Deltek Vision® Navigator 1.8

Frequently Asked Questions (FAQ)

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Overview

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

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

This guide covers the following areas:

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

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

Frequently Asked Questions

General Questions and Functionality

What is Navigator?

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

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

Does Navigator replace Vision Resource Planning?

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

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

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

Is there a cost for Navigator?

Navigator is delivered as part of Core Vision functionality, so all Vision clients current on maintenance and on Deltek Vision 7.1 (Cumulative Update #18 or higher) or Deltek Vision 7.2 (Cumulative Update #8 or higher) or later will have access to the most recent version of Navigator. The server requirements are as follows:

- Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, and Windows Server 2012 R2 are supported platforms.
- Microsoft .NET Framework 4.0 must be installed on the Deltek Vision web/application server.
- You must be a local administrator on the Deltek Vision web/application server to run the setup.
- Vision Navigator must be installed on your Deltek Vision web/application server.

Does Vision's role security apply to Navigator?

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

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

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

What languages are supported?

Navigator supports the same languages that are available with Vision:

- Dutch (Netherlands)
- English (United States)
- English (international)
- French (Canada)
- French (France)
- German (Germany)
- Portuguese (Brazil)
- Spanish (international)

The languages that are available are based on your Vision license.

Are Multicurrency and Multicompany supported?

Yes, both configurations are supported in Navigator.

Can Navigator be used for Opportunities?

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

How will the Project Budget Worksheet interact with Navigator?

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

Vision Resource Planning and Navigator

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

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

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

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

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

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

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

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

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

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

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

- Work breakdown structure that does not match the project's work breakdown structure
- More than 3 levels of work breakdown structure
- Multiple accordion calendar scales

- Resource assignments at levels within the work breakdown structure other than the lowest level

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

There is no functionality in Navigator that is disabled or "grayed out" if you do not own the Vision Resource Planning module. The primary difference is that you will not have access to Vision Project Planning, Project Planning Reporting, and Resource Management, including resource utilization and generic assignments. You will still be able to view Navigator plan budget amounts when running project reports, and will be able to change your budget source to Planning if needed.

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

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

Can I plan Consultants and/or Expenses in Navigator?

Yes. If you have appropriate access rights in Vision Security, you can select the Consultants and/or Expenses pages on the Navigator Planning tab. Details about your consultants and expenses display on the respective progress and summary charts, and you can use the grids to assign consultants and expenses to each level of your plan.

Configured in Vision, consultants and expenses are both typically supported at WBS1, WBS2, and the lowest level of the work breakdown structure. This plan structure and default settings are automatically applied from Vision in the Navigator grids; however, you can use the Navigator Plan Settings dialog box to override these settings for each individual plan. This feature allows you to tailor the specific planning levels, rates, and multipliers for each plan as needed.

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

When reimbursable consultant invoices or expenses are to be marked up on invoices to clients, a Project Manager needs to be able to see and manage both the amount being paid to their consultants or vendors and the amount to be billed to their client. In Navigator Plan Settings, you can identify when a project has a markup on reimbursable consultants and/or expenses and then identify the type of markup. When this is configured, a Cost/Bill toggle displays on the Navigator screen on each respective page. At this point, all planned values will be entered at Cost (based on the contract/estimated amounts with the consultant or vendors), and Navigator will calculate the bill amounts (the contract amount with the client). The markups only apply to reimbursable consultants and/or reimbursable expenses; direct consultants and direct expenses will be entered on the same screen, but the value will be the same at cost and billing. You can then toggle between cost and bill and the amounts in the grid and charts will change accordingly.

Where do the contract amounts come from in Navigator?

Navigator includes a Contract page that enables you to view a summary of the project's contract amounts. This includes pulling amounts for compensation, consultant fees, and reimbursable allowances from the Vision Project Info Center.

The main purpose to this page is to enable a Project Manager to break down the Compensation amount from the Project Info Center in order to account for Direct/Indirect Expenses and Labor. Additionally, this allows a Project Manager to identify differences between what has been planned for Reimbursable Expenses and Reimbursable Consultants versus the Reimbursable Allowance that was entered in the Project Info Center.

In Vision, Compensation includes both Labor and Direct Expense fees. How can I split this up in Navigator so I can plan on separate pages?

The Contract page displays compensation from Vision, and offers different options for how labor and direct/indirect expense amounts are recognized in the application.

For Navigator Plans on the Contract page, the Labor Contract equals Compensation – Direct/Indirect Expenses Contract. You can manually enter the Direct/Indirect Expense Contract values at the project lowest WBS levels, or you can select the Fill button if you want Navigator to fill in the Direct/Indirect Expenses column for you based on planned direct/indirect expenses on the Expenses Planning grid. If you planned expenses at a higher level and you click the Fill button, Navigator spreads the values down proportionally based on Compensation. You can edit those values anytime. The fill button does not perform synchronization of any kind; rather, it simply fills in the current amounts in the Direct/Indirect Expenses column.

What if Compensation reflects only the Labor Fee in my company?

For Navigator Plans on the Contract page, you can leave the Direct Expenses column blank. Navigator will automatically calculate the Labor Contract to equal the Compensation.

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

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

Feature/Functionality	Budget Worksheet	Navigator	Resource Planning
Budget/Plan Labor, Consultants, and Expenses at WBS Levels	✔	✔	✔
Labor Code Based Budgeting	✔	✔	✔
View Key Project Metrics (budget/plan, ETC, EAC, JTD)	✔	✔	✔
Utilize as Budget Source in Reports	✔	✔	✔
Graphical Views of Key Project Metrics		✔	
Budget/Plan Labor by Generic Resource/Employee		✔	✔
Budget/Plan Labor and Expenses Over Time		✔[3]	✔
Budget/Plan at Both Cost and Billing	✔	✔[2]	✔

Feature/Functionality	Budget Worksheet	Navigator	Resource Planning
View and Schedule Resources Based on Availability/Utilization		✔	✔
View Resource/Employee Utilization Across Entire Organization		✔	✔
View and Schedule Resources Based on Skills		✔	✔
Alert Notifications When Resources are Scheduled		✔	✔
Resource Utilization		✔	✔
Project Planning Reporting		✔	✔
Project Plans with more than 3 levels of WBS			✔
Project Plans with Multiple Accordion Calendar Scales			✔
Project Plans Mapped to Multiple Projects			✔
Project Plans with WBS Different from Project WBS			✔
Assign Resources in Project Plans at WBS Levels Other Than Lowest Level		✔[1]	✔
Utilize From Any Browser		✔	
Utilize From Tablet Devices		✔	
Collaborate via Kona		✔	

✔ — currently support
✔ — targeted to be supported in future release
✔ — supported with a Vision Resource Planning license

Notes

- 1 – Plan Level is can be selected at a level higher than the lowest WBS level for Consultant and Expense planning.
- 2 – Cost and Billing is only visible for Consultant and Expense planning at this time. Labor at cost is targeted for a future release.
- 3 – Labor can be planned over time, Expenses and Consultants are not planned over time inside of Navigator.

Vision Timesheet and Navigator

Can I maintain Timesheet information in Navigator?

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

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

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

Can I enter hours on my Timesheet in Navigator if I already entered hours in Vision or Touch time?

Yes. You can open, modify and/or submit your timesheet in any of the three tools during the timesheet period. Since it is the same exact timesheet in all three tools, you can pick up where you left off in whichever tool is the most convenient for you at that time.

Can I approve timesheets in Navigator?

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

Does Navigator support the use of units with timesheets?

Currently, you are not able to use units with timesheets in Navigator; however, plans to allow for units are scheduled for a future release.

Can I print my timesheet in Navigator?

Yes. The Navigator Timesheet Print Report dialog box provides options to run a summarized or detailed timesheet report for any selected timesheet. You can also choose to print a separate Revision Audit report if your access rights allow.

An additional feature now offers the ability to automatically print your timesheet report each time it is submitted. The report is run in PDF format and can be saved or printed.

Vision Expense Report and Navigator

Can I maintain Expense Report information in Navigator?

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

Can I use Expense Report categories that are configured in Vision on my Navigator Expense Report?

Yes. Your Vision system administrator configures the Expense Report categories that may be used for expense report entries. These categories allow you to apply predefined values when you select expense details for your expense reports. The categories that you can access are based on your security rights and assigned expense report group.

Can I enter amounts on my Expense Report in Navigator if I already entered details in Vision?

Yes. You can open, modify and/or submit your expense report in either of the tools. Since it is the same exact expense report in both tools, you can pick up where you left off in whichever tool is the most convenient for you at that time.

Can I approve expense reports in Navigator?

No. You can submit expense reports in Navigator, but all approvals must be completed in Vision Expense Reports.

Can I print my expense in Navigator?

Yes. The Navigator Expense Report Print Report dialog box provides options to run a summarized or detailed report for any selected expense report. You can also choose to automatically print your expense report each time it is submitted. The report is run in PDF format and can be saved or printed.

Can I attach receipts to my expense reports in Navigator?

Yes. When the Transactional Document Management (TDM) feature is in use with Vision, the Navigator Expense Reports allows you to upload and attach a receipt to one or more expense lines. By attaching receipts to your expense reports, they will be backed up online and available to follow your expense report through the approval and payment process.

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