focuses on a different area.

Form	Description
Roles	Use the Roles form to establish security rights for each role. These rights determine a role's access to the modules, tabs, templates, reports, and records. In many cases, security rights are hierarchical, meaning that you make a basic choice, then further refine that choice.
Users	Use this form to create a user record, specify a username and password, assign a security role, and set up default report settings.
Password Policies	Use this form to specify the options and restrictions for passwords.

Set Up Time

Use the Time Setup forms to make decisions about how employee time is tracked and how timesheets are formatted.

Video: See related video

Each setup form focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how employee timesheets will work, including the increments in which time can be tracked, whether employees can enter overtime hours, and whether an employee signature is required. For more information, see the Timesheet Overview help topic.
Time Periods	Use this form to set up timesheet periods. Employees must enter a timesheet for each timesheet period.
Non-Work Days	Use this form to identify the days of the week and the holidays on which employees are not expected to work.
Time Groups	Use this form to set up time groups to distribute timesheet administration responsibilities among different administrators. For example, you can use time groups to bring together employees who share the same job function, work in the same department, or work in the same office. After you set up a time group, you can assign employees to it.
Time Approvals	Use this form to specify that your firm uses an approval workflow for employee timesheets. You can choose among several workflow options. For more information, see the Approvals Center section of the help.
Time Categories	Use this form to specify that certain common time categories, such as vacation and administration, should display automatically on timesheets, to save employees time in completing timesheets. You can have a time category display on timesheets for all employees or for only those who belong to specific time groups.

Video

Title	Description
Set Up Time	Learn how to set up time tracking so that employees can enter, submit, and approve timesheets.

Set Up Expense

Use the Expense Setup forms to make decisions about how employee expense reports are tracked.

Video: See related video

Each setup form focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how employee expense reports work, including whether or not employees can enter advances on their expense reports or employee signatures are required. For more information, see the Expense Reports help topic.
Expense Groups	Use this form to set up expense groups to distribute expense report administration responsibilities among different administrators. For example, you can use expense groups to bring together employees who share the same job function, work in the same department, or work in the same office. After you set up an expense group, you can assign employees to it.
Expense Categories	Use this form to specify that certain common expense categories, such as hotels, meals, and airfare, should display automatically on expense reports, along with the correct accounting and billing information. You can have an expense category display on expense reports for all employees or for only those who belong to specific expense groups. For more information, see the Expense Categories help topic.
Payments	Use this form to determine the format of employee expense checks and remittance advices, as well as the bank account that they will be drawn upon unless a different bank is chosen.
Expense Approvals	Use this form to determine if you will use an approval workflow to have leaders approve employee expense reports. You can choose among several different workflow options. For more information, see the Approvals Center section of the help.

Video

Title	Description
Set Up Expense	Learn how to set up expense report tracking so that employees can enter, submit, and approve expense reports.

Set Up Cash Management

Use the Cash Management Setup forms to set up your company's bank codes, tax codes, accounts payable transactions, and credit cards.

Each setup form focuses on a different area.

Form	Description
Options	Use this form to set up the use of credit cards and tax auditing.
Banks	Use this form to set up bank codes, electronic funds transfers, and formats for export text files.
Tax Codes	Use this form to set up information related to taxes, input and output accounts, debit and credit postings, and tax reports. Vantagepoint uses this information to apply taxes to intercompany transactions.
Accounts Payable	Use the Accounts Payable form to specify how Vantagepoint processes accounts payable vouchers and to enable AP Invoice Approvals. You can establish the accounts payable settings system-wide for all companies in your enterprise. In addition to system-wide accounts payable options, there are other company-wide accounts payable options that you need to set up for each of your companies.

Set Up Accounting

Use the Accounting page to set parameters for accounting postings.

Video: See related video

Accounting has multiple menu options, each focused on a different area. The fields are pre-populated with default entries based on the options you selected during activation. We recommend you keep the default settings in each area, but you may need to change items that need to be specialized for your enterprise.

Review the default settings in each area and update any fields as needed. You can modify any fields and implement advanced features later in Vantagepoint Settings after the setup process is complete.

Menu Item	Description
Summary	This form shows you the work that you have done on the other forms.
Options	Use this form to choose how to indicate the levels of the work breakdown structure (WBS) at which you can enter project compensation amounts and contract detail amounts in the Projects hub.
Time Analysis	Use this form to set up the Time Analysis report, which lets you review how your employees are using their time. You can view employee time from several perspectives, using comparisons of

Menu Item	Description
	direct time, indirect time, and total time worked. An analysis of indirect time helps you monitor paid time off and control non-billable time. For more information, see the Time Analysis help topic.
Labor Posting	Use this form to set up direct and indirect labor accounts associated with specific labor types, such as Employee, Management, and Principal. When an employee charges time to a regular or indirect project, the labor cost is charged automatically to the appropriate account. Use the Override Labor Accounts section to set up exceptions to these rules. For more information, see the Labor Types Settings Overview help topic.
Absence Accrual	Use this form to identify the absence accruals (vacation, sick leave, and so on) that your enterprise tracks for its employees. For each absence accrual, you specify if you want to show the accrual balance on employee timesheets and if you want to set up an absence request approval process and, if so, the employee who is the approval administrator. You also set up a project of range of projects for each accrual. For more information, see the Accruals Processing Overview help topic.
Overhead Allocation	Use this form to define how the costs accumulated in overhead projects (such as vacation pay, sick time, rent, utilities, office supplies, and administration) will be distributed to regular, revenue-producing projects. For more information, see the Overhead Allocation help topic.

Video

Title	Description
Set Up Accounting	Learn the steps required to complete Accounting Setup. Using Vantagepoint to control project success means keeping project management consistent with your financial records. Accounting Setup provides the options to ensure project reporting is consistent with your company's financial reporting.

Set Up General Ledger

Use the General Ledger Setup form to set up accounts.

Form	Description
Chart of Accounts	Use this form to set up accounts, including specifying account numbers and names, setting the status and type, and establishing account groups. You can also add and modify accounts, define system default accounts, and assign accounts to an account range. For more information, see the Chart of Accounts Settings help topic.

Set Up Currency

Use the Currency Setup forms to establish currency formats. If you enable multiple currencies, you also specify the functional and triangulation currencies used in calculating currency exchanges, as well as set up and maintain daily and period exchange rates.

Each setup form focuses on a different area.

Form	Description
Options	Use this form to set up currency codes, descriptions, symbols, and units. If only one currency is enabled, you can also use this form to enable the Multicurrency application.
Daily Exchange Rates	Use this form to configure exchange rates from one currency to another currency for a specific date. If your firm uses multiple companies, the available currencies are limited to those enabled for the active company.
Period Exchange Rates	Use this form to configure exchange rates from one currency to another currency for a specific period. If your firm uses multiple companies, the available currencies are limited to those enabled for the active company.

Set Up Billing

Use the Billing Setup forms to make decisions about how your clients are billed.

Video: See related video

Each setup form focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how clients will be billed, including invoice numbering, whether retainers and retainage are tracked, and whether you use an approval process for invoices.

Form	Description
	For more information, see the Retainers, Retainage Overview, and Invoice Approval Overview help topics.
Fee	Choose whether or not to use scheduled billing. Scheduled billing allows you to invoice fee-based projects based on scheduled invoice dates and percent complete or dollar amounts. For more information, see the Scheduled Billing help topic.
Invoice Format	On this form, specify whether or not to display your company name, byline, and address on billing invoices.
Invoice Accounts	During final invoice processing, invoice transactions are charged to general ledger revenue accounts. Use this form to specify the default revenue account for each section of your invoice. For example, specify the revenue account associated with fee billings. You can also use this tab to enter the label that displays above each invoice section.
Taxes	Use this form to set up the taxes that you need to calculate and include on invoices. For each tax, specify the tax rate, the invoice sections to which it should be applied (labor, expense, fees, and so on), and the general ledger account to which the tax is charged.

Video

Title	Description
Set Up Billing	Learn how to set up Billing, including selecting options for preparing and formatting client invoices and tracking revenue and taxes.

Set Up Rate Tables

Use the Rate Tables Setup forms to establish billing, cost, labor, and expense rates, as well as related accounts and overrides.

Each setup form focuses on a different area.

Form	Description
Billing Labor Rates	Use this form to assign hourly billing rates to employees for billing their labor. These rates are used in the Billing application to calculate invoice amounts for a project if you select **Rate Table** as the labor rate method and a billing labor rate table in the project's billing terms. You can set up rate tables for specific clients or industries.

Form	Description
Billing Labor Categories	Use this form to set up labor categories with hourly rates for standard staff roles such as principal, project manager, or supervisor (different types of work).
Billing Labor Overrides	Use this form to set up a billing rate or labor category for employees whose labor is billed with a different labor rate or labor category for a particular project. Add the override table to the project's billing terms. The billing rate or labor category from the override table overrides the employee's billing rate or labor category that is specified in the labor rate table or the labor category table assigned to the project's billing terms. You can also use these tables to specify a maximum cost rate for an entire labor category, rather than by individual employees.
Billing Expense Accounts	Use this form to assign a multiplier (markup) to individual general ledger expense accounts for calculating billable expenses and consultant expenses on billing invoices for projects. These multipliers are used in the Billing application when invoices are generated for a project whose billing terms has **By account** selected for the expense rate method or the consultants rate method and an expense account table is specified. The multiplier for a general ledger account in a billing expense account table overrides the multiplier used for all expenses as specified in the **Multiplier** field in the Expense section and the Consultants section on the Rates tab in Billing Terms.
Billing Expense Categories	Use this form to create billing expense categories that allow you to bill a group of related expenses as one item on a billing invoice for a project. You can set up different billing expense category tables as needed, for example, a table to be used for a specific project. Add expense categories to each table and the multiplier (markup) to use for each expense category for calculating invoice billing amounts. Then add the general ledger accounts for each expense category. For a project to use an expense category table for billing invoices, the project's billing terms must have the expense rate method set to **By Category** and an expense category table specified.
Billing Expense by Vendor	Use this form if you want billing invoices for a project or class of projects to calculate vendor expenses on a billing invoice based on a multiplier (markup) for the specific vendor rather than on the overall multiplier specified for all expenses in a project's billing terms. You can set up different billing expense by vendor tables for different projects or classes of projects. For each table, add vendors and a multiplier for each vendor. For a project to use an expense by vendor table for billing invoices, the project's billing terms must have the expense rate method set to **By Vendor** and an expense by vendor table specified.

Form	Description
Cost/Pay Labor Rates	Use this form to set up labor rates to override the cost and/or pay labor rates entered for employees in the Employees hub. When you create a cost/pay labor rate table, you specify whether the rate table applies to cost rates, pay rates, or both. For each employee that you add to the table, enter a labor rate and an effective date for the rate if appropriate. Each employee in a labor rate table can have one row that does not specify an effective date; use this row to indicate a default rate to use if no other row has an applicable effective date. You can assign a cost/pay labor rate table to projects, employees, or both
Cost/Pay Labor Categories	Use this form to override cost or pay rates for specific projects for specific labor categories. Labor categories are standard staff roles on project (for example, principal-in-charge, project manager, or supervisor). The table can override cost rates, pay rates, or both.

Set Up Resource Planning

Use the Resource Planning Setup forms to make decisions about how you use the Resource Planning application.

Video: See related video

Each setup form focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have completed on the other forms.
Plan Settings	Use this form to make basic decisions about how you will use Resource Planning, including whether you plan consultant and non-consultant expenses, and what overhead rate you apply to planned projects. If you want to be able to enter plan data for expenses, select **Yes** for the **Enable Expense Planning** option. You can enter plan data for direct, indirect, and reimbursable expenses. If you want to be able to enter plan data for consultants, select **Yes** for the **Enable Consultant Planning** option. You can enter plan data for direct and reimbursable consultants. In the **Starting Day of the Week** field, select the first day in your work week. 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. It is commonly used as the basis for evaluating the EAC labor cost multipliers as projects move forward.

<table>
<tr><th>Form</th><th>Description</th></tr>
<tr><td></td><td>In the Overhead % field, enter the default overhead percentage for plans, as a whole number. For example, enter 10 for 10 percent. A user with the necessary security rights can still enter different percentages for individual projects.</td></tr>
<tr><td>Rates</td><td>Use this form to specify whether planned amounts should be based on cost rates, billing rates, or both. Later, you must provide additional information about cost and labor rate methods, tables, and multipliers.</td></tr>
<tr><td>Resource Settings</td><td>Use this form to specify:

Utilization Thresholds: These are the low and high utilization percentages within which an employee is considered fully utilized.
Example: You set the lowest percentage to 95 and the highest percentage to 105. If an employee's target utilization is 80 percent, that employee is considered properly utilized for a given period if their utilization is between 76 percent (.95 x 80) and 84 percent (1.05 x 80). The employee is under-utilized if their utilization is below 76 percent and over-utilized if it is above 84 percent.
Scheduled Thresholds: These are the low and high scheduled percentages within which an employee is considered fully scheduled.
Example: You set the lowest percentage to 95 and the highest percentage to 105. If an employee's available hours for a week is 40, that employee is considered properly scheduled if they are scheduled for between 38 hours (.95 x 40) and 42 hours (1.05 x 40). The employee is under-scheduled if their scheduled hours are less than 38 and over-scheduled if the hours are more than 42.
Soft and Hard Booking: This is an option to tentatively plan, or "soft book" assignments, then "hard book" them when they are confirmed.
The soft and hard book feature enables you to distinguish between tentative or placeholder resource assignments and those confirmed or approved assignments that you consider a permanent part of the plan. When you generate planning reports, you can filter those reports to include or exclude assignments based on booking status if you include the Booking column on the report.
</td></tr>
<tr><td>Labor Categories</td><td>Use this form to define a master list of labor categories and related standard billing rates. Labor categories are standard staff roles on projects (for example, Principal, Project Manager, or</td></tr>
</table>

Form	Description
	Supervisor). In the Employees hub, you can associate each employee with a default labor category. You can use labor category rates to invoice new projects. If you use the Resource Planning module, you can use these rates to set up plans for new projects. (If Vantagepoint is set up to use both multiple companies and multiple currencies, this form is not available.)
Non-Work Days	Use this form to identify the days of the week and the holidays on which employees are not expected to work. When Vantagepoint spreads planned hours for you in Resource Planning, non-work days and holidays are allocated no hours, but planners can still assign planned hours to them.

Video

Title	Description
Set Up Resource Planning	Learn how to set up the resource planning module, including selecting options for entering and viewing project, opportunity, and resource plans.

Set Up Project

Use the Project Setup forms to select options related to entering budgets, compensation, and contract amounts. If Vantagepoint is set up to support multiple companies, these settings apply to all your companies.

Each setup form focuses on a different area.

Form	Description
Budget	Use this form to specify the types of columns that can be displayed on the Budget form in the Projects hub and on the Budget Worksheet report.
Contract Management	Use this form to specify the work breakdown structure levels at which compensation amounts for projects can be entered, to indicate if you want to synchronize compensation amounts with contract amounts, and to define defaults for allocating estimated fees.

Set Up CRM

The CRM Setup page guides you through the multiple-step process of setting up your CRM processes, data, and user access.

Videos: See related videos below

You complete the CRM setup steps throughout Vantagepoint, not just on this page. This page walks you through the four main CRM setup steps and suggests videos and other learning resources for each of the steps.

Step	Description
Make a plan	Before you do anything, gather key stakeholders to discuss your goals for using Vantagepoint CRM and how you will achieve those goals. Discuss the data that you will bring into Vantagepoint from others sources, the terminology that you will use, and the workflows that you will establish. See the CRM Overview help topic for more information.
Set up your processes	Set up the framework for your CRM system, including establishing workflows, establishing terminology, and selecting the values that are available from drop-down lists. If you plan to integrate Vantagepoint CRM with Salesforce, set up the integration process. For more information, see the Workflow Configuration Overview help topic.
Set up your hubs	In the "hubs" area of Vantagepoint you store key data about your projects, employees, and more. As part of setting up CRM, you enter data about the firms (vendors and clients) with which you work, your contacts, projects you are pursuing, and your marketing efforts. You will probably import this data into Vantagepoint from information sources that you already maintain. For more information, see the Hubs help topic.
Empower your users	Identify the employees who will use Vantagepoint CRM and give them appropriate security access to the CRM applications. For more information, see the Security Settings help topic.

Videos

Title	Description
Get Started with CRM for Administrators	Learn how to navigate through the hubs and set up labels and lists. The video also introduces the import process, which automates the data entry process.
Use Hubs for CRM	Learn about the hubs used by CRM users and how to enter data into hubs manually, import data from outside sources, and quickly find or add a record.
Import Data for CRM	Learn how to separate CRM contacts from personal contacts, locate duplicates and remove them, and import contacts from outside sources.

Set Up Labels and Lists

Use the Labels and Lists Setup form to set up the terminology used in the CRM application and the values that are available from drop-down lists.

Video: See related video below

Each setup form focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Labels	During the Activation process, you identified the primary industry in which your enterprise operates. Based on this industry choice, your Vantagepoint database was updated to use industry-specific terminology. Now, on the Labels form, you can further customize terminology. For example, you might change the term "Employees" to "Team Members," "Associates," or "Specialists."
Lists	Throughout Vantagepoint, your users make choices from drop-down lists. For example, to identify the current state of a proposal, your business development staff selects a value for the **Proposal Status** option. Here, on the Lists form, you can review the values that are pre-set for these drop-down lists. (In the case of **Proposal Status**, for example, these values are **In Progress**, **In Review**, and **Submitted**.) You can change the default values to better reflect your business needs, add new values, and any remove values that you do not want.

Video

Title	Description
Set Up Labels and Lists	Learn how to set up a new custom label, edit an existing label, and edit lists and their drop-down values.

Set Up General

Use the General Setup forms to establish settings for all users. You can restrict access to these options in Security settings.

Each setup form focuses on a different area.

Form	Description
Options	Use this form to establish both system-wide and company-specific settings. System-wide settings include workflow logs,

Form	Description
	internet authentication, polling intervals for alerts, exported report destinations, FileStream file size upload limits, Hey Deltek interaction, and text editor font defaults. Company-specific settings include your company's name, address, and phone format.
Communications	If you installed Vantagepoint on your own server, use this form to set system-wide options for sending email messages for alerts or errors.
Modules	This form displays the Vantagepoint modules that you activated.

Set Up Integrations

Use the Integrations Setup forms in Utilities to set up integrations between Vantagepoint and other software products and to import data into Vantagepoint from a spreadsheet or other comma-separated values (.csv) file.

Video: See related video below

Each integration form applies to a different type of integration.

Form	Description
Ajera	Use this form to set up integration between Vantagepoint and Ajera. This tab has just one checkbox, **Enable Ajera Synchronization**.
API Authorization	Use this form if you are licensed to use the Resource Planning module and want to use any APIs to import data from other applications into the Vantagepoint database. Click **Generate Secret** to generate the Client ID and Client Secret.
Maconomy	Use this form to configure APIs to connect your Maconomy instance to Vantagepoint. This enables you to integrate Maconomy information with Vantagepoint and synchronize user-defined fields and workflow data.
VAT Registrations	Use the VAT Registrations form to configure the subscription license for Vantagepoint to use the vatlayer API system to validate European Union VAT numbers.
Salesforce	Use this form to set up integration between Vantagepoint and Salesforce, including the rules that control which data is shared between the two applications, when it is shared, and how data is mapped between the two applications.
QuickBooks	Use this form to turn on the QuickBooks integration, connect Vantagepoint with QuickBooks Online, run the initialization to copy records from QuickBooks Online to Vantagepoint for the first time, map records, set up the time interval for automatic updating to occur between Vantagepoint and QuickBooks

Form	Description
	Online, and complete other settings. For more information, see Set Up QuickBooks Integration.

Video

Title	Description
Integration with Salesforce	Learn how to use the Salesforce Integration module to integrate Salesforce and Vantagepoint. In addition, learn how to use existing Salesforce information to create projects in Vantagepoint, how to access and report on sales data in one place, and how to use Salesforce information to create estimates.

Set Up QuickBooks Integration

You set up the QuickBooks integration with Vantagepoint using the QuickBooks integration utility in Vantagepoint.

To open the utility, select **Utilities** » **Integrations** » **QuickBooks** in the Vantagepoint Navigation pane. You can use this utility when you log in to Vantagepoint with your setup credentials to initially activate and set up Vantagepoint, or use it when you log in after the initial setup to complete or modify the QuickBooks integration setup. The same QuickBooks form, tabs, and settings are included in the utility whether you use it during the initial Vantagepoint setup or after the initial setup.

For the integration setup, you connect Vantagepoint with QuickBooks Online, enter other integration settings, and mapping certain records.

Before you can connect Vantagepoint with QuickBooks Online, you must first do the following:

- Create an Intuit Developer Account
- Create an Intuit App for Vantagepoint

Then complete the settings on the tabs in the QuickBooks integration utility.

Tab on the QuickBooks Form	Description
Integration Setup	Use the settings on this tab to: ▪ Enable QuickBooks integration. ▪ Connect Vantagepoint with QuickBooks Online. ▪ Schedule how often to automatically update the data between the two products. ▪ Enter advanced and default settings.

Tab on the QuickBooks Form	Description
Accounts Mapping	Use this tab to review and map the general ledger accounts that are linked between Vantagepoint and QuickBooks Online.
Tax Code Mapping	Use this tab to review and map the tax codes that are linked between Vantagepoint and QuickBooks Online.
Employee Mapping	Use this tab to link an employee record with a corresponding vendor record so you can pay an employee in QuickBooks Online for expenses entered in an expense report in Vantagepoint.

For more information about each tab in the QuickBooks integration utility and how to complete the setup, see QuickBooks Integration Utility.

Vantagepoint Version and System Information

You can access information about your Vantagepoint installation on the About dialog box.

About Dialog Box

Use this dialog box to view information about your Vantagepoint installation, including the Vantagepoint version number, the database to which you are connected, and the user ID that you used to log in.

To access this dialog box, click the help **?** on any Vantagepoint screen and then click **About**.

Other information provided on this dialog box includes a list of installed modules, software licensing and copyright information, and additional miscellaneous system information.

If you use the Vantagepoint Connect add-in, the file name for the Microsoft Outlook add-in manifest URL that you need when you initially add the add-in in Outlook displays on the System Info tab on this dialog box. You must click the **Configure Connect** button in **Utilities** » **Integrations** » **Connect Administration** to populate this field.

The System Info tab on the Vantagepoint Help About dialog also includes Read-Only-Replica database server information if one is identified in the Weblink utility.

Display the About Dialog Box

You display the About dialog box from the main Vantagepoint toolbar in either the browser application or the desktop application.

1. Complete either of the following actions:
   - In the browser application, click **?** on the Vantagepoint toolbar.
   - In the desktop application, click **Help** on the Vantagepoint toolbar.
2. Click **About**.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management, and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue.

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