Deltek Vision® Navigator 1.5

Integration Guide

June 27, 2013

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Contents

Overview

This guide describes how Vision Navigator integrates with Vision and lists changes to the Vision online help.

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 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 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 Navigator, 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 documentation is available for the Vision Navigator release.

Document Name	Description
Vision Navigator Release Notes	The Release Notes list known issues, enhancements, and bug fixes for the current release.
Vision Navigator Installation Guide	This guide provides the server installation and client requirements for installing and running Vision Navigator.
Vision Navigator FAQs	This guide provides questions and answers to frequently asked Navigator questions.

Vision Help System Updates

This section highlights the Navigator-related updates that have occurred to the existing Vision 7.1 online help.

Billing

On the Labor Rate Tables topic, the word **Project** was removed from the **Available for Project Planning** label.

Configuration

Configuration » Planning» Plan Settings » General Tab

The General tab of Plan Settings topic was updated to reflect the Navigator Consultants feature. The fields that display on this tab are based on the use of the Vision Resource Planning module. See each table below to view the fields that display.

Resource Planning Module in Use

These fields display when using the Vision Resource Planning Module. If you use Vision Multicompany, you set these options for each company in your enterprise.

Enable Planning Tabs	Use the Enable Planning Tabs options to enable the Expense, Consultant, and Unit tabs in Planning.
Expenses	Select this option to enable the Expenses tab in Project Planning. When you select this option, fields related to the Expenses tab also display in Summary Grid Configuration. This option does not apply to Vision Navigator plans.
Consultants	Select this option to enable the Consultants tab in Project Planning. When you select this option, fields related to the Consultants tab also display in Summary Grid Configuration. If using Vision Navigator, select this option for Consultants to be planned for a project in Navigator.
Units	Select this option to enable the Units tab in Project Planning. When you select this option, fields related to the Units tab also display on the following forms: • Summary Grid Configuration • Rates tab of Project Planning • Summary tab of Project Planning • Analysis tab of Project Planning If you do not select this option, the Units tab and related fields do not display in Project Planning, and Job to Date unit numbers display under the Expense or Consultant tabs.

	This option does not apply to Vision Navigator plans.
Decimal Digits	Use the decimal digits fields to specify the number of decimal digits for hours, quantities, and amounts in plans.
Hour	Select the number of decimal digits for hours.
Quantity	Select the number of decimal digits for quantities. This setting does not affect multipliers or percents, other than Probability.
Amount	Select the number of decimal digits for amounts. When the amount is set to **Currency**, all amounts will follow the decimal digit setting of the currency unit of that amount. By default, Vision sets all Labor Rates and Unit Rates to **Currency**. This setting does not affect Cost Rate, Billing Rate, EAC Cost, or EAC Bill.
Create Plan from Project	Use this field to determine the amount of detail to copy when creating plans. This option does not apply to Vision Navigator plans.
Copy Down To	Select the default for the amount of detail to include when using the **New » New Plan from Existing Project** menu item on the Project Planning toolbar. Options are: • **Project** — Select this option to include project information when you create a plan from a project. • **Phase** — Select this option to include project and phase information when you create a plan from a project. • **Task** — Select this option to include project, phase, and task information when you create a plan from a project. • **Labor Code** — Select this option to include project, phase, task, and labor code information when you create a plan from a project.
Plan Compensation Values By Row and Period	When you select this option, the following areas are affected within Project Planning. • Users can enter compensation values by period and by row on the Labor tab in Project Planning. • The Summary tab of Project Planning displays the sum of all compensation columns from data on the Labor tab of Project Planning. • The **Actions** button on the Project Planning toolbar displays the

	Refresh Analysis Compensation option. • If the **Project Fee Entering Method** option on the General tab of Configuration » Accounting » System Settings is set to **At all levels of work breakdown structure**, all WBS level fees in the project are updated with the plan's corresponding fees. • If the **Project Fee Entering Method** option on the General tab of Configuration » Accounting » System Settings is set to **At lowest level only**, all compensation will be summed to update the project's fees. • When the **Compensation Values by Row and Period**, **Synchronize fees from Plan to Project**, and **Include in Utilization and Project Reports** options are all selected, Vision synchronizes fees only for those of the project's WBS levels that match. • When the **Compensation Values by Row and Period** and **Limit plan fees to contract totals** options are selected, you can enter compensation amounts on the Labor tab. This option does not apply to Vision Navigator plans.
Synchronize fees from Plan to Project	Select this option to synchronize all of a plan's compensation to its project when saving the plan. If you select the **Synchronize fees from Plan to Project** option, you cannot select the **Synchronize fees from contract to project** option on the General tab of Accounting System Settings. This option does not apply to Vision Navigator plans.
Limit Plan fees to Contract Totals	Select this option to limit the plan compensation amounts at the WBS1 level by the amounts entered in the Contract Management tab of the Project Info Center. This includes the **Compensation**, **Consultant Fee**, and **Reimbursable** amounts in Project Planning. If you also select the **Exact decimal limits** option, Vision verifies that the planned amount does not exceed the contract amount by more than 0.5 (applicable currency). If the planned amount exceeds the contract amount by more than the applicable currency, Vision limits the amount to exactly the contract amount, down to the decimal amount. • When the **Compensation Values by Row and Period** and **Limit plan fees to contract totals** options are selected, you can enter compensation amounts on the Labor tab. • When the **Compensation Values by Row and Period** option is not selected, but the **Limit plan fees to contract totals** option is selected, you can enter the compensation amounts on the Analysis tab, but Vision disables the compensation fields on the Labor tab. This option does not apply to Vision Navigator plans.
Exact Decimal Limits	Select this option to verify that the planned amount doesn’t exceed the contract amount by more than 0.5 (applicable currency). If the planned amount exceeds the contract amount by more than the applicable currency, Vision limits the amount to exactly the contract amount, down to the decimal amount.

	This option does not apply to Vision Navigator plans.
Default Settings for Creating a New Plan	Use these options to specify the default settings used to create a new plan. Even though you establish the initial default settings, users may modify and override those settings. For example, when you select the **Include in Utilization and Project Reports** option, that same option displays on the General tab of Project Planning. The user may remove the selection on that option for a Vision plan. When the user saves the plan, Vision saves the option specified by the user.
Starting Day of the Week	Select the day of the week on which business starts. This option does not apply to Vision Navigator plans.
Planned Revenue	Use these fields to calculate revenue based on planned labor, expense, and consultant information. This option does not apply to Vision Navigator plans.
Labor Multiplier Type	The options for this field depend on the **Budget Type** entry on the Rates tab. • If the **Budget Type** is set to **Cost and Billing**, the **Labor Multiplier Type** defaults to **User Entered (Cost)** and the options list displays: **User Entered (Cost)** **Planned Multiplier** **User Entered (Billing)** **Planned Ratio** • If the **Budget Type** is set to **Cost**: The **Labor Multiplier Type** defaults to **User Entered (Cost)**, which is the planned labor cost amount, and the options list displays **User Entered (Cost)** and **Planned Multiplier**. The **Planned Multiplier** that displays on the Analysis tab is calculated as follows: **Planned Total Compensation (Compensation + Consultant Fee + Reimbursable Allowance) - Direct and Reimbursable Expenses/Planned Labor Cost** • If the **Budget Type** is set to **Billing**: The **Planned Multiplier** defaults to **User Entered (Billing)**, which is the planned labor amount at billing value, and the options list displays **User Entered (Billing)** and **Planned Ratio**. The **Planned Ratio** that displays on the Analysis tab is calculated as follows: **Planned Total Compensation (Compensation + Consultant Fee + Reimbursable Allowance) - Direct and Reimbursable Expenses/Planned Labor Billing**

	If using Vision Navigator, all Navigator plans are set to **Planned Ratio**.
Multiplier	If the **Labor Multiplier Type** is set to **User Entered (Cost)** or **User Entered (Billing)**, you can enter a value in this field to specify the **Multiplier.** If the **Labor Multiplier Type** is set to **Planned Ratio** or **Planned Multiplier**, this field displays the **Planned Ratio** or **Planned Multiplier** as calculated on the Analysis tab. This option does not apply to Vision Navigator plans.
Reimbursable Method	Select the Reimbursable Method that you want to use to display the project revenue from reimbursable expenses and consultants. If using Vision Navigator, all Navigator plans are set to **Billing**.
Percent Complete Formula	Select the percent complete formula to be used as the default for the plans. This option is available only with the proper configuration settings on the Planning tab of Role Security. If using Vision Navigator, all Navigator plans are set to **JTD / (JTD + ETC)**.
Overhead Percent	Enter the overhead percent applied to the project.
Include in Utilization and Project Reports	Select this option for the **Include in Utilization and Project Reports** option to display on the General tab of Project Planning. When users select the **Include in Utilization and Project Reports** option, Vision includes the current plan when running Planning reports and Resource Management searches. If using Vision Navigator, all Navigator plans are included in utilization.
Default WBS Mapping Grid	Use these fields to determine how data summarizes in the default work breakdown structure. The system defaults are: **Project** 1 **Phase** 2 **Task** 3 **Labor Code** 4 You may specify more than three levels in the WBS. However, you can only map the first three levels to the WBS levels in accounting. This option does not apply to Vision Navigator plans.

Default WBS Mapping Drop-down	The Vision grids contain a drop-down list that displays a combination of the following options: [Print grid information] [Export grid data to Excel] [Enable Grouping] Not all options are available on all grids. See each topic for additional information. This option does not apply to Vision Navigator plans.
WBS Element	This column displays the defined WBS elements. This option does not apply to Vision Navigator plans.
Plan Level	Use this column to specify the level of each WBS element. You may specify more than three levels in the WBS. However, you can only map the first three levels to the WBS levels in accounting. A WBS element at a higher level summarizes data from the level below it. Thus, using the default project-phase-task levels would mean that task data rolls up to the phase level and that phase data, in turn, summarizes at the project level. If any of the levels are set to **0**, they will not be available on the Planning Grid Configuration dialog box or on the Default WBS Mapping dialog box. This option does not apply to Vision Navigator plans.
Match JTD	Use the **Match Job to Date** option to specify the level of matching between Job to Date information and each WBS level. When you select a level, all subsequent levels are automatically selected. When you do not select a level, Job to Date is calculated by summing numbers from lower levels. This option does not apply to Vision Navigator plans.
Navigator Plans Only	These options are used to create Navigator plans.
Calendar Scale	Select the default calendar scale for the Navigator plans. The default is Weekly.
Consultants Plan Level	Use this drop-down list to specify the default WBS level that will be used to plan the consultants for the project: • **Project** — Select this option to plan consultants at the Project level. • **Phase** — Select this option to plan consultants at the Phase level, if the project has phases. Otherwise, consultants are planned at the Project level. • **Lowest Level** — Select this option to plan consultants at the lowest level of the branch. The options in this list are based on the WBS settings that are defined in

	Vision Utilities Key Formats. For example, if the WBS 2 length is set to zero, then Project is the only option that displays in the Consultants Plan Level list. This option is only available when **Consultants** is selected in the Enable Planning Tabs group box.

Resource Planning Module Not in Use

These fields display when the Vision Resource Planning Module is not in use. If you use Vision Multicompany, you set these options for each company in your enterprise.

Hours Decimal	Use the hours decimal field to specify the number of decimal digits for hours, quantities, and amounts in plans.
Overhead %	Enter the overhead percent applied to the project.
Use Rate Tables with Effective Dates	Select this option to view rate tables with effective dates. If this option is not selected, Vision only displays rate tables that do not contain effective dates. Effective dates allow you to specify when a change will occur in the cost/pay rate associated with a specified labor rate, labor category, labor code, or labor override table. The date that a change will occur is the "effective date" of the change. This option is only available if the **Enable effective dates for labor billing rates** option in Vision Billing is selected.
Enable Consultants Planning Tab	Select this option to plan consultants for the company's projects.
Default Settings for Creating New Plan	Use these options to define the default settings when creating a new plan.
Calendar Scale	Select the default calendar scale for the Navigator plans. The default is **Weekly**.
Consultants Plan Level	This option is available when the **Enable Consultants Planning Tab** option is selected. Use this drop-down list to specify the default WBS level that will be used to plan the consultants for the project: • **Project** — Select this option to plan consultants at the Project level. • **Phase** — Select this option to plan consultants at the Phase level, if the project has phases. Otherwise, consultants are planned at the Project level. • **Lowest Level** — Select this option to plan consultants at the lowest leel of the branch. The options in this list are based on the WBS settings that are defined in

	Vision Utilities Key Formats. For example, if the WBS 2 length is set to zero, then Project is the only option that displays in the Consultants Plan Level list.
Labor Rates	These options are available if the **Allow Changes to Rate / Method Tables** option is selected in Vision Security Roles.
Generic Method	Use this drop-down list to select the default generic resource method that will be used to plan generic resources for the project: • **Labor Category** • **Labor Code**
Labor Cost Rates	
Rate Method	Select one of the following options from the drop-down list: • **From Employee Provisional Rate Table** (Employee Info Center) • **From Labor Rate Table** (Billing Rate Tables) • **From Labor Category Table** (Billing Rate Tables) • **From Labor Code Table** (Billing Rate Tables) If you select a rate method other than Employee Provisional Rate Table, you must also specify a **Rate Table**. Your security role for **Labor Cost Rates / Amounts** must be **Full Access** for you to select **From Employee Provisional Rate Table**.
Rate Table	If the **Rate Method** field is set to: • **From Employee Provisional Rate**, then no selection is available in this field. • **From Employee Labor Table, From Labor Category Table**, or **From Labor Code Table**, then use the Rate table lookup to select the appropriate rate table for your plan's cost rates from pre-defined tables. Only rate tables marked as available for planning are included in the lookup list. This rate table will provide the default cost rate for employees assigned to the Navigator plan.
Generic Table	Use this lookup to select a generic resource cost rate table for the selected generic method and rate method. Only rate tables marked as available for planning are included in the lookup list. The rate table will provide the default billing rate for generic resources assigned to the Navigator plan.
Labor Billing Rates	

Rate Method

Select one of the following options from the drop-down list:

- **From Employee Provisional Rate Table** (Employee Info Center)
- **From Labor Rate Table** (Billing Rate Tables)
- **From Labor Category Table** (Billing Rate Tables)
- **From Labor Code Table** (Billing Rate Tables)

When you select a rate method other than Employee Provisional Rate, you also need to specify a **Rate Table**.

Rate Table

If the **Rate Method** field is set to:

- **From Employee Provisional Rate**, then no selection is available in this field.
- **From Employee Provisional Rate Table, From Labor Category Table**, or **From Labor Code Table**, then use the Rate Table lookup for this field to select the appropriate rate table for your plan's billing rates from pre-defined tables. Only rate tables marked as available for planning are included in this lookup list.

This rate table will provide the default billing rate for employees assigned to the Navigator plan.

Generic Table

Use this lookup to select a generic resource billing rate table for the selected generic method and rate method. Only rate tables marked as available for planning are included in the lookup list.

The rate table will provide the default billing rate for employees assigned to the Navigator plan.

Billing Multiplier

Enter the multiplier for the labor billing calculation.

Labor Billing Amount = Planned Hrs * Billing Rate * Billing Multiplier

Consultants Rates

Calculate Consultant Billing Amounts

This option is available when the **Enable Consultants Planning Tab** option is selected.

Select **Calculate Consultant Billing Amounts** to automatically calculate planned billing amounts from planned cost. When selected, you may also select the rate method, rate table, and enter a multiplier.

If you do not select this option, the remainder of this group box is disabled.

Rate Method

Select one of the following options:

- **Multiplier Only**: Select this option to multiply all planned cost amounts by the assigned multiplier. Selecting this option disables the Rate Table field.

	• **From Expense Account Table:** Select this option to apply the table's multiplier to the account's planned cost. • **From Expense Category Table:** Select this option to apply the table's multiplier to the expenses category's planned cost.
Rate Table	If the **Rate Method** field is set to: • **Multiplier Only**, then no selection is available in this field. • **From Account Rate Table** or **From Category Rate Table**, then use the Rate Table lookup to select the appropriate rate table for your plan's consultant billing rates from pre-defined tables. Only rate tables marked as available for planning are included in this lookup list. This rate table will provide the default billing multiplier for consultants assigned to the Navigator plan.
Multiplier	Enter a numeric multiplier to be used with the Multiplier Only rate method or as the multiplier for accounts not listed in the selected rate tables.

Configuration » General » System Settings » Miscellaneous Tab

In the topic that describes the Miscellaneous tab of General » System Settings, a new **Vision Navigator Online Help** group box was added. Use the **Type of Help** option to select hosted or local help. Hosted help is updated automatically to match the version or release updates that apply, but requires the Vision administrator to save their Deltek Customer Care Connect site credentials in Vision. This is a one-time requirement so that end-users can access help system seamlessly. Local help is installed locally as part of the Navigator installation.

Navigator Online Help

Type of Help	There are two types of help available: Hosted and Local. • **Hosted** — Select this option for online help that is updated automatically to match the version or release updates that apply. This help requires the Vision Administrator to save their Deltek Customer Care Connect credentials in Vision. This is a one-time requirement so that users can access the help seamlessly. • **Local** — Select this option to use online help that is installed locally as part of the Vision Navigator installation.
Support Username	Enter a username that is used to access the Deltek Customer Care Connect site. This entry allows any Navigator user to access the hosted help for the version of Navigator that your firm is using.
Support Password	Enter a password that is used with the username to access the Deltek Customer Care Connect side. This entry allows any Navigator user to access the hosted help for the version of Navigator that your firm is using.

Info Center

Project Info Center » Time & Expense Tab

The Labor Code Levels field was updated to include information about Navigator plans.

Labor Code Levels	Select one or more labor code levels. The options you select in this field determine what labor code levels employees can use when they charge time to the project. Your options are used by the Timesheet application to validate labor charges against budgeted labor charges. The budgeted labor code level options available vary based on the number of labor code levels established in Utilities. This field is enabled in the following situations: • When you select **Warning** or **Error** in the **Budgeted Validation** field *and* the **Budget Worksheet** option in the **Budgeted Source** field. • When you select the **Project Planning** option in the **Budgeted Source** field *and* the **Labor Codes Only** or **Both** option in the **Budgeted Level** field. If you use Vision Navigator and the project has an associated Navigator plan, the warning or error is not checked against labor codes. Vision Navigator does not use labor codes as a plan level.

Create a New Project from a Plan

The Create a New Project from a Plan procedure was updated to include that you cannot select a Navigator plan as a template, and you cannot select a project to merge with if it is associated with a Navigator plan.

Planning

Project Planning Toolbar Topic

The **Change Navigator Plan to Vision Plan** option was added to the Actions menu on the Project Planning form. This option is described in the Project Planning Toolbar topic. Access to this toolbar option depends on your security settings in Role Security Configuration.

Option	Description
Actions	The **Actions** menu offers these options: • **Change Navigator Plan to Vision Plan —** Select this option to start maintaining a Vision Navigator plan in Vision. This option is only available if you are viewing a Vision Navigator plan and have the appropriate access rights. **procedure**: Change a Vision Navigator Plan to a Vision Plan

Resource Management Toolbar Topic

The **Navigator Plan Status** option was added to the Resource Utilization and Generic Resource Assignments toolbars. This option is described in the Resource Management Toolbar topic. Access to this toolbar option depends on your security settings in Role Security Configuration.

Option	Description
Navigator Plan Status	If you use Vision Navigator, click **Navigator Plan Status** to display the Navigator Plan Status dialog box. This lists the Vision Navigator plans that are currently checked out and/or have unpublished changes.

Creating Plan Records Overview Topic

This topic lists the different ways to create a new Vision plan record and how the options are affected by Navigator plans.

Use a Vision Navigator Plan

You can create plans in Vision Navigator. These plans can be viewed as read-only in Vision Project Planning. However, you have the option to change a Vision Navigator plan to a Vision plan, which will allow you to edit the plan within Vision. Going forward, you must maintain the plan in Vision and view the plan as read-only in Vision Navigator.

Create a New Plan from a Project

Step 3 of the procedure in this topic was updated as follows:

3. Click to **Select Specific Project** and use the Project Lookup dialog box to select the project to serve as the basis of the new plan. You cannot select a project that is associated with a Vision Navigator plan.

Step 10 of the procedure in this topic was updated as follows:

10. Select the **Merge with Plan** options to merge an existing plan with the selected project. This is useful when you have projects that are "in progress" and need to incorporate year-to-date information with an already existing plan structure. This will append the information from an existing plan to the bottom of the new plan being created. You cannot select a Vision Navigator plan for the merge.

Create a New Project from a Plan

Step 2 of the procedure in this topic was updated as follows:

2. Click to display the Plan Lookup dialog box and select the Vision plan that you want to open. This is the plan that will be used as the template for the new project. You cannot select a Vision Navigator plan as the template, and you cannot select a project to merge with if it is associated with a Navigator plan.

Spread Variance Overview

The following information was added to the overview topic for the Spread Variance feature:

The Spread Variance feature does not apply to Vision Navigator plans.

Utilities

Project Closeout Overview and Close Out Projects Topics

The Project Closeout Overview topic and the Close Out Projects topic were updated to include the following information:

- If you are using Vision Navigator, you cannot close out a project that contains Vision Navigator data. Vision will notify you that the project cannot be selected because it contains Vision Navigator data.

Key Convert Projects, Phase, and Tasks Form of Key Conversions

The **Combine** field description was updated in the following topics:

- Key Conversion Tasks Fields
- Key Conversion Phase Fields
- Key Conversion Projects Fields

Combine Existing Projects	Select this option if you want to consolidate existing projects. You can enter an existing project number in the **New Project** field. If you are using Vision Navigator and you select a project that has a Navigator plan, Vision displays an error message at run time that states you cannot combine project information because there is an associated plan in Vision Navigator.

Key Convert Vendor

The **Combine** field description was updated to include information about combining under the same WBS ID.

Field	Description
Combine Existing Vendors	Select this option if you want to consolidate existing vendors. Vision allows you to enter an existing vendor code in the **New Vendor** field. Note: When plan rows have the same vendor and account and are under the same Work Breakdown Structure ID, they are combined. When the vendor is the same, but the account numbers are different, they are not combined.

Return to top of page

Key Convert Account

The **Combine** field description was updated to include information about combining under the same WBS ID.

Field	Description
Combine Existing Accounts	Select this option if you want to consolidate existing accounts. Vision allows you to enter an existing account in the **New Account** field. Note: When plan rows have the same account number and vendor and are under the same Work Breakdown Structure ID, they are combined. When the account is the same, but the

vendor is different, they are not combined.

Key Convert Enable Phase/Task

The following note was added to this topic:

When using Vision Navigator, planned Labor is moved when your run key conversion to enable the first phase or a phase's first task. Planned Consultant information is only moved down if the Consultants Plan Level option, in Navigator Plan Settings, is set to use the lower level. For example, if you have planned labor and consultants at the Project level, and then enable phases, all planned labor is moved down to the new phase. Planned consultants are moved down if the Consultants Plan Level is set to Phase or Lowest Level.

Key Convert Disable Phase/Task

The following note was added to this topic:

When using Vision Navigator, planned Labor is moved up when you run a key conversion to disable a phase or task. Planned Consultant information is only moved up if it is assigned at the level being disabled. Planned labor rows for the same resource are combined when moved up under the same Work Breakdown Structure ID. Planned consultant rows are combined when moved up under the same Work Breakdown Structure ID if the account and vendor are the same. For example, if you have planned labor and consultants at the phase level, and then disable phases, all planned labor and consultants are moved up to the Project level.

Search and Replace

The following note was added to the Select Records field on this topic:

When a Search and Replace is performed on the Project Planning application area, Vision Navigator plans are excluded from the Plan Lookup.

New Vision Online Help Topics

The following topics are provided in the new **Vision Navigator** section that is included in the Planning section of the Vision help system:

- Vision Navigator Overview
- Navigator Plan Status Dialog Box
- Change a Navigator Plan to a Vision Plan
- Resource Planning Alerts and Vision Navigator

There is also a new topic within Vision Security:

- Navigator Tab of Security Roles

Vision Navigator Overview

Vision Project Planning integrates with Vision Navigator to allow you to manage complex projects through an alternative, streamlined application. Vision Navigator offers real-time planning, budget, invoice, and reporting statistics that are optimized to follow planning best practices. You can use Vision Navigator's simplified analysis tools to identify and act on any project performance issues or risks.

Vision Navigator also includes a Timesheet application that works with Vision Timesheet to allow you to enter your own timesheets and submit them for processing. Your system administrator configures your timesheet access rights that control the activities that you can perform in the application.

Vision Navigator Plan Status Dialog Box

If your firm uses Vision Navigator, click **Navigator Plan Status** on the Resource Utilization and Generic Resources forms to display the Navigator Plan Status dialog box. This read-only dialog box lists the Vision Navigator plans that are currently checked out and/or have unpublished changes. Use this dialog box to determine if certain Vision Navigator plans need to be checked in or published before you adjust labor resource assignments.

The Vision application checks the plan status whenever a Vision Navigator plan's updates are saved. If the changed labor resource assignments are on Vision Navigator plans that are checked out or have unpublished changes, the Navigator Plan Status dialog box displays. This dialog box lists those Vision Navigator plans that will be affected by pending labor resource changes. If you choose to continue with the save process, the listed Vision Navigator plans are automatically checked in or are reverted to the last published version of the plan and then the labor resource assignment changes are saved. After the resource assignment changes are saved, the affected Navigator plans are automatically published so Navigator and Vision show the same data.

If you cancel the save process, the Navigator Plan Status dialog box closes and the application returns to the previous screen with the unsaved edits.

You can click the column header to sort the grid columns on the Navigator Plan Status dialog box.

Change a Navigator Plan to a Vision Plan

You can create plans in either Vision or in Vision Navigator. If you create a plan in Navigator, you can only view the plan's information in Vision. However, you can change a Navigator plan to a Vision plan so that you can edit the plan in Vision. From that point forward, the plan must be maintained in Vision and no updates or modifications can be made to the plan in Navigator.

You must have **Full**, **Add/Modify**, or **Modify Only** access rights to Project Planning on the Record Access tab in Vision Role Security to convert a plan.

To change a plan created in Vision Navigator to a Vision plan, complete the following steps:

1. Open the plan record in Vision Project Planning. The plan displays with the following text: **Planned in Navigator**.
2. From the Project Planning menu, click **Actions » Change Navigator Plan to Vision Plan**.
3. Click **Yes** to confirm changing the plan. The Navigator plan is changed to a Vision plan and can only be maintained within Vision.

Changes Made to Vision Project Planning if Vision Navigator Plans Are In Use

Refer to the following list for changes to Vision when using Vision Navigator plans:

- The **New Plan from Existing Project** option does not allow you to create a new Vision plan for a project that already has a Vision Navigator plan. The option also stops you from merging a Vision plan with a Vision Navigator plan.
- The **New Plan from Existing Opportunity** option does not allow you to use a Vision Navigator plan as a template.
- The **Copy Current Plan** option is disabled if you have a Vision Navigator plan open.
- The **Select Plans to Copy** option does not allow you to select a Vision Navigator plan to copy.
- The **Select Plans to Delete** option does not allow you to delete a Vision Navigator plan through Vision. You must delete the plan through Vision Navigator.

Resource Planning Alerts and Vision Navigator

If you are using Vision Navigator, you or your Vision Administrator can set up two types of alerts, process and database, that send messages to team members when changes are made to Vision Navigator plans.

Alerts are available with or without the Vision Resource Planning module.

Process alerts are triggered by a reaction to information defined on your process server:

- Resource utilization percentages exceed, or fall short of, percentage thresholds that you specify for a plan. This alert only applies to published plan data.
- Budget milestone amounts or percentages have been reached. This alert only applies to published plan data.

- EAC hours or amount exceeds the established baseline for the plan. This alert only applies to published plan data.

Database alerts are triggered by a change in information in your database. They are triggered dynamically and do not depend on schedules that are defined on the process server:

- A new plan is created, or an existing plan is modified, deleted, or published. This alert also occurs when a Vision plan is converted to a Navigator plan, or a Navigator plan is converted to a Vision plan. Navigator data does not affect the following alerts: WBS Level added or deleted from plan, and project created from plan.
- Labor resource assignments for a plan have been made by someone other than the original author of that plan. This alert occurs on the most recent set of resources when the plan is published.
- The Plan Baseline was changed after the original version was saved. This is useful when you compare baseline labor costs to actual labor costs onscreen or in a report. This alert occurs when the plan is published.

Open the Vision or Navigator Project

When you receive an alert, you can select a Vision or Navigator link to open the project in the respective application. These alerts are delivered via Vision Dashboard or your personal email.

Additional Information

See the following topics in the Vision Configuration help for full descriptions and procedures:

- Set Up Alerts for Resource Utilization
- Set Up Alerts for Resource Assignments
- Set Up Alerts for Budget Milestones
- Baseline Change
- Estimate at Completion Exceeds Baseline
- Plan Creation, Modification, or Deletion

Navigator Tab of Roles Security

Use the Navigator tab to determine a role's access rights to the Vision Navigator application.

Location-Navigator Tab of Roles

To display the Navigator tab, complete the following steps:

1. From the Vision Navigation menu, click **Configuration » Security » Roles**.
2. On the Roles form, click the Navigator tab.

Navigator Access	
Navigator	Select this option for the role to have access to log in to Vision Navigator. When you select this option, all other Navigator options on this form are selected.
Employee	Select this option to enable access to the Employee Workspace and automatically

Workspace	enable the **Timesheet Tab** option.
Timesheet Tab	Select this option to enable access to the Timesheet features within Navigator. If this option is not selected, users assigned to this role cannot access the Employee Workspace.
Project Management Workspace	Select this option to enable access to the Project Management Workspace and automatically enable the **Dashboard Tab** and **Planning Tab** options.
Dashboard Tab	Select this option to enable access to the Dashboard features within Navigator. If this option is not selected, the Dashboard tab does not display within Navigator.
Planning Tab	Select this option to enable access to the Planning Tab within Navigator and automatically enable the **Labor** and **Consultants** options. If this option is not selected, the Planning tab does not display within Navigator.
Labor	This option enables the Labor charts and grids within the Planning tab. If the Planning tab option is selected, this option is automatically selected and cannot be turned off.
Consultants	Select this option to enable the Consultants charts and grids within the Planning tab. If not selected, the Consultant information does not display.
Additional Planning Security	These options display when the Resource Planning module is not licensed in Vision.
Allow Changes to Baseline	Select this option if the role can change the baseline. You can have only one baseline version for the current plan at any given time. If you use the **Save Baseline** option again for the same plan, you will overwrite the previous contents of the baseline.
Allow Changes to Rate / Method Tables	Select this option if the role can change the rate and method tables.
Apply Employee Record Level Access	Select this option to restrict employee access by this role to only those employee records defined by employee record level security established on the Record Access tab of Roles. Do not select this option if users with this security role need full access to all employee records.
Record Level Access	
Projects	The following options define the record level access to projects in Navigator. You have the option to use the same access rights that are defined for the Projects application on the Record Access tab of Roles, or you can set up a different strategy for accessing projects within Navigator.

Record Access	Select one of the following options to define the user access to perform project functions. • **Same as Project Record Access** – Select this option to apply the same access rights as those defined in the Access column for the Projects application on the Record Access tab. Selecting this option disables the Access option. • **Access** – Use this option to define the specific access rights for the projects accessed in Navigator. Access right options are as follows: Read Only Modify Only Add/Modify Full Read Only access stops the user from choosing a different image and selecting a Kona space for the project while within Navigator. The other access options allow the user to make these changes within Navigator.
Record Level View	Select one of the following options to define the projects the role can view in the Navigator Project list. • **Same as Project Record Level View** – Select this option to apply the same access rights as those defined in the Record Level View column for the Projects application on the Record Access tab. Selecting this option disables the Lookup option. • **Lookup** –Use the project lookup dialog to build a query that grants or restricts the projects listed in Navigator. After you make your selections, this field displays **In Use**. This field displays **Not In Use** when there are no options selected which means there are no restrictions placed on which projects display in Navigator. When you clear the Same as Project Record Level View option, the system defaults the Lookup field to match how Record Level View was set for the Projects application on the Record Access tab. You can change the query or remove what defaulted.
Record Level Update	Select one of the following options to define the projects the role will be able to update in Navigator. • **Same as Vision Project Record Level Update** – Select this option to apply the same access rights as those defined for the Projects application in the Record Level Update column on the Record Access tab. Selecting this option disables the Record Level Update lookup option. • **Lookup** – Use the project lookup dialog to build a query that grants or restricts which projects that the role will be able to update in Navigator. After you make your selections, this field displays **In Use**. This field displays **Not in Use** when there are no options selected which means there are no restrictions placed on which projects can be updated in Navigator. When you clear the Same as Vision Project Record Level Update option, the system defaults the Lookup field to match how Record Level Update was set for the Projects application on the Record Access tab. You can change the query or remove what defaulted. The selections made here and in Record Access determine whether the user can choose a different image and select a Kona space for the project while within Navigator.

Project Plans	The following options define the record level access to project plans in Navigator. You have the option to use the same access rights that are defined for the Project Planning application on the Record Access tab of Roles, or you can set up a different strategy for accessing project plans within Navigator.
Record Access	Select one of the following options to define the user access to perform plan functions. • **Same as Project Planning Record Access** – Select this option to apply the same access rights as those defined in the Access column for the Project Planning application on the Record Access tab. Selecting this option disables the Access option. This option is not available if you do not have the Resource Planning module. You must use the Access option to determine access rights. • **Access** – Use this option to define the specific access rights for the project plans accessed in Navigator. Access right options are as follows: Read Only Modify Only Add/Modify Full
Record Level View	Select one of the following options to define the project plans the role can view in the Navigator Planning tab. • **Same as Project Planning Record Level View** – Select this option to apply the same access rights as those defined in the Record Level View column for the Project Planning application on the Record Access tab. Selecting this option disables the Lookup option. **This option is not available if you do not have the Resource Planning module. You must use the Lookup option to determine plan view access. • **Lookup** –Use the plan lookup dialog to build a query that grants or restricts access to the plans displayed in Navigator. After you make your selections, this field displays **In Use**. This field displays **Not In Use** when there are no options selected which means there are no restrictions placed on which plans display in Navigator. When you clear the Same as Project Planning Record Level View option, the system defaults the Lookup field to match how Record Level View was set for the Project Planning application on the Record Access tab. You can change the query or remove what defaulted.
Record Level Update	Select one of the following options to define the project plans the role will be able to update in Navigator. • **Same as Project Planning Record Level Update** – Select this option to apply the same access rights as those defined in the Record Level Update column for the Project Planning application on the Record Access tab. Selecting this option disables the Lookup option. **This option is not available if you do not have the Resource Planning module. You must use the Lookup option to determine plan update access. • **Lookup** –Use the plan lookup dialog to build a query that grants or restricts access to the plans that the role will be able to update in Navigator. After you make your selections, this field displays **In Use**. This field displays **Not In Use** when there are no options selected which means there are no restrictions placed on which plans can be updated in Navigator. When you clear the Same as Project Planning Record Level Update option,

	the system defaults the Lookup field to match how Record Level Update column was set for the Project Planning application on the Record Access tab. You can change the query or remove what defaulted.

Functionality Information

How Data Updates in Vision and in Vision Navigator

You can create a plan in either Vision Navigator or Vision. You can then share data between the two applications, but you can only maintain the plan's information in one application at a time. For example, if your plan is created in Vision Planning, you enter all relevant data in Vision.

The following table shows how fields default when Navigator plans are created:

Plan Value	Default Setting
Plan Name	Project Name
Plan Number *	Project Number
Start and End Dates	Project's Initial Dates: Start and Completion Dates: Estimated dates. If only one exists, it is assigned as both the Start and End dates. If neither exists, tomorrow's date is assigned to both dates.
Calendar Scale	Defined in Vision's Plan Settings. If using Vision Multicompany, the default scale is defined in the project company's Plan Settings.
Starting Day of Week*	Monday
Budget Type*	Cost and Billing
Include in Utilization and Project Reports*	This option is selected.
% Complete Formula*	JTD/(JTD+ETC)
Show Unposted Actual Labor*	This option is selected.
Available to Other Users*	This option is selected.
Status*	Active
Planned Revenue: Labor Multiplier Type*	Planned Ratio
Planned Revenue: Reimbursable Method*	Billing
ETC/JTD Date Basis	Today's Date
Opportunity	Project's Opportunity
Primary Client	Project's Primary Client
Principal	Project's Principal

Plan Value	Default Setting
Supervisor	Project's Supervisor
Project Manager	Project's Project Manager
Probability from Opportunity, if project is linked to an opportunity	Probability on Project's Opportunity

*These settings are not visible in Vision Navigator.

If you change any of the following fields after a Navigattor plan is created, the field information is synchronized whenever the plan is published and reverted:

Changing…	Changes…
Project's short name	Plan's short name
Project's number	Plan's number
Project's organization	Plan's organization
Project's opportunity	Plan's opportunity
Project's primary client	Plan's primary client
Project's principal	Plan's principal
Project's project manager	Plan's project manager
Project's supervisor	Plan's supervisor
Project's status	Plan's status
Project's opportunity's probability	Plan's opportunity's probability

Conditions in Which You Cannot Convert a Vision Plan to a Vision Navigator Plan

There are certain conditions in which you cannot convert a Vision plan to a Navigator plan. If Navigator displays a message about one of these conditions, address the problem and then change the Vision plan to a Navigator plan.

Condition	Solution
More than one Vision plan exists for the project.	Consolidate the Vision plans. If appropriate, you can also change a plan so that it is not included in utilization and thus is not recognized.
The plan is mapped to more than one project.	On the Labor tab in Project Planning, adjust the projects that are mapped to the plan.
The plan contains extra plan levels	On the Labor tab in Project Planning, remove the

Condition	Solution
between WBS1 and WBS2, or between WBS 2 and WBS3, or the plan has Labor Code plan level rows.	plan level rows between WBS1 and WBS2 or between WBS 2 and WBS3, and/or remove the labor code plan level rows. When you delete a plan level row that has subordinate plan level or assignment rows, those rows are also deleted.
Resource assignments are not at the lowest-level WBS level.	On the Labor tab in Project Planning, move or delete resource assignment rows that are not assigned under the lowest WBS level in the plan.
The employee or generic resource is assigned more than once under the same WBS plan level row.	On the Labor tab in Project Planning, consolidate the resource's assignments so that each resource has only one assignment row under the lowest WBS plan level rows.
The Budget Type option is set to Cost or Billing.	On the Rates tab in Project Planning, change the **Budget Type** to **Cost and Billing** and, if necessary, update the rate methods, tables, and rates for the added type. If you add **Cost** to the budget type, verify that users' roles are updated to hide cost data if it is considered sensitive information.
The plan's Accordion Calendar is set with multiple calendar scales.	Change the plan's Accordion Calendar Format to have one bottom scale and one top scale for the entire date range. Avoid setting the bottom scale to **Daily**, **Accounting Period**, or **Yearly** because these are not valid Navigator scales.
The Accordion Calendar's bottom calendar scale is not valid in Navigator.	Change the bottom calendar scale in the plan's Accordion Calendar Format from **Daily**, **Accounting Period**, or **Yearly**.
The Accordion Calendar's date range causes values to be in the Overflow column.	On the Accordion Calendar dialog box, extend the date range so that no values display in the **Overflow** column.
There are plan level rows for vendors or accounts on the Expense and/or Consultant tabs.	Remove the plan level rows from the Expense and/or Consultant tabs in Vision Project Planning.
There are plan level rows for units or accounts on the Units tab.	Remove the plan level rows from the Units tab in Vision Project Planning.
An amount was manually added to the WBS on the Expense, Consultant, or Units tab in Vision Project Planning. For example, Planned Cost or Planning Bill.	Remove the cost and percent complete values from the Expense, Consultant, and/or Unit tabs in Vision Project Planning.
The Use Billing Currency not Project	If the Plan Billing currency does not match the

Condition	Solution
Currency option is selected.	Project Billing currency, or the Plan Cost currency does not match the Project Cost currency, the conversion is stopped.
The Use Billing Currency not Project Currency option is not selected.	The Plan Cost currency does not match the Project Cost currency and the conversion is stopped.

Vision Settings and Actions that Relate to the Vision Navigator Dashboard and Planning Tabs

There are settings and actions that occur in the Vision applications that are used or impact the data that displays on the Vision Navigator Dashboard and Planning tabs. The following Vision settings impact the data that displays in Vision Navigator:

- **Unposted Actual Labor** — Vision Navigator includes unposted actual labor values even if the Vision plan's **Show Unposted Actual Labor** option is not selected.
- **Include in Utilization and Project Reports** — If a project is mapped to multiple Vision plans, and the Include in utilization and project reports option is selected, the Vision Navigator totals are the combined value of the plans. If the project is mapped to multiple plans, the target cost multiplier and percent complete method from the plan with the earliest creation date are used in Vision Navigator.
- **Adding Phases and Tasks** — When the first phase is added to a project that has a Vision Navigator plan, any resources already assigned are shifted down to the first phase. The same is true if resources are assigned to the phase and the first task for the phase is added.
- **Deleting Phases and Tasks** — When a phase is deleted, any assigned resources on a Vision Navigator plan are also deleted. Likewise, when a task is deleted, any assigned resources are also deleted from the Vision Navigator plan.
- **Spread Variance** — You cannot use Vision’s Spread Variance feature on a Vision Navigator plan that has been published to Vision.

Settings for Spreading Amounts Across Calendar Periods

When you enter hours in Vision Navigator for a resource in the **ETC** field in the summary or calendar view, the hours are spread evenly to working days within each calendar period shown. The calendar periods are based on the WBS element's date range, and the calendar scale that is selected in Vision Navigator Plan Settings. The calculation it uses is as follows:

- **Hours Distributed per Calendar Period Calculation** — Hours Distributed per Calendar Period = (Hours Entered/Total Working Days in Range) * Calendar Period's Working Days
- **Non-Working Days** — Non-working days are determined by settings in the Vision Holiday Calendar. All other days are considered working days.
- **Vision Multicompany** — If you use Vision Multicompany, the Holiday Calendar in the project's company is checked.
- **ETC Hours** — When a WBS element is in progress and its start date is not in the future, you must edit all of the ETC hours in the individual calendar periods that include

tomorrow and beyond. Vision Navigator spreads the hours entered in a calendar period so that it can calculate the number of ETC hours. If the calendar period includes working days in the past and the future, Vision Navigator only includes the hours for tomorrow forward in the ETC hours total.

- **Hours Distributed Per Calendar Period Working Day** — Deltek recommends that you edit the next calendar period before today's date is included in that period. If you need to edit a calendar period that includes days in the past and the future, your entry is distributed across all the working days included in the period, not just the days for tomorrow forward. You may need to increase your entry to get the ETC total that you want for the period.
- **Hours Do Not Spread Correctly** — There may be situations where the plan's hours do not spread correctly. This can be caused by the start and/or end dates of the plan, or by the fact that the spread automatically starts tomorrow and goes forward. You can add hours to the plan so that the hours readjust across the period, or you can extend the end date for the period.

Vision Search and Replace Utility Fields

When any of the following fields are updated in Vision using the Search and Replace Utility, the associated RP and PN tables are updated for Navigator plans. This may result in visible field updates within the Navigator application. Refer to the following table as a guide for updates that may occur.

Vision Area	Vision Field	
Workflow		
Account		
Project Info Center	Short Name	
	Project Manager	
	Principal	
	Supervisor	
	Status	
Opportunity Info Center	Probability/Opportunity ID	
Opportunity and Project Info Centers		
	Opportunity ID/Probability	
	Client ID	
	Organization	
	Project Currency Code	Updates Cost Currency Code. If **Use project currency not**

Vision Area	Vision Field	
		billing currency = Yes, updates Billing Currency Code
	Billing Currency Code	Updates Billing Currency Code if **Use project currency not billing currency** = No
	Project Compensation (WBS1)	Updates Plan Cost Analysis: Compensation (on Analysis tab) and if **Use project currency not billing currency** = Yes, updates Plan Billing Analysis: Compensation
	Billing Compensation (WBS1)	Updates Plan Billing Analysis: Compensation
	Project Consultant Fee (WBS1)	Plan Cost Analysis: Consultant Fee (on Analysis tab) and if U**se project currency not billing currency** = Yes, updates Plan Billing Analysis: Consultant Fee,
	Billing Consultant Fee (WBS1)	Plan Billing Analysis: Consultant Fee

Use Vision Navigator without the Vision Resource Planning Module

You can use certain features and functions in Vision Navigator without also using the Vision Resource Planning module. See the following list, and the Vision online help, for information on the availability of options when you run Vision Navigator without the Vision Resource Planning module.

Vision Module	Area
Security	
Record Access tab of Role Security	The Project Planning row displays in the Application Record Access grid and defaults to None access with no row level security.
Planning tab of Role Security	The Allow Changes to Baseline and Allow Changes to Rate/Method Tables are the only options that display.
Access Rights tab of Role Security	The Planning options are hidden in the Application lists.
Role Summary Report	Planning-related data displays.
▪ **Reporting**	
Project Reporting	These reports display both Vision Navigator data: Consultant Ledger, Expense Summary, Labor Summary, Office Earnings, Project Earnings, Project Progress, and Project Summary.
Project List	The Budget Source options that are available are Budget Worksheet and Project Planning.
Employee List	The Utilization Ratio column displays.
▪ **Configuration**	
Planning » Plan Settings	Plan Settings include Hours Decimal, Overhead %, Use Rate Tables with Effective Dates, Enable Consultants Planning Tab, Default Settings for Creating a New Plan, Calendar Scale, Consultants Plan Level, Labor Rates, Generic Method, Rate Method, Rate Table, Generic Table, Labor Billing Rate Method, Labor Billing Rate Table, Labor Billing Generic Table, Billing Multiplier, Calculate Consultant Billing Amounts, and Rate Method.
Planning » Generic Resources	When you use Vision Navigator with Vision 7.0, Generic Resources are available.
▪ **Info Centers**	
General tab of Project Info Center	The Project Plan field displays.
Time and Expense tab of Project Info Center	The budget-related fields display.
Accounting tag of Employee Info	The Utilization Ratio field displays.

Vision Module	Area
Center	
Analysis Cubes	
Analysis Cubes	Planning data remains available in Analysis Cubes.
Project Review	
Project Review	The **Budget Source** options that are available are **Budget Worksheet** and **Project Planning**.
Utilities	
Key Conversions	The Generic Resources Key Conversion Utility is accessible.
Time and Expense	
Timesheet	When you use Vision Navigator with Vision 7.0: ▪ The **Copy from Planning** and **Show Planned Hours** options display. ▪ The **Labor Category** column is enabled.
Vendor Lookup	Planning fields display.

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