

Deltek Vision® 7.1

Performance Management Content and Functionality Overview

September 23, 2013

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Overview

This guide provides an overview of the components of Vision Performance Management.

Components

Performance Management is an optional module that comes in two editions:

- **Vision Performance Management Edition**

This edition contains the Analysis Cubes, Performance Dashboards, and Visualization components:

- **Analysis Cubes** — This provides you with a Vision project data cube and a general ledger data cube from which you create custom Vision reports with Microsoft Excel® or any business intelligence tool that supports SQL Server Analysis Services OLAP cubes. The Analysis Cubes also serve as the data sources for the performance dashboards that you create.
- **Performance Dashboards** — Use Tableau Server and Tableau Desktop (products of Tableau Software, Inc.), along with Vision Analysis Cubes and Microsoft SQL Server Analysis Services components, to create role-based graphical performance dashboards. Performance dashboards are business intelligence tools that executives and managers use to view and interact with critical project and general ledger data using a variety of graphical representations of that data. The performance dashboards are displayed as dashparts on the Vision Dashboard.

Vision Performance Management provides a set of sample performance dashboards, created using the Tableau software, that you can use as examples of the capabilities of performance dashboards and as a starting point for building your own performance dashboards. Each set is designed for a specific management and responsibility role in your firm, from corporate executives to project managers.
- **Visualization** — The Visualization feature in Vision Performance Management is a visual data analysis tool with interactive graphics. Visualization enables you to display key metric values for your projects, project plans, and opportunities in a graphical format to help you analyze performance, determine trends, and identify risks to your business. You can bring together metrics with different scales and time periods, and you can quickly switch the focus from one metric to another.

- **Performance Management Analysis Cubes Edition**

This edition contains only the Analysis Cubes component:

Analysis Cubes — This provides you with a Vision project data cube and a general ledger data cube from which you create custom Vision reports with Microsoft Excel® or any business intelligence tool that supports SQL Server Analysis Services OLAP cubes.

Additional Documentation

The following table lists additional related Deltek documentation available for this release. These are available for download from the Deltek Customer Care Connect site, along with other Vision documentation.

Document Name	Description
Deltek Vision 7.1 Release Notes	These release notes contain pre-installation information, database changes, and a summary of enhancements and software issues resolved in the Vision 7.1 release.
Deltek Vision 7.1 Installation and Configuration Guide for Performance Management (Analysis Cubes and Performance Dashboards)	This guide provides instructions on how to install and configure the following components of the Deltek Vision Performance Management module: <ul style="list-style-type: none"> ▪ Analysis Cubes ▪ Performance Management Dashboards
Deltek Vision 7.1 Technical Installation Guide	This guide contains detailed instructions for installing all the technical components of Vision, including the servers, the database, and the application itself.
Deltek Vision 7.1 Advanced Technical Administration Guide	This guide provides IT staff and system administrators with instructions for installing and configuring advanced technical components of Vision.
Deltek Vision 7.1 Custom Reports and Microsoft SQL Server Reporting Services	This guide provides instructions to create, deliver, and generate Vision custom reports with Microsoft SQL Server Reporting Services and its report writing tools.
Deltek Vision 7.1 Microsoft SQL Server Reporting Services Licensing FAQ	This guide explains the Microsoft SQL Server Reporting Services licensing implications for Vision.

Visualization: Standard Reports and Available Measures

Visualization includes pre-designed heat map reports for analyzing opportunities, project plans and projects. These reports and the measures available within each of them are described below.

For additional information, refer to the Vision online help, which documents these reports in more detail.

Project Planning Visualization

The Project Planning Visualization report enables you to compare multiple measures related to project planning. For example, a Project Planning Visualization heat map could compare cost variance with planned cost, as in the example below.



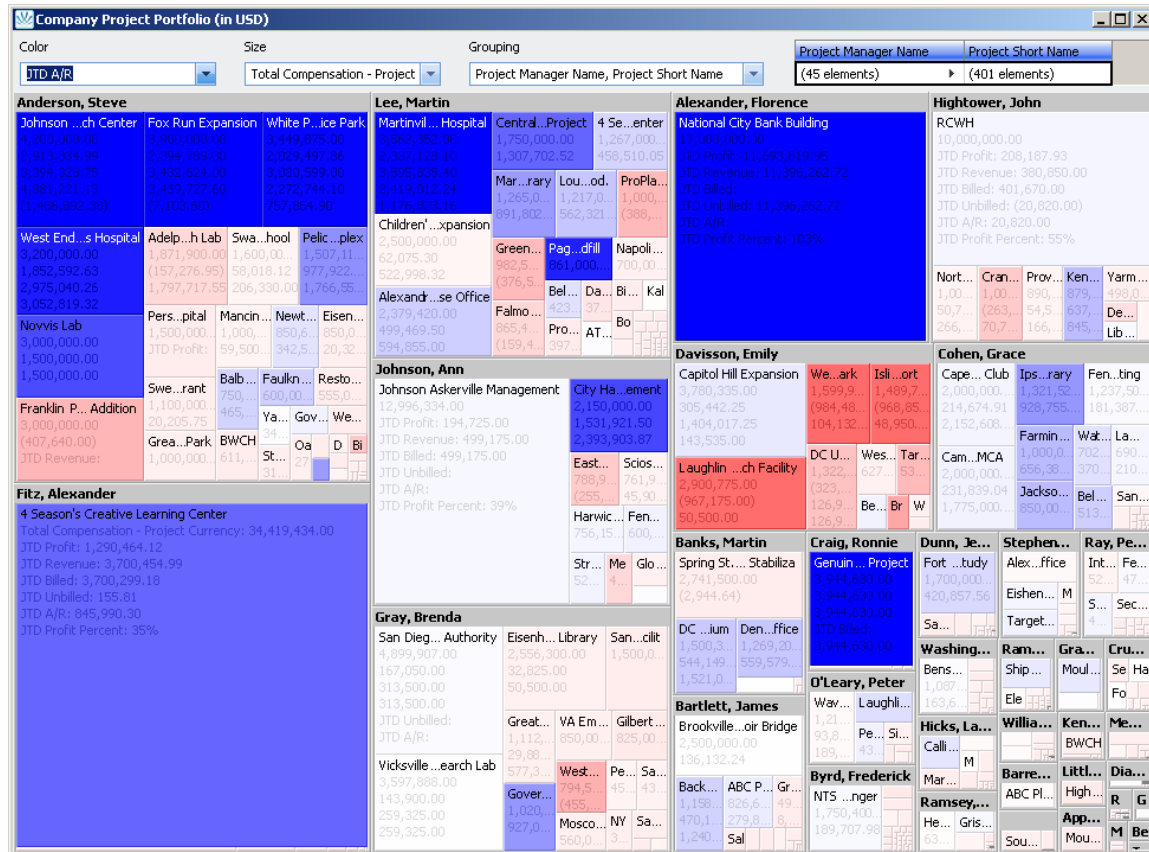
Project Planning Visualization Measures

In addition to calculated measures and Project Planning user-defined fields, you can make the following measures available for analysis on the Project Planning Visualization report:

Project Planning Visualization Measures		
Baseline Bill	Cost Planned Multiplier	Planned Bill
Baseline Cost	Cost Target Multiplier EAC Bill	Planned Cost
Baseline Hours	EAC Cost	Planned - EAC Bill
Baseline Labor Bill	EAC Hours	Planned - EAC Cost
Baseline Labor Cost	EAC Labor Bill	Planned - EAC Hours
Bill Budget Multiplier	EAC Labor Cost	Planned - EAC Labor Bill
Bill EAC Multiplier	ETC Bill	Planned - EAC Labor Cost
Bill Eff Multiplier	ETC Cost	Planned Hours
Bill Planned Multiplier	ETC Hours	Planned Labor Bill
Bill Target Multiplier	ETC Labor Bill	Planned Labor Cost
Compensation	ETC Labor Cost	Planned Revenue
Compensation Bill	JTD Bill	Reimb Allow
Consultant Fee	JTD Cost	Reimb Allow Bill
Consultant Fee Bill	JTD Hours	Total Comp Bill
Cost Budget Multiplier	JTD Labor Bill	Total Comp Cost
Cost EAC Multiplier	JTD Labor Cost	
Cost Eff Multiplier	JTD Revenue	

Project Visualization

The Project Visualization report enables you to compare multiple project-related measures. For example, a Project Visualization heat map could compare job-to-date accounts receivable to total compensation, as in the example below.



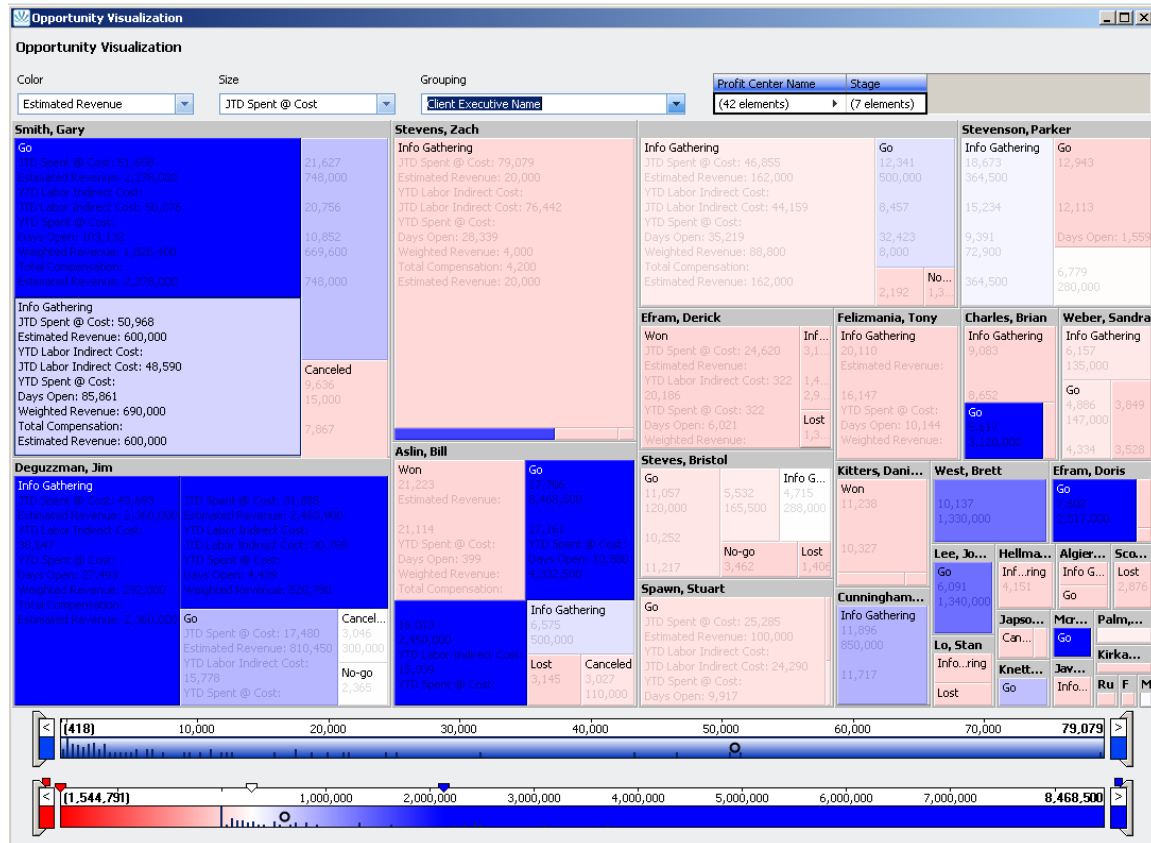
Project Visualization Measures

In addition to calculated measures and Project user-defined fields, you can make the following measures available for analysis on the Project Visualization report:

Project Visualization Measures		
A/R - Filtered	Final Agreed Fee Value	Reimb Allow - Billing Currency
A/R - JTD	Gross Margin - JTD	Reimb Allow - Functional Currency
Agreed Liability Duration (years)	Gross Margin - YTD	Reimb Allow - Project Currency
Agreed PI Duration (years)	Labor Direct Billing - JTD	Revenue - JTD
Agreed PI Value	Labor Direct Billing - YTD	Revenue - YTD
Backlog - Billing Currency	Labor Direct Cost - JTD	Spent @ Billing - JTD
Backlog - Functional Currency	Labor Direct Cost - YTD	Spent @ Billing - YTD
Backlog - Project Currency	Net Revenue @ Billing - JTD	Spent @ Cost - JTD
Billed - JTD	Net Revenue @ Billing - YTD	Spent @ Cost - YTD
Billed - YTD	Net Revenue @ Cost - JTD	Spent @ Cost Less OH - JTD
Client Satisfaction	Net Revenue @ Cost - YTD	Spent @ Cost Less OH - YTD
Compensation - Billing Currency	Profit - JTD	Total Compensation - Billing Currency
Compensation - Functional Currency	Profit - YTD	Total Compensation - Functional Currency
Compensation - Project Currency	Profit %	Total Compensation - Project Currency
Consultant Fee - Billing Currency	Profit Less OH - JTD	Total Contract
Consultant Fee - Functional Currency	Profit Less OH - YTD	Total Contract Value
Consultant Fee - Project Currency	Profit Less OH Percent - JTD	Unbilled - JTD
Discount %	Profit Less OH Percent - YTD	Unbilled - YTD
Effective Multiplier - JTD	Profit Percent - JTD	Variance - JTD
Effective Multiplier - YTD	Profit Percent - YTD	Variance - YTD
Final Agreed Contract Value	Realization Ratio - JTD	Variance Percentage - JTD
	Realization Ratio - YTD	Variance Percentage - YTD

Opportunity Visualization

The Opportunity Visualization report enables you to compare opportunity-related measures with measures from the associated promotional or regular project. For example, an Opportunity Visualization heat map could compare job-to-date amount spent job on the associated regular project to the opportunity's estimated revenue, as in the example below.



Opportunity Visualization Measures

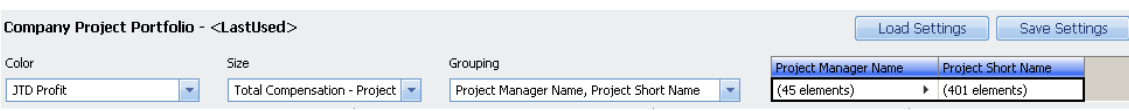
In addition to calculated measures and Opportunity user-defined fields, you can make the following measures available for analysis on the Opportunity Visualization report:

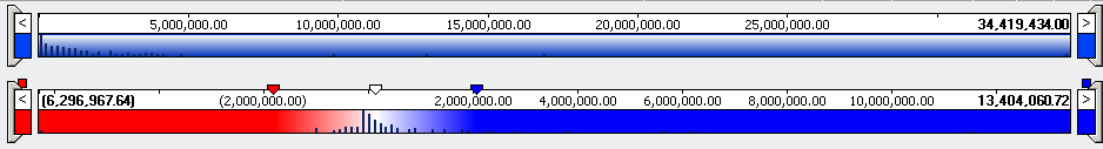
Opportunity Visualization Measures		
Estimated Revenue	Labor Indirect Cost - JTD	Days Open
Total Compensation	Spent @ Cost - YTD	Weighted Revenue
Labor Indirect Cost - YTD	Spent @ Cost - JTD	

Using Visualization

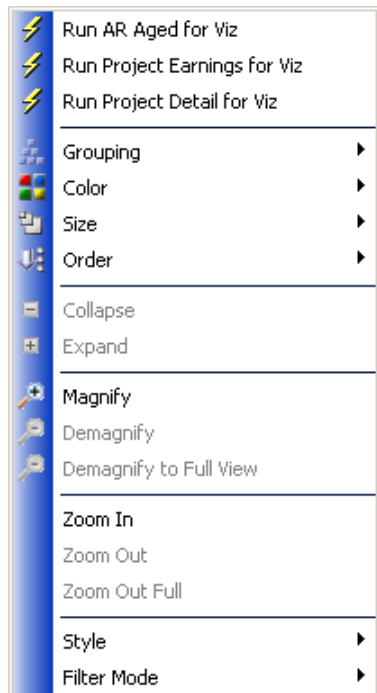
Within a Visualization window, you can modify the data view and drill down into additional detail. This functionality is summarized below. For a more detailed look at creating and working with Visualization heat maps, see the Vision online help topics for Visualization. In the Contents pane of the help window, navigate to **Reporting » Vision Performance Management » Visualizations**.

Visualization Heat Map Options

Option	Description
	
Load Settings	Click this button to regenerate the visualization map based on a set of saved options. Select the set of options in the Load Settings dialog box.
Save Settings	Click this button to save a version of a visualization map as a set of saved options. In the Save Settings dialog box, name the set of options and indicate if you want it to be available to all users with access to the visualization map. Settings that are saved include the current settings for Color , Size , Grouping , along with the settings for both the color slider and size slider.
Color	Use this dropdown list to select the metric that you want Vision to represent with the colors of the blocks on the visualization map. The list includes all measures for which you selected Color By on the Measures tab of the Options dialog box. You can also select None if you do not want Vision to assign colors to blocks.
Size	Use this dropdown list to select the metric that you want Vision to represent with the size of the blocks on the visualization map. The list includes all measures for which you selected Size By on the Measures tab of the Options dialog box. You can also select None if you want all blocks to be the same size.
Grouping	Use this dropdown list to select an option for summarizing the metric values on the visualization map. The list includes all grouping options you selected on the Grouping tab of the Options dialog box.

Option	Description
Grouping Categories	These fields are used to modify the grouping for the map without having to return to the Options dialog box. Using these fields you can filter the map to include only selected elements from the group, add an inner group, move a grouping category to another location in the hierarchy, remove a group or zoom in on a group.
	
Size Slider	Use the size slider (the top slider in the illustration above) is used to filter out blocks with low or high metric values (eliminate outliers) or review distribution of block metric values based on the metric selected in the Size dropdown list.
Color Slider	Use the color slider (the bottom slider in the illustration above) to filter out blocks with low or high metric values (eliminate outliers), review distribution of block metric values, change the high/low/mid colors, or adjust the gradient range based on the metric selected in the Color dropdown list.

Context Menu Options



Right-click on the heat map to display this context menu. For actions that affect the map as a whole, you can right-click anywhere on the map. For actions that relate to a particular block, right-click that block.

Option	Description
Drilldown reports	<p>The top part of the menu contains a list of reports that can be run based on the record selected in the heat map.</p> <p>The menu contains an option for each drill-down report you set up for the visualization map on the Drill Down Reports tab of the Options dialog box.</p>
Grouping	<p>Use this option to select an option for summarizing the metric values on the visualization map.</p> <p>This action has the same result as when you select an option in the Grouping field at the top of the Visualization window.</p>
Color	<p>Use this option to select the metric that you want Vision to represent with the colors of the blocks on the visualization map.</p> <p>This action has the same result as when you select an option in the Color field at the top of the Visualization window.</p>
Size	<p>Use this option to select the metric that you want Vision to represent with the size of the blocks on the visualization map.</p> <p>This action has the same result as when you select an option in the Size field at the top of the Visualization window.</p>
Order	<p>Use this option to indicate the sequence in which you want Vision to display the blocks.</p> <ul style="list-style-type: none"> ▪ None — Displays the blocks with the largest in the upper-left corner and the smallest in the lower-right corner ▪ Title — Displays the blocks in alphabetical or numeric sequence based on the current grouping ▪ Color — Displays the blocks in order from low color to high color ▪ Size — Displays the blocks in order from largest to smallest
Collapse/Expand	<p>When you have two or more levels of grouping in effect on the visualization map and you want to hide the inner blocks for a group, right-click the border of the block for that group. On the context menu, click Collapse to consolidate the inner blocks. Vision displays a plus sign (+) in the upper-right corner of a collapsed group block to distinguish it from blocks that are not collapsed.</p>
Magnify/Demagnify/ Demagnify to Full View	<p>Use this option to enlarge a specific block within the a heat map or to return to the pre-magnified view.</p>

Option	Description
Zoom In/Zoom Out/ Zoom Out Full	When you have two or more levels of grouping in effect on the visualization map, right-click in the block for the outermost grouping to display the context menu, and click Zoom In to zoom in on the inner blocks for that group. You can click Zoom In multiple times if there are multiple levels of grouping.
Style	<p>Use this option to select the map style:</p> <ul style="list-style-type: none"> ▪ Window — Vision displays category labels and metric values in the blocks. If you have two or more levels of grouping, the blocks for an inner group are contained within the outer group border, and the category label for the outer group is displayed in a header. ▪ Classic — Vision only displays category labels in the blocks. To view metric values, you must position the mouse pointer on the block. If you have two or more levels of grouping, the blocks for an inner group are contained within the outer group border. The category label for the outer group is displayed in the upper-left block in the group, not in a header bar. ▪ Cluster — Vision only displays category labels in the blocks, and they are centered vertically. To view metric values, you must position the mouse pointer on the block. If you have two or more levels of grouping, the blocks for an inner group are contained within the outer group border, and the category label for the outer group is displayed in a header bar. As it does for individual blocks, the color of group borders and headers represents a numeric value for the group.
Filter Mode	<p>Use this option to specify how blocks that are filtered out of the map based on the slider settings are displayed.</p> <ul style="list-style-type: none"> ▪ Compact — Vision removes the blocks that fall outside one or both of the metric value ranges and relocates the remaining blocks to eliminate the gaps. ▪ Ghost — Vision removes the blocks that fall outside one or both of the metric value ranges but leaves gaps where the removed blocks were located.

Analysis Cube Structure

An analysis cube is an analytical structure based on online analytical processing (OLAP). The use of an OLAP model for the Vision Analysis Cubes provides an analytical efficiency that would be difficult to achieve using the Vision transactional database as the data source. This efficiency is achieved in part because the Analysis Cubes contain partially pre-calculated data.

The data in the Analysis Cubes has a very specific structure, and it is critical to understand this structure and the related terms in order to work successfully with the Analysis Cubes. That structure has four primary components:

- Measures
- Dimensions
- Hierarchies
- Members

These components make it possible to extract, pivot, and further analyze data. Each of these components is described in more detail below.

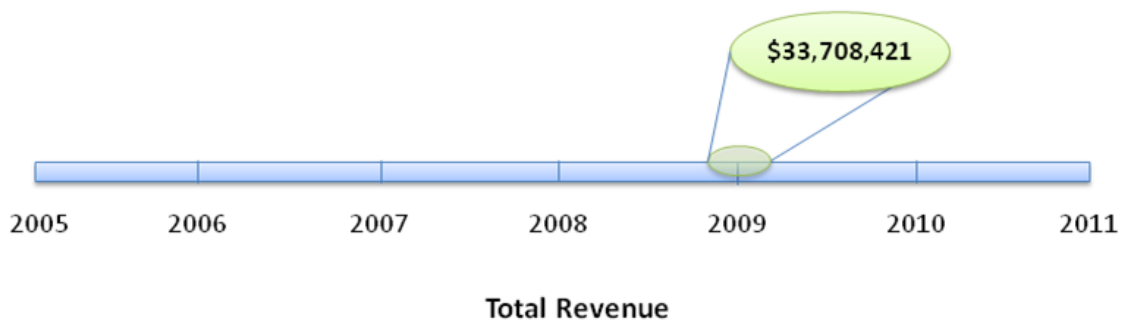
Measures and Dimensions

Measures are essentially the facts (numeric values) from the Analysis Cubes. Each cube contains a collection of measures. Descriptions of the Project Cube and General Ledger Cube measures are available in this document beginning on page 66.

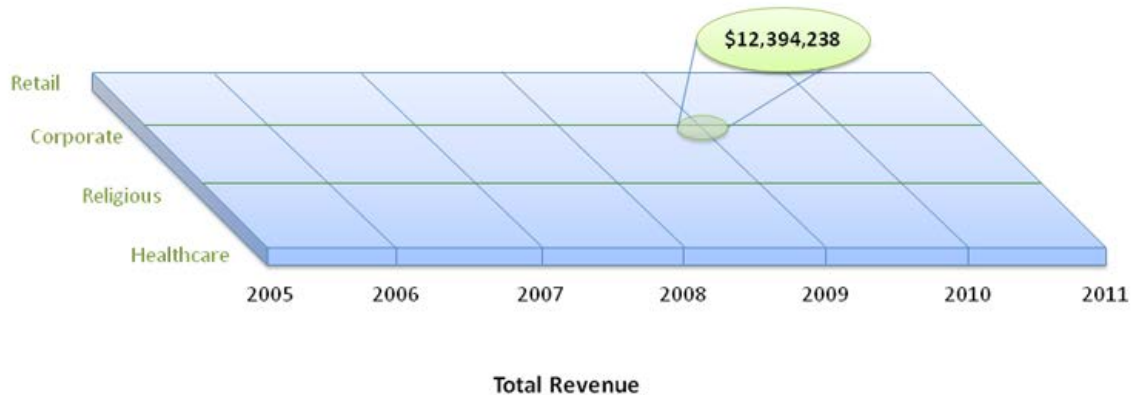
Revenue is an example of a measure. However, as a standalone number without any context, as in the example below, a revenue value is not that useful in assessing organizational performance.



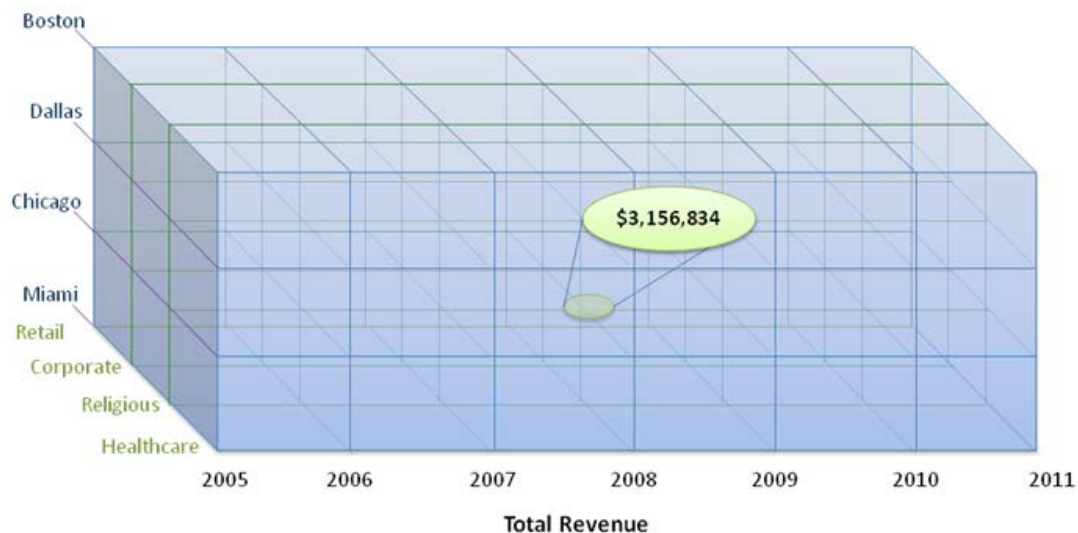
Dimensions provide context for measures and, as a result, make them useful for assessing the performance of an organization. Every measure has any number of dimensions applicable to it. Dimensions allow you to sort and group the measure data. Year is an example of a dimension. When you apply the year dimension to the Revenue measure, the measure gains meaning. In the example below, the revenue for the year 2009 was \$33,708,421.



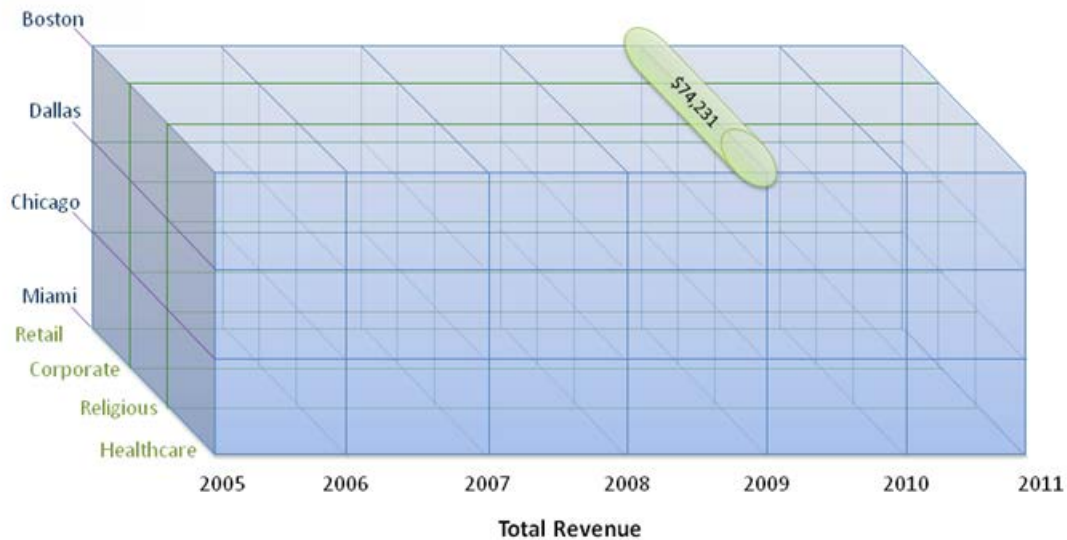
One of the most powerful characteristics of Analysis Cubes is that measures can have multiple dimensions. That is why they are called “cubes.” While applying the Year dimension to the Revenue measure makes the measure much more meaningful, applying additional dimensions can add even more context and enable further analysis. In the example below, a Market Type dimension is added to the pivot, revealing the total revenue amount for the corporate market for the year 2009: \$12,394,238.



You can continue to apply dimensions to a measure until you achieve the desired level of granularity. In the example below, the Office dimension is added, making it possible to see the 2008 revenue amount from the Religious market for the Chicago office.



And lastly, dimension–measure combinations can be represented in a summary format. In the illustration on the next page, the Revenue measure is shown for 2009 for the Boston office across all markets.

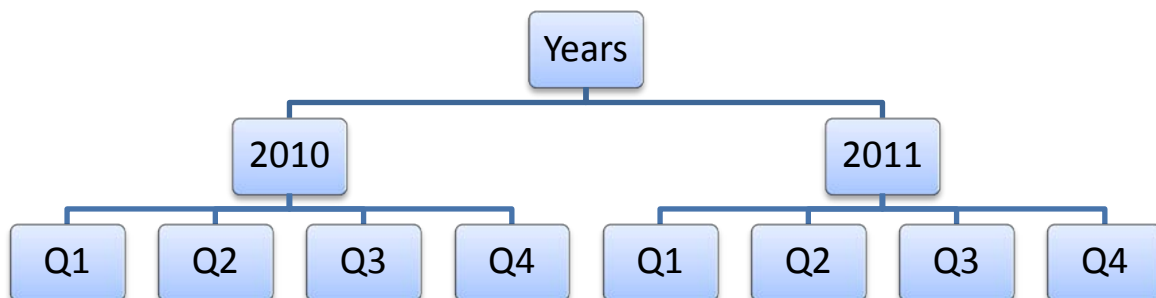


The Analysis Cube structure delivers significant power and flexibility, making the Analysis Cubes well-suited for use within a business intelligence solution.

For lists of the measures and dimensions in the Vision Analysis Cubes, see “Reference: Project Data Cube” on page 66 and “Reference: General Ledger Data Cube” on page 90.

Hierarchies

Hierarchies within Analysis Cubes provide the ability to “drill down” to additional levels of detail within a dimension. The best example of a hierarchy is one based on time periods. The example below is a Year – Quarter hierarchy. You could add levels to this hierarchy for months and even weeks.



When you use a pivot-based analysis tool with an Analysis Cube, you can typically expand and collapse hierarchies to expose or hide levels within the hierarchy. The following are examples of hierarchies from a typical Vision database:

- Project – Phase – Task
- Org 1 – Org 2 – Org 3...

Members

Members are the items included in a dimension. A dimension is the structural component within the cube, and the member is the data that populates that dimension.

For example, Project Type is a typical Vision dimension. The members of that dimension are the specific types of projects: Medical, Office Building, Education, Entertainment, Aviation, and so on.

Performance Management Dashboards Overview

The Vision Performance Management performance dashboards are business intelligence tools that executives and managers use to view and interact with critical organizational performance data using a variety of graphical representations of that data.

The sample performance dashboards provide out-of-the-box visualizations of your Vision Analysis Cubes data. However, you are not limited to the sample dashboards. VPM also includes a dashboard authoring tool from Tableau Software that enables you to modify the sample dashboards or to create and deploy dashboards that you design yourself.

Sample Performance Dashboards

The sample performance dashboards provided with Vision Performance Management are divided into sets that are designed for the following specific management and responsibility roles in your firm:

- Business development manager
- Executive
- Finance
- Organization manager
- Principal
- Project manager
- Resource manager

Many of the dashboards include automatically applied filters so that when you display them, the charts and tables only present data that is relevant to you. For example, if you display one of the organization manager dashboards, the dashboard, by default, only includes data for the organization to which you are assigned in Vision. And all of the sample performance dashboards offer multiple options for filtering and drilling into the data.

While you can use the sample performance dashboards as they are, they are also valuable as examples of the capabilities of performance dashboards and as starting points for building your own dashboards.

Dashboard Access

Vision users can add published performance dashboards—both sample dashboards and dashboards that you create—as Web dashparts to their Vision Dashboard, or they can display them from Vision Reporting in the standard Preview window.

You can also make the dashboards available to users from outside Vision, through a browser, for example, or on supported mobile devices.

To support collaboration, all of the dashboards offer options for saving, sharing, and distributing key views of the data.

Dashboard Authoring

Those in your firm who are interested in exploring your Vision Analysis Cubes data in new ways can use Tableau Desktop to design and build their own dashboards. Tableau Desktop is an extremely flexible and intuitive authoring tool, ideal for trying out innovative approaches to data analysis. The dashboards created with Tableau Desktop can be strictly for the author's own use,

or they can be published and made available to others who use VPM. Your VPM license includes full access to Tableau Desktop for any number of users.

Sample Role-Based Performance Dashboards

Vision Performance Management includes an extensive set of sample performance dashboards. This section describes and provides an illustration of each of those sample dashboards.

Business Development Manager Performance Dashboards

The Business Development Manager dashboards support those responsible for gaining new sales to ensure that your company meets its sales goals. The dashboards help the business development manager monitor progress against goals, assess the success of marketing efforts, and forecast future sales.

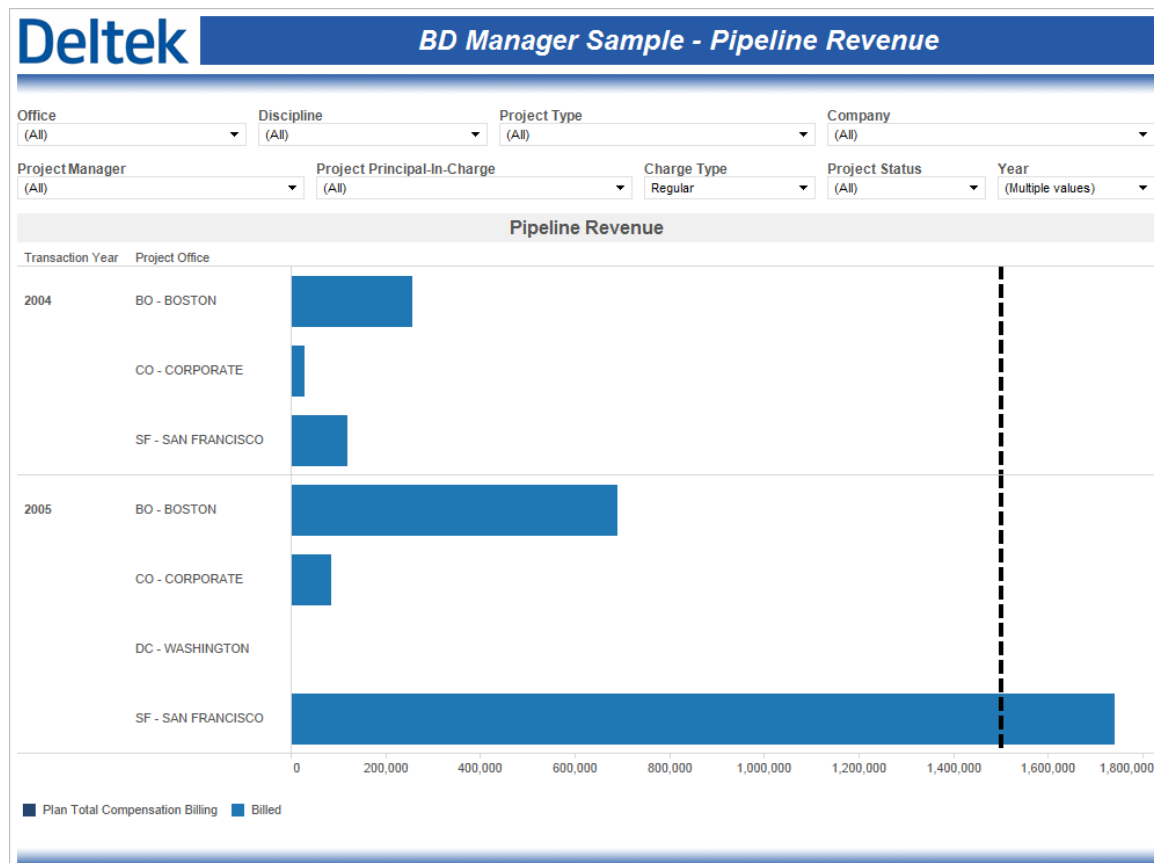
BD Manager Sample – Pipeline Revenue

The BD Manager Sample – Pipeline Revenue performance dashboard contains the Pipeline Revenue chart. That chart enables you to view historical revenue trends while projecting future workload based on data from the Planning module.

The Pipeline Revenue chart displays a stacked bar for each year and level 1 organization. Each bar segment represents either the actual amount billed or the total planned compensation.

For comparison, the chart also displays a black broken line across each bar that represents the organization revenue target.

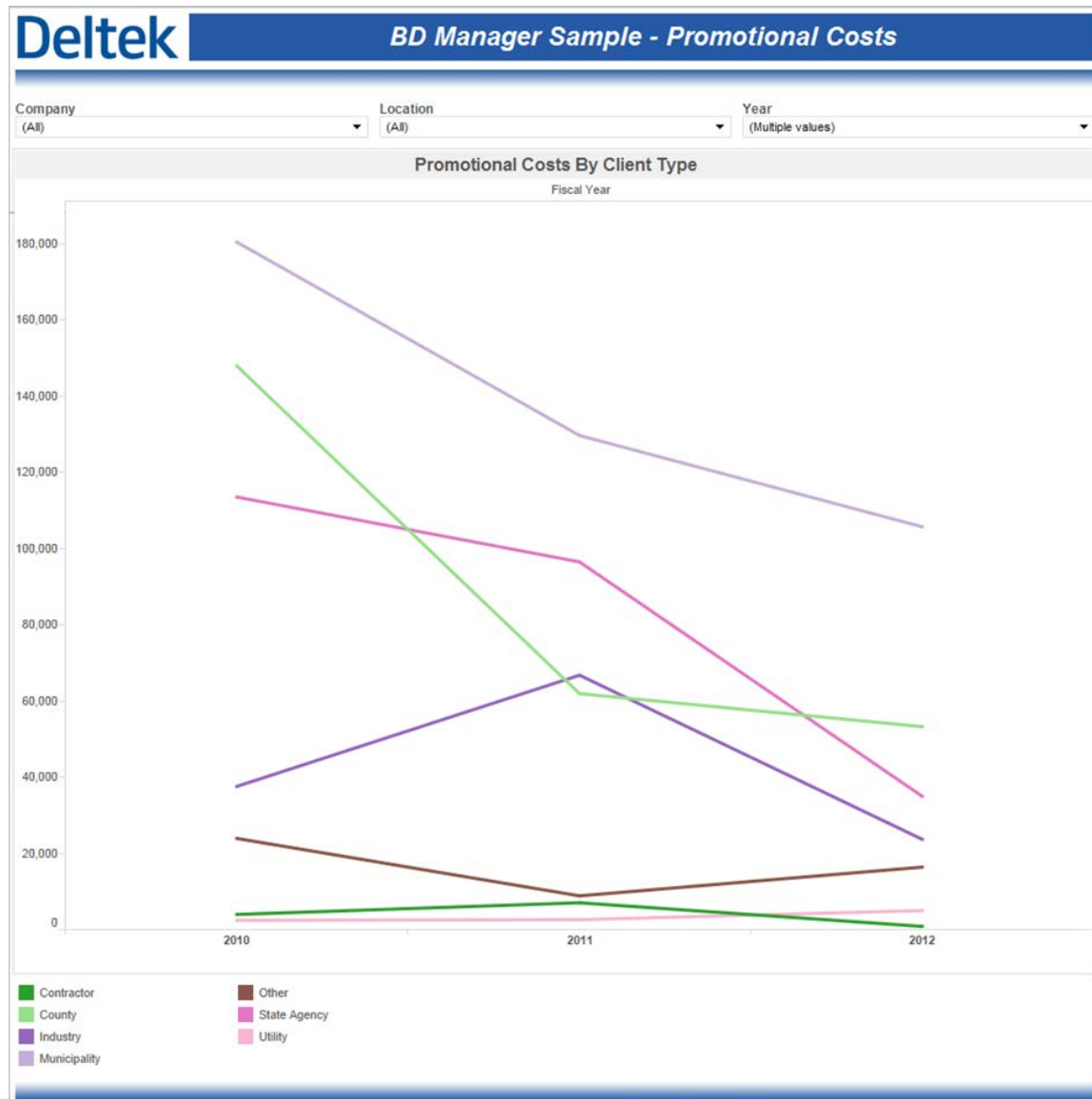
The Pipeline Revenue chart illustrates how you can use multiple measures on the same chart.



BD Manager Sample – Promotional Costs

The BD Manager Sample – Promotional Costs performance dashboard contains the Promotional Costs by Client Type chart. Each chart line represents the amounts spent on promotional projects for a specific client type for the fiscal years you select.

You can use this chart to evaluate your expenditures on marketing efforts, broken down by type of client.

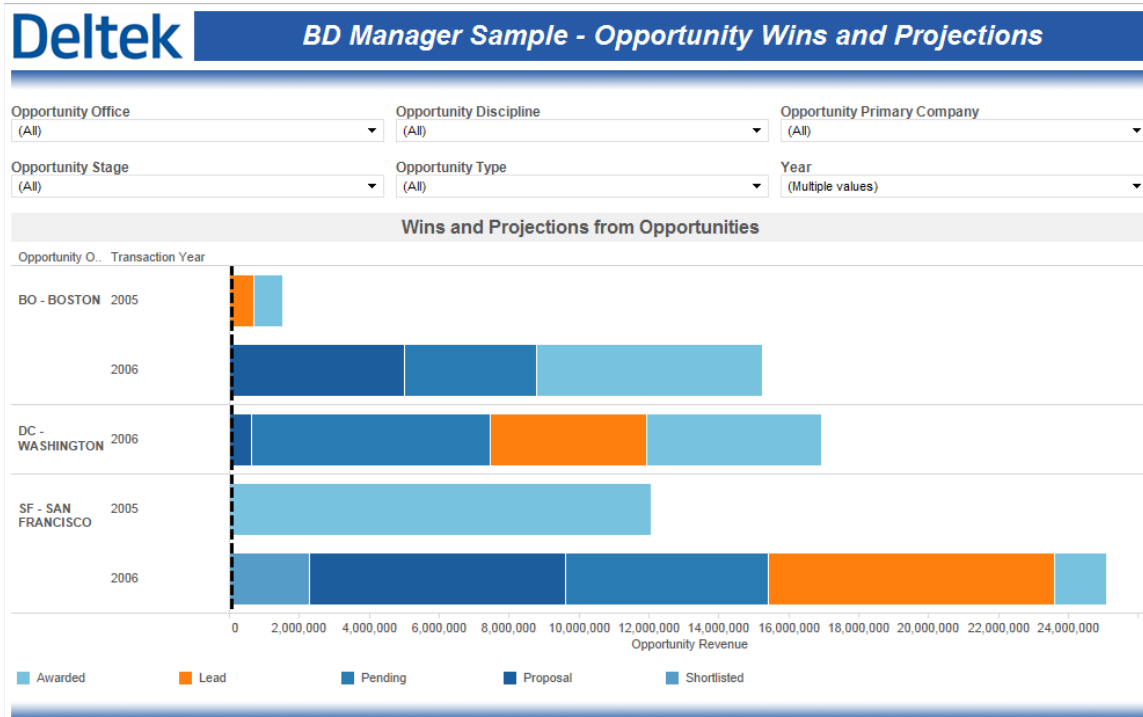


BD Manager Sample – Opportunity Wins and Projections

The BD Manager Sample – Opportunity Wins and Projections performance dashboard contains the Wins and Projections from Opportunities chart.

Each chart bar represents the total revenue that is associated with opportunities for the indicated level 1 organization that have an estimated start date in the year indicated. Each segment of the bar represents the revenue associated with opportunities currently assigned to that opportunity stage.

For comparison, the chart also displays a black broken line across each bar that represents the target revenue amount for each organization and time period.



Executive Performance Dashboards

The Executive dashboards are designed to give an enterprise-wide view. The measures that these dashboards display focus on overall company health.

Executive Sample – Project Status

The Executive Sample – Project Status performance dashboard helps you monitor performance of labor billing against budget for your firm.

Use the Project Budget table to view comparisons of actual, budgeted, and projected financial indicators. This table illustrates how you can use multiple measures in the same table.

To make full use of this table, you must have the Planning module. If you do not have Planning, the table only displays data for the **Labor Total Billing** and **AR Over 60** measures.

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Executive Sample - Project Status

Office
(Multiple values)

Discipline
(All)

Project Type
(All)

Charge Type
Regular

Project Status
(All)

Primary Company
(All)

Project Principal-In-Charge
(All)

Project Manager
(All)

Project Budget

Project Office	Baseline Labor Billing	Labor Total Billing	EAC Labor Billing	Total Baseline - EAC Labor Billing	EAC Multiplier Billing	AR Over 60
BO - BOSTON	744,941	1,062,643	1,062,643	192,467	6.33	538,542
CO - CORPORATE		135,881	135,881	1,119,229	48.09	65,333
DC - WASHINGTON	0	19,594	19,594	1,235,516	359.28	
SF - SAN FRANCISCO	0	2,575,431	2,575,431	-1,320,321	2.63	690,041

Executive Sample – Days Outstanding Metrics

The Executive Sample – Days Outstanding Metrics performance dashboard contains two charts that help you monitor days sales outstanding (DSO) and days WIP outstanding (DWO for your firm.

- **Days Sales Outstanding** — Use the Days Sales Outstanding chart to view DSO for the 90-day period preceding the most recent selected period, and compare that value to the target value:

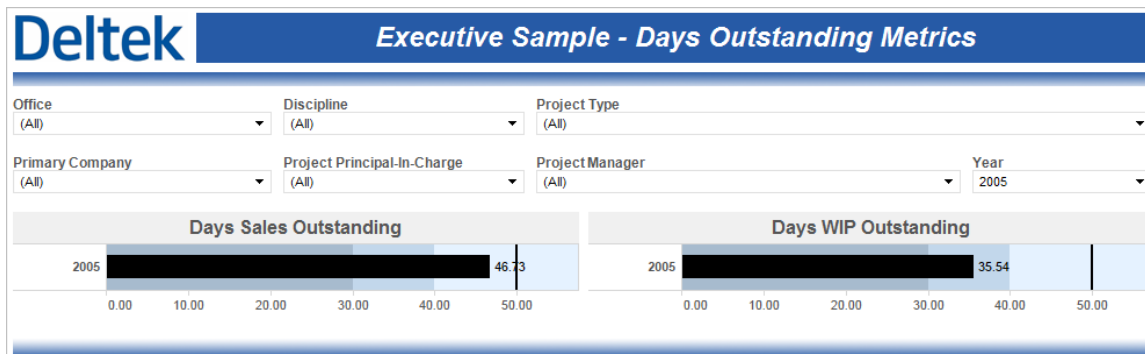
$DSO = \text{Accounts Receivable Balance} / (\text{Revenue Total for the last 90 transaction days} / 90)$

- **Days WIP Outstanding** — Use the Days WIP Outstanding chart to view DWO for the 90-day period preceding the most recent selected period, and compare that value to the target value:

$DWO = \text{Unbilled Total} / (\text{Revenue Total for the last 90 transaction days} / 90)$



The Standard Edition of Microsoft SQL Server 2008/2008 R2 does not support these charts. You must have the Enterprise Edition. If you have the Standard Edition, this dashboard is not available.



Executive Sample – Promotional Costs and AR Trending

The Executive Sample – Promotional Costs and AR Trending performance dashboard contains two charts that enable you to track expenditures on marketing efforts and evaluate trends in your accounts receivable balance.

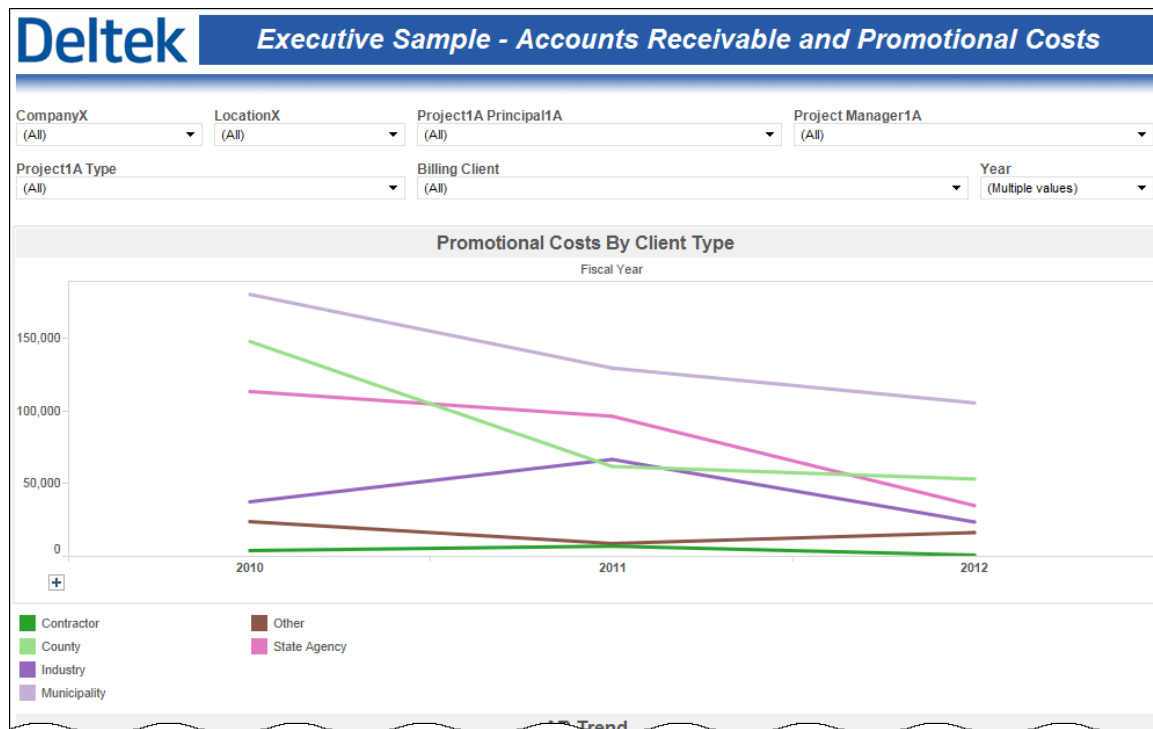
- **Promotional Costs by Client Type** — Each chart line on the Promotional Costs by Client Type chart represents the amounts spent on promotional projects for a specific client type for the fiscal years you select. You can use this chart to evaluate your expenditures on marketing efforts, broken down by type of client.
- **AR Trend** — Each chart line on the AR Trend chart represents the trend of the accounts receivable balance for one of your aging categories as of the end of each year you select. You can use this chart to track your success in reducing AR over time.

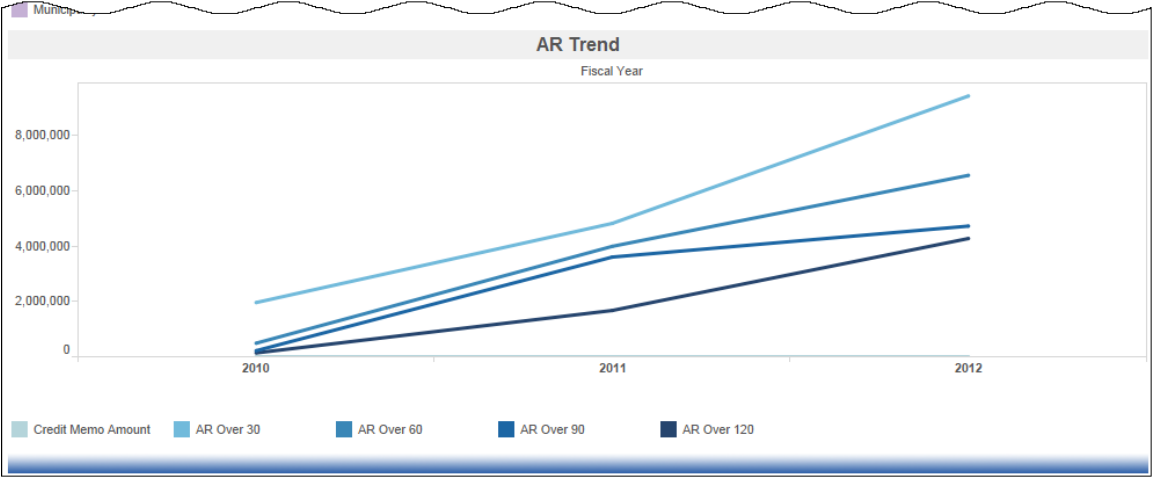
If you are using the credit memo feature, the chart includes a chart line for credit memo amounts.

The AR Trend chart illustrates how you can use multiple measures on the same chart.



The Standard Edition of Microsoft SQL Server 2008/2008 R2 does not support this chart. You must have the Enterprise Edition. If you have the Standard Edition, the dashboard does not display this chart, and the name of the dashboard is Executive Sample – Promotional Costs.



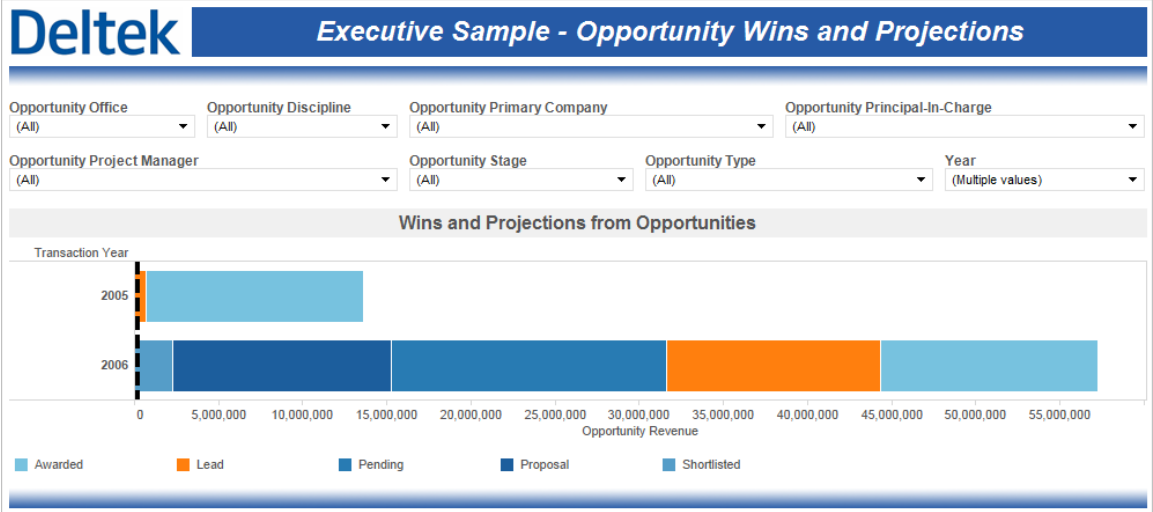


Executive Sample – Opportunity Wins and Projections

The Executive Sample – Opportunity Wins and Projections performance dashboard helps you compare the projected revenue associated with opportunities to your revenue targets.

The dashboard contains the Wins and Projections from Opportunities chart. Each chart bar represents the total revenue associated with opportunities that have an estimated start date in the year indicated. Each segment of the bar represents the revenue associated with opportunities currently assigned to that opportunity stage.

For comparison, target revenue amounts for each time period are displayed as a superimposed broken line.



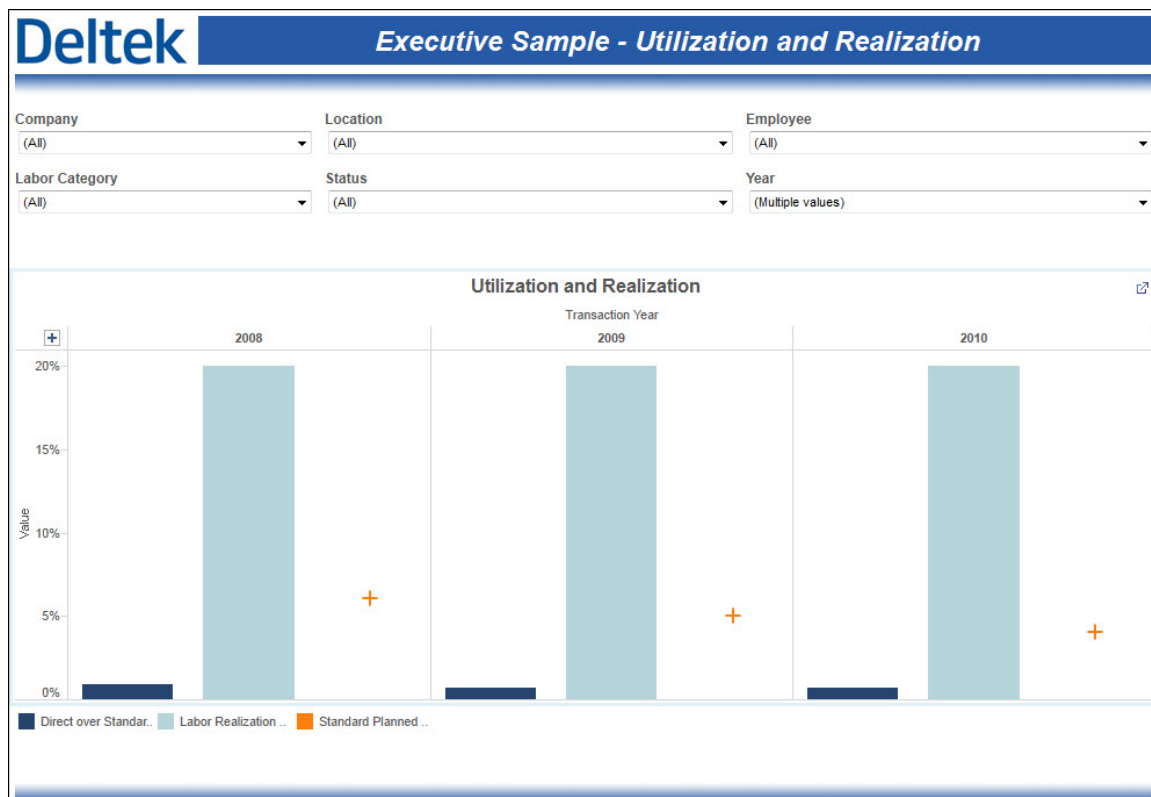
Executive Sample – Utilization and Realization

The Executive Sample – Utilization and Realization performance dashboard enables you to monitor actual labor utilization and realization, compare actual labor utilization to planned utilization, and review planned utilization for future time periods.

The dashboard contains the Utilization and Realization chart. That chart displays the following for each calendar year:

- A bar for actual utilization rate (Direct hours / Standard hours)
- A bar for actual realization rate (Labor realization hours / Standard hours)
- A data point for the planned utilization rate

The chart only displays values for **Standard Planned Billable Utilization** if you have the Planning module.



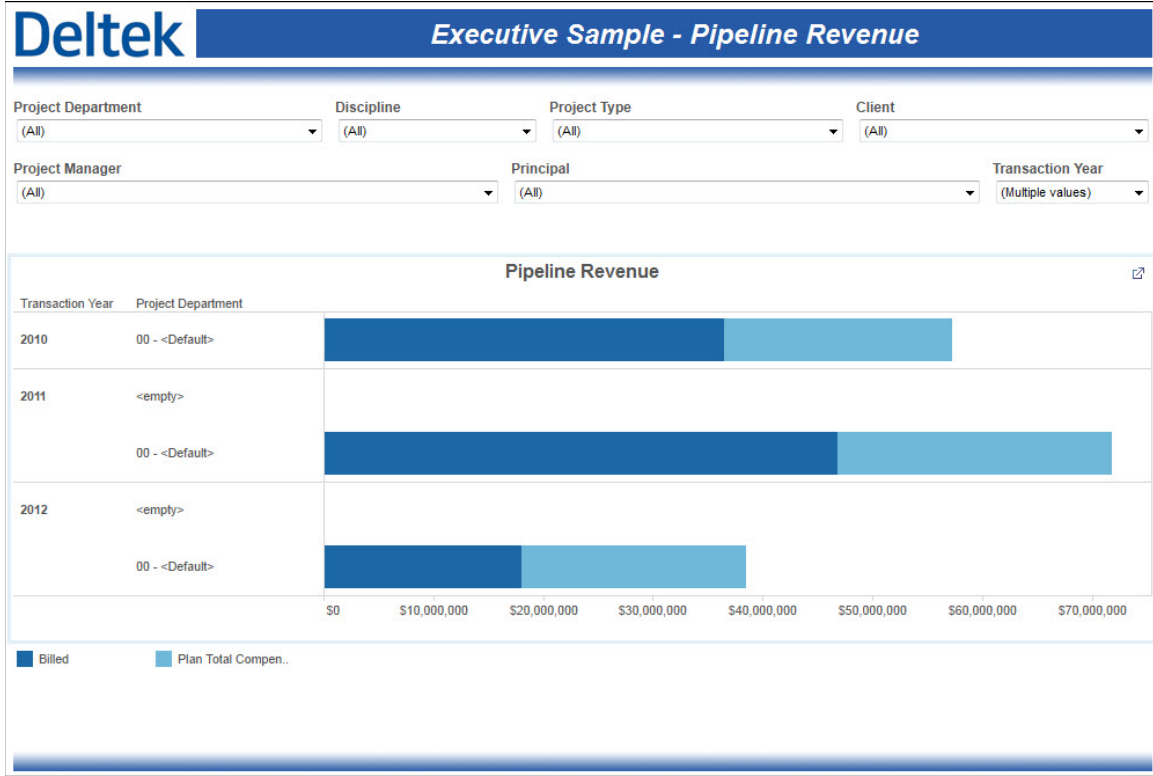
Executive Sample – Pipeline Revenue

The Executive Sample – Pipeline Revenue performance dashboard enables you to view historical revenue trends while projecting future workload based on data from the Planning module.

The Pipeline Revenue chart displays a stacked bar for each year and level 1 organization. Each bar segment represents either the actual amount billed or the total planned compensation.

For comparison, the chart also displays a black broken line across each bar that represents the organization revenue target.

The Pipeline Revenue chart illustrates how you can use multiple measures on the same chart.

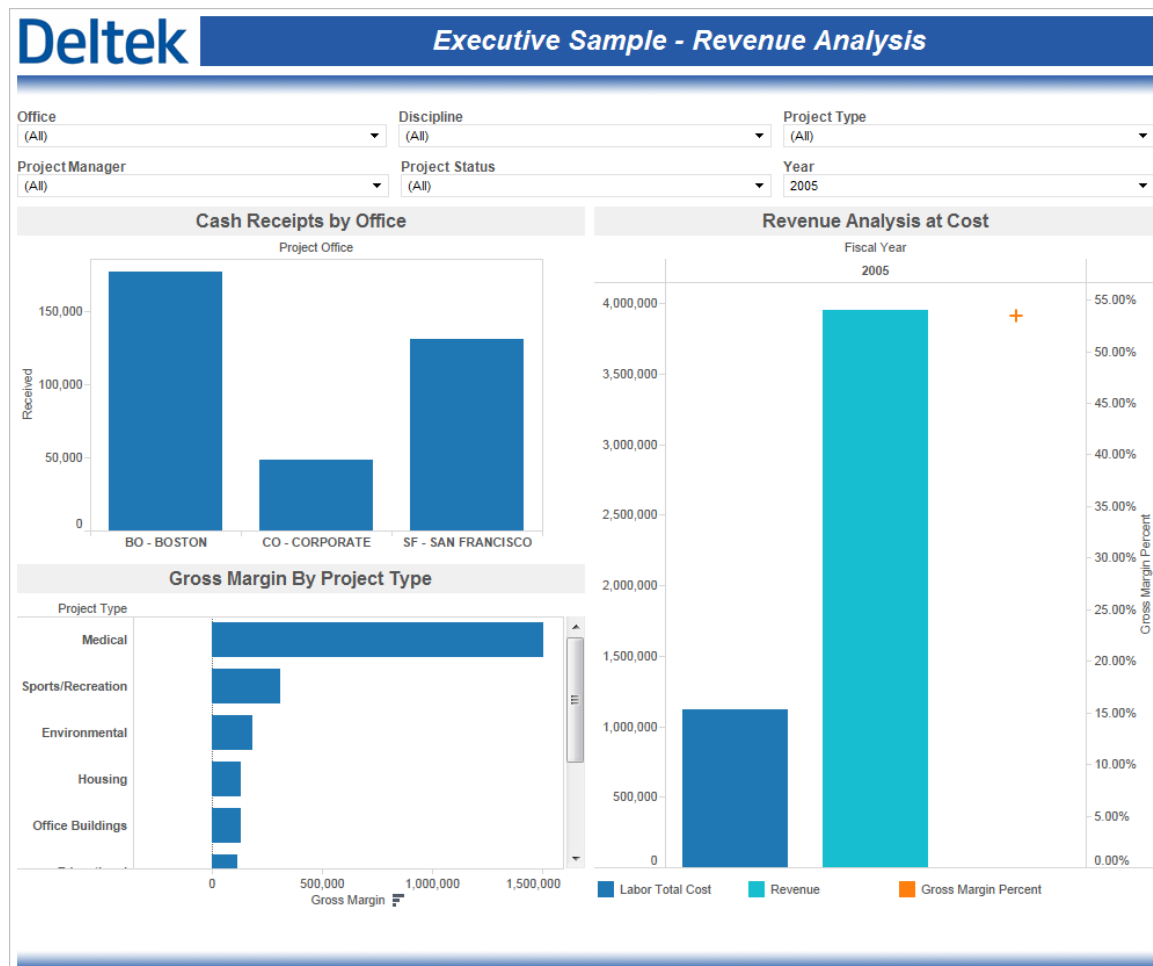


Executive Sample – Revenue Analysis

The Executive Sample – Revenue Analysis performance dashboard contains three key revenue-centered metrics for the company.

- **Cash Receipts by Organization Level 1** — Each bar on this chart represents the cash receipts amount for an organization or, if you drill down, for a principal or project manager.
- **Gross Margin by Project Type** — Each bar on this chart represents the gross margin amount for a project type.
- **Revenue Analysis at Cost** — Each pair of bars on this chart represents total revenue and labor cost. The + data points reference the **Gross Margin Percent** scale on the right axis to indicate the gross margin percentages.

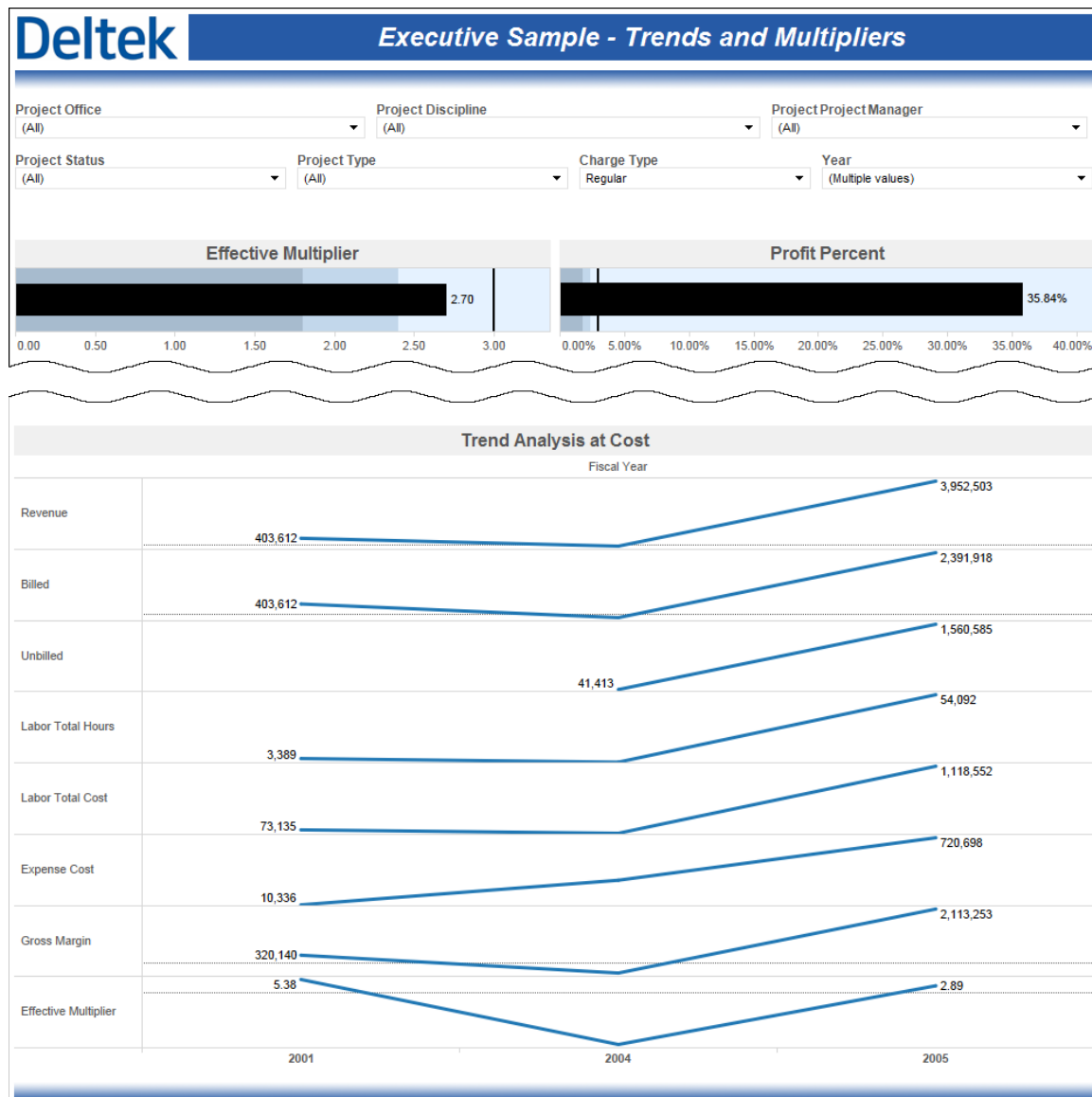
The Revenue Analysis at Cost chart illustrates how you can use multiple measures on the same chart.



Executive Sample – Trends and Multipliers

The Executive Sample – Trends and Multipliers performance dashboard provides three charts you can use to monitor effective multipliers and profit percentages and to review trends for a number of additional key metrics for your firm.

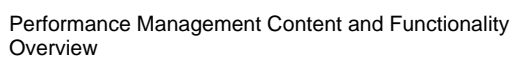
- **Effective Multiplier** — The Effective Multiplier chart compares the current effective multiplier value for the selected years to the target multiplier value.
- **Profit Percent** — The Profit Percent chart compares the current profit percentage for the selected years to the target percentage.
- **Trend Analysis at Cost** — The Trend Analysis at Cost chart is a collection of small line charts that tracks the change in the value, over time, of several key metrics. The values are based on cost rates.



The Executive Sample – Profit Drilldown performance dashboard compares revenue, labor total cost, expense total cost, and gross margin by organization. Each bar on the Profit Drilldown by Organization Level 1 chart represents one of these measures for the indicated organization.

For further analysis, you can drill down from organization as deep as the project manager level.

This performance dashboard provides a good example of how you can set up multiple drill-down levels.

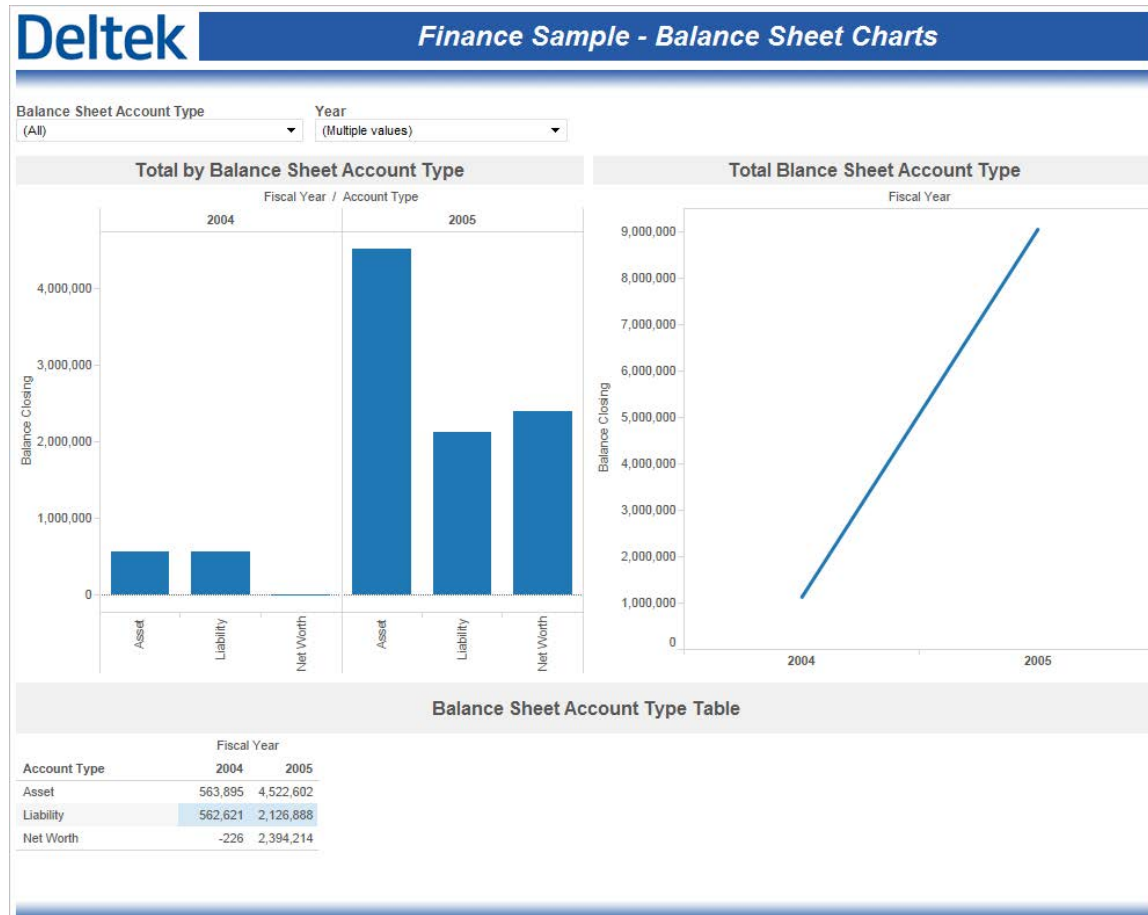


Finance Manager Performance Dashboards

The Finance Manager dashboards are valuable tools for those responsible for maintaining the health of key financial indicators, increasing cash flow, and managing overall company profitability. The Finance Income Charts and Finance Balance Sheet Charts provide a visual presentation of data available on an income statement or balance sheet, with filters by organization, type of account, and year. These charts make it easier to compare trends over time by organization and account. They also facilitate comparisons of spending to revenue.

Finance Sample – Balance Sheet

The Finance Charts Sample – Balance Sheet performance dashboard provides three views of closing balances for balance sheet accounts. You can drill down from fiscal year to quarter and period on all charts.



Finance Sample – Income Charts

The Finance Charts Income performance dashboard provides three views of closing balances for income statement accounts. You can drill down from fiscal year to quarter and period on all charts.



Organization Manager Dashboards

The Organization Manager dashboards are designed for those with a lead role in an organization, those with responsibility for the financial performance of the organization, for the utilization of the people within the organization, and the profitability of the organization's projects.

These dashboards are identical to the Principal dashboards except that they are automatically filtered to show only data for an organization manager's own organizations.

Organization Manager Sample – Project Status

The Organization Manager Sample – Project Status performance dashboard helps you monitor performance of labor billing against budget for your organization.

Use the Project Budget table to view comparisons of your current actual, budgeted, and projected financial indicators. This table illustrates how you can use multiple measures in the same table.

To make full use of this table, you must have the Planning module. If you do not have Planning, the table only displays data for the **Labor Total Billing** and **AR Over 60** measures.

Delttek

Organization Manager Sample - Project Status

Discipline

(All)

Project Type

(All)

Project Status

(All)

Primary Company

(All)

Project Manager

(Multiple values)

Project Principal-In-Charge

(All)

Charge Type

Regular

Project Budget

Project	Project Manager	Baseline Labor Billing	Labor Total Billing	EAC Labor Billing	Total Baseline - EAC Labor Billing	EAC Multiplier Billing	AR
00201	Steve W Anderson	664,381	2,174,827	2,174,827	-919,717	3.12	
00001	William R Apple		53,107	53,107	1,202,003	132.32	
00002	James R Bartlett		272,695	272,695	982,416	25.67	
00003	Grace M Cohen	80,560	260,147	260,147	994,963	26.83	
00302	Emily J Davisson		56,615	56,615	1,198,496	124.19	
00301	Luis J Gonzalez		185,265	185,265	1,069,845	37.90	
00101	Brenda K Gray	0	96,247	96,247	1,158,863	72.96	
00200	Johnathan J Hertz		125,926	125,926	1,129,184	55.67	
00666	John M Hightower				1,255,110		
00026	Ann M Johnson		23,674	23,674	1,231,436	297.30	
00020	Sally A Little	0	320,942	320,942	934,168	21.57	
00203	Jonathon J MacKenzie		34,236	34,236	1,220,874	205.33	
00202	Robert B Thompson		30,918	30,918	1,224,192	227.69	

Organization Manager Sample – Days Outstanding Metrics

The Organization Manager Sample – Days Outstanding Metrics performance dashboard contains two charts that help you monitor days sales outstanding (DSO) and days WIP outstanding (DWO) for your organization.

- **Days Sales Outstanding** — Use the Days Sales Outstanding chart to view DSO for the 90-day period preceding the most recent selected period, and compare that value to the target value:

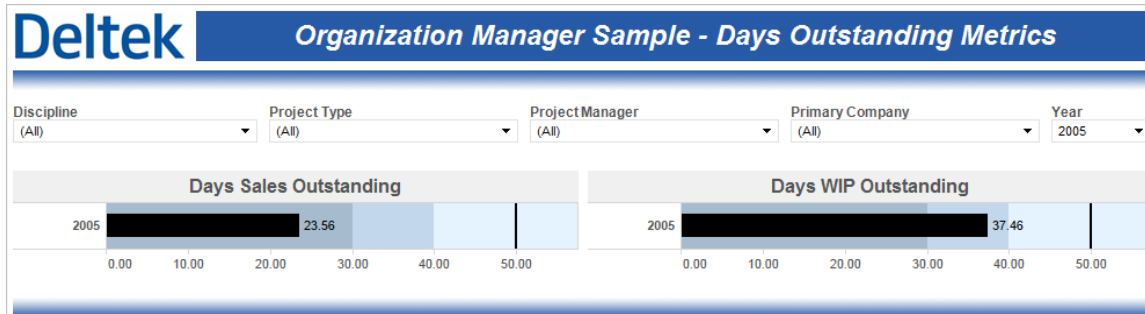
$$\text{DSO} = \text{Accounts Receivable Balance} / (\text{Revenue Total for the last 90 transaction days} / 90)$$

- **Days WIP Outstanding** — Use the Days WIP Outstanding chart to view DWO for the 90-day period preceding the most recent selected period, and compare that value to the target value:

$$\text{DWO} = \text{Unbilled Total} / (\text{Revenue Total for the last 90 transaction days} / 90)$$



The Standard Edition of Microsoft SQL Server 2008/2008 R2 does not support this chart. You must have the Enterprise Edition. If you have the Standard Edition, this dashboard is not available.



Organization Manager Sample – AR Trending

The Organization Manager Sample – AR Trending performance dashboard contains a chart that enables you to evaluate trends in your accounts receivable balance.

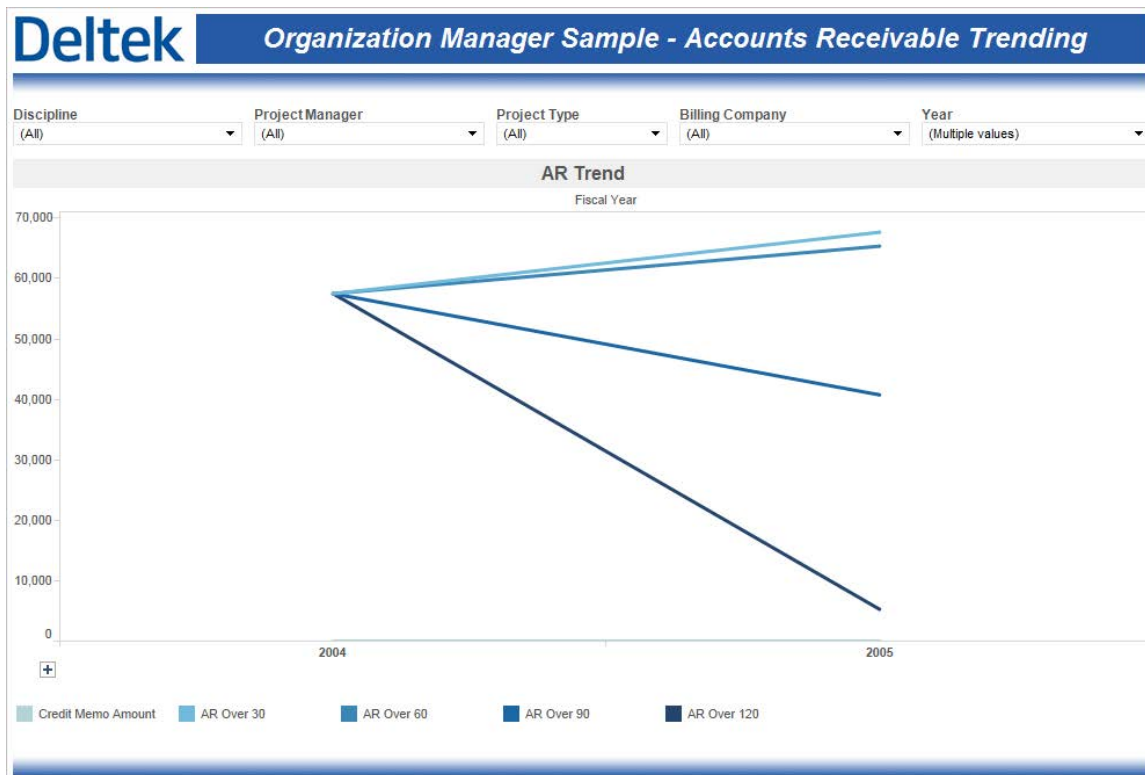
Each chart line on the AR Trend chart represents the trend of the accounts receivable balance for one of your aging categories as of the end of each year you select. You can use this chart to track your success in reducing AR over time.

If you are using the credit memo feature, the chart includes a chart line for credit memo amounts.

The AR Trend chart illustrates how you can use multiple measures on the same chart.



The Standard Edition of Microsoft SQL Server 2008/2008 R2 does not support this chart. You must have the Enterprise Edition. If you have the Standard Edition, this dashboard is not available.

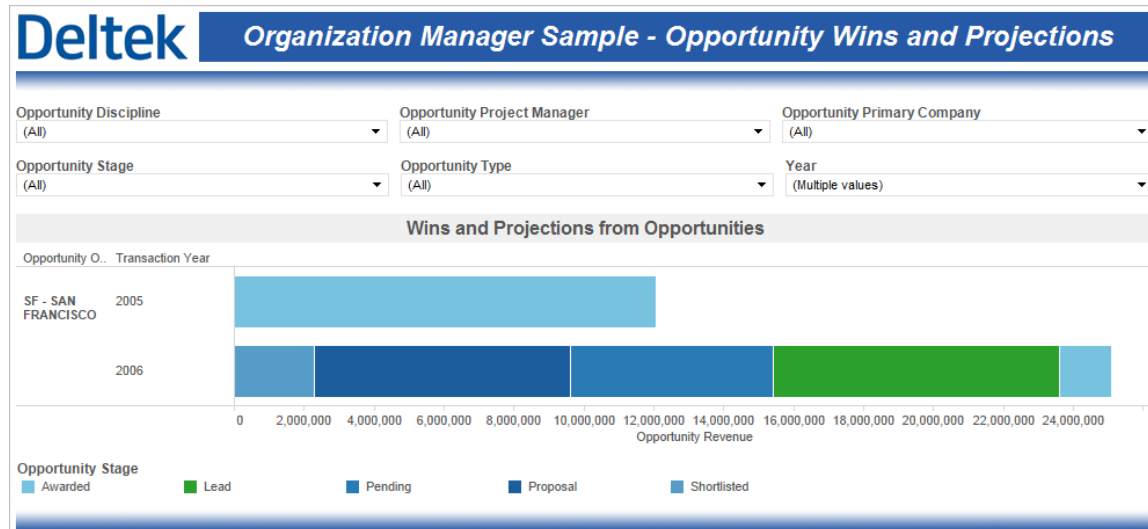


Organization Manager Sample – Opportunity Wins and Projections

The Organization Manager Sample – Opportunity Wins and Projections performance dashboard helps you compare the projected revenue associated with opportunities to your revenue targets.

Each chart bar on the Wins and Projections from Opportunities chart represents the total revenue associated with opportunities that are assigned to the manager's organization and that have an estimated start date in the year indicated. Each segment of the bar represents the revenue associated with opportunities currently assigned to that opportunity stage.

For comparison, target revenue amounts for each time period are displayed as a superimposed broken line.

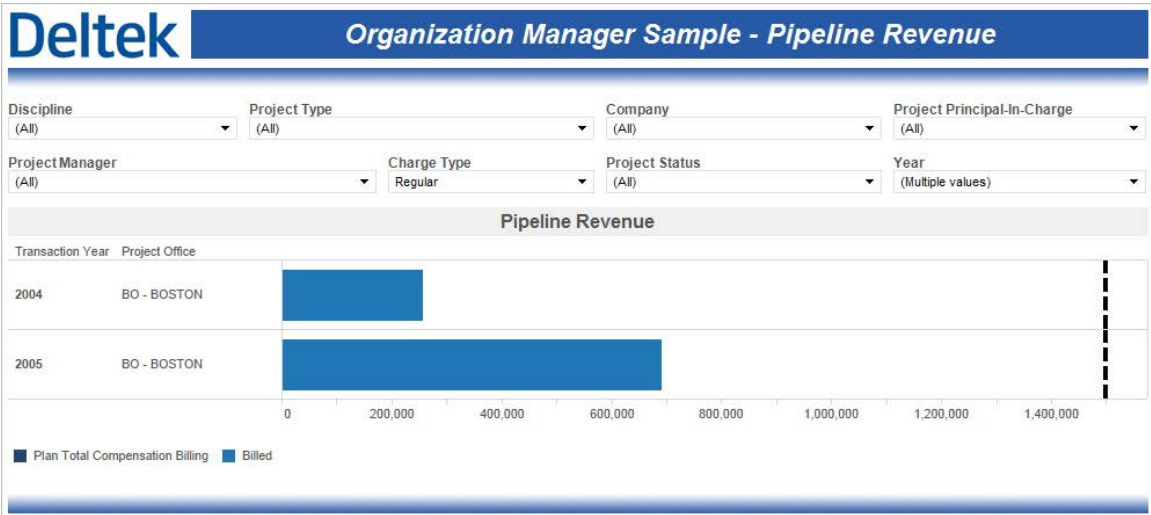


Organization Manager Sample – Pipeline Revenue

The Organization Manager Sample – Pipeline Revenue performance dashboard enables you to view historical revenue trends while projecting future workload based on data from the Planning module.

The Pipeline Revenue chart displays a stacked bar for each year. Each bar segment represents either the actual amount billed or the total planned compensation.

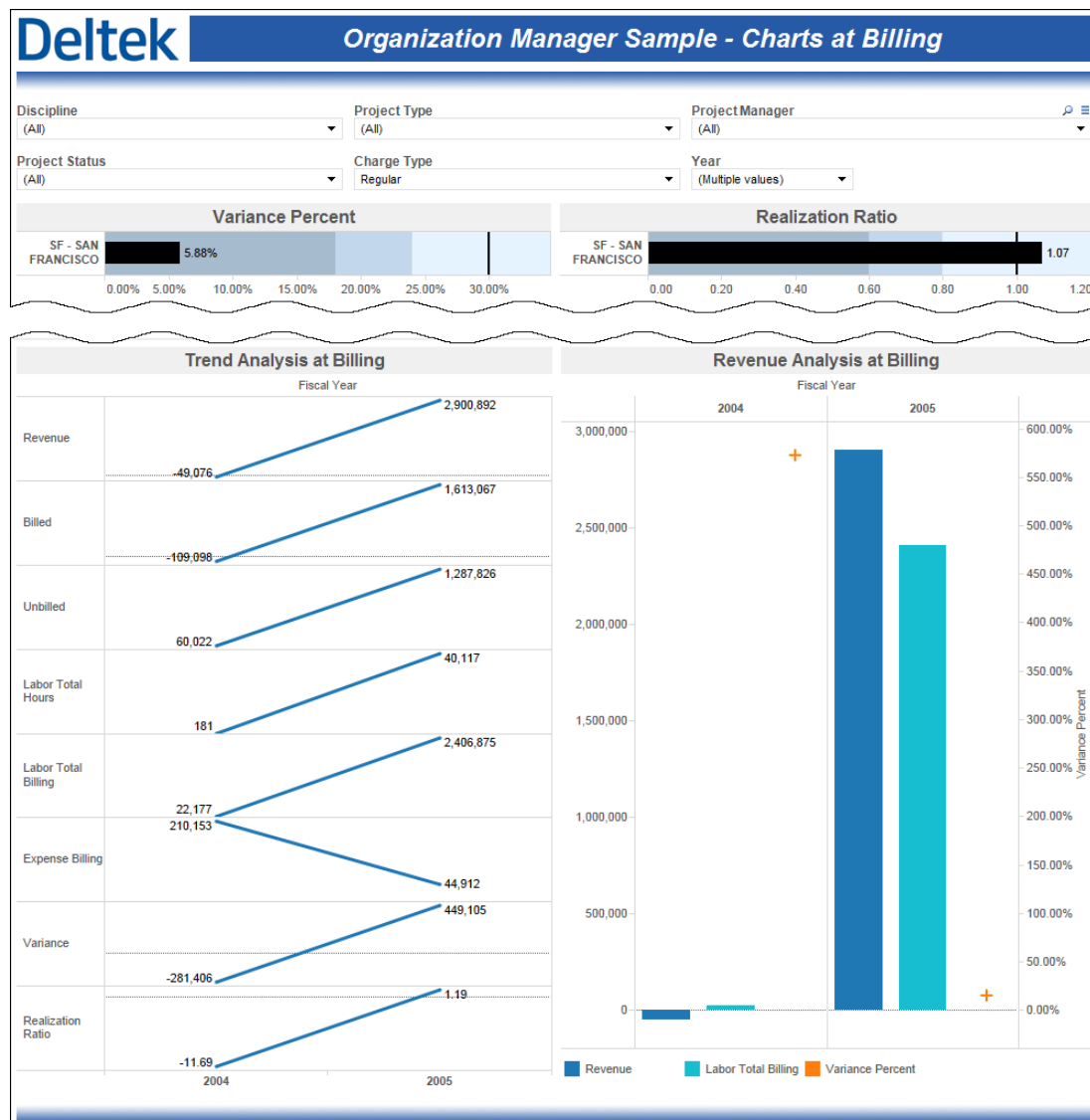
For comparison, the chart also displays a black broken line across each bar that represents the revenue target for your top-level organization.



Organization Manager Sample – Charts at Billing

The Organization Manager Sample – Charts at Billing performance dashboard contains four charts that each focuses on key billing-based metrics for an organization's projects.

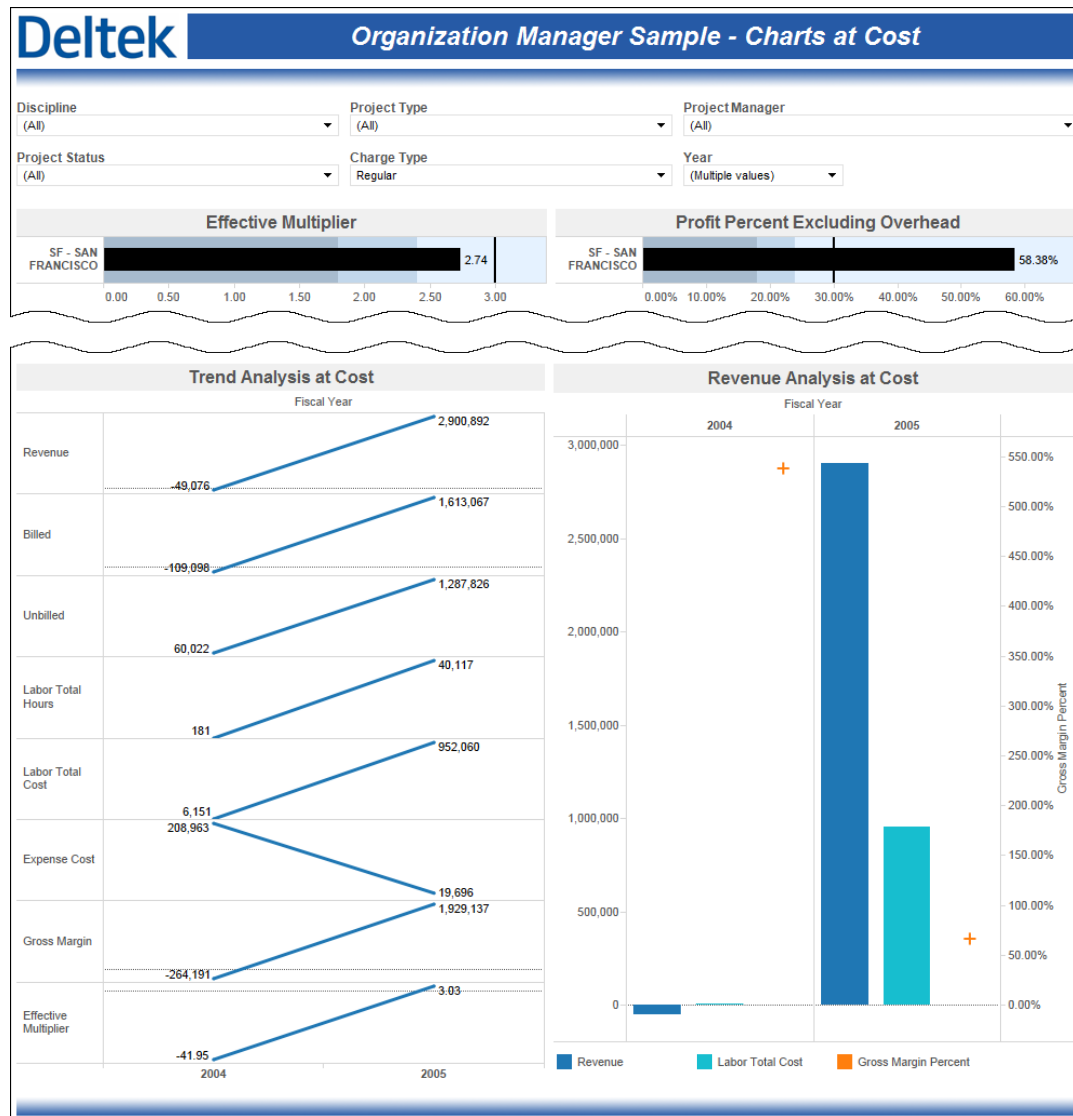
- **Realization Ratio** — This bullet chart compares realization ratio to the company target. You establish company targets as part of Vision Performance Management implementation.
- **Variance Percent** — This bullet chart compares the variance percentage, based on revenue and spent-at-billing amounts, to the company target. You establish company targets as part of Vision Performance Management implementation.
- **Trend Analysis at Billing** — The Trend Analysis at Billing chart tracks the change in the value, over time, of several key metrics. The values are based on billing rates.
- **Revenue Analysis at Billing** — Each pair of bars on this chart represents total revenue and labor billing. The + data points reference the **Variance Percent** scale on the right axis to indicate the variance percentages.



Organization Manager Sample – Charts at Cost

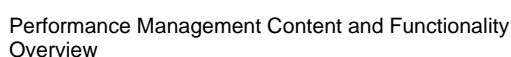
The Organization Manager Sample – Charts at Cost performance dashboard contains four charts that each focuses on key cost-based metrics for an organization's projects.

- **Effective Multiplier** — This bullet chart compares effective multiplier to the company target. You establish company targets as part of Vision Performance Management implementation.
- **Profit Percent Excluding Overhead** — This bullet chart compares the profit percentage, excluding overhead, to the company target. You establish company targets as part of Vision Performance Management implementation.
- **Trend Analysis at Cost** — The Trend Analysis at Cost chart tracks the change in the value, over time, of several key metrics. The values are based on cost rates.
- **Revenue Analysis at Cost** — Each pair of bars represents total revenue and labor cost. The + data points reference the **Gross Margin Percent** scale on the right axis to indicate the gross margin percentages.



The Organization Manager Sample – Profit Drilldown performance dashboard compares revenue, labor total cost, expense total cost, and gross margin by project manager. Each bar on the Profit Drilldown by Project Manager chart represents one of these measures for the indicated project manager's projects.

For further analysis, you can drill down from project manager through the project work breakdown structure (WBS) levels.

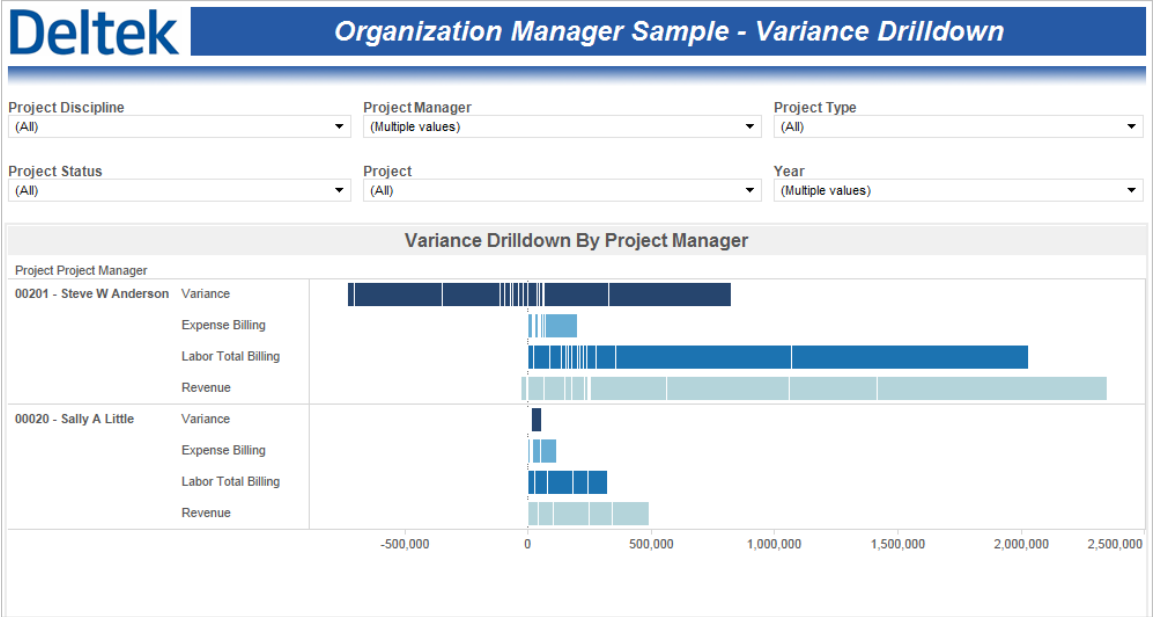


Organization Manager Sample – Variance Drilldown

The Organization Manager Sample – Variance Drilldown performance dashboard compares revenue, labor total billing, expense total billing, and variance by project manager. Each bar on the Variance Drilldown by Project Manager chart represents one of these measures for the indicated project manager’s projects.

Each segment of a stacked bar represents the value of that measure for a specific project. Position the mouse pointer over a segment to display the project number, project name, and measure value for that segment.

For further analysis, you can drill down from project manager through the project work breakdown structure (WBS) levels.



Principal Performance Dashboards

The Principal dashboards are designed for those in the principal role on a project, those responsible for a group of project managers and for the successful delivery of a group of projects. The Principal dashboards are automatically filtered to display data only for a principal's own projects.

Principal Sample – Project Status

The Principal Sample – Project Status performance dashboard helps you monitor performance of labor billing against budget for your projects.

Use the Project Budget table to view comparisons of your current actual, budgeted, and projected financial indicators. This table illustrates how you can use multiple measures in the same table.

To make full use of this table, you must have the Planning module. If you do not have Planning, the table only displays data for the **Labor Total Billing** and **AR Over 60** measures.

Deltek

Principal-In-Charge Sample - Project Status

Project Manager
(All)

Primary Company
(All)

Project Type
(All)

Project Status
(All)

Charge Type
Regular

Project Budget

Project	Project Manager	eline Labor Billing	Labor Total Billing	EAC Labor Billing	Total Baseline - EAC Labor Billing	EAC Multiplier Billing	AR Over 60
<empty>			73,664	73,664	1,181,446	88.87	54,082
00201	Steve W Anderson	0	1,956,315	1,956,315	-701,205	3.49	64,327
00002	James R Bartlett		182,508	182,508	1,072,603	38.43	104,367
00101	Brenda K Gray	0	96,247	96,247	1,158,863	72.96	33,432
00200	Johnathan J Hertz		125,926	125,926	1,129,184	55.67	38,492
00666	John M Hightower				1,255,110		
00020	Sally A Little	0	167,738	167,738	1,087,372	41.75	130,559

Principal Sample – Days Outstanding Metrics

The Principal Sample – Days Outstanding Metrics performance dashboard contains two charts that help you monitor days sales outstanding (DSO) and days WIP outstanding (DWO for your projects.

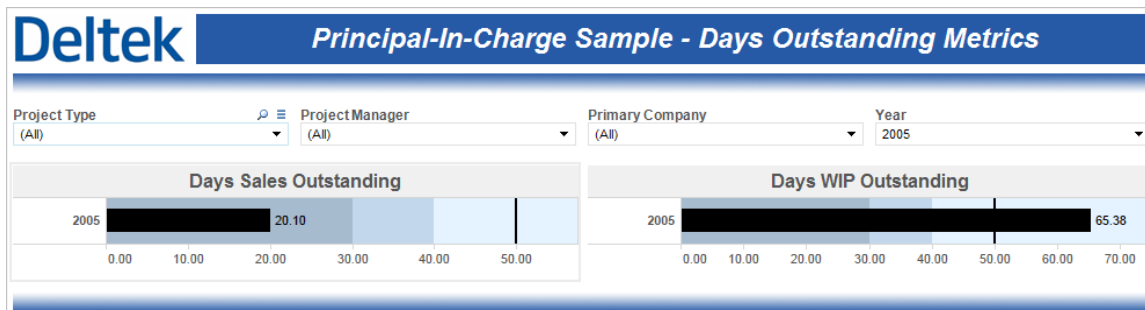
- **Days Sales Outstanding** — Use the Days Sales Outstanding chart to view DSO for the 90-day period preceding the most recent selected period, and compare that value to the target value:

$$\text{DSO} = \text{Accounts Receivable Balance} / (\text{Revenue Total for the last 90 transaction days} / 90)$$
- **Days WIP Outstanding** — Use the Days WIP Outstanding chart to view DWO for the 90-day period preceding the most recent selected period, and compare that value to the target value:

$$\text{DWO} = \text{Unbilled Total} / (\text{Revenue Total for the last 90 transaction days} / 90)$$



The Standard Edition of Microsoft SQL Server 2008/2008 R2 does not support this chart. You must have the Enterprise Edition. If you have the Standard Edition, this dashboard is not available.



Principal Sample – AR Trending

The Principal Sample – AR Trending performance dashboard contains a chart that enables you to evaluate trends in your accounts receivable balance.

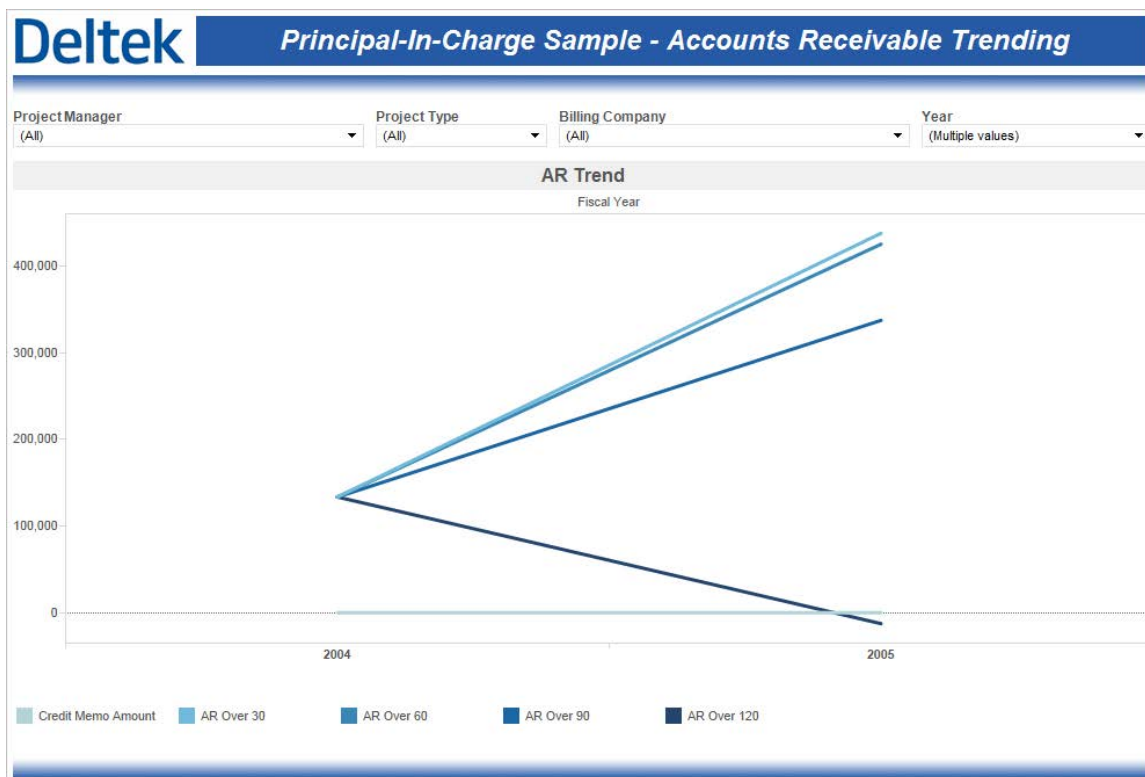
Each chart line on the AR Trend chart represents the trend of the accounts receivable balance for one of your aging categories as of the end of each year you select. You can use this chart to track your success in reducing AR over time.

If you are using the credit memo feature, the chart includes a chart line for credit memo amounts.

The AR Trend chart illustrates how you can use multiple measures on the same chart.



The Standard Edition of Microsoft SQL Server 2008/2008 R2 does not support this chart. You must have the Enterprise Edition. If you have the Standard Edition, this dashboard is not available.

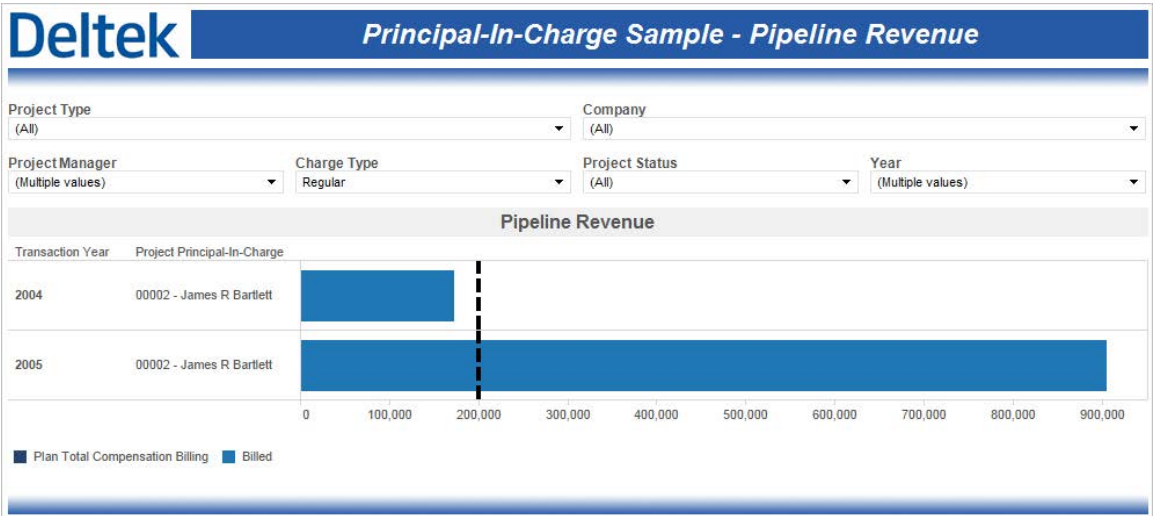


Principal Sample – Pipeline Revenue

The Principal Sample – Pipeline Revenue performance dashboard enables you to view historical revenue trends while projecting future workload based on data from the Planning module.

The Pipeline Revenue chart displays a stacked bar for each year. Each bar segment represents either the actual amount billed or the total planned compensation.

For comparison, the chart also displays a black broken line across each bar that represents the revenue target for your projects.

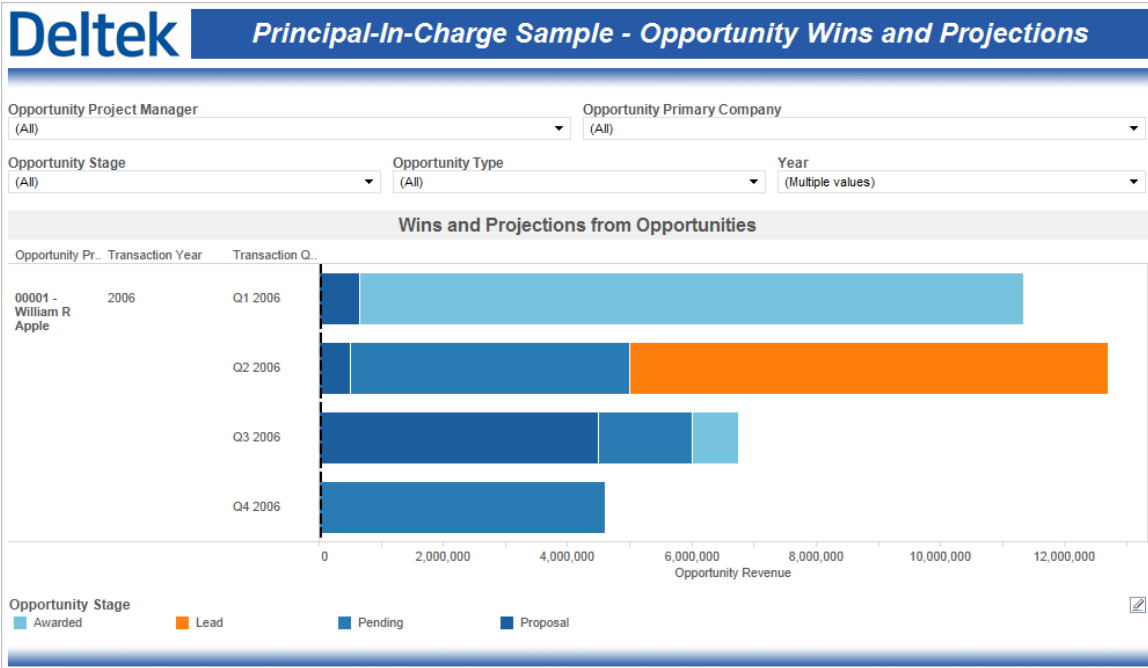


Principal Sample – Opportunity Wins and Projections

The Principal Sample – Opportunity Wins and Projections performance dashboard helps you compare the projected revenue associated with opportunities to your revenue targets.

Each chart bar on the Wins and Projections from Opportunities chart represents the total revenue associated with opportunities that are assigned to the principal and that have an estimated start date in the year indicated. Each segment of the bar represents the revenue associated with opportunities currently assigned to that opportunity stage.

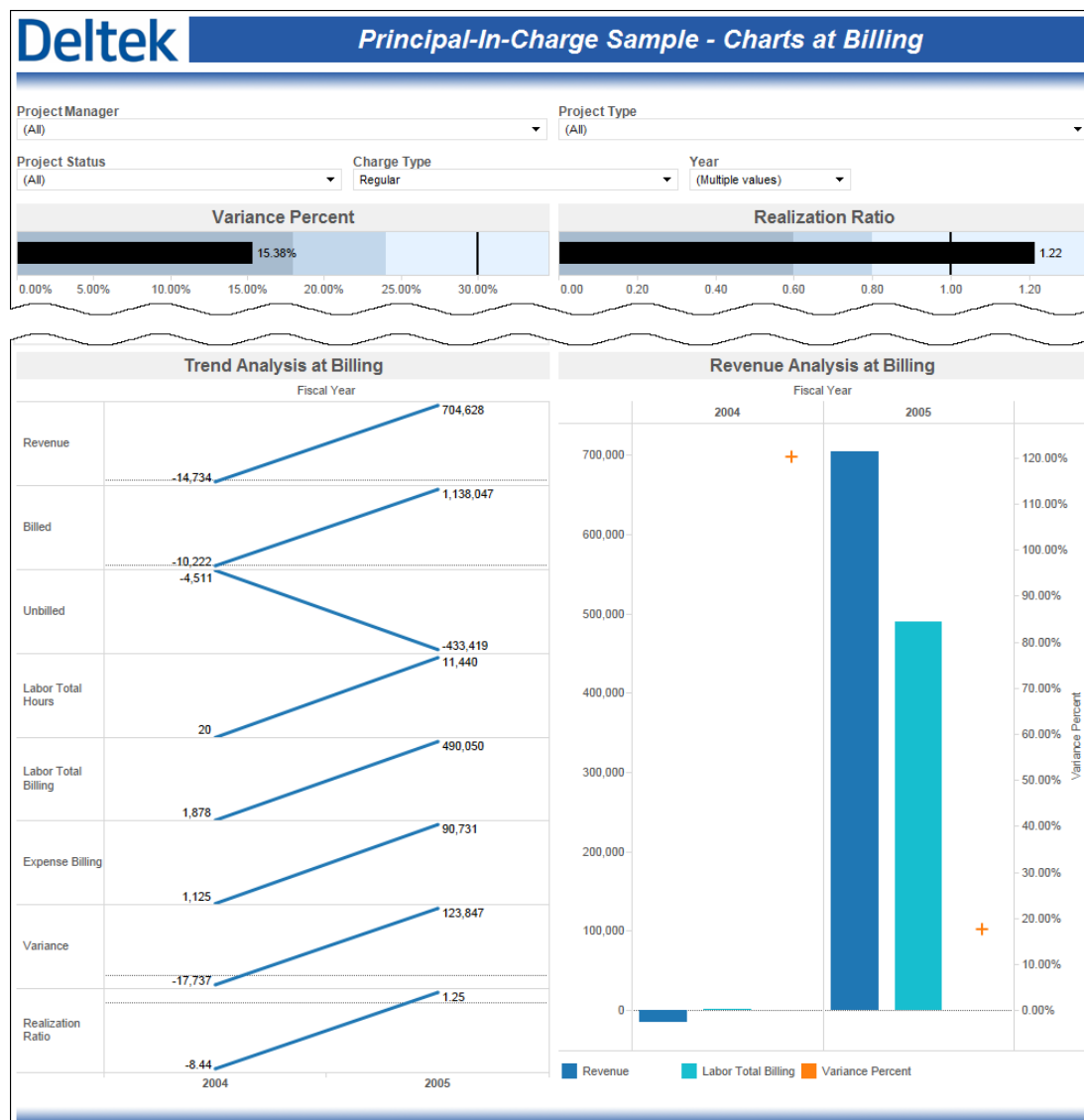
For comparison, target revenue amounts for each time period are displayed as a superimposed broken line.



Principal Sample – Charts at Billing

The Principal Sample – Charts at Billing performance dashboard contains four charts that each focuses on key billing-based metrics for a principal's projects.

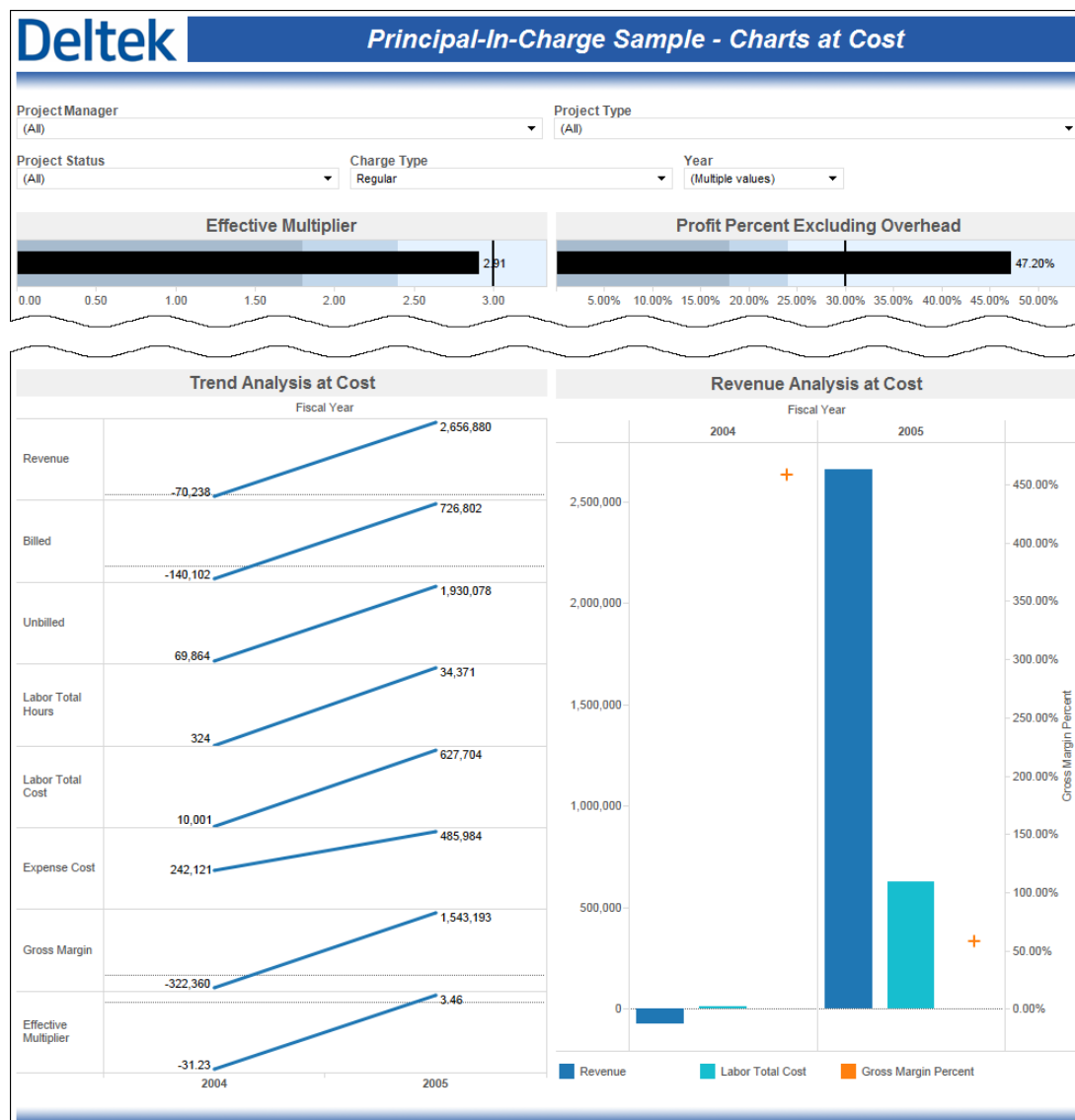
- **Realization Ratio** — This bullet chart compares realization ratio to the target. You establish targets as part of Vision Performance Management implementation.
- **Variance Percent** — This bullet chart compares the variance percentage, based on revenue and spent-at-billing amounts, to the target. You establish targets as part of Vision Performance Management implementation.
- **Trend Analysis at Billing** — The Trend Analysis at Billing chart tracks the change in the value, over time, of several key metrics. The values are based on billing rates.
- **Revenue Analysis at Billing** — Each pair of bars on this chart represents total revenue and labor billing. The + data points reference the **Variance Percent** scale on the right axis to indicate the variance percentages.



Principal Sample – Charts at Cost

The Principal Sample – Charts at Cost performance dashboard contains four charts that each focuses on key cost-based metrics for an organization's projects.

- **Effective Multiplier** — This bullet chart compares effective multiplier to the target. You establish targets as part of Vision Performance Management implementation.
- **Profit Percent Excluding Overhead** — This bullet chart compares the profit percentage, excluding overhead, to the target. You establish targets as part of Vision Performance Management implementation.
- **Trend Analysis at Cost** — The Trend Analysis at Cost chart tracks the change in the value, over time, of several key metrics. The values are based on cost rates.
- **Revenue Analysis at Cost** — Each pair of bars represents total revenue and labor cost. The + data points reference the **Gross Margin Percent** scale on the right axis to indicate the gross margin percentages.

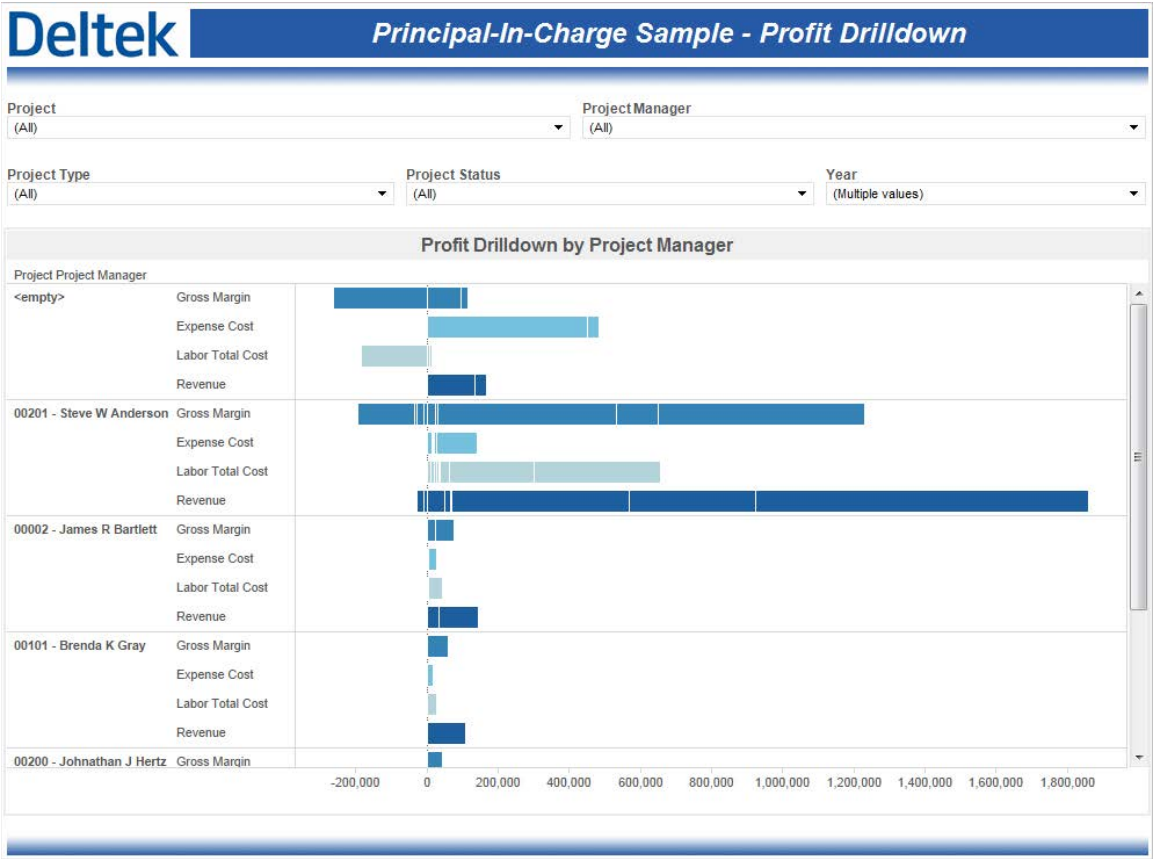


Principal Sample – Profit Drilldown

The Principal Sample – Profit Drilldown performance dashboard compares revenue, labor total cost, expense total cost, and gross margin by project manager. Each bar on the Profit Drilldown by Project Manager chart represents one of these measures for the indicated project manager's projects.

Each segment of a stacked bar represents the value of that measure for a specific project. Position the mouse pointer over a segment to display the project number, project name, and measure value for that segment.

For further analysis, you can drill down from project manager through the project work breakdown structure (WBS) levels.

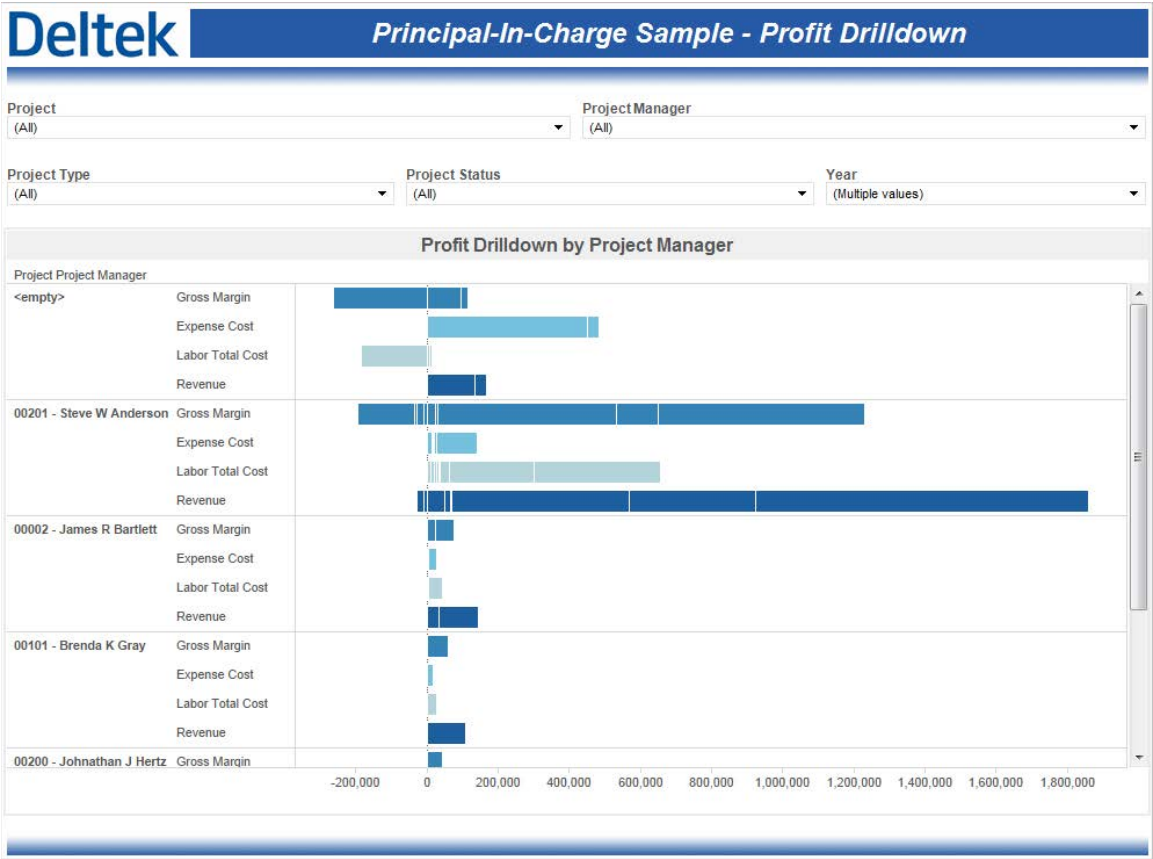


Principal Sample – Variance Drilldown

The Principal Sample – Variance Drilldown performance dashboard compares revenue, labor total billing, expense total billing, and variance by project manager. Each bar on the Variance Drilldown by Project Manager chart represents one of these measures for the indicated project manager's projects.

Each segment of a stacked bar represents the value of that measure for a specific project. Position the mouse pointer over a segment to display the project number, project name, and measure value for that segment.

For further analysis, you can drill down from project manager through the project work breakdown structure (WBS) levels.



Project Manager Performance Dashboards

The Project Manager dashboards have charts and tables similar to those on the Principal dashboards, but with a different level of drill down. They focus on individual projects and the performance of a project manager's portfolio. The Project Manager dashboards are automatically filtered to display data only for a project manager's own projects.

Project Manager Sample – Project Status

The Project Manager Sample – Project Status performance dashboard helps you monitor performance of labor billing against budget for your projects.

Use the Project Budget table to view comparisons of your current actual, budgeted, and projected financial indicators. This table illustrates how you can use multiple measures in the same table.

To make full use of this table, you must have the Planning module. If you do not have Planning, the table only displays data for the **Labor Total Billing** and **AR Over 60** measures.

Delttek

Project Manager Sample - Project Status

Project Type

(All)

Project Primary Company

(All)

Charge Type

Regular

Project Status

(All)

Project Budget

Project Number - Short Name	Baseline Labor Billing	Labor Total Billing	EAC Labor Billing	Total Baseline - EAC Labor Billing	EAC Multiplier Billing	AR Over 60
0020202.02 - Martinville Children's Hospital	0	963,065	963,065	292,045	7.31	
0021003.00 - West End Women's Hospital	0	712,844	712,844	542,267	9.88	
2002005.00 - Cape Cod Vacation Club	80,560	200,733	200,733	1,054,377	35.07	
1999005.00 - City Hall Facade Replacement		180,454	180,454	1,074,656	38.92	116,410
1999009.00 - ABC Plaza Study		125,926	125,926	1,129,184	55.67	38,492
1998001.00 - Fenway Park Wall		117,247	117,247	1,137,863	58.87	39,331
1999001.00 - City Park Crosswalk Feasibility Study		107,380	107,380	1,147,730	65.35	79,511
2000007.00 - Farmington Water and Sewer Plant		104,509	104,509	1,150,601	67.33	96,331
2000012.00 - Greater Baltimore Industrial	0	96,247	96,247	1,158,863	72.96	33,432

Project Manager Sample – Days Outstanding Metrics

The Project Manager Sample – Days Outstanding Metrics performance dashboard contains two charts that help you monitor days sales outstanding (DSO) and days WIP outstanding (DWO for your projects.

- **Days Sales Outstanding** — Use the Days Sales Outstanding chart to view DSO for the 90-day period preceding the most recent selected period, and compare that value to the target value:

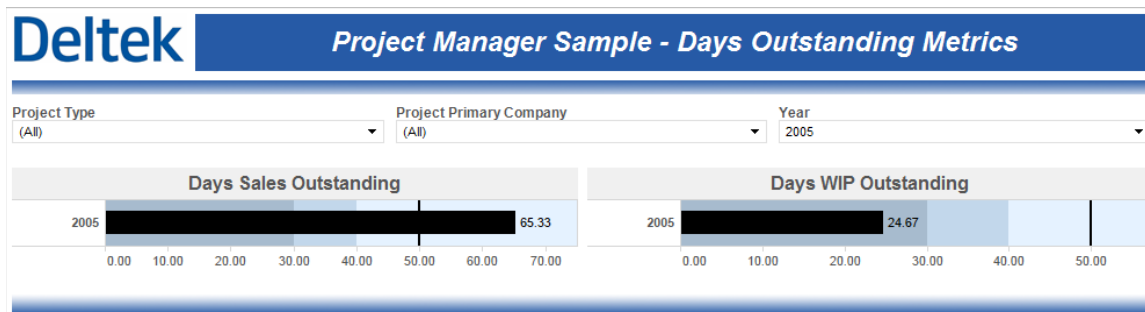
$$\text{DSO} = \text{Accounts Receivable Balance} / (\text{Revenue Total for the last 90 transaction days} / 90)$$

- **Days WIP Outstanding** — Use the Days WIP Outstanding chart to view DWO for the 90-day period preceding the most recent selected period, and compare that value to the target value:

$$\text{DWO} = \text{Unbilled Total} / (\text{Revenue Total for the last 90 transaction days} / 90)$$

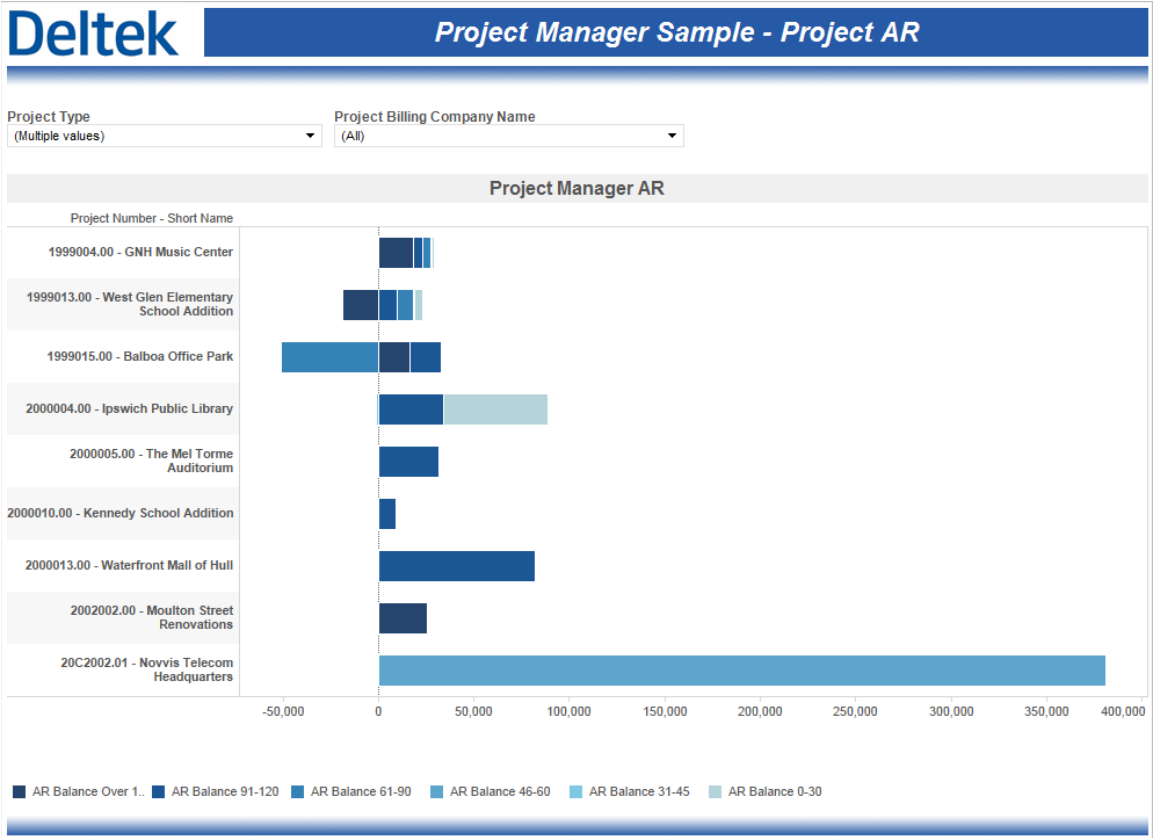


The Standard Edition of Microsoft SQL Server 2008/2008 R2 does not support this chart. You must have the Enterprise Edition. If you have the Standard Edition, this dashboard is not available.



Project Manager Sample – Project AR

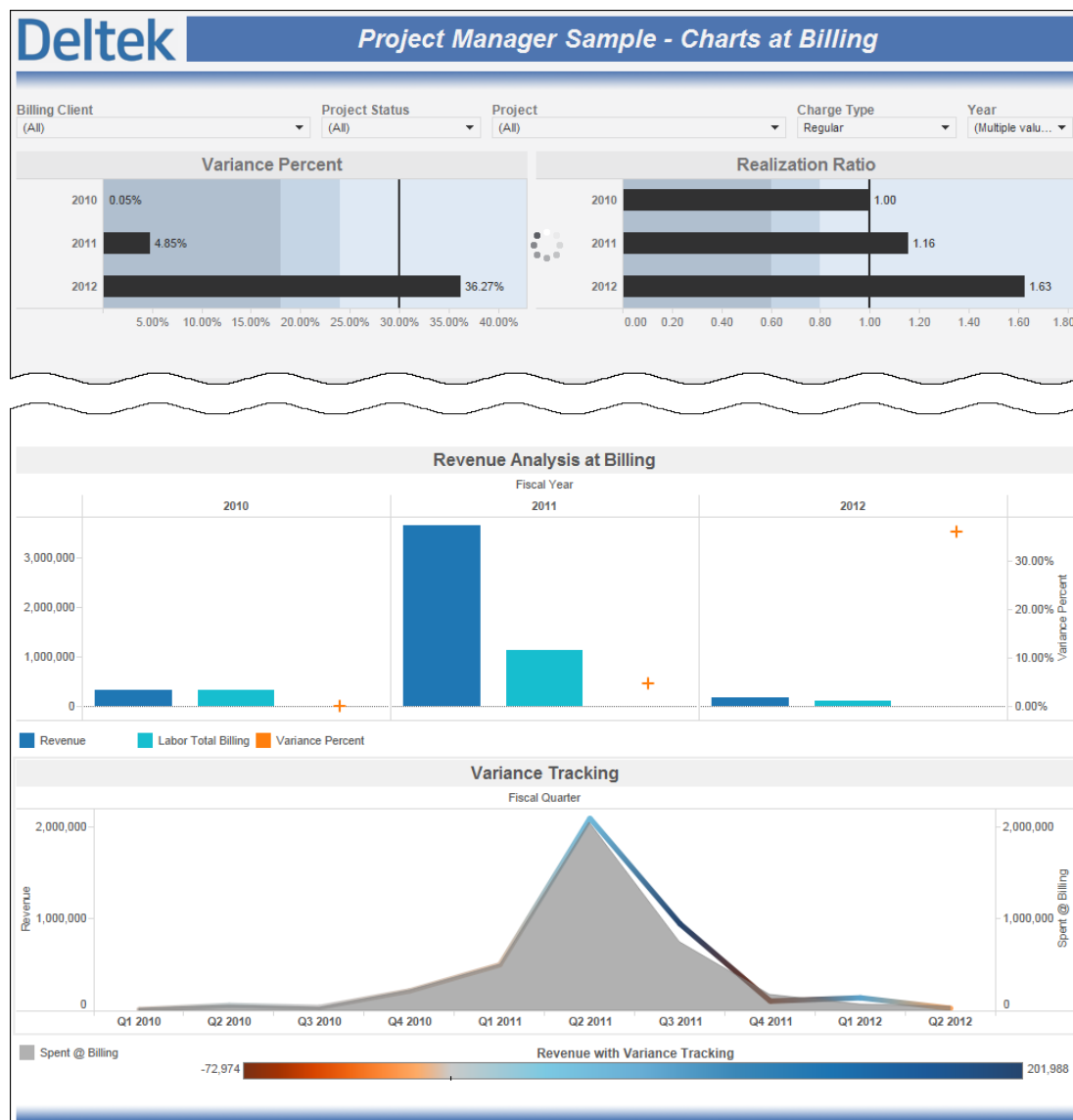
The Project Manager Sample – Project AR performance dashboard contains the Accounts Receivable by Project chart. Each stacked bar represents the total current AR balance for a project, and each segment of the stacked bar represents the AR balance for an AR aging category.



Project Manager Sample – Charts at Billing

The Project Manager Sample – Charts at Billing performance dashboard contains four charts that each focuses on key billing-based metrics for a project manager's projects.

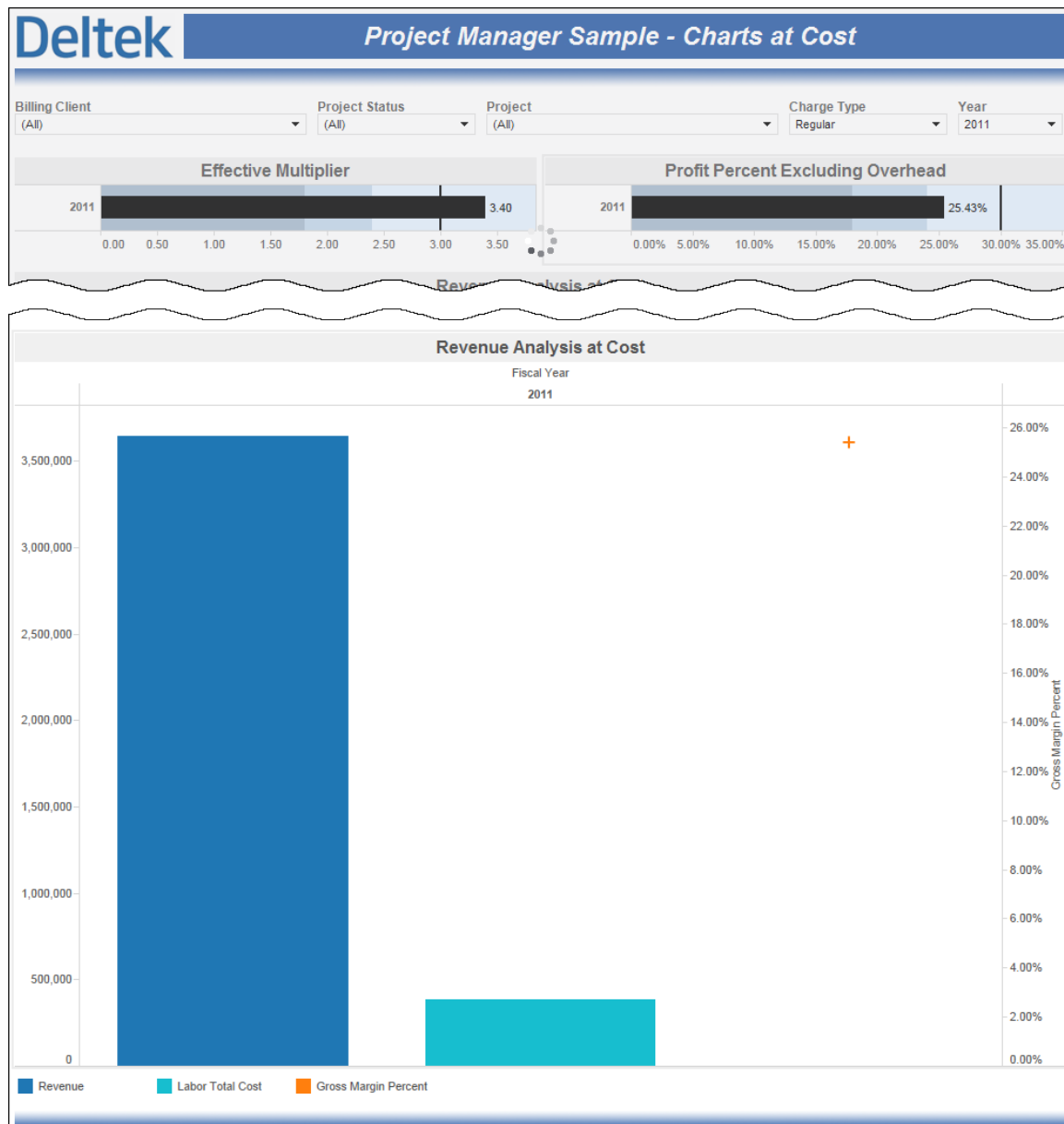
- **Realization Ratio** — This bullet chart compares realization ratio to the target. You establish targets as part of Vision Performance Management implementation.
- **Variance Percent** — This bullet chart compares the variance percentage, based on revenue and spent-at-billing amounts, to the target. You establish targets as part of Vision Performance Management implementation.
- **Revenue Analysis at Billing** — Each pair of bars on this chart represents total revenue and labor billing. The + data points reference the **Variance Percent** scale on the right axis to indicate the variance percentages.
- **Variance Tracking** — The Variance Tracking chart displays total revenue by quarter as a charted line and total amount spent at billing rates by quarter as a gray filled area.



Project Manager Sample – Charts at Cost

The Project Manager Sample – Charts at Cost performance dashboard contains three charts that each focuses on key cost-based metrics for an organization's projects.

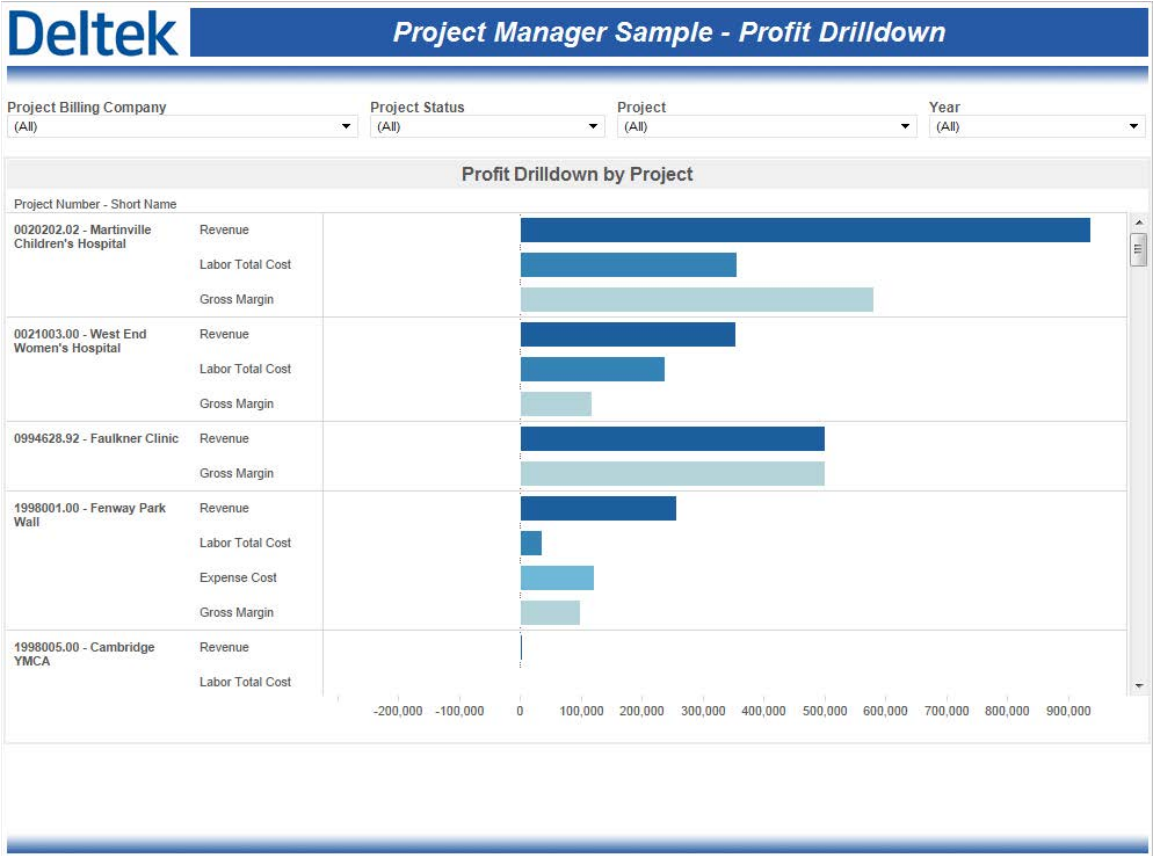
- **Effective Multiplier** — This bullet chart compares effective multiplier to the target. You establish targets as part of Vision Performance Management implementation.
- **Profit Percent Excluding Overhead** — This bullet chart compares the profit percentage, excluding overhead, to the target. You establish targets as part of Vision Performance Management implementation.
- **Revenue Analysis at Cost** — Each pair of bars represents total revenue and labor cost. The + data points reference the **Gross Margin Percent** scale on the right axis to indicate the gross margin percentages.



Project Manager Sample – Profit Drilldown

The Project Manager Sample – Profit Drilldown performance dashboard compares revenue, labor total cost, expense total cost, and gross margin by project. Each bar on the Profit Drilldown by Project chart represents one of these measures for the indicated project.

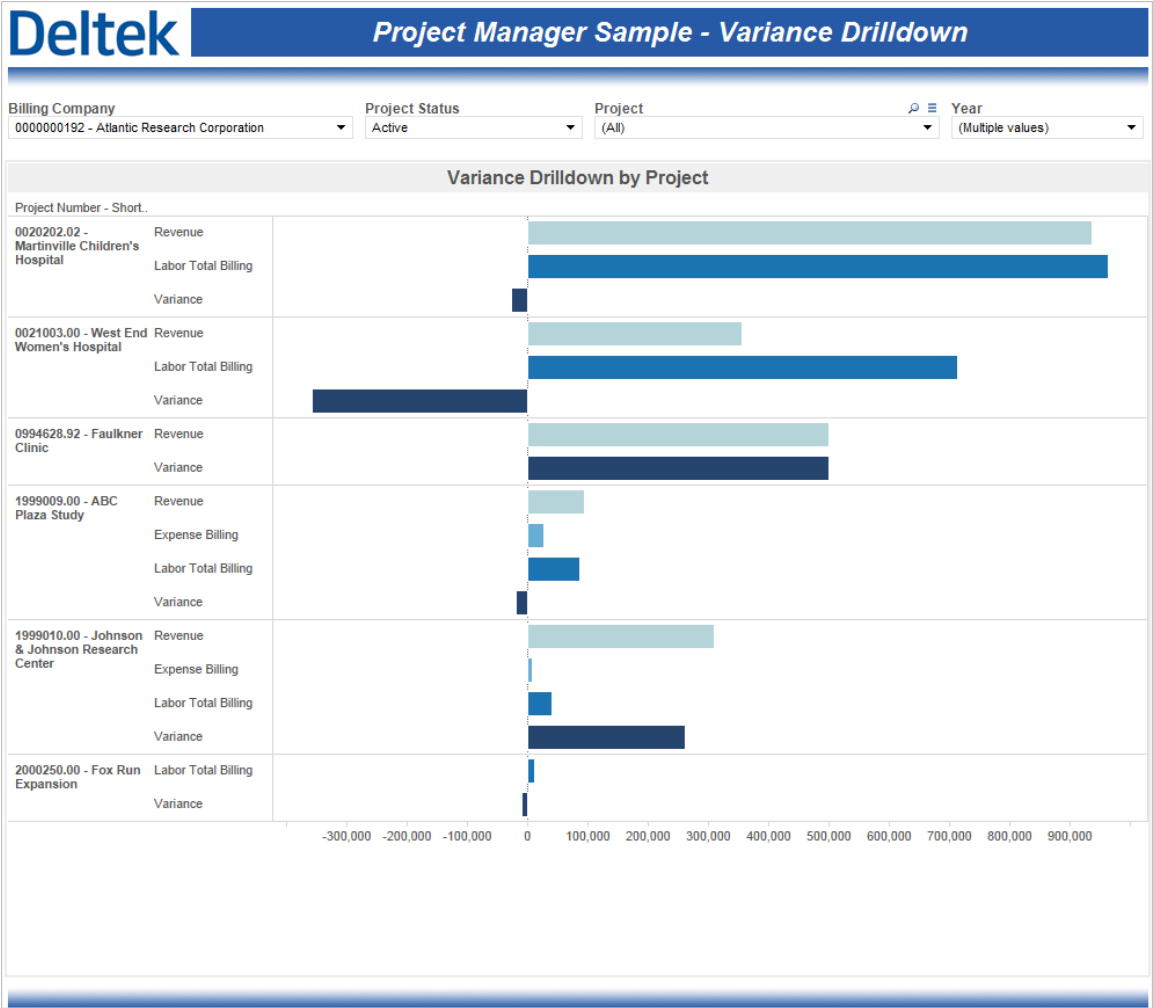
For further analysis, you can drill down from the top work breakdown structure (WBS) level to lower levels.



Project Manager Sample – Variance Drilldown

The Project Manager Sample – Variance Drilldown performance dashboard compares revenue, labor total billing, expense total billing, and variance by project. Each bar on the Variance Drilldown by Project chart represents one of these measures for the indicated project.

For further analysis, you can drill down from the top work breakdown structure (WBS) level to lower levels.



Resource Manager Performance Dashboards

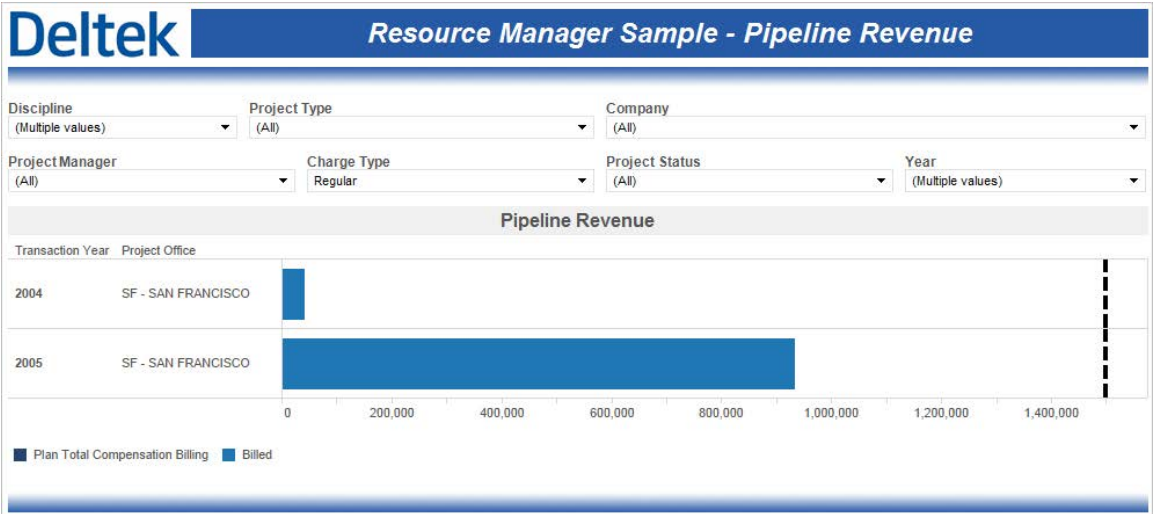
The Resource Manager dashboards supports managers who are responsible for the efficient staffing of their team, including hiring and firing, promotions, and bonuses. The dashboards help the resource manager monitor utilization, identify projects that are over- or under-staffed, and shift resources to correct staffing imbalances.

Resource Manager Sample – Pipeline Revenue

The Resource Manager Sample – Pipeline Revenue performance dashboard enables you to view historical revenue trends while projecting future workload based on data from the Planning module.

The Pipeline Revenue chart displays a stacked bar for each year. Each bar segment represents either the actual amount billed or the total planned compensation.

For comparison, the chart also displays a black broken line across each bar that represents the revenue target for your top-level organization.



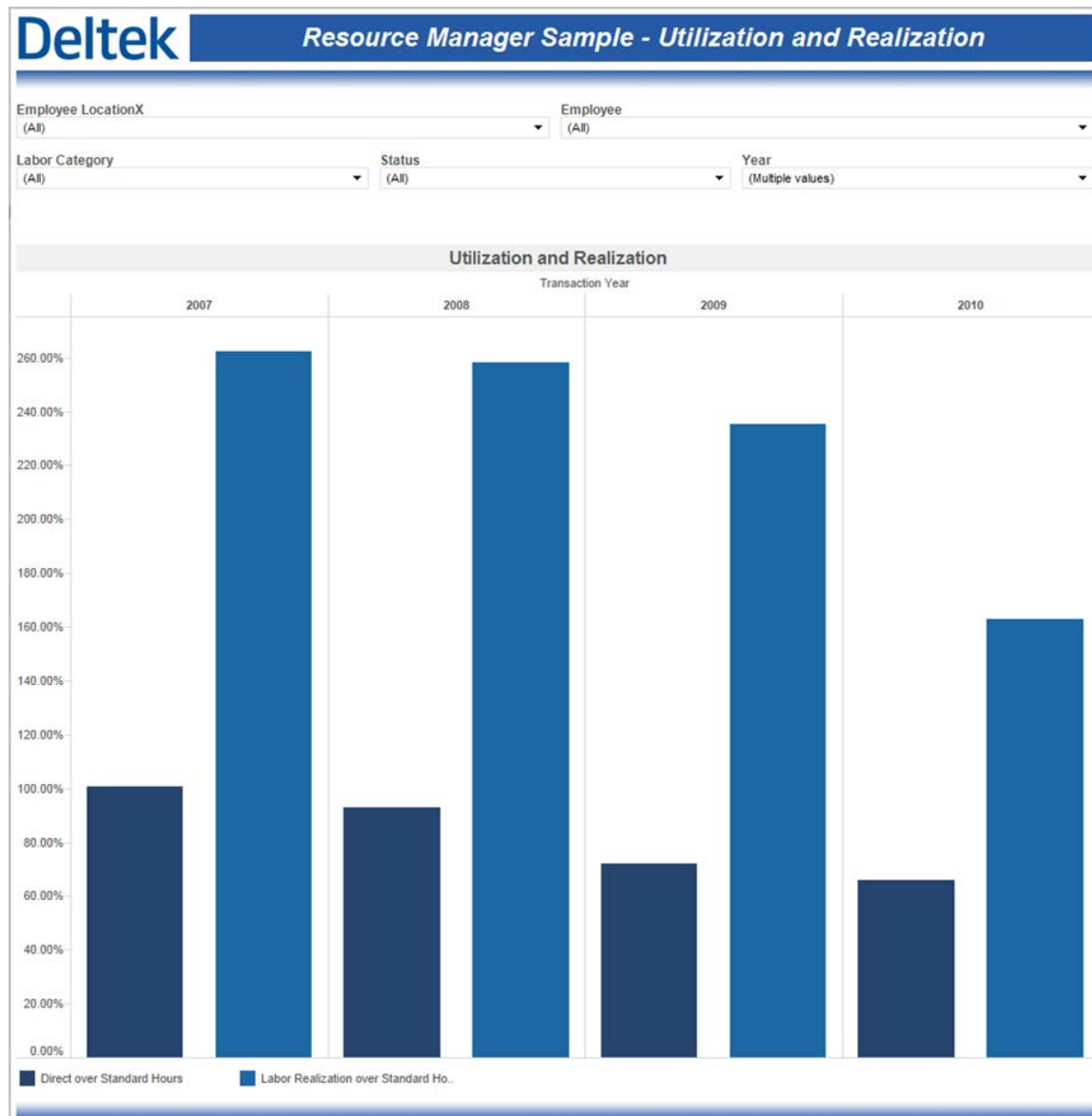
Resource Manager Sample – Utilization and Realization

The Resource Manager Sample – Utilization and Realization performance dashboard enables you to monitor actual labor utilization and realization, compare actual labor utilization to planned utilization, and review planned utilization for future periods.

The dashboard contains the Utilization and Realization chart. That chart displays the following for each calendar year:

- A bar for actual utilization rate (Direct hours / Standard hours)
- A bar for actual realization rate (Labor realization hours / Standard hours)
- A data point for the planned utilization rate

The chart only displays values for **Standard Planned Billable Utilization** if you have the Planning module.

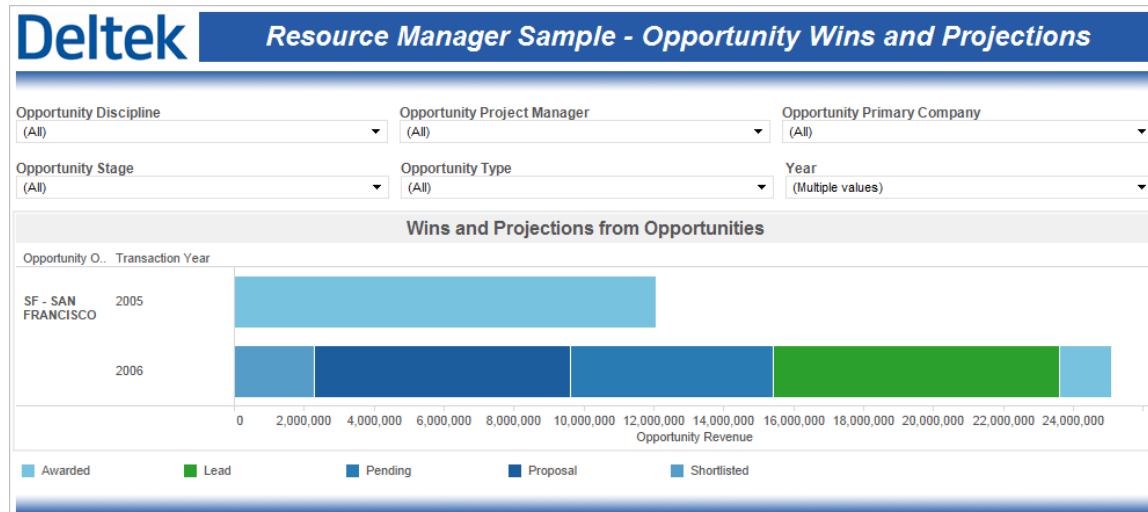


Resource Manager Sample – Opportunity Wins and Projections

The Resource Manager Sample – Opportunity Wins and Projections performance dashboard helps you compare the projected revenue associated with opportunities to your revenue targets.

Each chart bar on the Wins and Projections from Opportunities chart represents the total revenue associated with opportunities that are assigned to the manager's organization and that have an estimated start date in the year indicated. Each segment of the bar represents the revenue associated with opportunities currently assigned to that opportunity stage.

For comparison, target revenue amounts for each time period are displayed as a superimposed broken line.

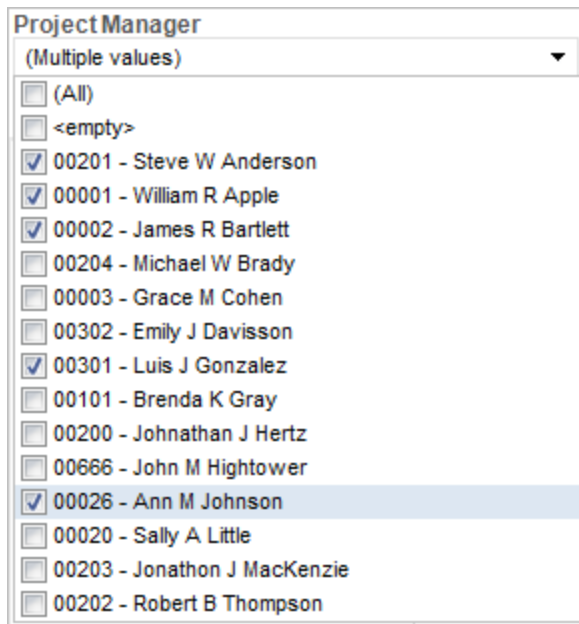


Using Performance Dashboards

This section describes the functionality that performance dashboard users typically use.

Select Filter Values

Use the filter lists at the top of the dashboard to filter the data included on the dashboard. As you select values, Vision updates the dashboard based on your selections.



Some filter lists contain many values. In those cases, you can search for the values you want to select.

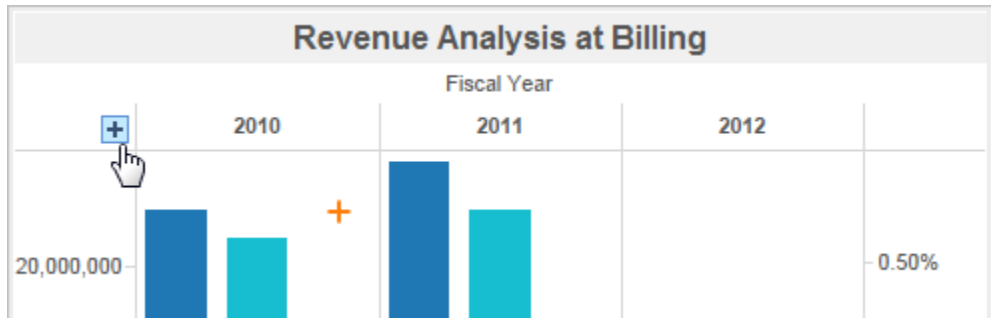


By default, each filter list displays all possible filter values, even if other filters you have applied make some of those values invalid. You have the option to exclude those invalid values from the list.

Drill Down to More Detailed Data

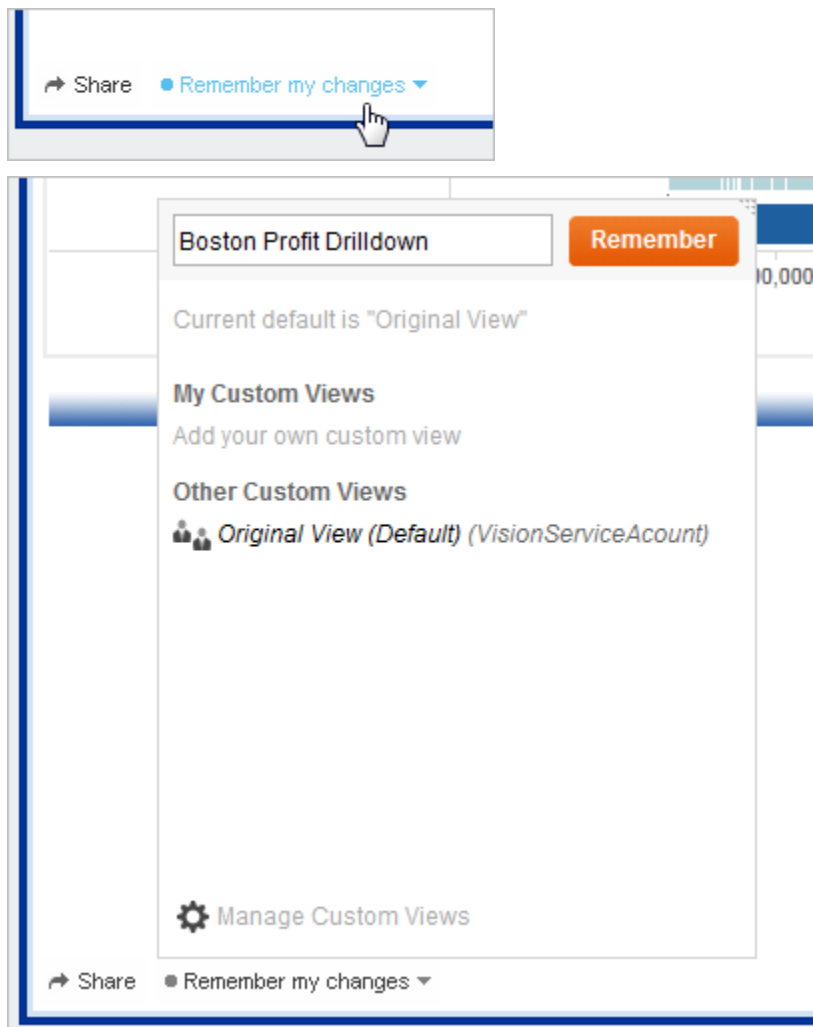
For many charts and tables, you can drill down from higher level data to more detailed data.

Position the mouse pointer in the heading information for the dimension from which you want to drill down to display the Drill Down icon: . Click  to display data at the next level of the drill-down hierarchy.

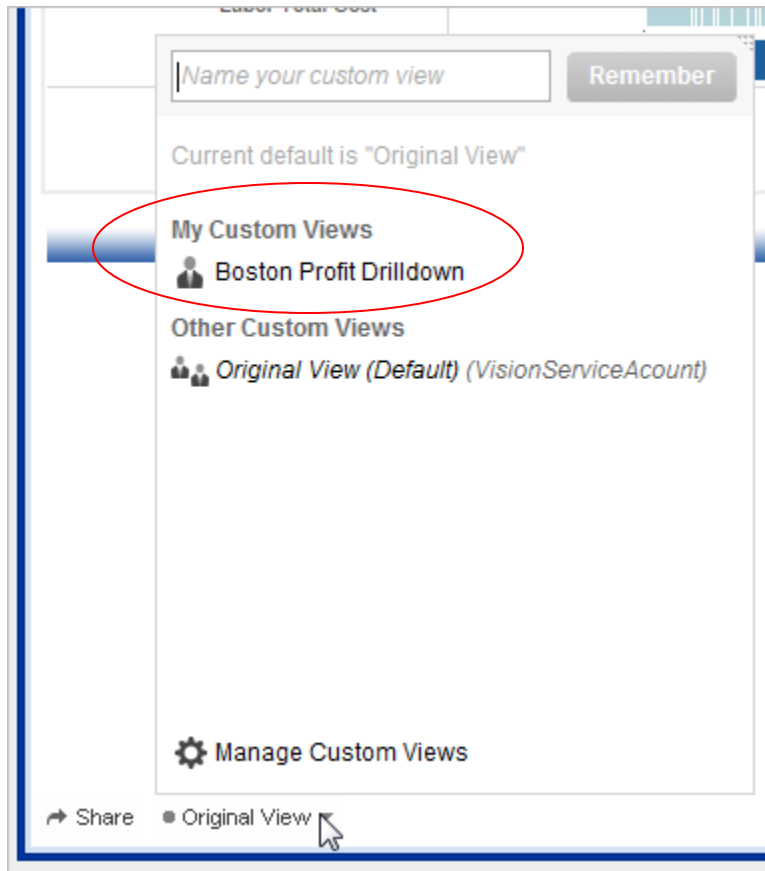


Create a Custom View for a Dashboard

You can create a custom view of a performance dashboard so you can display that view quickly in the future or share it with others. When the data you want is displayed, click **Remember my changes** below the dashboard.




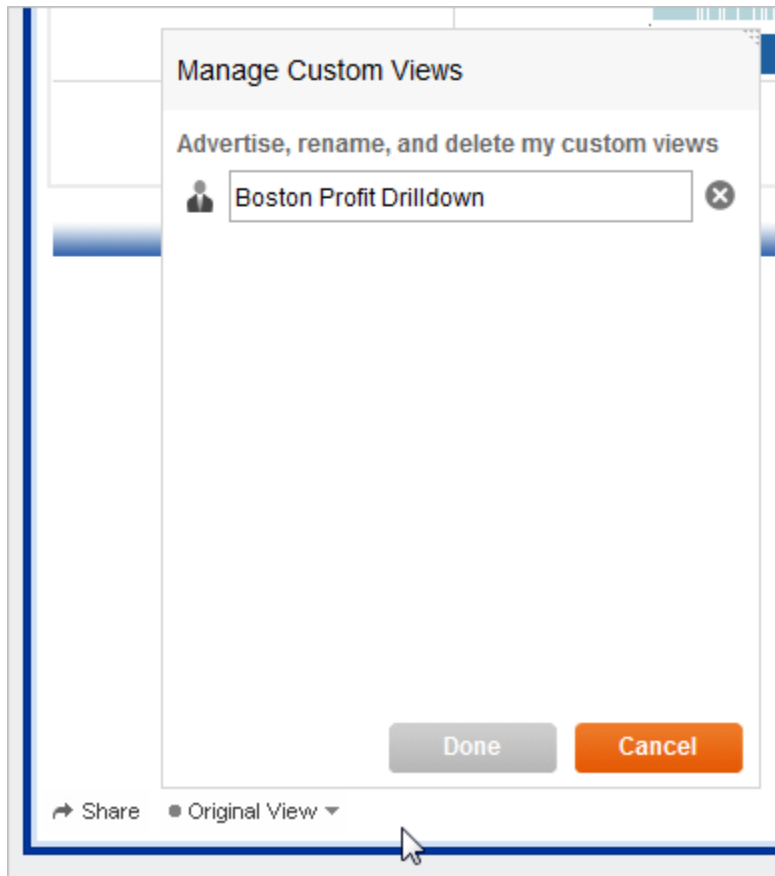
If custom views exist for a dashboard, you can select that view to display it, rather than having to reconstruct it using filters and other options.



If you create a custom view for a dashboard and you prefer it to your current default view, you can make that custom view your default.

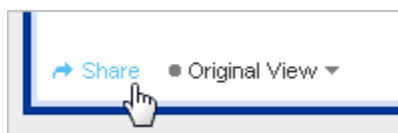
Share Dashboard Views

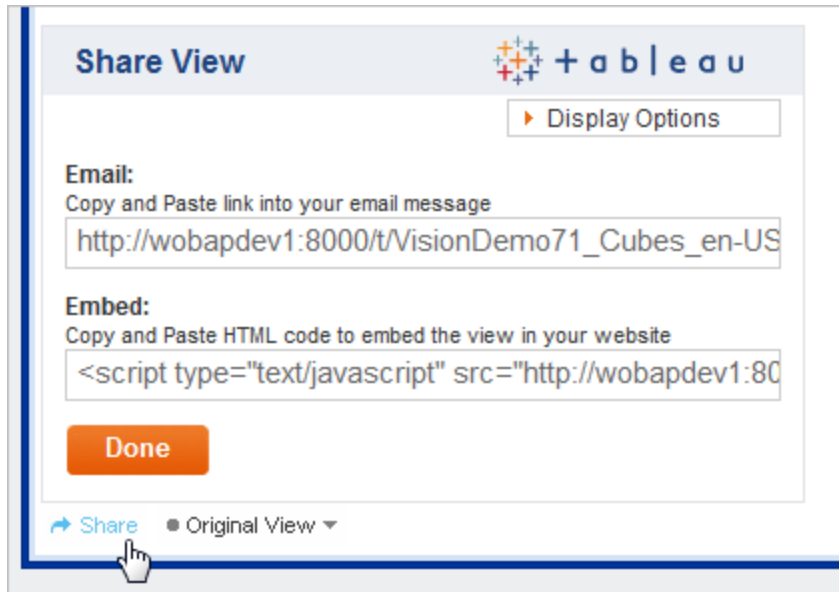
If you create a custom view for a dashboard, you can make it available as an optional view to others who use that dashboard by “advertising” it. After you create the custom view, click **Manage Custom Views** in the Custom Views dialog box and click  in the Manage Custom Views dialog box.



You can also share the contents of a dashboard with others by sending a link to it in an email message. The recipient of the email can then view and interact with the dashboard. In addition, you can embed a dashboard view in a Web page. For example, you could add it to a blog, a wiki, or a Web application. Those who access the Web page can then view and interact with the dashboard.


Click **Share** below the dashboard to access these options.





Export Dashboards

You can export an image of a dashboard in a Portable Network Graphics (.PNG) image file or in a .PDF file and then, for example, distribute it by email, annotate it in a graphics application, or print it. You can also export dashboard data in a data file or a .CSV file.

Click  below the dashboard.

Reference: Project Data Cube

The Vision online help contains descriptions of all dimensions and measures for the Project Data Cube. In the Contents pane of the help window, navigate to **Reporting » Analysis Cubes » Vision Data Cubes**.

Project Data Cube Dimensions

Accounts Group

Report Type - Account Type - Account Number

More Fields Folder

Account Currency Code
Account Number - Name
Account Status
Account Type
Report Type

Activities Group

Activity End Date Calendar
Activity Start Date Calendar

Activity Client Folder

Activity Client City
Activity Client Country
Activity Client Parent
Activity Client Relationship
Activity Client State-Province
Activity Client Status
Activity Client Type
Activity Client User Defined Currency
Activity Client ZIP-Postcode

More Fields Folder

Activity Client Name
Activity Contact Name
Activity Employee Created By Name
Activity Employee Owner Name
Activity End Date

Activity Is All Day Event

Activity Is Completed

Activity Is From Planning

Activity Is Private

Activity Opportunity Name

Activity Priority

Activity Project Name

Activity Start Date

Activity Subject

Activity Type

Billing Status Group

Billing Status

Employees Group

Employee Hire Date Calendar
Employee Raise Date Calendar
Employee Termination Date Calendar
Employees by Geography
Employees by Org
Employees by Org1
Employees by Org2

Address Folder

Employee Home City
Employee Home Country
Employee Home State-Province
Employee Home ZIP-Postcode

More Fields Folder

Employee Hire Date
Employee Labor Category

Employee
Employee Name
Employee Number - Name
Employee Org1
Employee Org2
Employee Org3
Employee Org4
Employee Org5
Employee Raise Date
Employee Status
Employee Supervisor
Employee Termination Date
Employee Title
Employee Type

Expense Type Group

Expense Type

Fiscal Periods Group

Fiscal Year - Quarter - Period

More Fields Folder

Fiscal Month
Fiscal Period
Fiscal Quarter
Fiscal Year

Invoices Group

Invoice Number

Labor Categories Group

Labor Categories

Labor Codes Group

Labor Codes By Labor Code Level 1
Labor Codes By Labor Code Level 2

More Fields Folder

Labor Code
Labor Code Level 1

Labor Code Level 2
Labor Code Level 3
Labor Code Level 4
Labor Code Level 5

Opportunities Group

Opportunities by Geography
Opportunity by Organization
Opportunity by Org 1
Opportunity by Org 2
Opportunity by Primary Client - Contact
Opportunity Estimated Completion Date
Calendar
Opportunity Estimated Start Date
Calendar
Opportunity Opened Date Calendar
Opportunity Closed Date Calendar

Location Address Folder

Opportunity - Location City
Opportunity - Location Country
Opportunity - Location County
Opportunity - Location State-Province
Opportunity - Location ZIP-Postcode

Opportunity Client Folder

Opportunity Client Name
Opportunity Client Parent
Opportunity Client Primary City
Opportunity Client Primary Country
Opportunity Client Primary State-Province
Opportunity Client Primary ZIP-Postcode
Opportunity Client Relationship
Opportunity Client Status
Opportunity Client Type
Opportunity Client User Defined
Currency Code

More Fields Folder

Opportunity Client
 Opportunity Closed Date
 Opportunity Estimated Completion Date
 Opportunity Estimated Start Date
 Opportunity Name
 Opportunity Number-Name
 Opportunity Opened Date
 Opportunity Org
 Opportunity Org1
 Opportunity Org2
 Opportunity Org3
 Opportunity Org4
 Opportunity Org5
 Opportunity Primary Client
 Opportunity Primary Contact
 Opportunity Principal
 Opportunity Probability
 Opportunity Project Manager
 Opportunity Source
 Opportunity Stage
 Opportunity Status
 Opportunity Supervisor
 Opportunity Type
 Opportunity User Defined Currency

Plans Group

Plan End Date Calendar
 Plan Start Date Calendar
 Plan Task Tree
 Plans by Principal and Project Manager
 Plans by Project Manager

Plan Client Folder

Plan Client Name
 Plan Client Parent
 Plan Client Primary City

Plan Client Primary Country
 Plan Client Primary State-Province
 Plan Client Primary ZIP-Postcode
 Plan Client Relationship
 Plan Client Status
 Plan Client Type
 Plan Client User Defined Currency

More Fields Folder

Plan Client
 Plan End Date
 Plan Labor Multiplier Type
 Plan Name
 Plan Number
 Plan Opportunity
 Plan Organization
 Plan Org Level 1
 Plan Org Level 2
 Plan Org Level 3
 Plan Org Level 4
 Plan Org Level 5
 Plan Percent Complete Formula
 Plan Principal
 Plan Probability
 Plan Project Manager
 Plan Reimbursable Method
 Plan Start Date
 Plan Status
 Plan Supervisor
 Plan Utilization Include Flag

Presentation Currency Group

Currency

Project Contracts Group

Project Approved Date
 Project Contract Number

Project Contract Status
Project Contract Type
Project Include in Fees check box
Project Request Date

Projects Group

Phases by Organization
Project Actual Completion Date
Calendar
Project by Principal and Project
Manager
Project Estimated Completion Date
Calendar
Project Manager by Project Number
Project Manager from Organization
Project Organization by Project Principal
and Project Manager
Project Organization by Project Type
and Project Manager
Project Start Date Calendar
Project Tree by Number
Project Type by Project Organization
and Project Manager
Projects by Billing Client - Contact
Projects by Geography
Projects by Organization
Projects by Primary Client - Contact
Tasks by Organization

Location Address Folder

Project Location City
Project Location Country
Project Location County
Project Location State
Project Location Zip-Province Code

Multicurrency Folder

Billing Currency Code
Phase Functional Currency Code
Project Currency Code

Project Functional Currency Code
Task Functional Currency Code

Phase Folder

Phase Biller
Phase Number – Short Name
Phase Organization
Phase Org Level 1
Phase Org Level 2
Phase Org Level 3
Phase Org Level 4
Phase Org Level 5
Phase Principal
Phase Project Manager
Phase Responsibility
Phase Revenue Type
Phase Status
Phase Supervisor
Phase Type

Project Folder

Project Actual Completion Date
Project Bid Date
Project Biller
Project Billing Client
Project Billing Contact
Project Charge Type
Project Construction Completion Date
Project Contract Date
Project Estimated Completion Date
Project Federal Indicator
Project Is Referable
Project Number – Short Name
Project Opportunity
Project Organization
Project Org Level 1
Project Org Level 2

Project Org Level 3
Project Org Level 4
Project Org Level 5
Project Primary Client
Project Primary Contact
Project Principal
Project Professional Services
Completion Date
Project Project Manager
Project Promotional Project
Project Responsibility
Project Revenue Type
Project Start Date
Project Status
Project Supervisor
Project Type

Project Billing Client Folder

Project Billing Client Name
Project Billing Client Parent
Project Billing Client Primary City
Project Billing Client Primary Country
Project Billing Client Primary State-
Province
Project Billing Client Primary ZIP-
Postcode
Project Billing Client Relationship
Project Billing Client Status
Project Billing Client Type
Project Billing Client User Defined
Currency

Project Primary Client Folder

Project Primary Client Name
Project Primary Client Parent
Project Primary Client Primary City
Project Primary Client Primary Country
Project Primary Client Primary State-
Province

Project Primary Client Primary ZIP-
Postcode
Project Primary Client Relationship
Project Primary Client Status
Project Primary Client Type
Project Primary Client User Defined
Currency

Task Folder

Task Biller
Task Number
Task Number – Short Name
Task Organization
Task Org Level 1
Task Org Level 2
Task Org Level 3
Task Org Level 4
Task Org Level 5
Task Principal
Task Project Manager
Task Responsibility
Task Revenue Type
Task Status
Task Supervisor-In-Charge
Task Type

Transaction Dates Group

Calendar

More Fields Folder

Transaction Date
Transaction Month
Transaction Month of Year
Transaction Quarter
Transaction Quarter of Year
Transaction Year

Transaction Types Group

Transaction Types

Units Group

Unit Billing Currency Code
Unit Cost Currency Code
Unit Number-Name
Unit Table
Unit Table - Number - Name
Unit Type

Vendors Group

Vendors by Geography
Vendors by Org
Vendors by Org1
Vendors by Org2

Primary Address Folder

Vendor Primary City
Vendor Primary Country
Vendor Primary State-Province
Vendor Primary ZIP-Postcode

More Fields Folder

Vendor 1099 Required
Vendor is Alaska Native
Vendor is Disabled Veteran Owned Small Business
Vendor Is Disadvantaged Business
Vendor Is HBCU
Vendor Is Minority Business
Vendor Is Small Business
Vendor Is Veteran Owned Small Business
Vendor Is Woman Owned
Vendor
Vendor Name
Vendor Number - Name
Vendor Payment Terms
Vendor Prior Work
Vendor Recommend

Vendor Specialty
Vendor Status
Vendor Type
Vendor User Defined Currency
Vendors by Org3
Vendors by Org4
Vendors by Org5

Vendor Paid Group

Vendor Paid by Org1
Vendor Paid by Geography
Vendor Paid by Org2
Vendor Paid by Organization

Primary Address Folder

Vendor Paid Primary City
Vendor Paid Primary Country
Vendor Paid Primary State-Province
Vendor Paid Primary ZIP-Postcode

More Fields Folder

Vendor Enabled Company - <company code - company name>
Vendor Paid 1099 Required
Vendor Paid is Alaska Native
Vendor Paid is Disabled Veteran Owned Small Business
Vendor Paid Is Disadvantaged Business
Vendor Paid Is HBCU
Vendor Paid Is Minority Business
Vendor Paid Is Small Business
Vendor Paid Is Veteran Owned Small Business
Vendor Paid Is Woman Owned
Vendor Paid Name
Vendor Paid Number - Name
Vendor Paid Organization Level 3
Vendor Paid Organization Level 4
Vendor Paid Organization Level 5

Vendor Paid Payment Terms

Vendor Paid Prior Work

Vendor Paid Recommend

Vendor Paid Specialty

Vendor Paid Status

Vendor Paid Type

Vendor Paid User Defined Currency
Code

Project Data Cube Measures

Values Group

Earnings Folder

- Backlog
- Contract Backlog
- Effective Multiplier
- Gross Margin
- Gross Margin Percent
- Net Revenue
- Net Revenue @ Billing
- Profit
- Profit Excluding Overhead
- Profit Percent
- Profit Percent Excluding Overhead
- Realization Ratio
- Spent @ Billing
- Spent @ Cost
- Spent @ Cost Excluding Overhead
- Variance
- Variance Percent

Earnings – Multicurrency Folder

- Backlog in Billing Currency
- Backlog in Project Currency
- Contract Backlog in Billing Currency
- Contract Backlog in Project Currency
- Effective Multiplier in Billing Currency
- Effective Multiplier in Project Currency
- Gross Margin in Billing Currency
- Gross Margin in Project Currency
- Net Revenue in Billing Currency
- Net Revenue in Project Currency
- Profit Excluding Overhead in Billing Currency
- Profit Excluding Overhead in Project Currency

- Profit in Billing Currency
- Profit in Project Currency
- Profit Percent Excluding Overhead in Billing Currency
- Profit Percent Excluding Overhead in Project Currency
- Spent @ Cost in Billing Currency
- Spent @ Cost in Project Currency
- Spent @ Cost Excluding Overhead in Billing Currency
- Spent @ Cost Excluding Overhead in Project Currency

Unbilled Folder

- DWO 360 (DWO = Days Work-In-Progress Outstanding)
- DWO 90
- Unbilled
- Unbilled - Consultant <Revenue Category 2>
- Unbilled - Labor <Revenue Category 1>
- Unbilled - Reimb <Revenue Category 2>
- Unbilled - <Revenue Category 4>
- Unbilled - <Revenue Category 5>
- Unbilled - Other

Unbilled – Multicurrency Folder

- DWO 360 in Billing Currency (DWO = Days Work-In-Progress Outstanding)
- DWO 360 in Project Currency
- DWO 90 in Billing Currency
- DWO 90 in Project Currency
- Unbilled - Consultant <Revenue Category 2> in Billing Currency
- Unbilled - Consultant <Revenue Category 2> in Project Currency
- Unbilled - Labor <Revenue Category 1> in Billing Currency

Unbilled - Labor <Revenue Category 1>
in Project Currency

Unbilled - Reimbursable <Revenue
Category 3> in Billing Currency

Unbilled - Reimbursable <Revenue
Category 3> in Project Currency

Unbilled - <Revenue Category 4> in
Billing Currency

Unbilled - <Revenue Category 4> in
Project Currency

Unbilled - <Revenue Category 5> in
Billing Currency

Unbilled - <Revenue Category 5> in
Project Currency

Unbilled In Billing Currency

Unbilled In Project Currency

Unbilled - Other in Billing Currency

Unbilled - Other in Project Currency

Account Measures Group

Accounts Count

Accounts Receivables Group

Accounts Receivable Balance

Credit Memo Amount

DSO 90 (DSO = Days Sales
Outstanding)

DSO 360

Multicurrency Folder

Accounts Receivable Balance in Billing
Currency

Accounts Receivable Balance in Project
Currency

Credit Memo Amount in Billing Currency

Credit Memo Amount in Project
Currency

DSO 360 in Billing Currency (DSO =
Days Sales Outstanding)

DSO 90 in Billing Currency

DSO 360 in Project Currency

DSO 90 in Project Currency

Activities Measures Group

Activities Count

Activity Client Measures Group

Activity Clients Count

AR Balance Group

AR Balance 0-30

AR Balance 31-45

AR Balance 46-60

AR Balance 61-90

AR Balance 91-120

AR Balance over 120

Total Outstanding AR

Multicurrency Folder

AR Balance 0-30 in Project Currency

AR Balance 31-45 in Project Currency

AR Balance 46-60 in Project Currency

AR Balance 61-90 in Project Currency

AR Balance 91-120 in Project Currency

AR Balance over 120 in Project
Currency

AR Balance 0-30 in Billing Currency

AR Balance 31-45 in Billing Currency

AR Balance 46-60 in Billing Currency

AR Balance 61-90 in Billing Currency

AR Balance 91-120 in Billing Currency

AR Balance over 120 in Billing Currency

AR Trending Group

AR Over 30

AR Over 45

AR Over 60

AR Over 90

AR Over 120

Total Outstanding AR

Multicurrency Folder

AR Over 30 in Billing Currency
AR Over 30 in Project Currency
AR Over 60 in Billing Currency
AR Over 60 in Project Currency
AR Over 90 in Billing Currency
AR Over 90 in Project Currency
AR Over 120 in Billing Currency
AR Over 120 in Project Currency

Billed Group

Billed
Billed Add Ons
Billed Consultants
Billed Fees
Billed Interest
Billed Labor
Billed Other
Billed Reimbursables
Billed Taxes
Billed Units

Billed by Category Folder

Billed - Consultant
Billed - Labor
Billed - Other Category
Billed - Reimb
Billed - <Revenue Category 4>
Billed - <Revenue Category 5>

Billed by Category – Multicurrency Folder

Billed - Consultant
Billed - Consultant (*Revenue Category 2*) In Project Currency
Billed - Labor (*Revenue Category 1*) In Billing Currency
Billed - Labor (*Revenue Category 1*) In Project Currency

Billed - Other Category In Billing Currency
Billed - Other Category In Project Currency
Billed - Reimb (*Revenue Category 3*) In Billing Currency
Billed - Reimb (*Revenue Category 3*) In Project Currency
Billed - <Revenue Category 4> In Billing Currency
Billed - <Revenue Category 4> In Project Currency
Billed - <Revenue Category 5> In Billing Currency
Billed - <Revenue Category 5> In Project Currency

Multicurrency Folder

Billed Add Ons in Billing Currency
Billed Add Ons in Project Currency
Billed Consultants in Billing Currency
Billed Consultants in Project Currency
Billed Fees in Billing Currency
Billed Fees in Project Currency
Billed in Billing Currency
Billed in Project Currency
Billed Interest in Billing Currency
Billed Interest in Project Currency
Billed Labor in Billing Currency
Billed Labor in Project Currency
Billed Other in Billing Currency
Billed Other in Project Currency
Billed Reimbursables in Billing Currency
Billed Reimbursables in Project Currency
Billed Taxes in Billing Currency
Billed Taxes in Project Currency
Billed Units in Billing Currency
Billed Units in Project Currency

Compensation – Contract Group

Contract Compensation
Contract Consultant Fee
Contract Reimbursable Allowance
Contract Total Compensation

Multicurrency Folder

Contract Compensation in Billing Currency
Contract Compensation in Functional Currency
Contract Consultant Fee in Billing Currency
Contract Consultant Fee in Functional Currency
Contract Reimbursable Allowance in Billing Currency
Contract Reimbursable Allowance in Functional Currency
Contract Total Compensation in Billing Currency
Contract Total Compensation in Functional Currency
Project Contract Compensation in Billing Currency
Project Contract Compensation in Functional Currency
Project Contract Consultant Fee in Billing Currency
Project Contract Consultant Fee in Functional Currency
Project Contract Reimbursable Allowance in Billing Currency
Project Contract Reimbursable Allowance in Functional Currency
Project Contract Total Compensation in Billing Currency
Project Contract Total Compensation in Functional Currency
Phase Contract Compensation in Billing Currency

Phase Contract Compensation in Functional Currency
Phase Contract Consultant Fee in Billing Currency
Phase Contract Consultant Fee in Functional Currency
Phase Contract Reimbursable Allowance in Billing Currency
Phase Contract Reimbursable Allowance in Functional Currency
Phase Contract Total Compensation in Billing Currency
Phase Contract Total Compensation in Functional Currency
Task Contract Compensation in Billing Currency
Task Contract Compensation in Functional Currency
Task Contract Consultant Fee in Billing Currency
Task Contract Consultant Fee in Functional Currency
Task Contract Reimbursable Allowance in Billing Currency
Task Contract Reimbursable Allowance in Functional Currency
Task Contract Total Compensation in Billing Currency
Task Contract Total Compensation in Functional Currency

Phase Folder

Phase Contract Compensation
Phase Contract Consultant Fee
Phase Contract Reimbursable Allowance
Phase Contract Total Compensation

Project Folder

Project Contract Compensation
Project Contract Consultant Fee
Project Contract Reimbursable Allowance

Project Contract Total Compensation

Task Folder

Task Contract Compensation

Task Contract Consultant Fee

Task Contract Reimbursable Allowance

Task Contract Total Compensation

Compensation – Plan Group

Plan Compensation Billing

Plan Compensation Cost

Plan Consultant Fee Billing

Plan Consultant Fee Cost

Plan Reimbursable Allowance Billing

Plan Reimbursable Allowance Cost

Plan Total Compensation Billing

Plan Total Compensation Cost

Compensation – Project Group

Consultant Fee

Reimbursable Allowance

Total Compensation

Multicurrency Folder

Compensation in Functional Currency

Consultant Fee in Functional Currency

Phase Compensation in Functional Currency

Phase Consultant Fee in Functional Currency

Phase Reimbursable Allowance in Functional Currency

Phase Total Compensation in Functional Currency

Project Compensation in Functional Currency

Project Consultant Fee in Functional Currency

Project Reimbursable Allowance in Functional Currency

Project Total Compensation in Functional Currency

Reimbursable Allowance in Functional Currency

Task Compensation in Functional Currency

Task Consultant Fee in Functional Currency

Task Reimbursable Allowance in Functional Currency

Task Total Compensation in Functional Currency

Total Compensation in Functional Currency

Phase Folder

Phase Compensation

Phase Consultant Fee

Phase Reimbursable Allowance

Phase Total Compensation

Project Folder

Project Compensation

Project Consultant Fee

Project Reimbursable Allowance

Project Total Compensation

Task Folder

Task Compensation

Task Consultant Fee

Task Reimbursable Allowance

Task Total Compensation

Employee Measures Group

Employee Hours Per Day

Employee Prior Years With This Firm

Employee Provisional Rate Billing

Employee Provisional Rate Cost

Employee Target Ratio

Employee Utilization Ratio

Employee Years With Other Firms

Employees Count
Total Employee Hours Per Day

Employees Contract Credits Group

Employee Contract Credit Amount
Employee Contract Credit Percent

Multicurrency Folder

Employee Contract Credit Amount in Billing Currency
Employee Contract Credit Percent in Functional Currency

Expense – Billing Group

Consultant Direct Billing
Consultant Reimbursable Billing
Consultant Total Billing
Expense Billing
Other Expense Direct Billing
Other Expense Reimbursable Billing
Other Expense Total Billing
Unit Direct Billing
Unit Reimbursable Billing
Unit Total Billing

Cumulative Folder

Consultant Cumulative Billing
Consultant Direct Cumulative Billing
Consultant Reimbursable Cumulative Billing
Expense Cumulative Billing
Other Expense Cumulative Billing
Other Expense Direct Cumulative Billing
Other Expense Reimbursable Cumulative Billing
Unit Cumulative Billing
Unit Direct Cumulative Billing
Unit Reimbursable Cumulative Billing

Expense – Cost Group

Consultant Direct Cost
Consultant Reimbursable Cost
Consultant Total Cost
Expense Cost
Other Expense Direct Cost
Other Expense Reimbursable Cost
Other Expense Total Cost
Unit Direct Cost
Unit Quantity
Unit Reimbursable Cost
Unit Total Cost

Cumulative Folder

Consultant Cumulative Cost
Consultant Direct Cumulative Cost
Consultant Reimbursable Cumulative Cost
Expense Cumulative Cost
Other Expense Cumulative Cost
Other Expense Direct Cumulative Cost
Other Expense Reimbursable Cumulative Cost
Unit Cumulative Cost
Unit Cumulative Quantity
Unit Direct Cumulative Cost
Unit Reimbursable Cumulative Cost

Cumulative – Multicurrency Folder

Consultant Direct Cumulative Cost in Billing Currency
Consultant Direct Cumulative Cost in Project Currency
Consultant Reimbursable Cumulative Cost in Billing Currency
Consultant Reimbursable Cumulative Cost in Project Currency
Consultant Total Cumulative Cost in Billing Currency

Consultant Total Cumulative Cost in Project Currency

Expense Cumulative Cost in Billing Currency

Expense Cumulative Cost in Project Currency

Other Expense Direct Cumulative Cost in Billing Currency

Other Expense Direct Cumulative Cost in Project Currency

Other Expense Reimbursable Cumulative Cost in Billing Currency

Other Expense Reimbursable Cumulative Cost in Project Currency

Other Expense Total Cumulative Cost in Billing Currency

Other Expense Total Cumulative Cost in Project Currency

Unit Direct Cumulative Cost in Billing Currency

Unit Direct Cumulative Cost in Project Currency

Unit Reimbursable Cumulative Cost in Billing Currency

Unit Reimbursable Cumulative Cost in Project Currency

Unit Total Cumulative in Billing Currency

Unit Total Cumulative in Project Currency

Multicurrency Folder

Consultant Direct Cost in Billing Currency

Consultant Direct Cost in Project Currency

Consultant Reimbursable Cost in Billing Currency

Consultant Reimbursable Cost in Project Currency

Consultant Total Cost in Billing Currency

Consultant Total Cost in Project Currency

Expense Cost in Billing Currency

Expense Cost in Project Currency

Other Expense Direct Cost in Billing Currency

Other Expense Direct Cost in Project Currency

Other Expense Reimbursable Cost in Billing Currency

Other Expense Reimbursable Cost in Project Currency

Other Expense Total Cost in Billing Currency

Other Expense Total Cost in Project Currency

Unit Direct Cost in Billing Currency

Unit Direct Cost in Project Currency

Unit Reimbursable Cost in Billing Currency

Unit Reimbursable Cost in Project Currency

Unit Total Cost in Billing Currency

Unit Total Cost in Project Currency

Labor – Billing Group

Labor Total Billing

Cumulative Folder

Labor Cumulative Billing

Labor – Cost Group

Labor Overtime Cost

Labor Overtime Hours

Labor Regular Cost

Labor Regular Hours

Labor Special Overtime Cost

Labor Special Overtime Hours

Labor Total Cost

Labor Total Hours

Cumulative Folder

Labor Cumulative Cost

Labor Cumulative Hours

Cumulative – Multicurrency Folder

Labor Cumulative Cost in Billing Currency

Labor Cumulative Cost in Employee Currency

Labor Cumulative Cost in Project Currency

Multicurrency Folder

Labor Overtime Cost in Billing Currency

Labor Overtime Cost in Project Currency

Labor Regular Cost in Billing Currency

Labor Regular Cost in Project Currency

Labor Special Overtime Cost in Billing Currency

Labor Special Overtime Cost in Project Currency

Labor Total Cost in Billing Currency

Labor Total Cost in Project Currency

Labor – Employee Group

Benefit Cost

Benefit Hours

Direct Cost

Direct Cost Overtime

Direct Cost Special Overtime

Direct Hours

Direct Hours Overtime

Direct Hours Special Overtime

Indirect Cost

Indirect Cost Overtime

Indirect Cost Special Overtime

Indirect Hours

Indirect Hours Overtime

Indirect Hours Special Overtime

Labor Overtime Cost in Employee Functional Currency

Labor Realization Amount

Labor Realization Hours

Labor Regular Cost in Employee Functional Currency

Labor Special Overtime Cost in Employee Functional Currency

Labor Total Cost in Employee Functional Currency

Non-Billable Cost

Non-Billable Cost Overtime

Non-Billable Cost Special Overtime

Non-Billable Hours

Non-Billable Hours Overtime

Non-Billable Hours Special Overtime

Multicurrency Folder

Benefit Cost in Billing Currency

Benefit Cost in Project Currency

Direct Cost in Billing Currency

Direct Cost in Project Currency

Direct Cost Overtime in Billing Currency

Direct Cost Overtime in Project Currency

Direct Cost Special Overtime in Billing Currency

Direct Cost Special Overtime in Project Currency

Indirect Cost in Billing Currency

Indirect Cost in Project Currency

Indirect Cost Overtime in Billing Currency

Indirect Cost Overtime in Project Currency

Indirect Cost Special Overtime in Billing Currency

Indirect Cost Special Overtime in Project Currency

Labor Realization Amount in Billing Currency

Labor Realization Amount in Project Currency

Non-Billable Cost in Billing Currency
 Non-Billable Cost in Project Currency
 Non-Billable Cost Overtime in Billing Currency
 Non-Billable Cost Overtime in Project Currency
 Non-Billable Cost Special Overtime in Billing Currency
 Non-Billable Cost Special Overtime in Project Currency

Opportunity Client Measure Group

Opportunity Clients Count

Opportunity Measures Group

Opportunities Days Opened
 Opportunities Count

Overhead Group

Overhead

Multicurrency Folder

Overhead in Billing Currency
 Overhead in Project Currency

Plan Client Measures Group

Plan Clients Count

Plan Expenses – Billing Group

Baseline Folder

Baseline Consultant Direct Billing
 Baseline Consultant Reimbursable Billing
 Baseline Consultant Total Billing
 Baseline Other Expense Direct Billing
 Baseline Other Expense Reimbursable Billing
 Baseline Other Expense Total Billing
 Baseline Total Expense Billing
 Baseline Unit Direct Billing
 Baseline Unit Reimbursable Billing

Baseline Unit Total Billing

Baseline – EAC Folder

Total Baseline - EAC Consultant Direct Billing
 Total Baseline - EAC Consultant Reimbursable Billing
 Total Baseline - EAC Consultant Total Billing
 Total Baseline - EAC Other Expense Direct Billing
 Total Baseline - EAC Other Expense Reimbursable Billing
 Total Baseline - EAC Other Expense Total Billing
 Total Baseline - EAC Unit Direct Billing
 Total Baseline - EAC Unit Reimbursable Billing
 Total Baseline - EAC Unit Total Billing

EAC Folder

EAC Consultant Direct Billing
 EAC Consultant Reimbursable Billing
 EAC Consultant Total Billing
 EAC Other Expense Direct Billing
 EAC Other Expense Reimbursable Billing
 EAC Other Expense Total Billing
 EAC Unit Direct Billing
 EAC Unit Reimbursable Billing
 EAC Unit Total Billing

ETC Folder

ETC Consultant Direct Billing
 ETC Consultant Reimbursable Billing
 ETC Consultant Total Billing
 ETC Other Expense Direct Billing
 ETC Other Expense Reimbursable Billing
 ETC Other Expense Total Billing
 ETC Unit Direct Billing

ETC Unit Reimbursable Billing

ETC Unit Total Billing

Percent Complete Folder

Percent Complete Baseline Consultant Billing

Percent Complete Baseline Other Expense Billing

Percent Complete Baseline Unit Billing

Percent Complete JTD Consultant Billing

Percent Complete JTD Other Expense Billing

Percent Complete JTD Unit Billing

Percent Complete Planned Consultant Billing

Percent Complete Planned Other Expense Billing

Percent Complete Planned Unit Billing

Percent Complete User-Entered Consultant Billing

Percent Complete User-Entered Other Expense Billing

Percent Complete User-Entered Unit Billing

Planned Folder

Planned Consultant Direct Billing

Planned Consultant Reimbursable Billing

Planned Consultant Total Billing

Planned Other Expense Direct Billing

Planned Other Expense Reimbursable Billing

Planned Other Expense Total Billing

Planned Total Expense Billing

Planned Unit Direct Billing

Planned Unit Reimbursable Billing

Planned Unit Total Billing

Planned – EAC Folder

Total Planned - EAC Consultant Direct Billing

Total Planned - EAC Consultant Reimbursable Billing

Total Planned - EAC Consultant Total Billing

Total Planned - EAC Other Expense Direct Billing

Total Planned - EAC Other Expense Reimbursable Billing

Total Planned - EAC Other Expense Total Billing

Total Planned - EAC Unit Direct Billing

Total Planned - EAC Unit Reimbursable Billing

Total Planned - EAC Unit Total Billing

Plan Expenses – Cost Group

Baseline Folder

Baseline Consultant Direct Cost

Baseline Consultant Reimbursable Cost

Baseline Consultant Total Cost

Baseline Other Expense Direct Cost

Baseline Other Expense Reimbursable Cost

Baseline Other Expense Total Cost

Baseline Total Expense Cost

Baseline Unit Direct Cost

Baseline Unit Quantity

Baseline Unit Reimbursable Cost

Baseline Unit Total Cost

Baseline – EAC Folder

Total Baseline - EAC Consultant Direct Cost

Total Baseline - EAC Consultant Reimbursable Cost

Total Baseline - EAC Consultant Total Cost

Total Baseline - EAC Other Expense
Direct Cost

Total Baseline - EAC Other Expense
Reimbursable Cost

Total Baseline - EAC Other Expense
Total Cost

Total Baseline - EAC Unit Direct Cost

Total Baseline - EAC Unit Quantity

Total Baseline - EAC Unit Reimbursable
Cost

Total Baseline - EAC Unit Total Cost

EAC Folder

EAC Consultant Direct Cost

EAC Consultant Reimbursable Cost

EAC Consultant Total Cost

EAC Other Expense Direct Cost

EAC Other Expense Reimbursable Cost

EAC Other Expense Total Cost

EAC Unit Direct Cost

EAC Unit Quantity

AC Unit Reimbursable Cost

EAC Unit Total Cost

ETC Folder

ETC Consultant Direct Cost

ETC Consultant Reimbursable Cost

ETC Consultant Total Cost

ETC Other Expense Direct Cost

ETC Other Expense Reimbursable Cost

ETC Other Expense Total Cost

ETC Unit Direct Cost

ETC Unit Quantity

ETC Unit Reimbursable Cost

ETC Unit Total Cost

Percent Complete Folder

Percent Complete Baseline Consultant
Cost

Percent Complete Baseline Other
Expense Cost

Percent Complete Baseline Unit Cost

Percent Complete JTD Consultant Cost

Percent Complete JTD Other Expense
Cost

Percent Complete JTD Unit Cost

Percent Complete Planned Consultant
Cost

Percent Complete Planned Other
Expense Cost

Percent Complete Planned Unit Cost

Percent Complete User-Entered
Consultant Cost

Percent Complete User-Entered Other
Expense Cost

Percent Complete User-Entered Unit
Cost

Planned Folder

Planned Consultant Direct Cost

Planned Consultant Reimbursable Cost

Planned Consultant Total Cost

Planned Other Expense Direct Cost

Planned Other Expense Reimbursable
Cost

Planned Other Expense Total Cost

Planned Total Expense Cost

Planned Unit Direct Cost

Planned Unit Quantity

Planned Unit Reimbursable Cost

Planned Unit Total Cost

Planned – EAC Folder

Total Planned - EAC Consultant Direct
Cost

Total Planned - EAC Consultant
Reimbursable Cost

Total Planned - EAC Consultant Total
Cost

Total Planned - EAC Other Expense
Direct Cost

Total Planned - EAC Other Expense
Reimbursable Cost

Total Planned - EAC Other Expense
Total Cost

Total Planned - EAC Unit Direct Cost

Total Planned - EAC Unit Quantity

Total Planned - EAC Unit Reimbursable
Cost

Total Planned - EAC Unit Total Cost

Plan Labor – Billing Group

Baseline Folder

Baseline Labor Billing

Baseline – EAC Folder

Total Baseline - EAC Labor Billing

EAC Folder

EAC Labor Billing

Earned Value Folder

ACWP Planned Billing

BCWP Baseline Billing

BCWP Fees Billing

BCWP Planned Billing

BCWS Baseline Billing

BCWS Planned Billing

ETC Folder

ETC Labor Billing

Percent Complete Folder

Percent Complete Baseline Labor Billing

Percent Complete JTD Labor Billing

Percent Complete Planned Labor Billing

Percent Complete User-Entered Labor
Billing

Planned Folder

Planned Labor Billing

Planned – EAC Folder

Total Planned - EAC Labor Billing

Plan Labor – Cost Group

Baseline Folder

Baseline Hours

Baseline Labor Cost

Baseline – EAC Folder

Total Baseline - EAC Hours

Total Baseline - EAC Labor Cost

EAC Folder

EAC Hours

EAC Labor Cost

Earned Value Folder

ACWP Planned Cost

BCWP Baseline Cost

BCWP Fees Cost

BCWP Planned Cost

BCWS Baseline Cost

BCWS Planned Cost

ETC Folder

ETC Hours

ETC Labor Cost

Percent Complete Folder

Percent Complete Baseline Labor Cost

Percent Complete JTD Labor Cost

Percent Complete Planned Labor Cost

Percent Complete User-Entered Labor
Cost

Planned Folder

Planned Hours

Planned Labor Cost

Planned – EAC Folder

Total Planned - EAC Hours

Total Planned - EAC Labor Cost

Plan Totals – Billing Group

Baseline Folder

Baseline Total Billing
Total Baseline Consultant Billing
Total Baseline Consultant Direct Billing
Total Baseline Consultant Reimbursable Billing
Total Baseline Labor Billing
Total Baseline Other Expense Billing
Total Baseline Other Expense Direct Billing
Total Baseline Other Expense Reimbursable Billing
Total Baseline Unit Billing
Total Baseline Unit Direct Billing
Total Baseline Unit Reimbursable Billing

Baseline – EAC Folder

Plan Analysis Compensation Billing
Plan Analysis Consultant Fee Billing
Plan Analysis Reimbursable Allowance Billing
Plan Analysis Total Compensation Billing

EAC Folder

EAC Total Billing

ETC Folder

ETC Total Billing

Multipliers Folder

Budget Multiplier Billing
EAC Multiplier Billing
Plan Multiplier Billing
Target Multiplier Billing

Planned Folder

Planned Total Billing

Total Planned Consultant Billing

Total Planned Consultant Direct Billing
Total Planned Consultant Reimbursable Billing
Total Planned Labor Billing
Total Planned Other Expense Billing
Total Planned Other Expense Direct Billing
Total Planned Other Expense Reimbursable Billing
Total Planned Unit Billing
Total Planned Unit Direct Billing
Total Planned Unit Reimbursable Billing

Planned – EAC Folder

Total Planned - EAC Total Billing

Plan Totals - Cost Group

Baseline Folder

Baseline Total Cost
Total Baseline Consultant Cost
Total Baseline Consultant Direct Cost
Total Baseline Consultant Reimbursable Cost
Total Baseline Labor Cost
Total Baseline Labor Hours
Total Baseline Other Expense Cost
Total Baseline Other Expense Direct Cost
Total Baseline Other Expense Reimbursable Cost
Total Baseline Unit Cost
Total Baseline Unit Direct Cost
Total Baseline Unit Quantity
Total Baseline Unit Reimbursable Cost

Baseline – EAC Folder

Total Baseline - EAC Total Cost

Compensation – Plan Analysis Folder

Plan Analysis Compensation Cost
Plan Analysis Consultant Fee Cost
Plan Analysis Reimbursable Allowance Cost
Plan Analysis Total Compensation Cost

EAC Folder

EAC Total Cost

ETC Folder

ETC Total Cost

Multipliers Folder

Budget Multiplier Cost
EAC Multiplier Cost
Plan Multiplier Cost
Target Multiplier Cost

Planned Folder

Planned Total Cost
Total Planned Consultant Cost
Total Planned Consultant Direct Cost
Total Planned Consultant Reimbursable Cost
Total Planned Labor Cost
Total Planned Labor Hours
Total Planned Other Expense Cost
Total Planned Other Expense Direct Cost
Total Planned Other Expense Reimbursable Cost
Total Planned Unit Cost
Total Planned Unit Direct Cost
Total Planned Unit Quantity
Total Planned Unit Reimbursable Cost

Planned – EAC Folder

Total Planned - EAC Total Cost

Planned Billable Utilize Hours Group

Planned Billable Utilization Hours

Planned Utilize Hours Group

Planned Utilization Hours

Project Billing Client Measures

Project Billing Clients Count

Project Budgeting Group

Phase Folder

Phase Budget Expense Billing
Phase Budget Expense Cost
Phase Budget Expense EAC Billing
Phase Budget Expense EAC Cost
Phase Budget Expense ETC Billing
Phase Budget Expense ETC Cost
Phase Budget Hours
Phase Budget Labor Billing
Phase Budget Labor Cost
Phase Budget Labor EAC Billing
Phase Budget Labor EAC Cost
Phase Budget Labor EAC Hours
Phase Budget Labor ETC Billing
Phase Budget Labor ETC Cost
Phase Budget Labor ETC Hours

Project Folder

Project Budget Expense Billing
Project Budget Expense Cost
Project Budget Expense EAC Billing
Project Budget Expense EAC Cost
Project Budget Expense ETC Billing
Project Budget Expense ETC Cost
Project Budget Hours
Project Budget Labor Billing
Project Budget Labor Cost

Project Budget Labor EAC Billing
Project Budget Labor EAC Cost
Project Budget Labor EAC Hours
Project Budget Labor ETC Billing
Project Budget Labor ETC Cost
Project Budget Labor ETC Hours

Task Folder

Task Budget Expense Billing
Task Budget Expense Cost
Task Budget Expense EAC Billing
Task Budget Expense EAC Cost
Task Budget Expense ETC Billing
Task Budget Expense ETC Cost
Task Budget Hours
Task Budget Labor Billing
Task Budget Labor Cost
Task Budget Labor EAC Billing
Task Budget Labor EAC Cost
Task Budget Labor EAC Hours
Task Budget Labor ETC Billing
Task Budget Labor ETC Cost
Task Budget Labor ETC Hours

Project Measures Group

Phase Folder

Phase Count

Phase Percent Completes Folder

Phase Percent Complete - Expenses
Phase Percent Complete - Labor
Phase Percent Complete - Overall

Project Folder

Projects Count

Project Percent Completes Folder

Project Percent Complete - Expenses
Project Percent Complete - Labor

Project Percent Complete - Overall

Task Folder

Task Count

Task Percent Completes Folder

Task Percent Complete - Expenses
Task Percent Complete - Labor
Task Percent Complete - Overall

Project Primary Client Measures Group

Project Primary Clients Count

Promotional Spent – Billing Group

Promotional Spent At Billing

Promotional Spend – Cost Group

Promotional Spent At Cost

Multicurrency Folder

Promotional Spent At Cost in Billing
Currency
Promotional Spent At Cost in Project
Currency

Received Group

Received

Multicurrency Folder

Received in Billing Currency
Received in Project Currency

Revenue – Opportunity Group

Opportunity Revenue
Opportunity Weighted Revenue

Revenue – Plan Group

Plan Consultant Revenue
Plan Expense Revenue
Plan Labor Revenue
Plan Revenue

Plan Unit Revenue

Revenue – Project Group

Revenue

Revenue - Consultant <Revenue Category 2>

Revenue - Labor <Revenue Category 1>

Revenue - Other Category

Revenue - Reimb <Revenue Category 3>

Revenue - <Revenue Category 4>

Revenue - <Revenue Category 5>

Revenue 360

Revenue 90

Multicurrency Folder

Revenue 360 in Project Currency

Revenue 360 in Billing Currency

Revenue 90 in Project Currency

Revenue 90 in Billing Currency

Revenue - Consultant <Revenue Category 2> in Billing Currency

Revenue - Consultant <Revenue Category 2> in Project Currency

Revenue - Labor <Revenue Category 1> in Billing Currency

Revenue - Labor <Revenue Category 1> in Project Currency

Revenue - Other Category in Billing Currency

Revenue - Other Category in Project Currency

Revenue - Reimb <Revenue Category 3> in Billing Currency

Revenue - Reimb <Revenue Category 3> in Project Currency

Revenue - <Revenue Category 4> in Billing Currency

Revenue - <Revenue Category 4> in Project Currency

Revenue - <Revenue Category 5> in Billing Currency

Revenue - <Revenue Category 5> in Project Currency

Revenue in Billing Currency

Revenue in Project Currency

Time Analysis Group

Direct over Total Cost

Direct over Total Cost less Benefit

Direct over Total Hours

Direct over Total Hours less Benefit

Available Folder

Available Billable Goal

Available Cost

Available Full Time Equivalent

Available Hours

Available Number of Working Days

Available Planned Billable Utilization

Available Planned Scheduled Ratio

Available Planned Utilization

Direct over Available Cost

Direct over Available Cost less Benefit

Direct over Available Hours

Direct over Available Hours less Benefit

Labor Realization over Available Hours

Standard Folder

Direct over Standard Cost

Direct over Standard Cost less Benefit

Direct over Standard Hours

Direct over Standard Hours less Benefit

Labor Realization over Standard Hours

Standard Billable Goal

Standard Cost

Standard Full Time Equivalent

Standard Hours

Standard Number of Working Days
Standard Planned Billable Utilization
Standard Planned Scheduled Ratio
Standard Planned Utilization

Vendor Measures Group

Vendors Count

Vendor Paid Group

Vendor Paid Last Year

Vendor Paid This Year

Reference: General Ledger Data Cube

The Vision online help contains descriptions of all dimensions and measures for the General Ledger Data Cube. In the Contents pane of the help window, navigate to **Reporting » Analysis Cubes » Vision Data Cubes**.

General Ledger Data Cube Dimensions

Account Groups Group

Report Type - Group Type - Summary - Detail

More Fields Folder

Account Group Table
Account Group Type
Detail Account Group
Report Type
Summary Account Group

Accounts Group

Report Type - Account Type - Account Number

More Fields Folder

Account Currency Code
Account Number – Name
Account Status
Account Type
Report Type

Consolidated GL Budgeting Group

Consolidated GL Budget Currency
Consolidated GL Budget Group
Consolidated GL Budget Name
Consolidated GL Budget Year
Consolidated GL Budget Org 1

Consolidated GL Reporting Group

Consolidated GL Reporting Currency
Consolidated GL Reporting Group

Employees Group

Employees by Geography
Employees Organization
Employees Org1
Employees by Org2
Employee Hire Date Calendar
Employee Raise Date Calendar
Employee Termination Date Calendar

Address Folder

Employee Home City
Employee Home Country
Employee Home State-Province
Employee Home ZIP-PostCode

More Fields Folder

Employee Hire Date
Employee Labor Category
Employee
Employee Name
Employee Number - Name
Employee Org1
Employee Org2
Employee Org3
Employee Org4
Employee Org5
Employee Raise Date
Employee Status
Employee Supervisor
Employee Termination Date

Employee Title

Employee Type

Fiscal Periods Group

Fiscal Year - Quarter - Period

More Fields Folder

Fiscal Month

Fiscal Period

Fiscal Quarter

Fiscal Year

General Ledger Budgeting Group

GL Budget Name

GL Budget Organization

GL Budget Year

Organizations Group

Organization

Organization Level 1

Organization Level 2

Organization Level 3

Organization Level 4

Organization Level 5

Presentation Currency Group

Currency

Projects Group

Phases by Organization

Project Actual Completion Date
Calendar

Project by Principal and Project
Manager

Project by Project Manager

Project Estimated Completion Date
Calendar

Project Manager by Project Number

Project Manager from Organization

Project Organization by Project Principal
and Project Manager

Project Organization by Project Type
and Project Manager

Project Start Date Calendar

Project Type by Project Organization
and Project Manager

Project Tree by Number

Projects by Geography

Projects by Organization

Projects by Primary Client - Contact

Tasks by Organization

Location Address Folder

Project Location City

Project Location Country

Project Location County

Project Location State-Province

Project Location ZIP-Postalcode

Multicurrency Folder

Billing Currency Code

Phase Functional Currency Code

Project Currency Code

Project Functional Currency Code

Task Functional Currency Code

Phase Folder

Phase Number – Short Name

Phase Organization

Phase Org Level 1

Phase Org Level 2

Phase Org Level 3

Phase Org Level 4

Phase Org Level 5

Phase Principal

Phase Project Manager

Phase Responsibility

Phase Revenue Type

Phase Status

Phase Supervisor

Phase Type

Project Folder

Project Actual Completion Date

Project Bid Date

Project Billing Client

Project Billing Contact

Project Charge Type

Project Construction Completion Date

Project Contract Date

Project Estimated Completion Date

Project Federal Indicator

Project Is Referable

Project Number – Short Name

Project Opportunity

Project Organization

Project Org 1

Project Org 2

Project Org 3

Project Org 4

Project Org 5

Project Primary Client

Project Primary Contact

Project Professional Services
Completion Date

Project Principal

Project Project Manager

Project Promotional Project

Project Responsibility

Project Revenue Type

Project Start Date

Project Status

Project Supervisor

Project Type

Project Billing Client Folder

Project Billing Client Name

Project Billing Client Parent

Project Billing Client Primary City

Project Billing Client Primary Country

Project Billing Client Primary State-
Province

Project Billing Client Primary ZIP-
Postcode

Project Billing Client Relationship

Project Billing Client Status

Project Billing Client Type

Project Billing Client User Defined
Currency

Project Primary Client Folder

Project Primary Client Name

Project Primary Client Parent

Project Primary Client Primary City

Project Primary Client Primary Country

Project Primary Client Primary State-
Province

Project Primary Client Primary ZIP-
Postcode

Project Primary Client Relationship

Project Primary Client Status

Project Primary Client Type

Project Primary Client User Defined
Currency

Task Folder

Task Number – Short Name

Task Organization

Task Org Level 1

Task Org Level 2

Task Org Level 3

Task Org Level 4

Task Org Level 5

Task Principal

Task Project Manager
Task Responsibility
Task Revenue Type
Task Status
Task Supervisor
Task Type

Transaction Dates Group

Calendar

More Fields Folder

Transaction Date
Transaction Month
Transaction Month of Year
Transaction Quarter
Transaction Quarter of Year
Transaction Year

Transaction Types Group

Transaction Types

Vendors Group

Vendors by Geography
Vendors by Org
Vendors by Org1
Vendors by Org2

Primary Address Folder

Vendor Primary City

Vendor Primary Country
Vendor Primary State-Province
Vendor Primary ZIP-Postcode

More Fields Folder

Vendor 1099 Required
Vendor is Alaska Native
Vendor is Disabled Veteran Owned Small Business
Vendor Is Disadvantaged Business
Vendor Is HBCU
Vendor Is Minority Business
Vendor Is Small Business
Vendor Is Veteran Owned Small Business
Vendor Is Woman Owned
Vendor
Vendor Name
Vendor Number - Name
Vendor Payment Terms
Vendor Prior Work
Vendor Recommend
Vendor Specialty
Vendor Status
Vendor Type
Vendor User Defined Currency

General Ledger Data Cube Measures

Consolidated GL Budgeting Group

Consolidated GL Budget Amount

Consolidated GL Reporting Group

Consolidated Eliminations Amount

Consolidated GL Amount

Consolidated GL Balance Closing

Cash Basis Folder

Consolidated Eliminations Amount -
Cash Basis

Consolidated GL Amount - Cash Basis

Consolidated GL Balance Closing -
Cash Basis

General Ledger Group

Amount

Amount Credit

Amount Debit

Balance Closing

Balance Opening

Cash Basis Folder

Amount – Cash Basis

Amount Credit – Cash Basis


Amount Debit – Cash Basis

Balance Closing – Cash Basis

Balance Opening – Cash Basis

GL Budgeting Group

Budget Amount



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