Deltek Know more. Do more.™

Deltek Vision® 7.1

Getting Started Guide

June 27, 2013

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Overview

Welcome to Deltek Vision®, the Web-based enterprise management software solution designed specifically for professional services organizations. Vision combines all of your front-office and back-office data into one integrated system and enables all the members of your firm to use and share the same information—thereby helping increase the efficiency and productivity of your business.

Getting Started

Getting Started introduces you to the many features and capabilities offered in Vision.

This guide intends to provide a clear understanding of Vision's functionality and logic, and help you realize this product's full potential.

You will learn about the Vision applications, how to navigate through Vision and use its system-wide features, how to modify the interface to suit your needs, and how to use records and reports. In addition, you will learn about Vision's Work Breakdown Structure (WBS), which will help you organize and manage your records and reports.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it here free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at the far right.
2. In the **Annotations** pane that displays, click **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.

Deltek recommends that you save the document to a slightly different filename so as to keep the original file from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

If You Need Assistance

If you need assistance installing, implementing, or using Vision, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In.**

If you do not have a username and password for the Customer Care Connect site, contact your firm's Vision Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

The following table lists the additional Deltek documentation available for this release.

Annual Guides

Starting with the 7.1 release, some of the Vision guides such as the Concepts guide and Implementation guide will be updated and published only once a year at the end of the year instead with each release. The title of these annual guides will include the year instead of the software version. The information in these guides will apply to the current release at the time that the guides are published. Any software changes made after the annual guides are published will be included in the next annual update.

Because this is being implemented in the middle of the year, the annual guides will be published with the 7.1 release, and their content will apply only for the 7.0 SP1 release. When the guides are republished at the end of the year, they will include the 7.1 content.

Document Name	Description
Deltek Vision Concepts Guide	
Deltek Vision Concepts Guide	This guide describes the concepts underlying the basic accounting, project control, and customer relationship management (CRM) functions of the Vision application.
Deltek Vision Installation and Implementation Guides	
Deltek Vision Technical Installation Guide	This guide contains detailed instructions for installing all the technical components of Vision, including the servers, the database, and the application itself.
Deltek Vision Advanced Technical Administration Guide	This guide provides IT staff and system administrators with instructions for installing and configuring advanced technical components of Vision.
Deploying Deltek Vision at a Hosting Provider	This guide contains instructions for deploying Deltek Vision at a hosting provider.

<table>
<tr><th>Document Name</th><th>Description</th></tr>
<tr><td>Deltek Vision Implementation Guide</td><td>This guide contains information about configuring and setting up Vision applications and features.</td></tr>
<tr><td colspan="2">Deltek Vision Migration Guides</td></tr>
<tr><td>Deltek Advantage to Deltek Vision Migration Guide</td><td>This guide contains information about migrating from Advantage to Vision, including the steps in the migration process and an overview of Vision features.</td></tr>
<tr><td>Deltek FMS to Deltek Vision Migration Guide</td><td>This guide contains information about migrating from FMS to Vision, including the steps in the migration process, discussions of the key migration decisions, and procedures for verifying the converted data.</td></tr>
<tr><td>Deltek Sema4 to Deltek Vision Migration Guide</td><td>This guide contains information about migrating from Sema4 to Vision, including the steps in the migration process and an overview of Vision features.</td></tr>
<tr><td colspan="2">Deltek Vision Quick Reference Cards</td></tr>
<tr><td>Deltek Vision Quick Reference Cards</td><td>Quick reference cards provide snapshots of specific business processes or Vision forms, with tips for entering data and using application toolbars.

The following quick reference cards are available:
▪ Accounts Payable (Create a Voucher from a Purchase Order)
▪ Create Client from Vendor Utility
▪ Dashboard
▪ Desktop and Microsoft Office Integration
▪ Expense Report
▪ Navigation Tree Designer
▪ Project Planning
▪ Purchasing (Create a Standard Purchase Order)
▪ Resource Management (Generic Resource Assignments and Resource Utilization)
▪ Screen Designer
▪ SF330 Proposals
▪ Template Based E-mails
▪ Timesheet
▪ User Options
▪ Visualization</td></tr>
</table>

Document Name	Description
Deltek Vision Document Management Guide	
Deltek Vision Document Management Installation Guide	This guide contains detailed information on the necessary prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.
Deltek Vision Interface to Microsoft Project	
Deltek Vision Interface to Microsoft Project 2010	This guide describes how the manual scheduling feature in Microsoft Project 2010 impacts the two-way interface between Deltek Vision and Microsoft Project 2010.
Deltek Vision Performance Management and Analysis Cubes Guides	
Deltek Vision Installation Guide for Performance Management (Analysis Cubes and Performance Dashboards)	This guide provides instructions on how to install and configure the following components of the Deltek Vision Performance Management module: ▪ Analysis Cubes ▪ Performance Management Dashboards
Deltek Vision Performance Management Content and Functionality Overview	This guide provides an overview of Vision Performance Management functionality and the pre-built visualizations and dashboards that are included with it.
Deltek Vision Reporting Guides	
Deltek Vision Custom Reports and Microsoft® SQL Server Reporting Services	This guide provides instructions for creating, delivering, and generating Vision custom reports with Microsoft SQL Server Reporting Services and its report writing tools.
Deltek Vision Microsoft SQL Server Reporting Services Licensing FAQ	This guide explains the Microsoft SQL Server Reporting Services licensing implications for Vision.
Deltek Vision Connect for Microsoft Outlook Guides	
Deltek Vision Connect for Microsoft Outlook Installation Guide	This guide contains an overview of Vision Connect for Microsoft Outlook, as well as technical installation, setup, and maintenance information.
Deltek Vision Connect for Microsoft Outlook Presets Configuration Guide	This guide describes how to create presets for Connect for Microsoft Outlook synchronization filters. This guide is intended to be used by a system administrator, IT staff, or a custom developer.
Deltek Vision Connect for Microsoft Outlook Frequently Asked Questions	This document contains frequently asked questions (FAQs) on topics regarding deployment, customization, environment, usage, and functionality.

Document Name	Description
Deltek VisionXtend Guides	
Deltek VisionXtend Web Services and APIs for Deltek Vision	This guide explains how to use the Deltek VisionXtend platform to integrate Vision with other applications, access web services, implement data validation routines, and establish workflow procedures using the Microsoft .NET Framework.
Deletk VisionXtend Testing the Vision Web APIs / Web Services	This guide provides basic information about testing Vision APIs using soapUI.

Vision Applications

Core Vision Applications

All the Vision applications are accessed through the Vision Navigation menu, except for the Dashboard, which is accessed from the toolbar at the top of the Vision screen. Each application has its own online help section that explains, in detail, how each application functions.

Application	Description
Dashboard	The dashboard is your "portal" into Vision. You choose the applications, records, and reports you most frequently use and place them on your dashboard—thereby creating a personalized view of your business world that is accessible from a single screen in Vision.
Info Center	The Vision Info Center is a collection of information centers that you use to manage all of your business-related data. Use the Info Center to enter, view, and revise data for a variety of record types, including projects, contacts, and employees.
Calendar/Activities	Vision CRM (which includes the Calendar/Activities application) provides you with a variety of options for scheduling and managing your daily activities, as well as maintaining information about your clients and contacts.
Proposals	Vision Proposals streamlines production of SF254, SF255, SF330, and Custom proposals, minimizing preparation time and improving communication among the proposal team.
Planning	Vision Planning includes tools to guide project managers and proposal writers in constructing plans for opportunities and projects.
Billing	Vision Billing lets you bill labor, expenses, fees, and units in all industry-standard formats; process, modify, accept, and print invoices; and generate billing-related reports.
Transaction Center	The Vision Transaction Center allows you to enter and maintain data on various types of transactions, including disbursements, expenses, invoices, and vouchers.

Application	Description
Accounting	Vision Accounting provides the tools you need to manage all of your firm’s day-to-day accounting data, including accounts payable, accounts receivable, budgeting, accrual, revenue, and employee expense information.
Human Resources	Vision Human Resources allows you to maintain interfaces with external payroll applications or to process payroll using the Vision Payroll application.
Time & Expense	Vision Time and Expense consists of two separate applications—Timesheet and Expense Report—that allow you to record your own time and expense charges and then submit them for processing.
Purchasing	Vision Purchasing allows your firm to automate its procurement processes for items, services and capital items. The application integrates Vision security, accounts payable, billing, and employee and vendor Info Centers, optimizing use of relevant data elsewhere in your Vision database.
Inventory	Vision Inventory allows you to manage and track both inventory items and non-inventory items as part of your overall purchasing and requisition process.
Reporting	Vision Reporting offers you a wide range of reports that present information about all aspects of your projects, clients, employees, accounts, and other important records in your database.
Utilities	Vision Utilities allow you to perform various system-wide functions in Vision, such as managing your record formats, process server options, and reporting functions. Utilities can also be used to monitor user activity in Vision.
Configuration	Vision Configuration contains all the tools you need to set up and configure the Vision applications, and to customize the look and feel of your application.

Additional Vision Applications

Vision applications that you purchase separately form the core Vision software include the following:

- **Connect for Microsoft Outlook** — Vision Connect for Microsoft Outlook is add-in software that allows you to perform some common Vision Customer Relationship Management (CRM) tasks directly 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** — Vision 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.
- **Navigator** — Vision Navigator gives you the tools that you need to plan, manage, monitor, and execute your projects quickly and accurately. It tightly integrates with Vision so that you can manage complex projects through a streamlined application. Vision 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 so you can quickly identify and act on project performance issues or risks.
- **Performance Management** — The Performance Management module contains Vision Analysis Cubes, Performance Dashboards and the Visualization feature.

  With Analysis Cubes, you can create Vision custom reports with Microsoft® Excel® 2007 or other report writing software that uses Microsoft Analysis Services (a component of Microsoft® SQL Server™).

  With Performance Dashboards, you use Tableau Server and Tableau Desktop (products of Tableau Software, Inc.), along with Vision Analysis Cubes and Microsoft SQL Server Analysis Services components, to create role-based graphical performance dashboards. Performance dashboards are business intelligence tools that executives and managers use to view and interact with critical project and general ledger data using a variety of graphical representations of that data. The performance dashboards are displayed as dashparts on the Vision Dashboard.

  Visualization is a visual data analysis tool with interactive graphics. Visualization enables you to display key metric values for your projects, project plans, and opportunities in a graphical format to help you analyze performance, determine trends, and identify risks to your business.

Start Vision

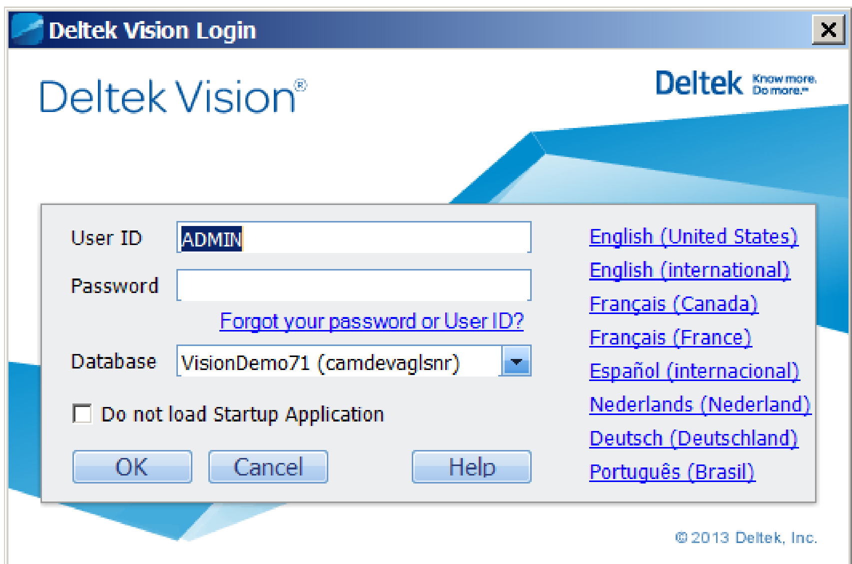
To begin working in Vision, you must do the following:

1. Log in.
2. Select an accounting period.
3. Select a menu choice.

Each step is explained in detail in the following sections.

Log In

The Vision splash screen is where you enter the required data to access Vision. Click the Vision icon on your desktop or go to your firm's designated Vision site on the Internet (or your firm's Intranet) to access the Vision splash screen.



Deltek Vision Splash Screen

To log in to Vision, complete the following steps:

1. Complete the fields on the splash screen.
   - **User ID** — Individual identification for each user, provided by your Vision Administrator.
   - **Password** — Individual password for each user, provided by your Vision Administrator.
   - **Database** — Use the drop-down list to enter the desired database. See your Vision Administrator if you do not know the database name.
   - **Do not load Startup Application** — Individual users can specify the application they want to open when they log on to Vision. Select this option to bypass the startup application and open the welcome page when you log on.

2. Click the **Log In** button. The Period Selection dialog box appears. See the next section for details on completing this dialog box.

Select a Language in Vision

From the splash screen, you can also select a language to use in Vision.

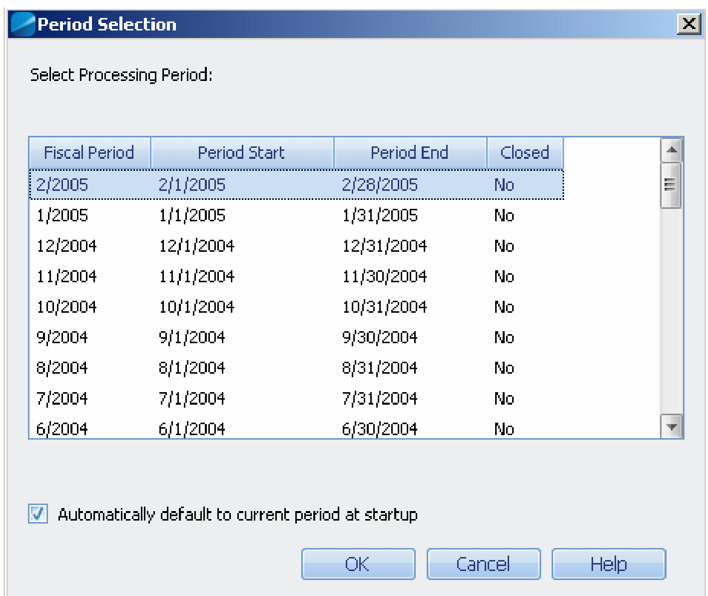
All enabled languages display as link labels in their corresponding languages on the splash screen. The link label is in the language for which it will translate. The splash screen switches to the language of the link label that you click. Then, when you log in, Vision is in that language.

For example, if you click the Deutsch link, the dialog box changes to German. When you log in, the Vision database labels are in German.

No visible language links display on the splash screen if only one language is enabled.

Select an Accounting Period

After you complete the fields on the Vision splash screen and click the **Log In** button, the Period Selection dialog box displays (unless you have previously enabled the **Automatically default to current period at startup** option on this dialog box).



Period Selection Dialog Box

To select an accounting period, complete the following steps:

1. Select an accounting period in which to process data.
2. Enable/disable the **Automatically default to current period at startup** option.

   If you select this option, Vision does not display the period Selection option each time you log in. Instead, Vision automatically opens the current period each time you log in.
3. Click **OK**. The default application displays.

If you select a period other than the current one, a **Prior Period Active** notice appears above the Navigation menu tree. Although you can process data in historical periods, the selection of these periods should be used only to print reports reflective of that time frame. Performing processing functions can lead to unexpected results in your database.

Select a Menu Choice

The default application opens after you select an accounting period. The Vision Navigation menu appears on the left side of the screen.

Use the Navigation menu to open any of the Vision applications (except for the Dashboard, which is accessed from the toolbar at the top of the Vision screen).

Using Vision

The Vision user interface lets you easily maneuver between applications, records, and forms.

The Vision interface components discussed in this section are:

- Vision Terminology
- Global Icons
- Navigation Menu

Vision Terminology

Certain terms are used throughout Vision, this guide, and the Help system.

The following table contains definitions of these terms to help you properly understand and use Vision.

Term	Definition
Navigation Menu	The Vision Navigation menu is located on the left side of the Vision screen. It provides access to all of the Vision applications except for the Dashboard, which is accessed from the toolbar at the top of the Vision screen. Click a Navigation menu option, and a sub-menu list displays. Select the desired sub-menu option and click it. The selected application opens on the right side of the Vision screen.
Toolbar	Toolbars are located at the top of each application record or form and at the top of each grid table in the Vision application. The toolbars allow you to perform various functions within the application record, form, or grid table, such as creating, saving, deleting, or printing a record; running or scheduling a process; and viewing help for the current application or form. Toolbar options vary from application to application and grid to grid. In addition to the application, form, and grid toolbars, the Vision toolbar (located at the top of the Vision screen) provides one-click access to various system-wide features. The Vision toolbar is discussed in more detail on page 15.

Term	Definition
Record	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 using various forms. For example, each project is a record containing data from the General, Accounting, Team, and other tabs in the Project Info Center. An existing record can be modified, deleted, and copied at any time; and new records can be added at any time. Records are maintained through the Info Center.
Tab	Vision applications are organized in a tabular format. The tabs in an application may contain data entry fields and/or data entry grids. To view the contents of a tab, click on it. A collection of application tabs in Vision is referred to as a record or form.
Dialog Box	Dialog boxes display as pop-up windows in the Vision application. Dialog boxes may contain data entry fields and/or data entry grids. Dialog boxes display when you click certain Navigation menu options, as well as certain toolbar and field-level icons.
Field	Fields appear on tabs and dialog boxes. Use fields to enter, maintain, and view data for a record or transaction. Some fields require you to manually enter data, while others contain icons that allow you to perform various functions. For example, you can use an icon to select appropriate values from a list, enter and save text using a word processing tool, and even to create a new record so you can enter the record in the data field. Some fields are display-only. You cannot enter or edit data in these fields. These fields are grayed out on your screen.

Term	Definition
Grid	Grids appear on tabs and dialog boxes. Use grids to enter, maintain, and view data for a record or transaction. A grid is a collection of fields arranged in columns and rows. Grids make it easy for you to sort and organize data. You can sort data in most grids using any one of the available grid column headings. Click a grid column heading to establish a sort order (ascending or descending). Click the column heading again to reverse the sort order.
Option	Options are selections or choices which appear on a menu or form. Options usually appear in drop-down list form. Options allow you to select the item or response desired.
Configuration	In addition to standard system setup options, Vision offers a variety of ways for you to change the look and feel of your product, such as renaming tabs and labels, adding new tabs, and reformatting your Dashboard.

Global Icons

Global icons are function keys that let you maneuver around the Vision applications. They are located on the toolbar at the top of your Vision screen and can be accessed at any time.

Vision Global Icons

The following table explains the function of each of the Global icons.

Global Icon	Description
Hide Navigation / Show Navigation	Click the **Hide Navigation** icon to hide the Navigation menu. Click the **Show Navigation** icon to display the Navigation menu, if it is currently hidden.
Back Arrow	Click the **Back** arrow icon to move back to the application you were previously working in.
Forward Arrow	Click the **Forward** arrow icon to return to the application you were working in before using the Back arrow.

Global Icon	Description
Dashboard	Click the **Dashboard** icon to open the Dashboard application.
Search	Click the **Search** icon to open the Info Center Search application.
Options	Click the **Options** icon to open the User Options dialog box. Use this dialog box to set display preferences, select a startup application, specify reporting default settings, and enable activity reminders.
Kona	This icon displays in the toolbar only if you use the Deltek Kona application. Click the icon to open the Kona application directly from within Vision. If the current project is associated with a Kona space, the associated Kona space opens automatically.
Navigator	This icon displays in the toolbar only if you use the Deltek Navigator application. Click this icon to open the Vision Navigator application from within Vision. If the current project is associated with a Navigator plan, the plan opens automatically in Navigator. If Navigator is not installed or configured, an error message displays.
Help	Click the **Help** icon to open the Vision Help system. The Help system displays in its own window so you can continue to reference the application while using the help. The **Help** icon also allows you to connect to the Deltek Customer Care Connect site. You must have a username and password to access the Customer Care Connect site.
Log Off	Click the **Log Off** icon to exit Vision and return to the Vision splash screen. From there, you can either log on again or close Vision.

Navigation Menu

The Vision Navigation menu is located on the left side of the Vision screen. It provides access to all of the Vision applications except for the Dashboard, which is accessed from the toolbar at the top of the Vision screen.

Click a Navigation menu option, and a sub-menu list displays. Select the desired sub-menu option and click it. The selected application opens on the right side of the Vision screen.

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.

To open an application or form in a new browser window, right-click on the item in the Vision Navigation menu, then select the **Open in new Window** option.

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

Hide the Vision Navigation Menu

You can hide the Vision Navigation menu at any time to enhance the size of the Vision screen. To do this, click the **Hide Navigation** icon on the toolbar at the top of your Vision screen. To reinstate the menu, click the **Show Navigation** icon.

Vision Help System

This section introduces Vision's Help system and explains how to navigate your way through the Help system. You'll also learn about the icons and related links that you'll find in most topics.

We encourage you to use the help as much as possible. It's easily accessible any time you are working within an application—just click the **Help** icon located on the Vision toolbar at the top of your screen.

When you click the **Help** icon, Vision displays a drop-down list with several options. The following table provides a description of each of the help options available to you.

Help Option	Description
Contents	Click this option to open the Vision Help System.
Help Desk	Click 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 emails directly to Deltek Vision Support, or you can set up an internal Help Desk mailbox to respond to questions from your staff.
Customer Care Connect	Click this option to go to the Deltek Customer Care Connect site. You must have a username and password to access the Customer Care Connect site.
Knowledge Base	Click 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. You must have a username and password to access the Customer Care Connect site.
Contact Us	Click 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 Customer Care Connect site.
About	Click this option to view application, database, and server information for Vision.

Help System Options

After you open the Vision Help system, you have several options for finding, viewing, and printing information in the help system.

The following table describes the options available in the Vision help system.

Navigation Option	Description
Contents 	Use the Table of Contents to navigate to books and topics in the help system. The Contents frame is displayed by default. If you have navigated away from this default frame, click the **Contents** button to return to the Table of Contents.
Index/Search 	Click the **Index/Search** button to display the index for the entire help system. You can search for index entries using keywords.
Glossary 	Click the **Glossary** button to open a list of Vision terms and their definitions.
Print	Click the **Print** button to print the help topic currently open.
Back 	Click the **Back** button to navigate back to topics you have previously viewed.
Show/Hide 	Click the **Show/Hide** button to display all drop-down text in the current topic. Click the icon again to hide the drop-down text.
Scroll Arrows 	Click the **Scroll Arrows** to scroll backward or forward through the help topics in the Table of Contents.
Hide Navigation Menu 	Click the **Hide Navigation** menu button to close the Navigation pane. Click the **Contents**, **Index**, or **Glossary** button to display the Navigation pane again.

Help Topic Features

Topics in the Help system include links and icons that, when selected, provide more detail related to a displayed topic. These key features are explained below:

Help Option	Description
Overviews	The online help for each application starts with an overview. The overview introduces you to the application and provides links to the application's main features.
Links	Links are automatic jumps from the current topic to another topic or to a Web site that offers further information. They are identified by a word or a series of words in blue lettering with a solid line under them. Clicking on this word or phrase brings you from the current topic to the selected topic or Web site. Click the **Back** button to return to the original topic.
Pop-ups	Pop-ups are descriptions or explanations displayed when you click on green underlined text. The text displays in a box overlaid onto the current topic. Click anywhere outside of the pop-up to make the pop-up disappear. You can also print pop-ups. To print a pop-up, right-click inside of the pop-up and then select **Print**.
Drop-down Text	Drop-downs are used in the Help system to display graphics, toolbar locations, or information relevant to the help topic you have selected. Drop-down links are always gray and the information always displays below the current text. Click on a drop-down link to open, and click again to close.
Expanding Text	Expanding text provides additional explanation and detail relevant to the help topic you have selected. The expanding text link and its subsequent text appears in blue lettering, and displays within the current paragraph. Click to expand the text, and click again to contract the text.

Help Option	Description
Notes	Click the **Notes** icon to display helpful facts about a topic. A pop-up window displays additional information about the current topic.
Warnings	**Exclamation Mark** icons provide warnings about a particular process or action.
Related Topics	Click the **Book** icon to display a list of related help topics that may be useful to you. Simply click on any related topic to display it.
Where am I? Where am I?	When using a checklist in the Vision Help to complete a task, click on the **Where am I?** icon to display where you are in the checklist process.
Multicompany	This symbol appears in topics related to Multicompany in Vision. See the Multicompany Concepts section in the Vision Help for more information about this feature.
Multicurrency	This symbol appears in topics related to Multicurrency in Vision. See the Multicurrency Concepts section in the Vision Help for more information about this feature.

Form and Dialog Box Help

In addition to the **Help** icon on the Vision toolbar, you have two additional options for accessing help in Vision.

- **Application Toolbar Help Icon** — Each application form in Vision includes a toolbar that allows you to perform various functions. Click the **Help** icon on this toolbar to display a help topic specific to the application form you have open.

  For example, if you click the **Help** icon on the application toolbar in an Opportunity Info Center record, Vision displays the Opportunity Info Center Overview help topic.

- **Dialog Box Help Button** — Each dialog box in Vision includes a **Help** button. Click the **Help** button icon on a dialog box to display a help topic specific to the dialog box have open.

  For example, if you click the **Help** button on the Print Report dialog box, Vision displays the Print a Report help topic.

System-wide Features

Vision's system-wide features include various data and word processing functions designed to simplify your tasks. They are easily accessible while working in any of the applications. This section introduces you to these features.

The system-wide features are:

- Data Access Methods
- Grid Options
- Grid Drop-down Options
- Required Fields
- Relational Fields
- Activity Reminders
- Alerts
- Text Editor

Data Access Methods

Vision is designed to allow easy data access when you work in an application, thereby simplifying the process of updating or searching for information. Data is organized using forms, tabs, dialog boxes, and grids (as described in the table on page 13).

The following table explains the ways in which data may be selected or entered on the forms, tabs, dialog boxes, and grids in Vision.

Data Access Method	Description
Drop-down Lists 	Drop-down lists are available in fields that contain a **Drop-down Arrow**, either at the left or right side of the field. Drop-down lists display valid choices for completing a data entry field. Click on the drop-down arrow to display the drop-down list. Then click on your choice from the drop-down list to select the item and enter it in the field. For example, the drop-down list in the **Prefix** field of Employee Info Center displays **Dr.**, **Mr.**, **Mrs.**, and **Ms.** You can select any of these default responses for the Prefix field.
Find Icon 	The **Find** icon displays in all **Find** fields and in some data entry fields. This icon indicates that you have access to a corresponding lookup list for the field. Click this icon to open the lookup list.

Data Access Method	Description
Calendar Icon 	The **Calendar** icon displays in fields that require you to enter a date. Click this icon to display a drop-down calendar that you can use to select the date you want to enter in the date field.
Add-on-the-Fly Icon 	The **Add-on-the-Fly** icon displays in certain relational entry fields throughout the Info Center. Click this icon to open a blank Info Center record and create a new record (while keeping the original record open). The new record is then added to your database and to the relational entry field in the original record.
Ellipsis Icon	The **Ellipsis** icon indicates that additional data is available for the data entry field. Click this icon to view or enter additional data in the selected field.
Notes Icon 	To access the Text Editor, click the **Notes** icon in any **Notes, Memo**, **Comments**, **Description**, or **Proposal** fields are used to add notes or miscellaneous information when on a for, tab, or dialog box. You can enter text directly in these fields or click the **Notes** icon in the field to access the Vision Text Editor.
Phone Format Icon 	The **Phone Format** icon displays in fields that require you to enter a phone number. Click this icon to open the Phone Format dialog box and set the appropriate phone number format for your country.

Grid Options

Grid options allow you to perform various functions on the data in a grid table. Grid options display on the toolbar at the top of each grid in Vision. Click a grid option to perform the desired function.

The grid options available on each grid vary from application to application. The most common grid options are **Insert**, **Copy**, and **Delete**. Other grid options allow you to **Associate** records in a grid with other records in your database, **Edit** data in a grid, and move records up and down in the grid table (**Move Up** and **Move Down**).

Grid Slide Bars

The slide bars found on some grids in Vision allow you to maneuver among the fields within a grid when there are too many fields to display on the screen at once.

Horizontal slide bars are located at the bottom of the grid, and vertical slide bars are located along the right side of the grid, where applicable. Move the horizontal slide bars to the left or right and the vertical slide bars up or down to view additional data in the grid.

Grid Customization

You can reduce the size of the fields in a grid, or hide them completely if they are not needed. To do this, place your cursor on the vertical line between two fields and slide it to the left or to the right until the field is the desired size (or completely hidden).

You can also rearrange the order of fields in a grid by highlighting the field name and dragging it to the left or to the right to the desired location.

All changes are saved automatically.

Grid Drop-down Options

The Vision grids contain a drop-down that displays a combination of the following options:

- Print grid information
- Export grid data to Excel
- Enable Grouping

See each the following for additional information on each option.

Print Grid Information

Use the Print option on the Vision grids to print the grid's information.

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

1. Click the drop-down arrow on the grid header.
2. Click **Print**. The Print Preview form displays.
3. Use the toolbar to modify the preview as needed.
4. From the File menu, select **Print** to print the grid information directly to your default printer.

Export Grid Data to Excel

The grids in Vision include an Export to Excel feature that enables you to export the grid's information to a Microsoft Excel file.

To export a grid to Excel, complete the following steps:

1. Click the drop-down arrow on the grid header.
2. Click **Export to Excel**. The Microsoft Excel application opens.
3. Use Microsoft Excel to modify, print, or email the data as needed.
4. Save the file to your local desktop.

Enable Grouping

Some of the grids in Vision include an **Enable Grouping** option. Use this option to select the order of column headers.

To enable a grid's Enable Grouping option, complete the following steps:

1. Click the drop-down arrow on the grid header.
2. Click **Enable Grouping**. A field displays with the instruction to "Drag a column header here to group by that column."
3. Drag and drop the column headers into this field in the order that you want them to display.

The data for each column header displays as you move column headers to the field.

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

Vision's relational database allows you to 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 on the hyperlink to jump to the related record in your database.

Right-click on 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.

Specify Activity Reminder Delivery Method

To specify how you want to receive activity reminders, click the **Options** icon on the Vision toolbar at the top of your screen to open the User Options dialog box. Then, click on the Activity tab.

There are two types of activity reminders—email and popup.

- Select the **Enable email reminders** option to receive email reminders for upcoming activities.
- Select the **Enable popup reminders** option to receive popup reminders for upcoming activities.

You must be logged on to Vision to see a popup reminder; you do not need to be logged on to Vision to receive an e-mail reminder.

Alerts

Alerts are a Vision workflow function designed to remind you of calendar events, project tasks to be assigned or approved, and the need to submit timesheets, expenses, and project budgets. How you utilize alerts depends on your role within the team structure (such as project management or accounting).

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

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

See the Alerts Configuration section of the Vision Help system to learn how to set up alerts.

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.

Although you can enter text directly into one of these fields, to manipulate the text (for example, to change a font size from 8 to 10 point or style from regular to bold), you must use the Text Editor.

To access the Text Editor, click the **Notes** icon in any **Notes, Memo**, **Comments**, **Description**, or **Proposal** field.

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, many of the menu and toolbar options will be familiar to you.

Vision saves your Text Editor files in a Rich Text Format (.rtf extension), allowing you to copy and paste text from any standard Windows application into the **Notes, Memo**, **Comments**, **Description**, and **Proposal** fields using the Text Editor. Some Windows programs and Web pages have unique formatting and graphics options that Vision may not support; thus, you may have to reformat text that you copy and paste from other systems.

See the Text Editor section of the Vision Help system to learn more about using the Vision Text Editor.

Lookup Lists

Use lookup lists to locate a record, or locate a group of records that share certain characteristics. For example, you can use a lookup list to search for all of your contacts who live in a particular state, or find all of your projects with the same project type. Also, you can access single records, such as an employee's Employee Info Center record, using a specific employee number or name.

Lookup lists are available wherever you see the **Find** icon in the upper-right corner of a field. Click once on this icon to access a lookup list.

Using a Lookup List

Lookup lists work by narrowing your search criteria, thereby eliminating the need to examine large numbers of records to find specific information. Instead, you have only the records you need at your disposal.

Info Center Lookups

Each Vision Info Center (such as Opportunities or Employees) offers additional lookup options specific to that Info Center. For example, Opportunity Info Center uses searches like "Opportunity Number" or "Opportunity Name," while Employee Info Center uses searches such as "Employee Last Name" and "Employee Number."

You can also use Info Center Search. This tool enables you to search all Info Center record types. You specify the search text, record values, and record types you want to search for and Vision retrieves all matching records in your database.

See the Info Center section of the Vision Help system to learn more about Info Center lookups and search options.

Configuring Lookup Lists

In General System setup, you can establish a lookup limit, determine the number of records that can be retrieved during a lookup, and authorize users to automatically retrieve records in a lookup.

Setting Up Lookup List Options

Your system administrator determines the following lookup list options for your firm.

Lookup Tabs Field	Description
Allow users to automatically retrieve records in lookups	If this option is selected, Vision controls whether records are automatically retrieved when lookups are initially opened. If the option is not selected, Vision does not retrieve records automatically in lookups. If this option is selected, you can now determine whether to automatically retrieve records when opening lookups.

Lookup Tabs Field	Description
Use lookup limits	Select this option to place a limit on the number of records Vision will retrieve in a lookup. If your company has a large database, you may want to limit the number of records Vision retrieves, since retrieval may take some time. If you selected this option, select the maximum number of records in the **Maximum number of records** field.
Maximum number of records	If you selected the previous option, enter in this field the maximum number of records to allow.
Use Dashboard lookup limits	Use this option to limit the number of records you want to display on your dashparts.
Maximum number of Dashboard records	If you selected the previous option, enter in this field the number of maximum records to allow. For example, if you enter a limit of five and a user has ten records in a dashpart, only five will display at a time. The number you select is the same number for all your dashparts that use records.

See the Configuration section of the Vision Help system to learn more about configuring lookup lists.

Lookup List Search Options

There are four basic search types to choose from when using a Lookup list.

- Direct
- Standard
- Advanced
- SQL Where Clause

Which search type you choose depends on the complexity of your search.

The four search types are explained in the following sections.

Quick Find Searches

In addition to the four Lookup list search options noted above, you can also use the Quick Find search feature to quickly search for and find records in Vision.

Quick Find searches let you access a record simply by entering part of a valid key code, such as an employee’s last name or a client number.

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

1. Click once inside the **Find** field of the record you are working in.
2. Enter either 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, then Vision will search for every record beginning with that character.
   - If you enter more than one character, then Vision will search 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. If the information you have entered matches a value in the Vision database, then the record appears.

Multiple Record Matches

Sometimes, the information you enter produces more than one result. In the case of multiple record matches, a box appears containing all records that match your criteria. Click on the record you wish to access.

Quick Find and Info Center

When performing a quick find search in the Info Center application, the **Active Only** checkbox setting is applied.

For example, when you perform a quick find for projects that start with the letter "**a**", if the **Active Only** checkbox had previously been checked in the lookup dialog box, then only "active" projects will be returned in the quick find drop-down display.

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 the **Find** icon, located in the upper-right corner of the record, to display the lookup list.
2. Select the type of criteria you plan to search by using the drop-down list in the **Search By** field (**Client Number** or **Employee Name**, for example).
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.
4. Click **Search**.

   A list of all records matching your search criteria appears.
5. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** button and then clicking **Select**.

   The first record that matches your criteria displays.
6. Use the **Left arrow** and R**ight arrow** buttons to navigate through the records you selected.

Be sure to click the **Clear** button before starting a new Direct search so that information from the previous search is not included in the new search.

Standard Lookup

Use the Standard lookup for one-time searches using basic criteria such as Names, Numbers, and Types.

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

1. Click the **Find** icon, located in the upper-right corner of the record, to display the lookup list.
2. Select **Standard** by using the drop-down list in the **Display Type** field.
3. Select the type of criteria you plan to search by using the drop-down list in the **Search By** field (**Client Number** or **Employee Name**, for example).
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. Select **Active Only** to display only those records whose status is currently Active.
6. Select **Pending Accounting Review** to display only those records that are pending review.
7. Click **Search** (or press **Enter**).

   A list of all records matching your search criteria displays.
8. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** button and then clicking **Select**.

   The first record that matches your criteria displays.
9. Use the **Left arrow** and **Right arrow** buttons to navigate through the records you selected.

Be sure to click the **Clear** button before starting a new Standard search so that information from the previous search is not included in the new search.

Get Total Rows Function

Select **Get Total Rows** to display the row count in a completed search. This function is available when the **Use Lookup Limit** option is selected in General System Settings.

Displaying Records

- Click on the **Next X Rows >>** hyperlink to view the next group of rows (X represents the number you choose in the General System Settings).
- Click on the **<< Previous X Rows** hyperlink to view previous rows (X represents the number you choose in the General System Settings).

This function is available when the **Use Lookup Limit** option is selected in General System Settings.

Multicompany

An **Active Company** field appears in the Standard lookup when Multicompany is enabled. Select the **Active Company** field to select Projects, Employees and Organizations that belong to the active company. Selecting this field also allows you to create global saved searches containing active company items without creating a different search for each company.

Advanced Lookup

The Advanced lookup lets you enter additional criteria that limits the data retrieved by the search.

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

1. Click the **Find** icon, located in the upper-right corner of the record, to display the lookup list.
2. Select **Advanced** from the **Display Type** drop-down list.

   The Advanced search form displays.
3. Enter the desired search type using the drop-down list for the **Search Type** field (**Client Number** or **Employee Name**, for example).

   The drop-down arrow displays when you click anywhere in the **Search Type** field.
4. Enter a comparative operator using the drop-down list for the **Operator** field (which appears when you click anywhere in the **Operator** field).

   For an Advanced search, you can implement searches such as “Is Me and Is Not Me”, and “Is Mine and Is Not Mine”.

   Comparative operators are used in SQL Where clauses to select records based on numeric or character values.
5. Click inside the **Search List** field to display the Binoculars icon, then click once on that icon to display a dialog box that corresponds to your **Search Type** selection.
6. In the Search List dialog box, highlight the records you wish to display and then click **Select**.
7. Select one of the logical operators, **AND** or **OR**, using the drop-down list for the **Cond** text grid (which appears when you click anywhere in the **Cond** field).
8. **Optional**. Use parenthesis to group multiple levels of expressions for a given search. To use parenthesis, you must manually enter parenthesis into the left and right parenthesis grid columns. If the number of parenthesis on the left does not match the number on the right, you will be prompted to fix the expression prior to searching, applying, or saving saved searches.
9. Use the **Move Up** and **Move Down** buttons to arrange the order of your search criteria.
10. Use **Insert**, **Copy**, and **Delete** to modify your search criteria as needed.
11. **Optional**. Select **Display Search Text**. If this option is selected, the search results grid will be replaced with a text box containing a readable, color coded, indented version of the current Advanced search. This display allows you to see the entire Advanced search and how nested levels of the search (based on parenthesis) relate to each other. This checkbox will automatically be unchecked the next time you click the **Search** button.
12. Select **Active Only** to display only those records whose status is currently Active.

13. Select **Pending Accounting Review** to display only those records that are pending review.
14. Click **Search**.

    A list of all records matching your search criteria displays.
15. For an Advanced search, you can implement the **Organize** button to use the criteria for future searches.
16. Click **Select All** to display all records, or highlight only those records you wish to display by pressing the **Ctrl** and **Shift** keys at the same time and then clicking **Select**.

    The first record that matches your criteria displays.
17. Use the **Left arrow** and **Right arrow** buttons to navigate through the records you selected.

Be sure to click the **Clear** button before starting a new Advanced search so that information from the previous search is not included in the new search.

Get Total Rows Function

Select **Get Total Rows** to display the row count in a completed search. This function is available when the **Use Lookup Limit** option is selected in General System Settings.

Displaying Records

- Click on the **Next X Rows >>** hyperlink to view the next group of rows (X represents the number you choose in the General System Settings).
- Click on the **<< Previous X Rows** hyperlink to view previous rows (X represents the number you choose in the General System Settings).

This function is available when the **Use Lookup Limit** option is selected in General System Settings.

Sub Tables

Sub tables corresponding to certain Search Types are displayed in the **Sub Table** field. You can use this information to manually order sub tables together so that they will be combined in a single EXISTS clause. When searches of like sub tables are not entered sequentially in the Advanced grid, then a separate EXISTS clause will be created for each search type.

Info Center Queries

From the Advanced lookup, you can perform Info Center queries based on a field in another Info Center. For example, you can query for all **Employees** whose **Supervisor** has a title of **CEO**.

Using this option 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. After selecting one of these options, the **Field** option becomes active. Use the **Field** drop-down list to select the desired field type.

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

See the Security Roles Configuration section of the Vision Help system for more information about Info Center queries.

Is Me and Is Not Me Operators

You can use the "is me" and “is not me” operators specifically for Report Favorites and saved searches. These operators work only with search fields that are employee numbers, such as **Employee Number** or **Supervisor Number**. It does not work with search fields based on names, such as **Employee Last Name**.

To use this option, enter **Supervisor Number**, for example, in the **Search Type** field and **is me** in the **Operator** field.

Is Mine and Is Not Mine Operators

"Is mine" and "is not mine" operators are used for all Organization-based search fields, with the exception of names. For example, if your organization structure consists of two levels—office and discipline—you can perform searches that automatically match the organization of the employee logged on to Vision.

Some examples are "organization is mine" and "office is mine" and "discipline is not mine". This functionality is similar to the "is me" operator for employee numbers and can be very useful for setting up global searches and record level security.

SQL Where Clause Lookup

The SQL Where Clause lookup lets you create more complex selection criteria by creating your own SQL WHERE clause.

Vision then uses that SQL WHERE clause to query the database and find records that meet your selection criteria.

See the Lookup Lists section of the Vision Help system for more information about using the SQL Where Clause lookup, including the SQL operators that allow data to be filtered.

The Organize Function

Advanced and SQL Where Clause searches provide an **Organize** button that lets you save, delete and rename search criteria without re-entering all the necessary data.

Save a Search

You save searches by selecting a folder from the **Folder Name** field, or creating a new folder. Then, you enter a name for your search in the **Save Name** field.

The types of searches you can save depend upon your "role" within your organization. Your role must be determined before you can save a search.

See the Configuration section of the Vision Help system to learn how roles are assigned.

Retrieve a Saved Search

To retrieve a saved search, complete the following steps:

1. Click the open folder icon located in the top-right corner of each record.
2. On the Save Searches dialog box, double-click on the saved search that you want to retrieve.

Modify a Saved Search

To delete a saved search, complete the following steps:

1. Click the drop-down arrow for the **Searches** field on the Lookup dialog box to display the Organize Options dialog box.
2. Right-click the search that you want to delete and select **Delete**.
3. On the dialog box that asks you to confirm the deletion, click **Yes**

   Vision deletes the saved search.
4. To delete multiple saved searches, repeat steps two and three before closing the dialog box.
5. Click **Close** to exit the Organize Options dialog box for searches.

To rename a search, complete the following steps:

1. Click the drop-down arrow for the **Searches** field on the Lookup dialog box.
2. On the Organize Options dialog box, right click the search that you want to rename and select **Rename**.
3. Enter the new name.
4. To rename multiple saved searches, repeat steps two and three before closing the dialog box.
5. Click **Close** to exit the Organize Options dialog box for searches.

Launch Saved Searches from a URL

To launch a saved search directly 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:

   launchapp.aspx?initialpage=<appname>&keyValue=Search|<folder name>|<sub folder name>|<searchname>

See your system administrator for further assistance.

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 using various forms. For example, each project is a record, containing data from the General, Accounting, Team, and other tabs.

You can add a new record at any time, and you can modify, delete, or copy an existing record whenever you choose. Records are maintained through the Vision Info Center.

Record Types

There are eleven Info Center record types:

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

To access records, click the Info Center option from the Vision Navigation menu, and then click the record type you want to access.

Record Management

Most records are managed in the Vision Info Center. They are fully integrated and designed to work together to make it easier for you to find and use the data you need.

In the Info Center, you can:

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

Other records you might work with in Vision include:

- Plans
- Proposals
- Vouchers
- Invoices

See the Info Center help section to learn more about record management.

Scroll Through Records

You can scroll through multiple open records using the **Arrow** buttons, located to the left of the **Find** field.

Vision Arrow Buttons

- The **Far-left** button brings you to the first selected record, and the **Far-right** button brings you to the last record.
- The **Left arrow** and **Right arrow** buttons allow you to scroll through the open records in the order they were selected.

Use Quick Find to Enter Data

You can use the Quick Find feature to enter data in any field where the **Find** icon is displayed. Simply enter a full or partial value in the selected field and press **Enter** to retrieve a list of matching values for the field. Select a value from the list to enter that value in the field.

See *Quick Find Searches* on page 28 to learn more about using the Quick Find feature.

Configure Vision

There are many parts of Vision that you can modify to suit your particular needs. For example, you can establish your system settings and security options, activate modules, select templates and code tables, add your own tabs to forms, and rename labels.

Configuration is located on the Vision Navigation menu. From there, your system administrator can set up the Vision application and select the options that best meet your firm's business requirements.

User Options

Vision's User Options dialog box allows you to determine how Vision looks. It also provides easy access to frequently-used data.

User Options allow you, by user name, 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.

Set Up User Options

To set up User Options, complete the following steps:

1. From the Vision toolbar, click the **Options** icon to open the User Options form.
2. Complete the fields on the following tabs.
   - General Tab
   - Startup Tab
   - Reporting Tab
   - Activity Tab
3. Click **OK**.

See the Configuration section of the Vision Help system to learn more about configuration settings and user options.

Reports

The Vision reporting application offers you a wide range of reports that present information about all aspects of your projects, clients, employees, and accounts. The reports come with a set of default formatting options, which you may keep or modify.

You can use Vision Reporting to:

- Generate reports for previewing onscreen or for printing. You can print a report right away or schedule it to run at a later time.
- Set report options, which 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 options tabs. Similarly, you're able to save sets of selection criteria. Both types of named, saved sets are available in any future reporting session, making the reporting process easier and quicker.
- Create and save favorite report formats. Once 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. You can even access any of your favorites from your dashboard.
- Drill down for detail on certain types of data.
- Export Vision data directly to an Adobe® PDF file, a Microsoft® Excel® spreadsheet file, or a Rich Text Format (RTF) file through the Data Export reports.

Report Types

The following types of reports can be accessed from the reports application, located on the Vision Applications Menu:

- 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
- Visualization Reports

For each report type you can organize favorites, as well as schedule, refresh, preview, print, download, and e-mail reports.

Saved Settings and Favorites

The Reporting application lets you use two time-saving features, called Saved Settings and Favorites.

Saved Settings

Saved Settings are a saved selection of report options, which includes all settings on all options tabs. You can also save sets of selection criteria. Both types of saved sets can be named and used during any reporting session to quickly generate a report.

Favorites

A Favorite is a saved report format, consisting of the report name, a set of saved report options, and a set of saved selection criteria. After a favorite is created, it takes just a click to generate the report with current data.

See the Reporting section in the Vision Help system to learn more about the Reporting application.

Work Breakdown Structure (WBS)

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 that 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 within 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:

- The organizational (or profit center) structure
- The WBS or project structure.
- The labor code structure for labor cost.
- The chart of accounts structure for expenses.

See the Work Breakdown Structure Concepts section of the Vision Help system to learn more about the work breakdown structure.

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