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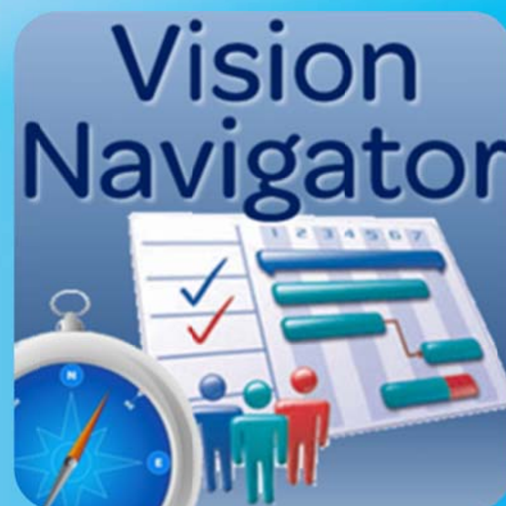
Deltek Vision® Navigator 1.6

New Features & Enhancements



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Contents

Navigator New Features

This section includes summaries of the new features included for this release.

Dashboard Tab

Switch Dashparts

The Switch Dashpart dialog box includes the Expense and Contract dashpart options:

- Expense Plan Summary
- Expense Progress
- Contract Breakdown
- Contract Calculations

Planning Tab

The Planning tab of Vision Navigator is divided into Contract, Labor, Expenses, and Consultants pages. Select each of these options to open the respective page.

Project Settings » Plan Settings

The Plan Settings dialog box automatically displays when you create a new plan. This prompts you to set the necessary plan defaults during plan creation.

Plan Settings is now divided to reflect specific options that are available for the Labor, Expenses, and Consultants pages. When you create a plan, most of the fields are populated automatically with the defaults that are set on the General tab and Rates tab in **Vision » Configuration » Planning » Plan Settings**. Navigator Plan Settings allow you to override those defaults for each individual plan and specify your plan multipliers, rates, planning levels, and calendar scale.

Your access to these options is dependent on your access rights in Vision Security.

Change Planning Level

You can now change the planning level that is set on the Plan Settings dialog box after your plan has been created and saved.

Changing the planning level has multiple implications if the existing plan includes resource rows that are planned under a level that is different than the new level. If you change the planning level in any of the following situations, Navigator will prompt you with messages letting you know the implications of your change.

- Any planned resource rows under a WBS level that does not match the new planning level are removed.
- When planned resource rows that are included in the baseline are to be removed, and you have access rights to change the baseline, the rows will be removed. If your access rights do not allow you to change the baseline, you cannot change the planning level.

- Any planned resource rows that are already at the new planning level will remain at that level.
- Resource rows with JTD will be shown at the new planning level once the change is complete.
- If the plan is not balanced (where some phases have tasks and some do not) and you select **Lowest Level**, Navigator will remove the resource rows that are lower than the selected level.

Overhead or Promotional Projects

When the project's charge type is **Overhead** or **Promotional**, the Consultants page is not available on the Planning tab or on the Plan Settings dialog box.

Planning Command Bar

Delete Button

You cannot select the Delete button if the plan has a baseline and you do not have access rights to change the baseline.

Labor

Labor Resources Grid

The following changes have been made to the Labor Resources grid:

- Baseline – The Labor grid now includes a Baseline column at each WBS level.
- Delete Resources -- You can no longer delete a resource if there are assigned JTD or baseline amounts.
- Replace Resources – You can no longer replace a resource if there is JTD.

Labor Plan Timeline Dashpart and Chart

The baseline amount is now included on the Labor Plan Timeline dashpart and chart.

Start and End Dates

As you add or modify a plan's WBS elements, it may be necessary to change the start and/or end dates to accommodate the shift in assignments. In this situation, Navigator will consider all start dates and end dates in the WBS and expand and/or contract to reflect the earliest and latest dates.

Consultants

Consultant Resources Grid

The following changes have been made to the Consultants Resources grid:

- Delete Consultants -- You can no longer delete a consultant type if there are assigned JTD or baseline amounts.

- Replace Consultants – You can no longer replace a consultant type or name if there is JTD.

Consultants Charts

The chart data and their respective titles are updated to reflect when cost information is displaying. For example, if you select **Cost** on the Cost/Billing toggle button, the Planned and JTD amounts update to reflect cost, and the actual chart title updates as follows: **Consultant Plan Summary (Cost).**

This change does not impact the Consultants dashparts as they only display amounts at Billing.

Expenses

When you select Expenses on the Planning tab, the new Expenses charts and grid display. You can view expense details on the charts and assign expenses to the current Navigator plan on the grid. In order to see expenses, the following must be true:

- The **Enable Expense Planning** option must be selected for your company on the General tab in Vision » Configuration » Planning » Plan Settings.
- Your Vision Security Role allows access to Expenses on the Navigator tab in Vision » Configuration » Roles.

Expenses Dashparts and Charts

The Expenses feature includes dashparts that display on the Navigator Dashboard and charts that display on the Expenses page. The dashparts display a summary of the expense information, while the charts update to reflect the selected WBS level on the Expenses grid.

Expense Progress

The Expense Progress dashpart and chart provide a view of the progress of the JTD and planned balance for the expense types, through today.

Expense Plan Summary

The Expense Plan Summary dashpart and chart provide a view of the expense account contract, planned, and job-to-date (JTD) amounts.

When you save the plan, both charts update to reflect any edits that are made to the plan.

Expenses Currency

If your firm uses Vision Multicurrency, the currency amounts display in the project's billing currency or project currency. The currency is based on the **Use Billing Currency not Project Currency** option in Vision » Accounting » System Settings.

Expenses Grid

The Expenses grid allows you to plan the expenses for a project at the following levels: WBS1, WBS2, or the lowest level. The dates on the Expenses grid are read-only and are populated directly from the Labor page. The data in the remaining columns update based on your plan entries and settings.

View Expense Bill or Cost Amounts

The Expenses planning page includes a toggle button that you can use to switch from displaying bill amounts to cost amounts for baseline, planned, JTD, and planned less JTD. When the toggle is not available, billing amounts only are shown.

This toggle button displays on the Expenses planning page under the following circumstances:

- For Navigator plans, the **Reimbursable Expenses Rate Method** on the Plan Settings dialog box in Navigator is **Multiplier Only**, **From Account Rate Table**, or **From Category Rate Table**.
- For Vision plans, the **Calculate Expense Billing Amounts** option is selected on the Rates tab of Vision » Planning » Project Planning, and the corresponding rate method is set to **Multiplier Only**, **From Accounts Rate Table**, or **From Category Rate Table**. If the project has multiple Vision plans that are included in utilization, the setting on the plan with the earliest creation date is used.

When you select this toggle button, the baseline, planned, JTD, and planned less JTD amounts on the grid and charts update to reflect costs. In addition, the chart titles on the Expenses page are updated to reflect that cost information is displaying. For example, if you select **Cost** on the Cost/Billing toggle button, the title of the Expenses Plan Summary chart updates as follows: **Expense Plan Summary (Cost)**.

Expenses amounts on the dashparts are always at Billing.

Expenses Resource Grid

You can use the Expenses Resource grid to add expense types and vendor names to the WBS elements, and then assign planned amounts to each of the rows.

You cannot delete an expense or vendor resource if there are assigned JTD or baseline amounts, nor can you replace an expense or vendor if there is JTD.

Add Expense Types Dialog Box

To begin the process of assigning expenses to a plan, you must select the WBS element in the grid for which you want to assign expenses. When you click the **Add** button, the Add Expense Types dialog box displays. This dialog box allows you to select the types of expenses for your plan.

Use the **Search** field to search your results list, and sort the columns on the results list in ascending or descending order by expense type, type, and account. When you click **Finish**, the expense(s) that were selected in the dialog are added to the WBS element and you can further define the expense and plan information.

The expense types are the same as the account names that are defined in Vision » Info Center » Accounts » Chart of Accounts with the account type of Direct, Reimbursable, or Indirect.

Expense Type and Vendor Name Lookups

After you add an expense type to the grid, you can use the Expense Type and/or Vendor Name lookups to change the expense type or add vendor information to the WBS element.

Expenses Grid Row Menu

The **Menu** button on the Expenses grid includes **Copy** and **Delete** options that allow you to copy and delete expense records on the grid. This button does not display if the plan is not checked out, you do not have the appropriate access rights, or you are viewing a Vision plan.

Expenses Functions

The save baseline, publish, revert, and delete menu options now apply to expenses.

Contract

The Contract page enables you to view the project's Contract amounts from the Vision Project Info Center (Compensation, Consultant Fee and Reimbursable Allowance) and the plan (for Reimbursable Expenses and Reimbursable Consultants). The Contract grid also allows you to further break down the compensation amount to properly account for labor and direct/indirect expenses.

When you select the Contract page on the Planning tab, the Contract charts and grid display. In order to see the Contract page option, the following must be true:

- Your Vision Security Role allows access to Contract on the Navigator tab in **Vision » Configuration » Roles**.

Contract Dashparts and Charts

The Contract feature includes dashparts that display on the Navigator Dashboard and charts that display on the Contract page. The dashparts update to display a summary of the contract information, while the charts update to reflect the selected WBS level on the Contract grid.

Contract Breakdown

The Contract Breakdown dashpart and chart provide an overview of the labor, expense, and consultant contract amounts for the selected project.

Contract Calculations

The Contract Calculations dashpart and chart display the contract amounts, and their associated calculations, for the selected project.

Contract Currency

If your firm uses Vision Multicurrency, this field displays the currency code. The currency code is based on the **Use Billing Currency not Project Currency** option in **Vision » Accounting » System Settings**.You can click on the Currency label to view additional details and access the associated online help topic.

Contract Grid

The Contract grid displays the contract information related to the current project. The columns and their respective amounts are dependent on a number of factors:

- If the plan is a Vision plan, it depends on the compensation calculation setting in Vision » Configuration » Planning » Plan Settings.

- The Fee amounts (Compensation, Consultant Fee and Reimbursable Allowance) in Vision » Info Center » Project.
- The amount entered in the direct/indirect expenses column.
- Planning Tabs enabled in Vision » Configuration » Planning » Plan Settings.
- The user's security access on the Navigator tab in Vision » Configuration » Security » Roles.

When the project is refreshed or the plan is saved in Navigator, the Compensation, Consultant Fee, and Reimb. Allowance updatee to reflect changes made in Vision » Info Center » Project. When changes are made to the planned values on the Consultants and Expenses grids, the Reimb. Consultants and Reimb. Expenses amounts update when the Navigator plan is saved.

This grid also includes the ability to quickly identify when planned reimbursables (consultants and expenses) for a WBS element is greater than the Reimb. Allowance. A red flag displays in the corner of the cell to indicate this issue.

Direct/Indirect Expenses Column

If the plan is a Navigator plan, the only editable fields on the Contract page are for direct/indirect expenses. Since compensation from Vision » Info Center » Projects typically represents Labor Fee + Direct/Indirect Expenses, this column has been added so that you can identify how much compensation is for direct/indirect expenses and how much is for labor.

This column allows you to manually enter the direct/indirect expenses at the project's lowest WBS level in order to properly calculate the labor contract amount at that level (which is the level for which Labor is planned). You can also save time and use the Fill button to populate the column from the planned direct/indirect expenses.

If the Vision Resource Planning module is licensed and the plan is a Vision plan, the amount displayed in this column depends on the setting selected **For Vision plans viewed in Navigator, compensation equals**.

- If **Labor and Direct Expenses** is selected, the direct expense column in Navigator for the Vision plan will show the direct expenses planned billing amounts from the Vision plan. The labor column will equal Compensation minus Direct Expenses.
- If **Labor** is selected, the direct expense column will equal zero and the labor column will equal Compensation.

Fill Direct/Indirect Expense Amounts

If direct/indirect expenses are part of the compensation amount and you have planned for your direct/indirect expenses on the Expenses page, you can use the  **Fill** button to populate the Direct/Indirect Expenses column. This copies the direct/indirect expense planned amounts entered on the Expenses planning page into this column for the planned WBS level. You can modify these amounts as needed.

If amounts were not planned at the project's lowest WBS level, the amounts are spread to lower levels. The spread is calculated based on the proportion of compensation at each level. You can use the Fill button at any time to replace the amounts in the column. The Fill button displays when the following conditions are true:

- The project has a Navigator plan.
- The Expenses Planning tab is enabled in Vision » Configuration » Planning » Plan Settings.

Contract Calculations and Tooltips

Various calculations and tooltips were added and/or updated on the Contract, Labor, Expenses, and Consultants pages to reflect the addition of the Contract page. Refer to the information these calculations and tooltips provide for a synopsis of how the amounts were calculated and applied in Navigator.

Contract Functions

The save baseline, publish, revert, and delete menu options now apply to contracts.

Options » My Settings

The My Settings dialog box includes a Color Scheme option that allows you to change the default set of colors that display when you initially log into Navigator. When you use this drop-down to select a different color scheme, the changes take effect when you click **Finish**. These changes remain in effect until you make a different selection. You can select a color scheme for each Navigator database.

Warning Indicators

Navigator displays visual indicators on the project list for projects that contain warnings. When you mouse over or tap warning indicators, tooltips display to explain the warnings. As you resolve warning conditions in Vision and/or Navigator, the visual indicators in Navigator update accordingly. These indicators include:

- No labor contract
- No consultant contract
- No expense contract
- Labor EAC higher than contract
- Expense EAC higher than contract
- Consultant EAC higher than contract