Stambaugh
Ness
Vantagepoint/Vision
Virtual User Group
January 18, 2023
PRESENTED BY:
Stambaugh Ness
www.stambaughness.com

Meet Your Presenter(s)

Susan Patrick

Director, Client Solutions

Karen Sigel

Consultant, Deltek Vision/Vantagepoint

Agenda

SN Upcoming Events & Updates

Our Main Event: Proposals!

Have you ever thought about being able to generate proposals from the system? Well, you can!

Reminder to Fill out Survey!

Upcoming UG Meetings

Virtual

When: February 15, 2023
Time: 2:00 – 3:00PM
Where: At Your Desk
Topic: Preparing Financial Statements: A Better Way for Your Firm

Pittsburgh

When: January 19, 2023
Time: 9:00 – 11:00AM
Where: Desmone Architects

South Central PA

When: March 16, 2022
Time: 9:30 – 11:30AM
Where: RLPS Architects

Why People Need to be Part of Your Business Strategy

February 02, 2023
2:00 p.m. - 3:00 p.m. EST
At Your Desk, GoToWebinar

Hope is not a strategy, yet many companies build business strategies and plans upon a foundation of hope; we hope our employees don't leave; we hope there are enough quality candidates/hires to meet our growth goals.

Research recently conducted by SN found that 85% of AEC firms surveyed view the ability to recruit talent as one of the major issues facing their companies, with 50% of firms identifying retention of existing staff as a major challenge. Demographic changes are a certainty, and they aren't boding well for our industry.

Join our upcoming webinar, for a detailed look at the data and challenges facing AEC firms from the people perspective, with recommendations for how to be more strategic about your most important asset: your people.

Deltek
Premier Partner

Stambaugh Ness

Ownership as a Recruitment Tool: Risk or Reward?

February 09, 2023
2:00 p.m. - 3:00 p.m. EST
At Your Desk, GoToWebinar

To win an increasingly competitive talent war, many architectural and engineering firms rely on offers of ownership stakes to recruit and hire high-level talent. But it's a strategy that can quickly backfire when unvetted employees suddenly become owners; it's a risk that can put a firm in a challenging situation both organizationally and financially.

Join SN's Brad Wilson and Kristi Weierbach, as they dive into some of the complexities of using ownership as a recruitment tool and how to avoid related risks.

Deltek
Premier Partner

Stambaugh Ness

Compensation & Benefit Challenges in Today's Economic Landscape

February 14, 2023
2:00 p.m. - 3:00 p.m. EST
At Your Desk, GoToWebinar

A recent SN survey revealed that wage growth and benefit costs are two of the top five challenges facing AEC firms today. With the current economic environment adding to industry uncertainty, firms seek guidance on compensation and benefits decision-making. Fortunately, there are many philosophies and resources to aid companies through this process.

Join Kate Allen and Kristi Weierbach for their upcoming webinar, where they'll address these important organizational issues and offer insight into managing the delicate balance of people and money.

Deltek
Premier Partner

Stambaugh Ness

Polling Question

Do you currently generate proposa
from Vision or Vantagepoint?

- Yes
- No
- Not Sure
- Didn’t know you could

Deltek
Premier Partner

Stambaugh Ness

Vision / Vantagepoint Proposals

Deltek
Premier Partner

Stambaugh Ness

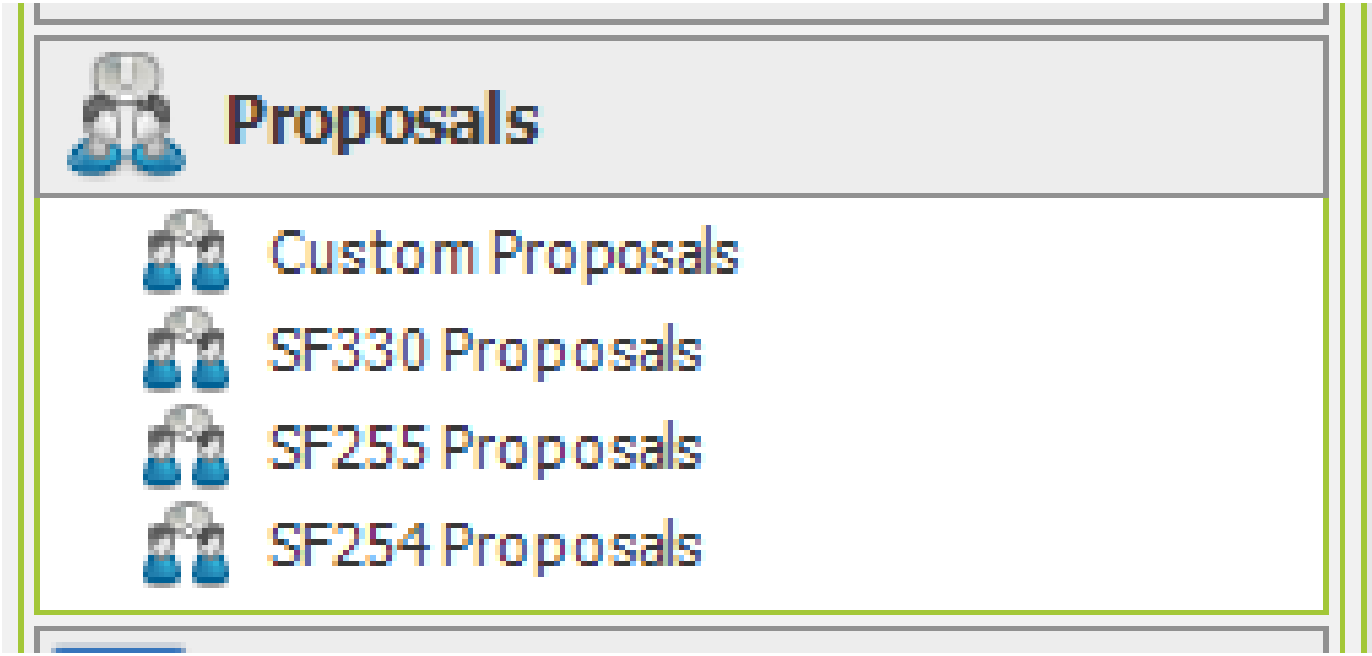
Vision Proposals

Deltek
Premier Partner

Stambaugh Ness

Vision Proposals

- Requires CRM and/or Proposal Module License(s)



- Custom Proposals
- Government Forms
  - SF330
  - SF255/SF254
- Ability to merge directly from Info Centers

Stambaugh Ness

Vision Merge Template

- Can be created for Word or InDesign:
  - InDesign requires FILESTREAM be enabled
- Macro available to add Info Center fields (standard and user defined – including grids).
- Formatting determined by Merge Templates:
  - Margins, fonts, spacing, etc.

Deltek
Premier Partner

Stambaugh Ness

Include Graphics

Links

	Description	Link Path	Graphic
	ER - nurses station / patients	C:\Users\SFerrell\Pictures\Vision\Emergency Room\ER.jpg	☑
	Nurses Station	C:\Users\SFerrell\Pictures\Vision\Emergency Room\nurses-station.jpg	☑

- Must be associated to records within Links grid.
- Graphic checkbox must be selected.

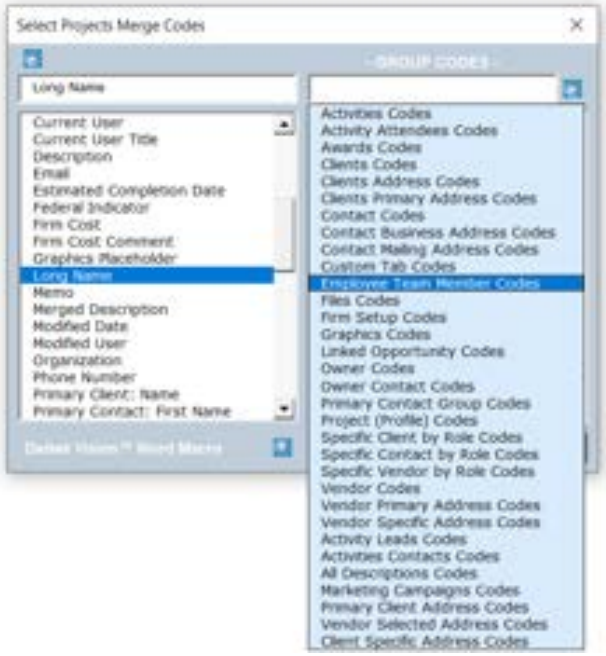
Deltek
Premier Partner

Stambaugh Ness

Merge Template Macro (Word)

- See Utilities>Download Merge Macro
- Vision toolbars accessible within Add-ins tab in Word.
- All Merge Templates must contain [Begin] & [End] statements.
- Group Codes also available for grid data, etc. (also require [Begin] and [End] statements).

[Begin Projects][**Longname**]

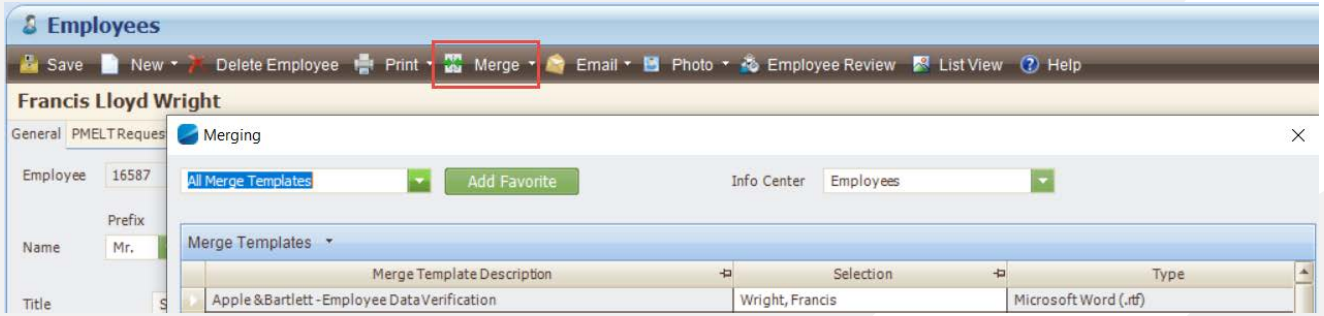


Deltek
Premier Partner

Stambaugh Ness

Merge Templates

- Word templates must be saved as .rtfs
- Text overflows allowed:
  - Resumes and project profiles, etc., can exceed a single page.
- Accessible directly from standard Info Centers for merging record(s) (CRM users only).

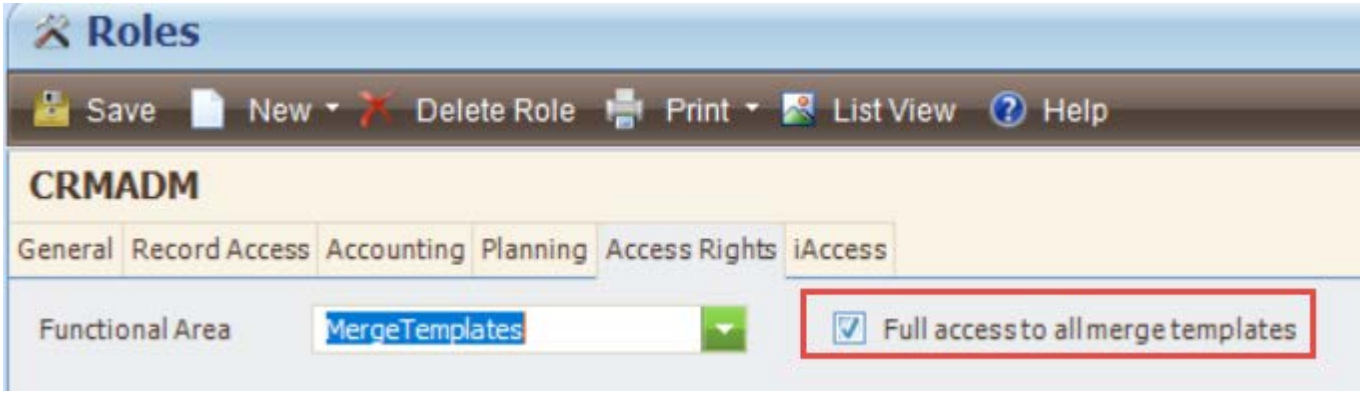


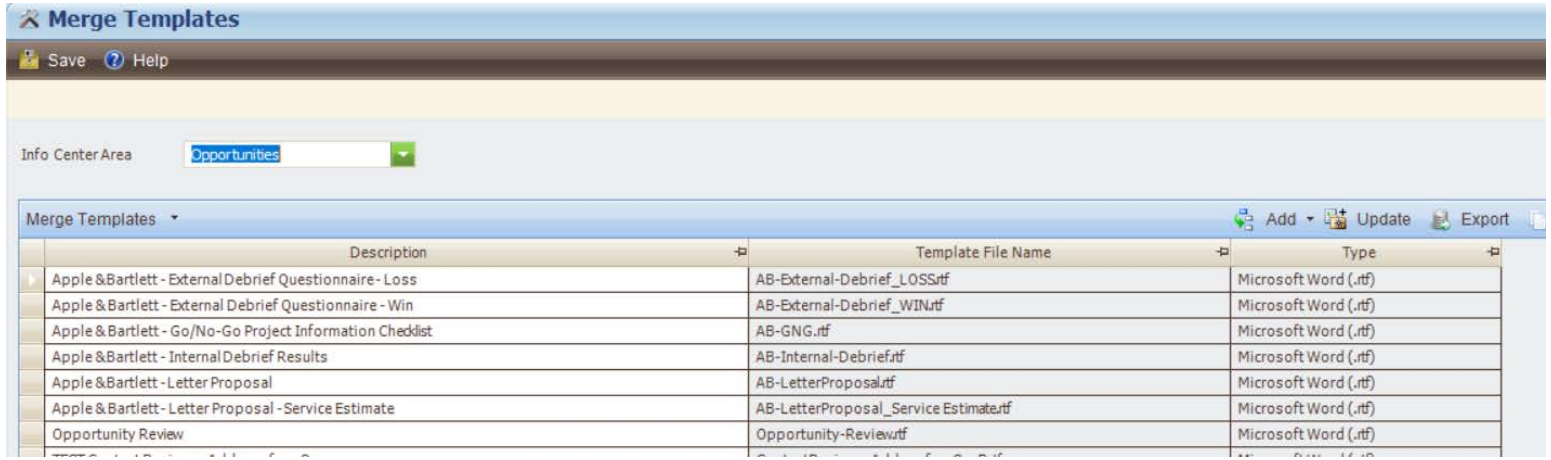
VISION BACKGROUND TAB	
Education / Specialized Training	[Degrees:][Degree][{` / `(Specialty)}][{` / `(Institution)}][{` / `(Yearearned)}] [End]
Registrations / Licenses	[Licenses:][License] **State:** [@fullstatename(Statelicensed)] **Number:** [Licensenumber] **Earned:** [@DATE(`mm/d/yy`,Dateearned)] **Expires:** [@DATE(`mm/d/yy`,Dateexpires)] **Active?** [IncludeInProposal] [End]
Skills / Discipline Codes	[Skills:][Skill][{` / PRIMARY?: `(Primaryind)}] [End] **NOTE:** Only one skill can be marked as 'Primary'. The Primary skill associated with the Employee is the skill associated for Employee Census reports, etc.

Deltek
Premier Partner

Stambaugh Ness

Merge Templates





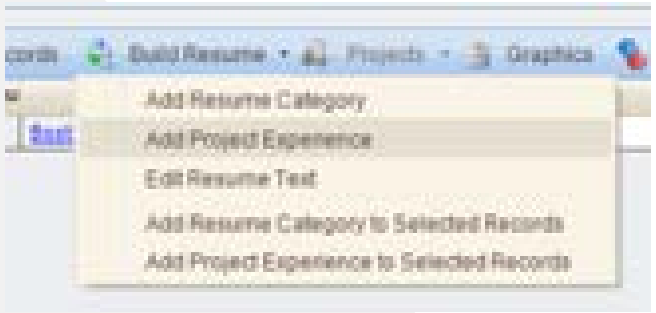
- Managed within Configuration > General > Merge Templates: Organized by Info Center
- Unable to create Merge Templates for User-Defined Info Centers.
- Recommend updating applicable security roles to allow access to ALL Merge Templates.

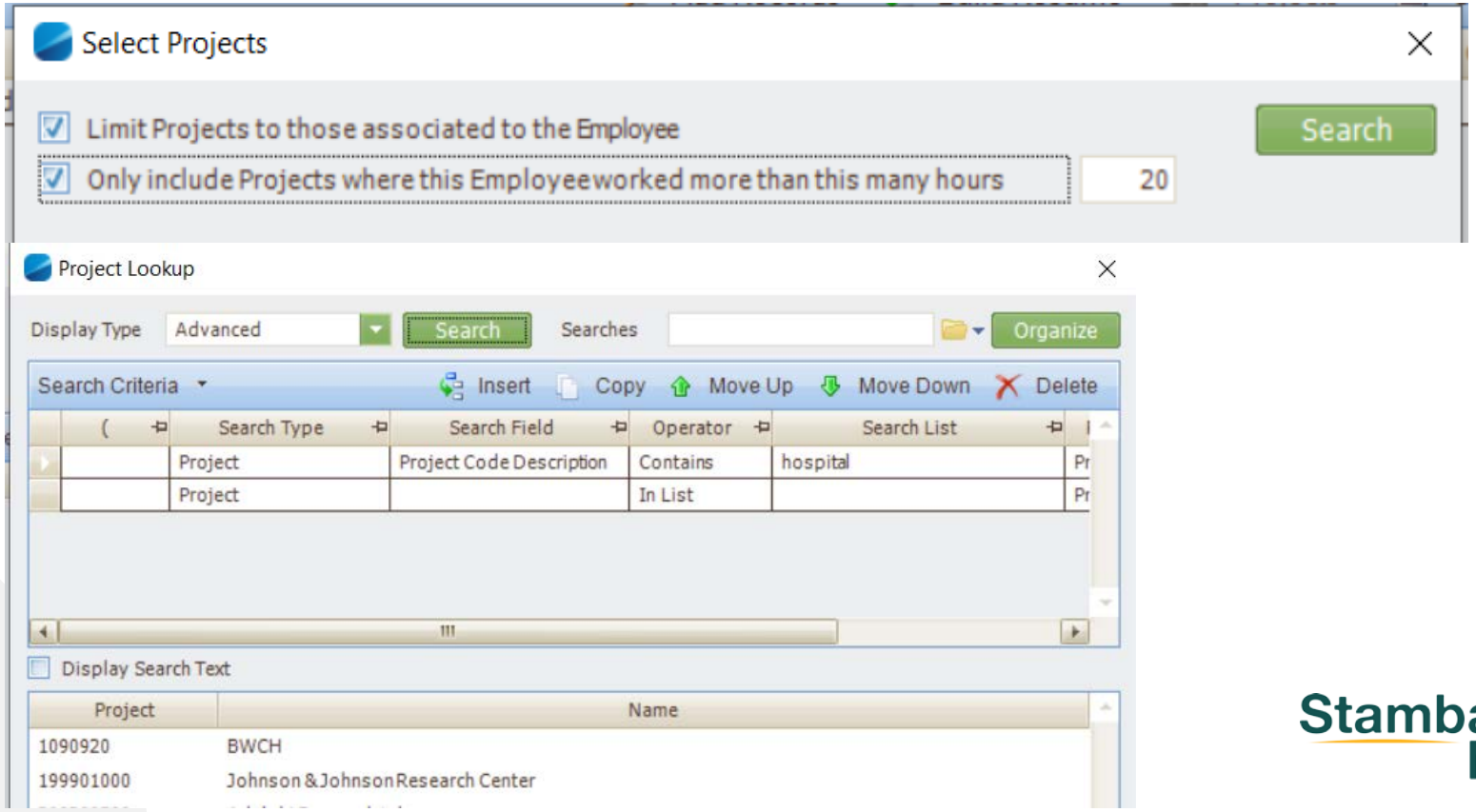
Deltek
Premier Partner

Stambaugh Ness

Custom Proposals

- Use of the Proposal Module allows users to select specific projects to appear on Employee resumes, etc.
  - Resumes merged directly from the Info Center pull all projects associated to Employee.
- Resume data is pulled from both the Employee and Projects Info Center for projects associated to the Employee's record.



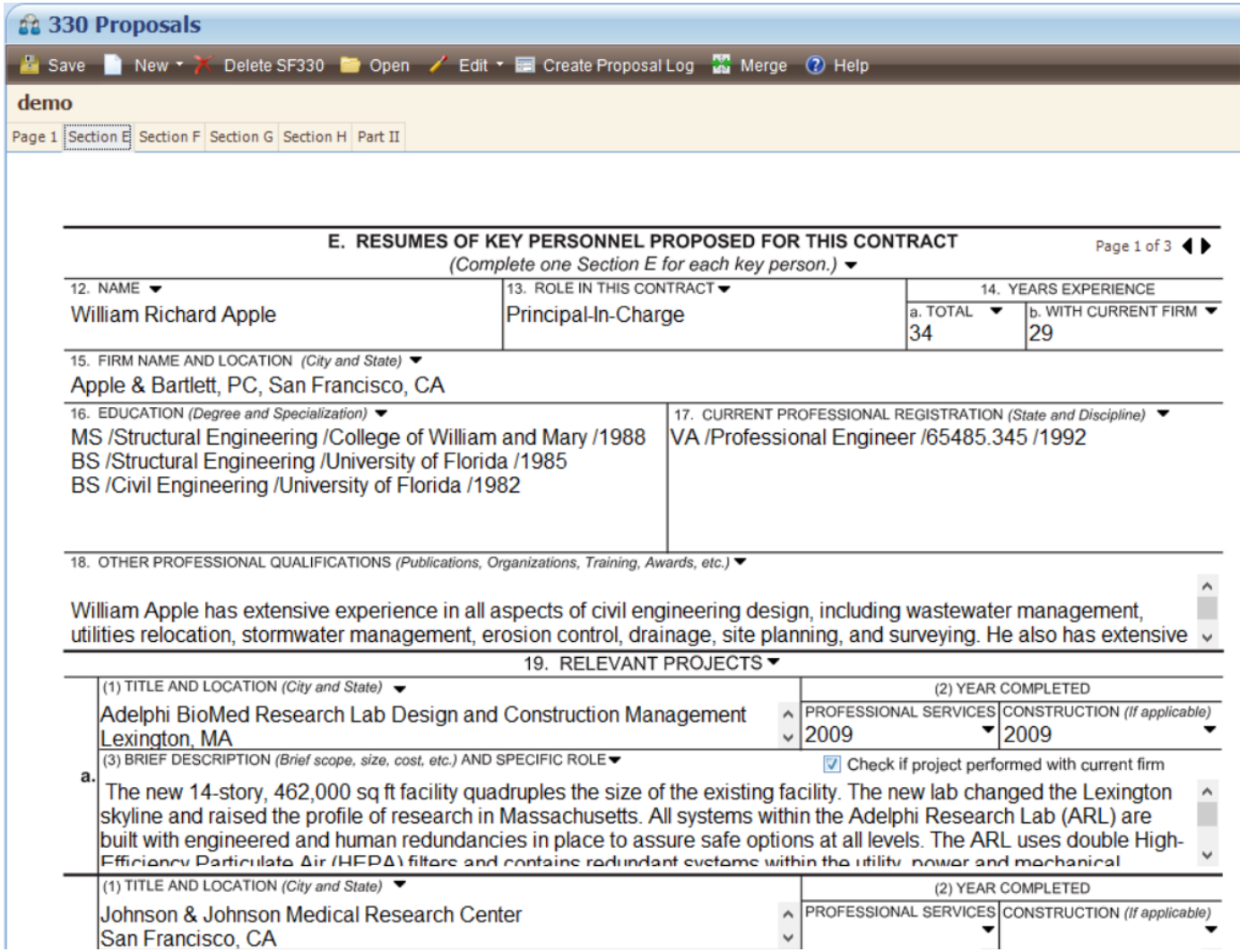


Deltek
Premier Partner

Stambaugh Ness

SF330 Templates

- Graphical interface pulls data from Clients, Vendors, Employees, Projects, and Text Libraries.
- Automatically populates relevant team members in Section F based on associations in Projects (Employees and Subconsultants) and team member selections on first page of SF330.



Deltek
Premier Partner

Stambaugh Ness

Tips/Tricks

- Store data consistently throughout Info Centers for standardized use in proposal documents.
- Store Project data (Descriptions, etc.) at the Project level of the WBS only.
- Use the Deltek-provided macro to add additional fields to existing Merge Templates.
- Do not type within [bracketed] area of Merge Templates to avoid any special character errors in Word.

Polling Question

Are you storing Project Descriptions and Resume Text in your system today?

- Yes
- No
- Not Sure
- Didn’t know you could

Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposals

Deltek
Premier Partner

Stambaugh Ness

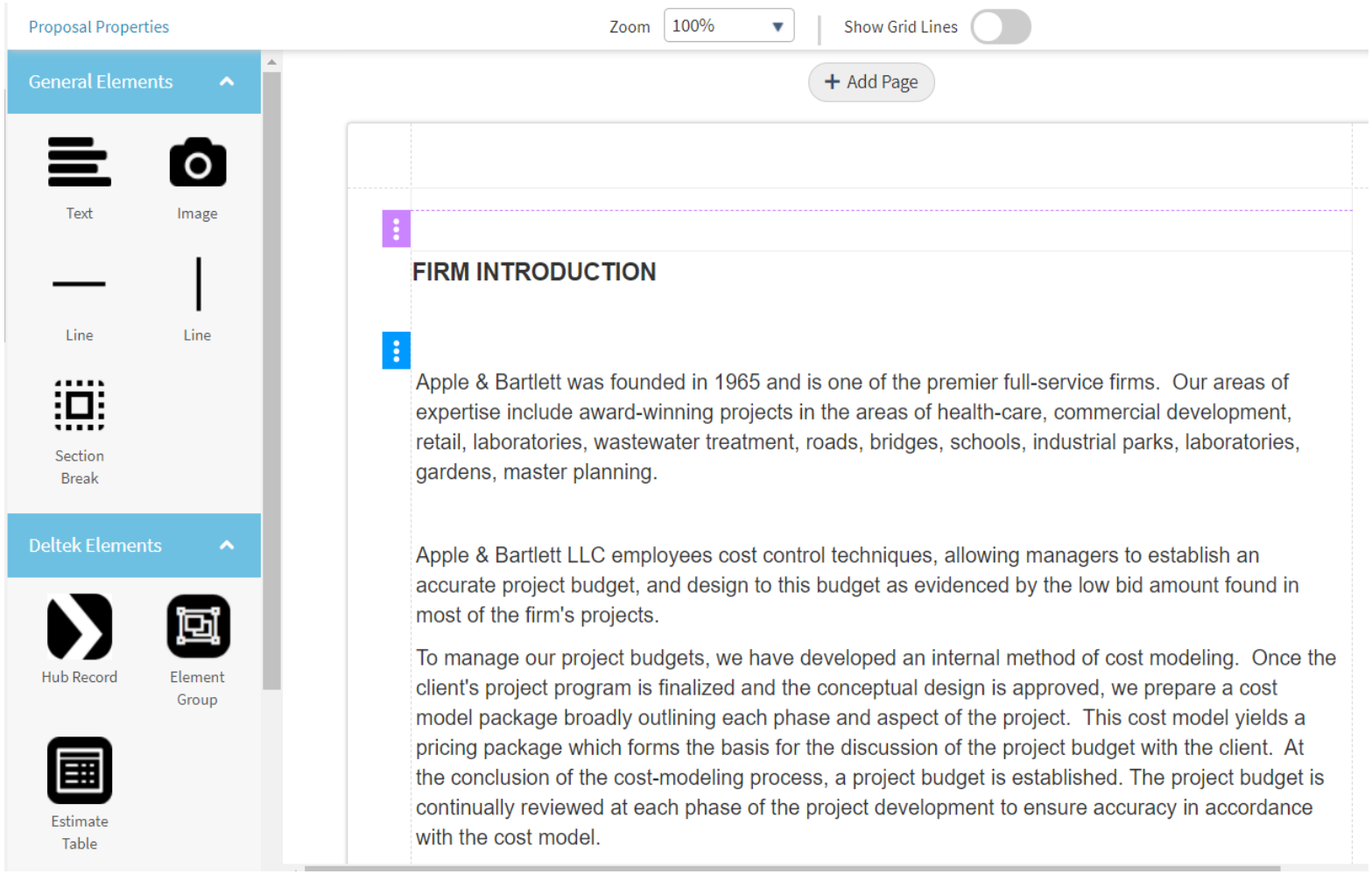
Vantagepoint Proposal Builder

Requires CRM Plus license.

Merge Templates no longer used:

- Vantagepoint has Proposal Builder included as a single application
- Requires FILESTREAM
- Word and PDF are currently the only
  supported formats (InDesign is in development; no timetable for release)

- SF330 available in Desktop Client only.

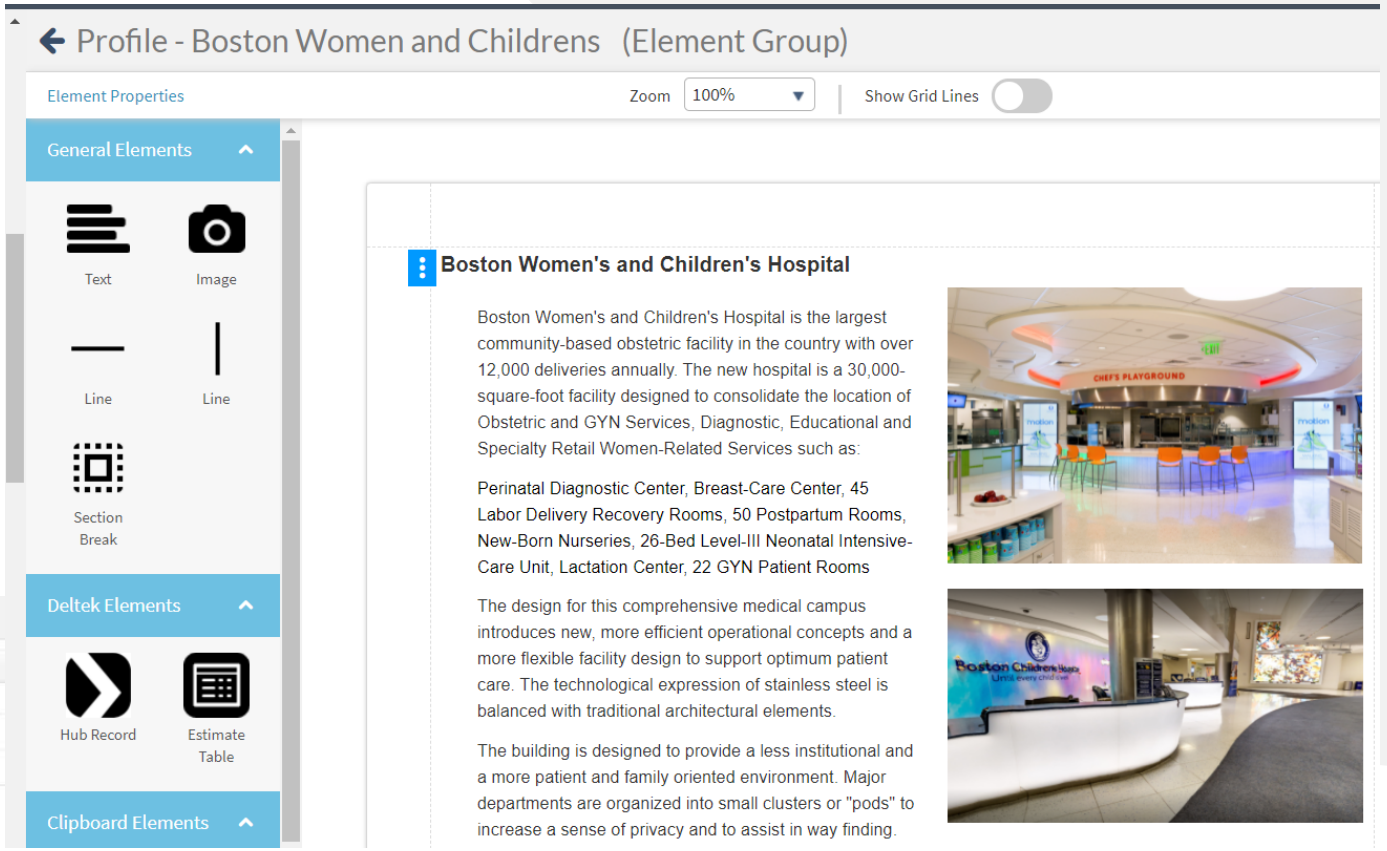


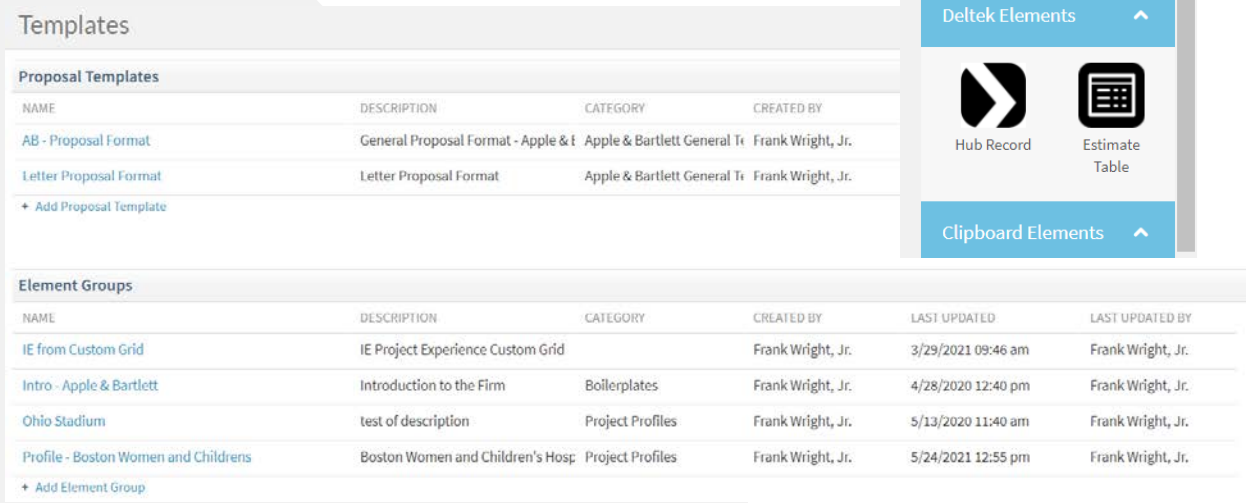
Deltek Premier Partner

Stambaugh Ness

Vantagepoint Proposal Builder

- Element Groups can be created for common proposal areas:
  - Project Profiles
  - Firm Introductions
- Images can be associated to proposals from Attachments, Links, or network location.



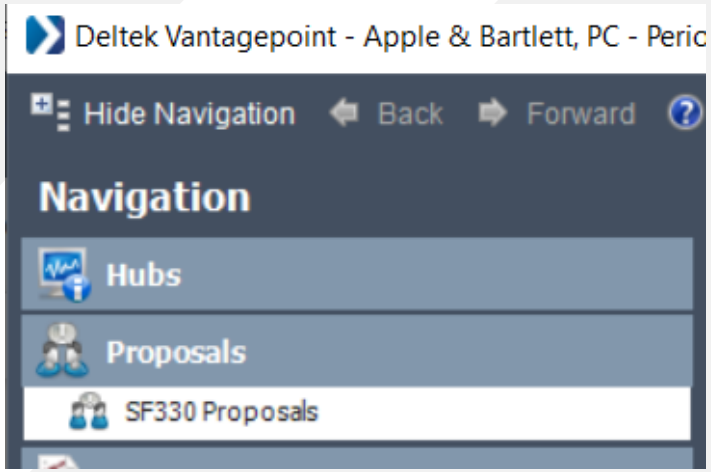


Deltek Premier Partner

Stambaugh Ness

Parity Items Not Yet Available in Vantagepoint 5.5

- Merging directly from Hubs.
- Merges directly to InDesign.
- Support of customized templates for SF330s:
  - SF330 still located in Desktop
  - No plan to include 254/255s in Vantagepoint



Deltek
Premier Partner

Stambaugh Ness

Tips/Tricks

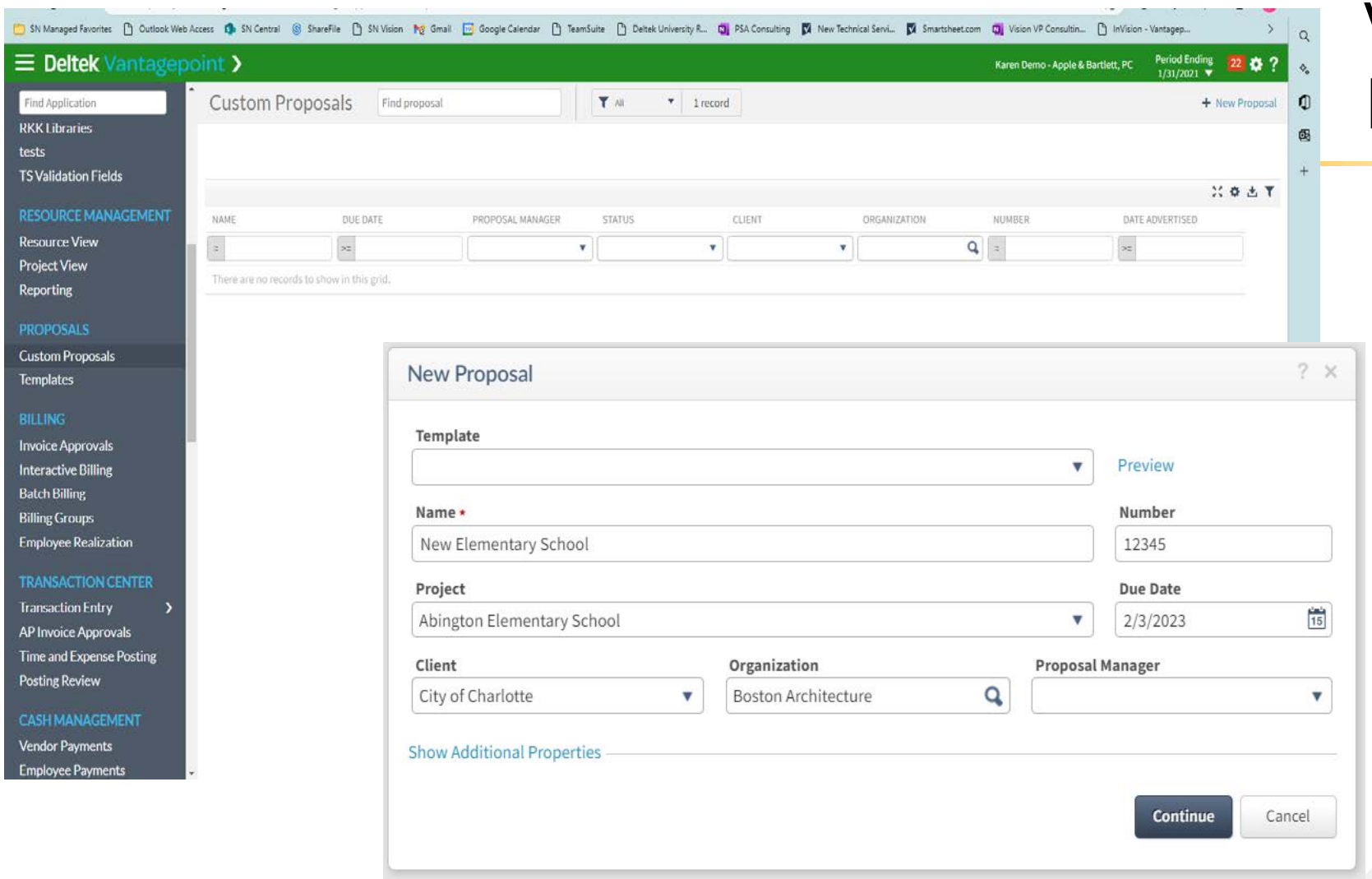
- Store data consistently throughout hubs for standardized use in proposal documents.
- Create Element Groups for common proposal pieces such as project profiles, etc.
- Be careful when updating text for Project Descriptions, etc. while in Draft mode as updates flow to the Hub record.

Vantagepoint Proposals Demo

Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposals

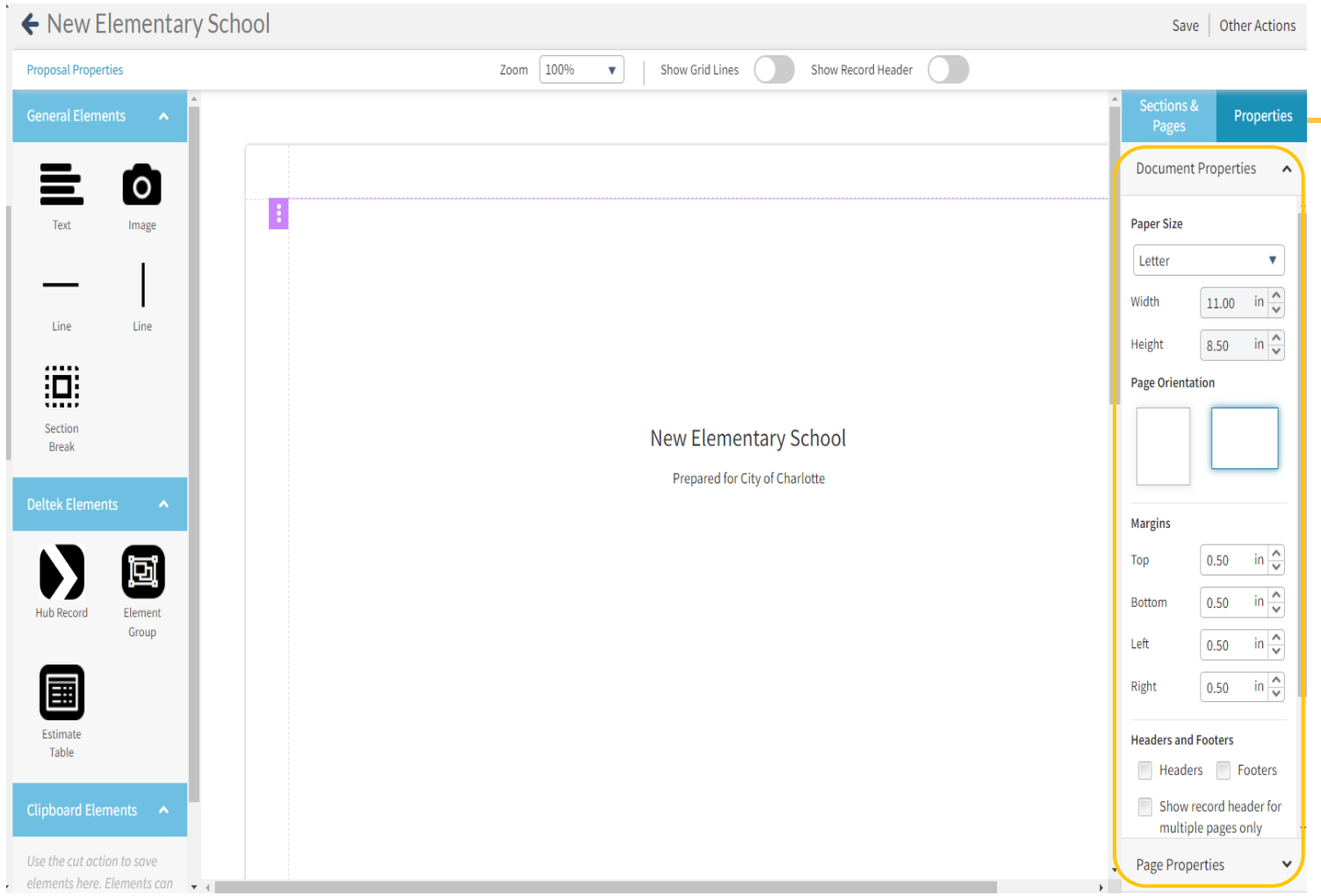


- New proposals can be created “from scratch” or from a template.
- New Proposals dialog allows entry of basic important information about the Proposal.
- Additional Properties are also available if needed.
- If templates are available, can be chosen from dropdown.

Deltek Premier Partner

Stambaugh Ness

Vantagepoint Proposals

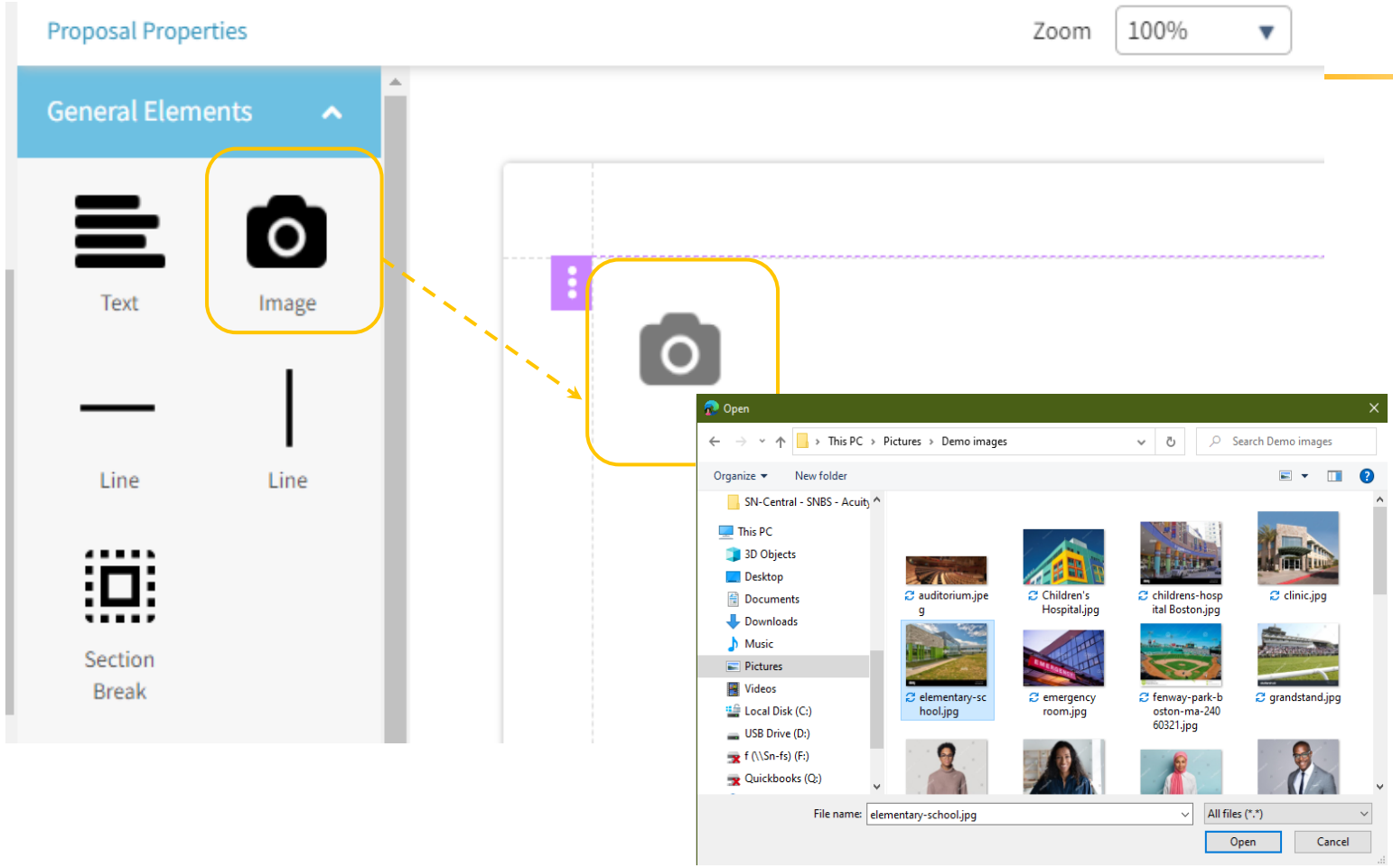


- Proposal Name and Client are inserted automatically on the Cover Page.
- Begin by setting up document format.
- All new proposals are formatted in landscape orientation by default.

Deltek
Premier Partner

Stambaugh Ness

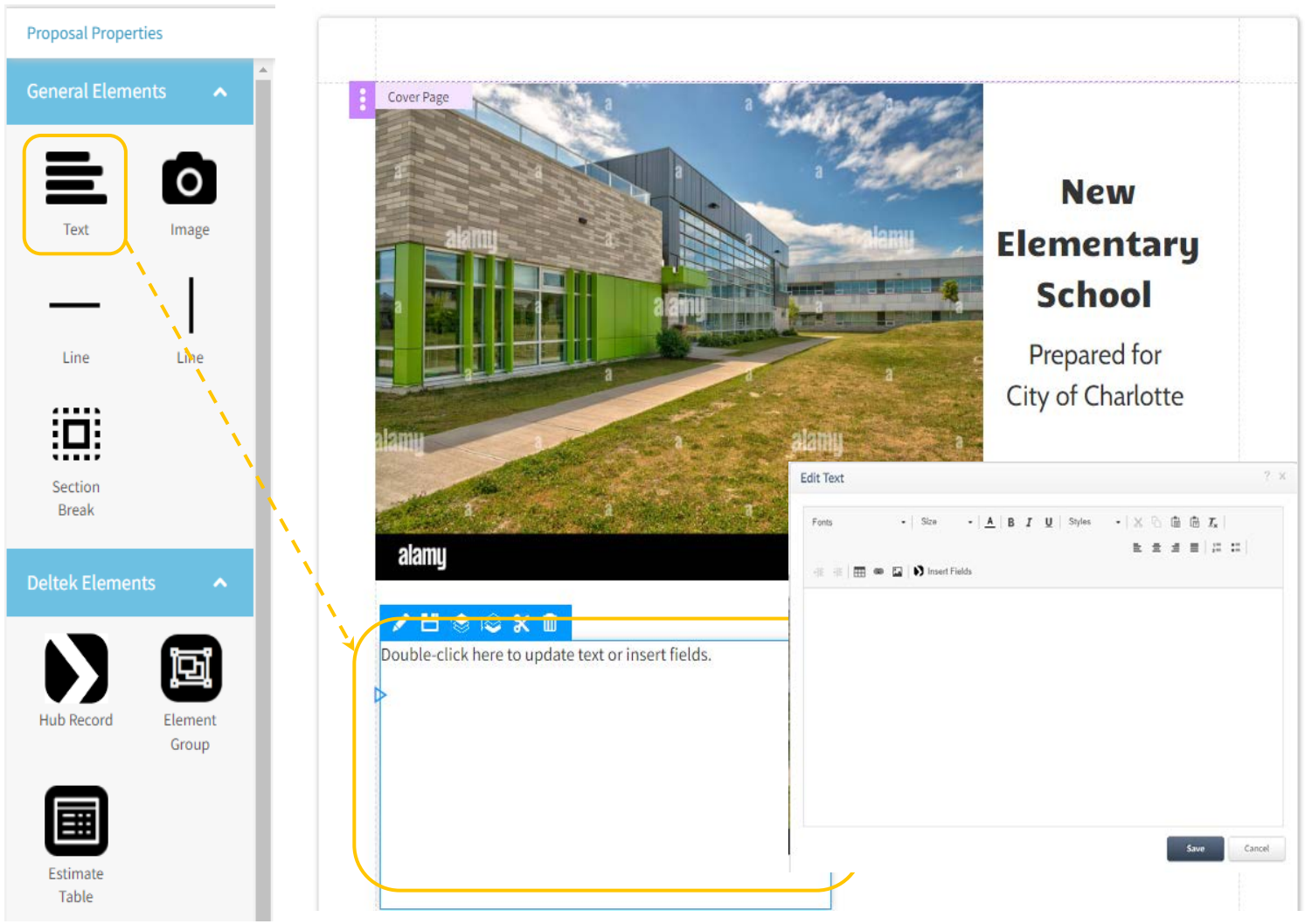
Vantagepoint Proposals



- Images can be inserted and retrieved from a network location.
- Images import at full size but can be resized and manipulated once inserted.

Deltek
Premier Partner

Stambaugh Ness

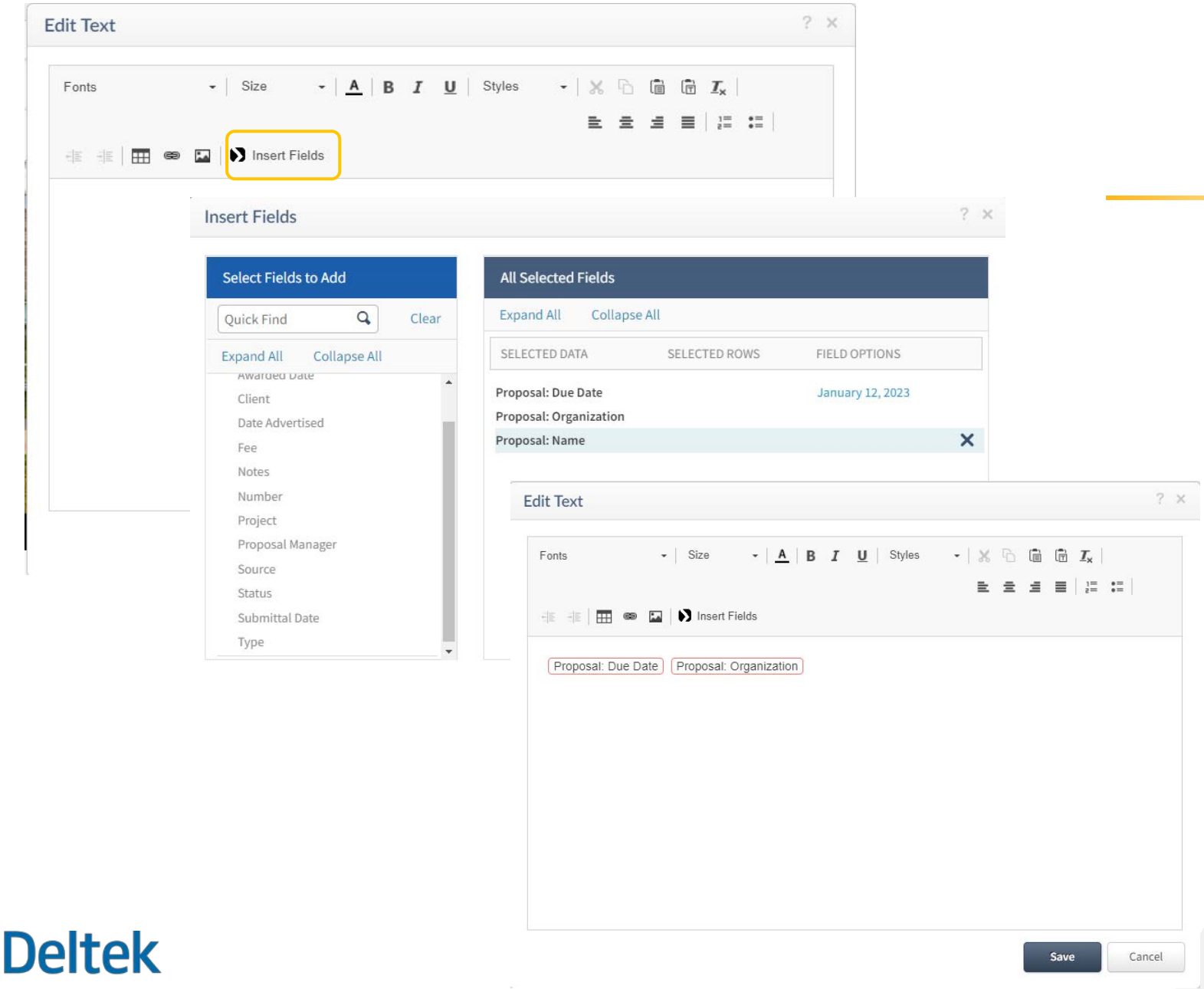


Vantagepoint Proposals

- Text fields are inserted the same as image placeholders.
- Text Editor allows the insertion of relevant fields
- Text Editor also has formatting capabilities

Deltek
Premier Partner

Stambaugh Ness

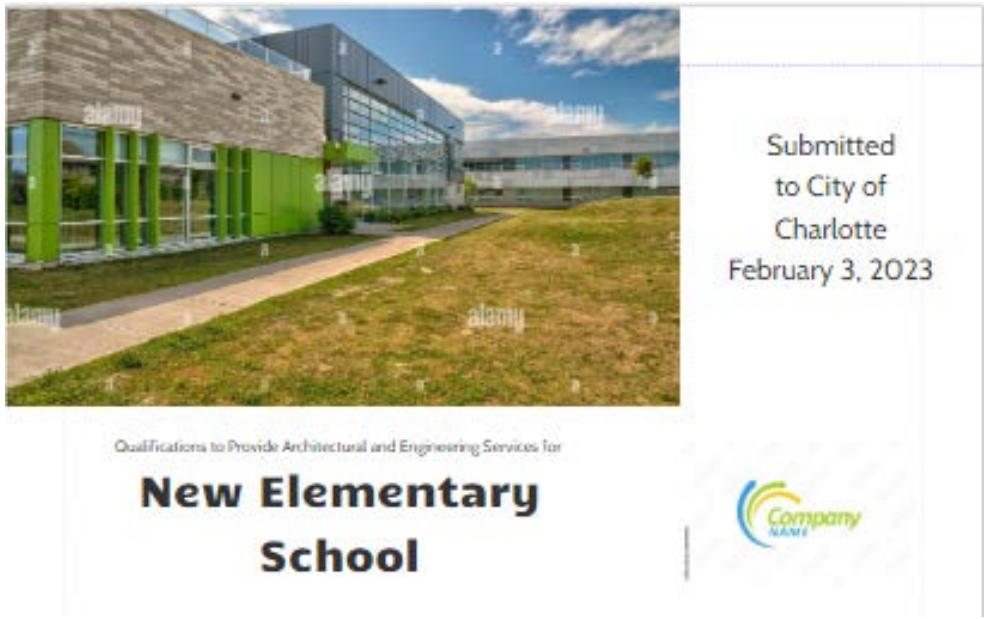


Vantagepoint Proposals

- Text fields are inserted the same as image placeholders.
- Text Editor allows the insertion of relevant proposal fields
- Text Editor has formatting capabilities

Deltek
Premier Partner

Stambaugh Ness



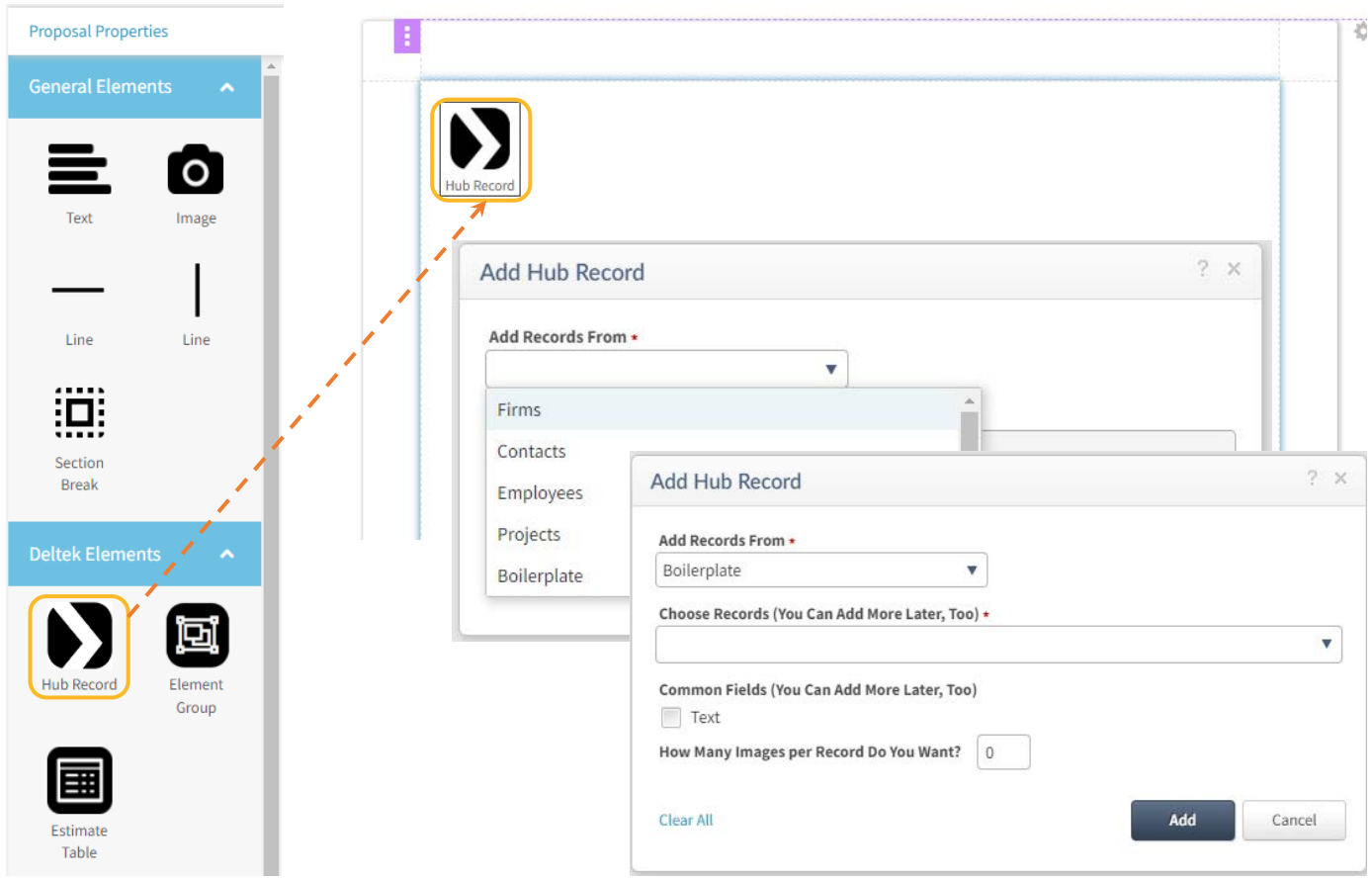
Vantagepoint Proposals

- Once the section is complete, it be saved as a draft or finalized and saved.
- “Save as Draft” allows continuing changes
- Once finalized, no further edits can be made.

Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposals

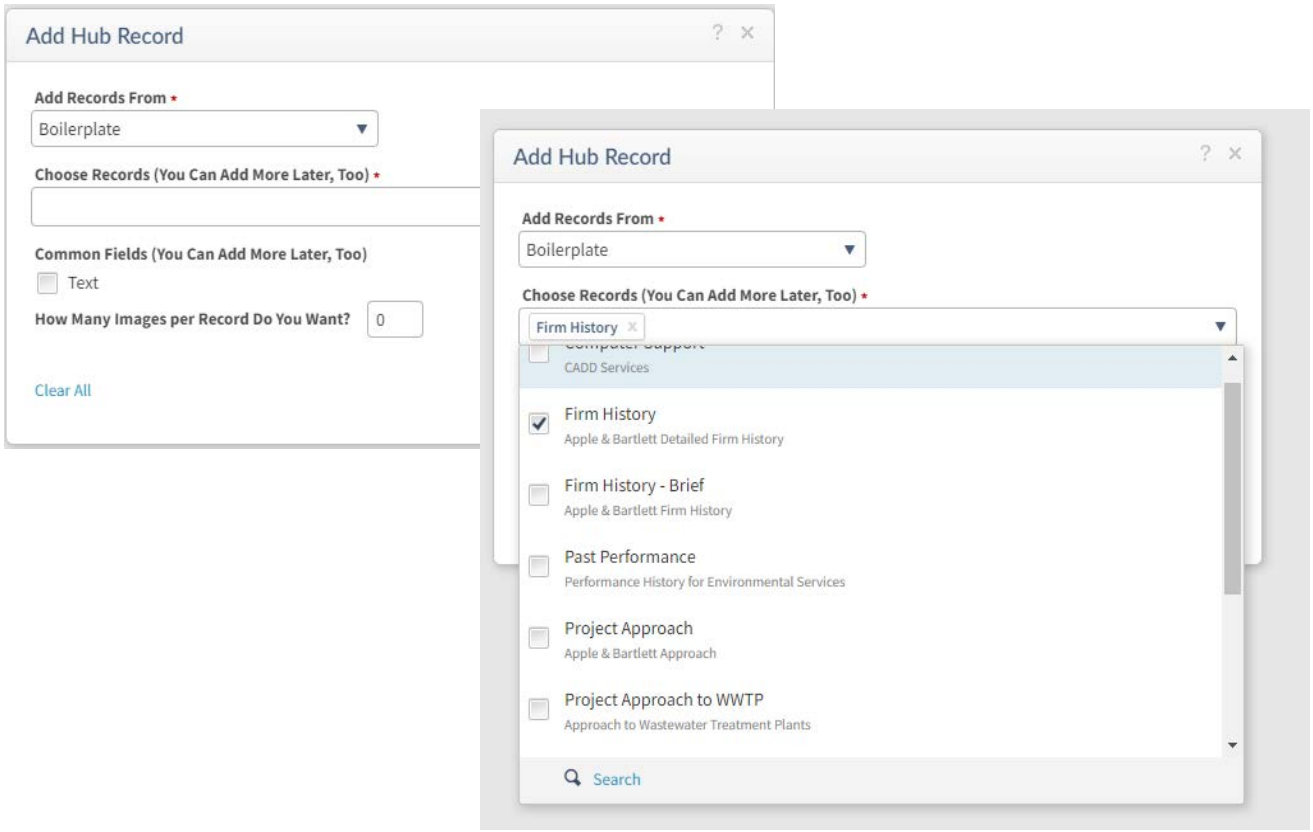


- Content can be added from any of the Hubs.
- The dialog allows a choice of records and number of images.
- Records can be added after the section has been created.

Deltek
Premier Partner

Stambaugh Ness

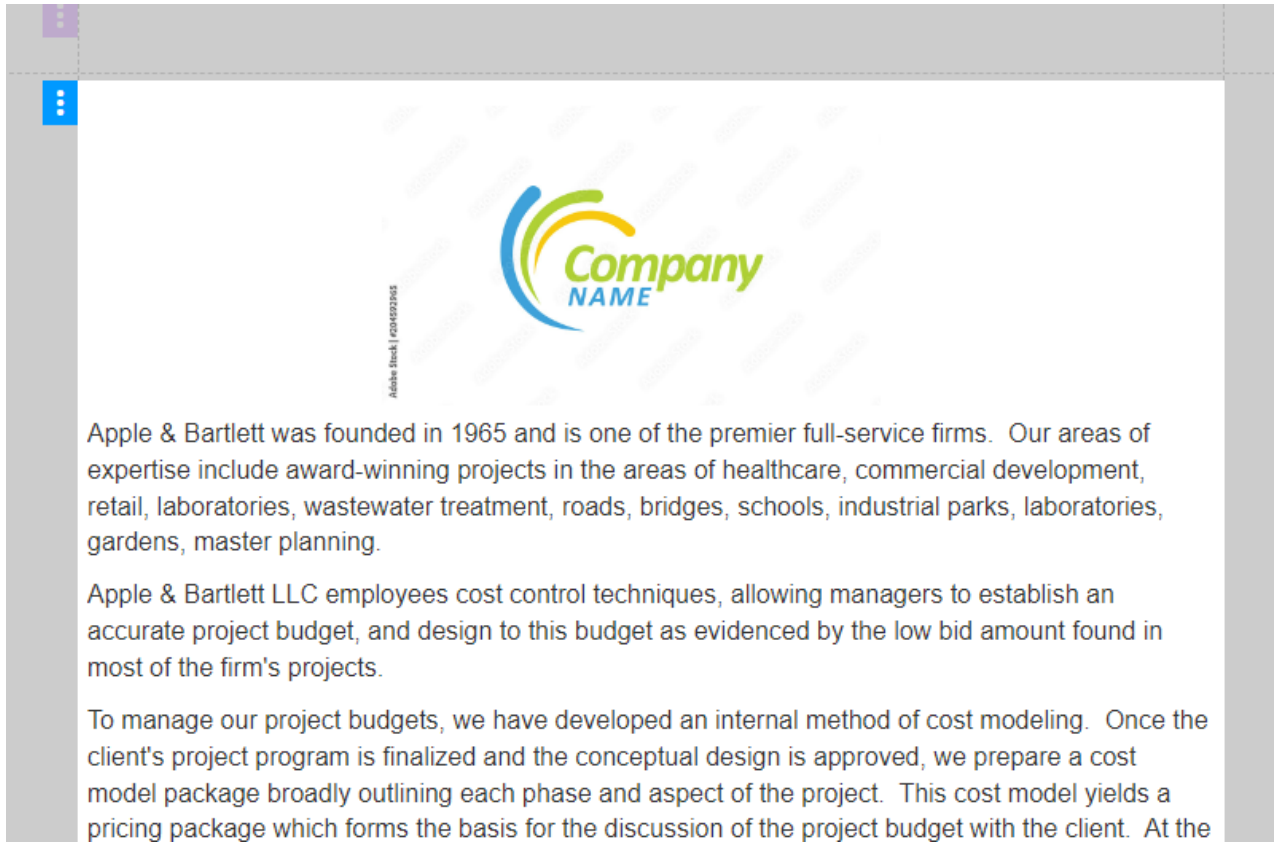
Vantagepoint Proposals



- Content can be added from any of the Hubs.
- The dialog allows a choice of records and number of images.
- Records can be added after the section has been created.

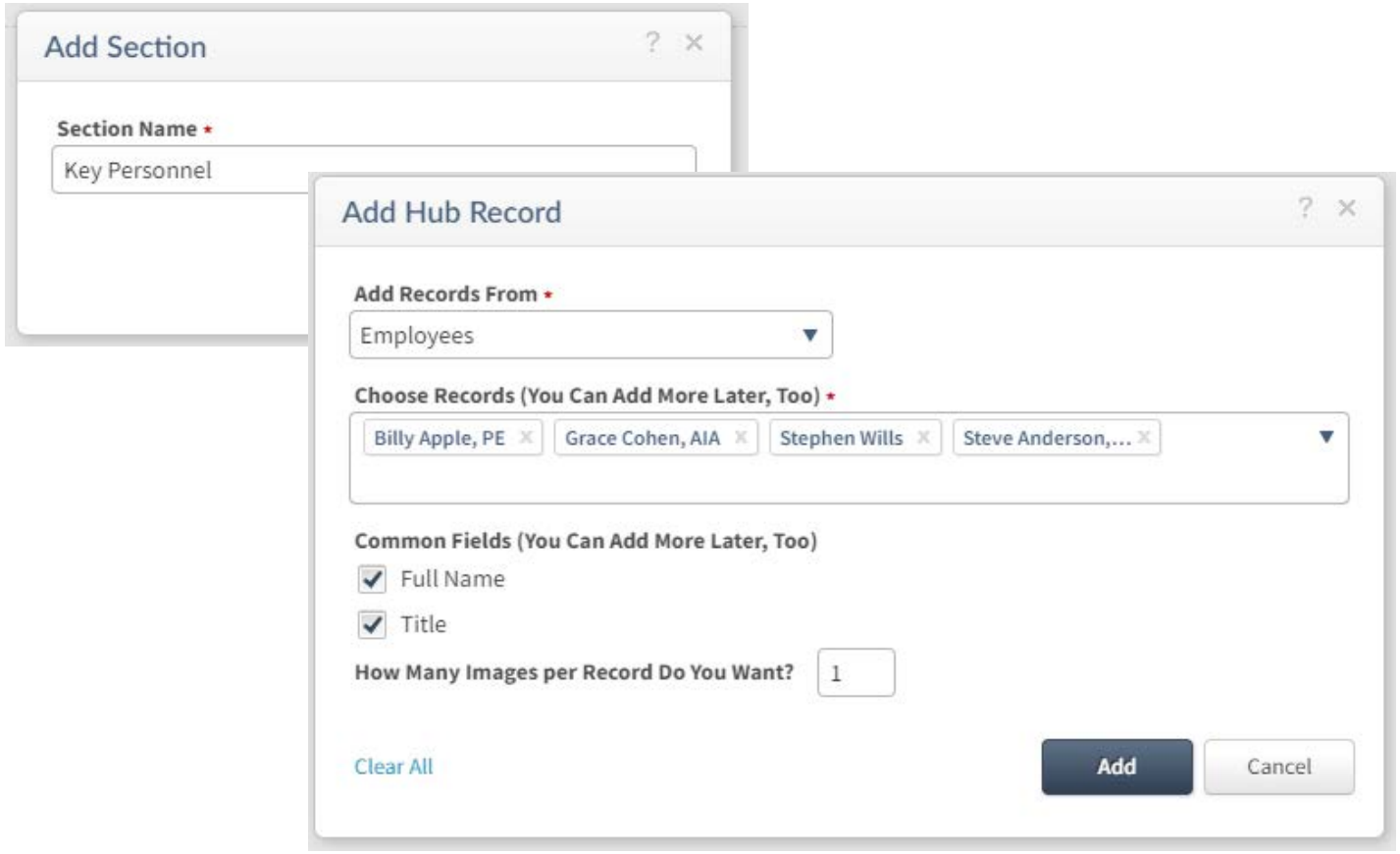
Deltek
Premier Partner

Stambaugh Ness



Vantagepoint Proposals

- Text can be formatted after merge.
- Images can be added and resized.
- Remember to save your record as a draft until ready to finalize the whole proposal.



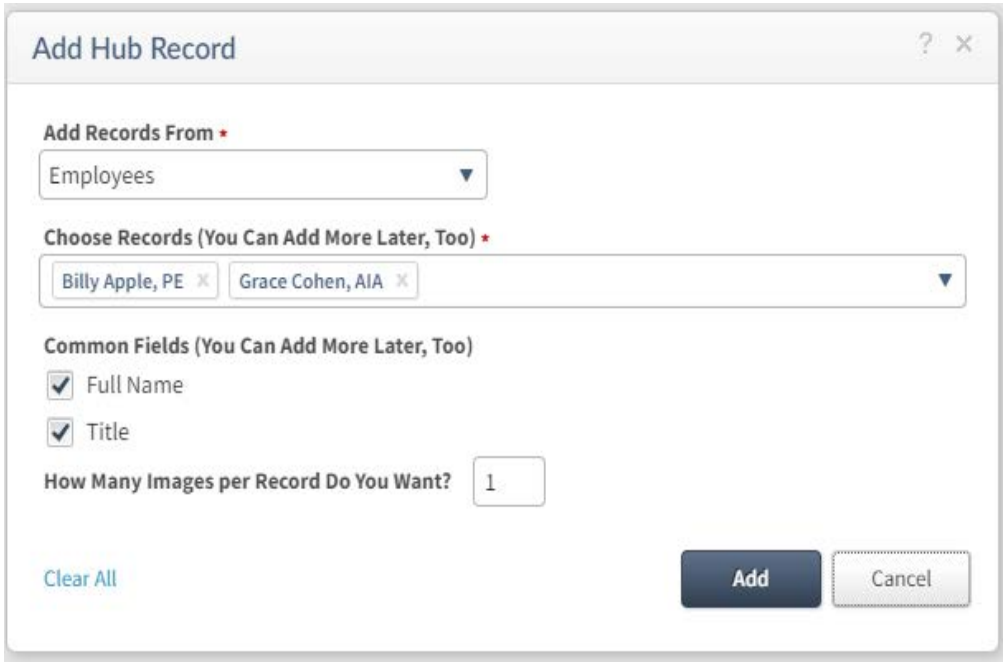
Vantagepoint Proposals: Resumes

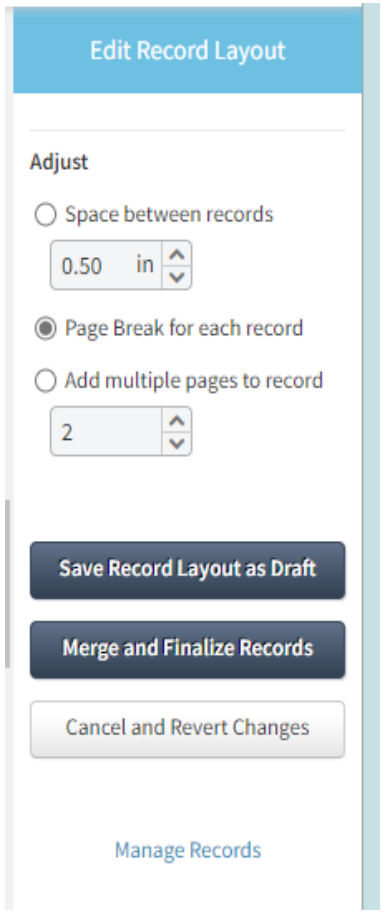
- Select the personnel and properties you want to display in the resume.

Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposals: Resumes





- Record layout defaults to two per page; set the layout as you desire.

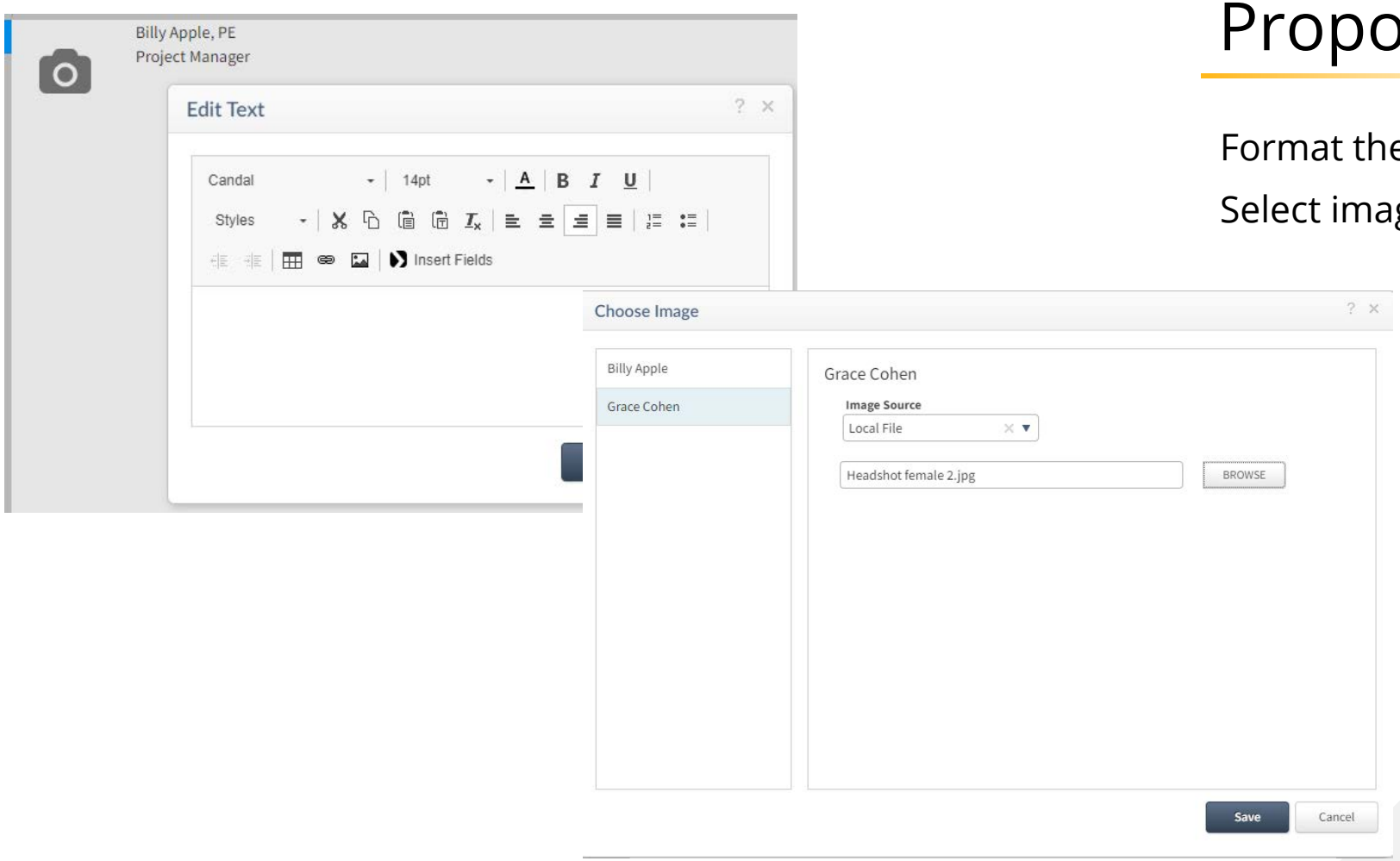
Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposals: Resumes

Format the text as appropriate.

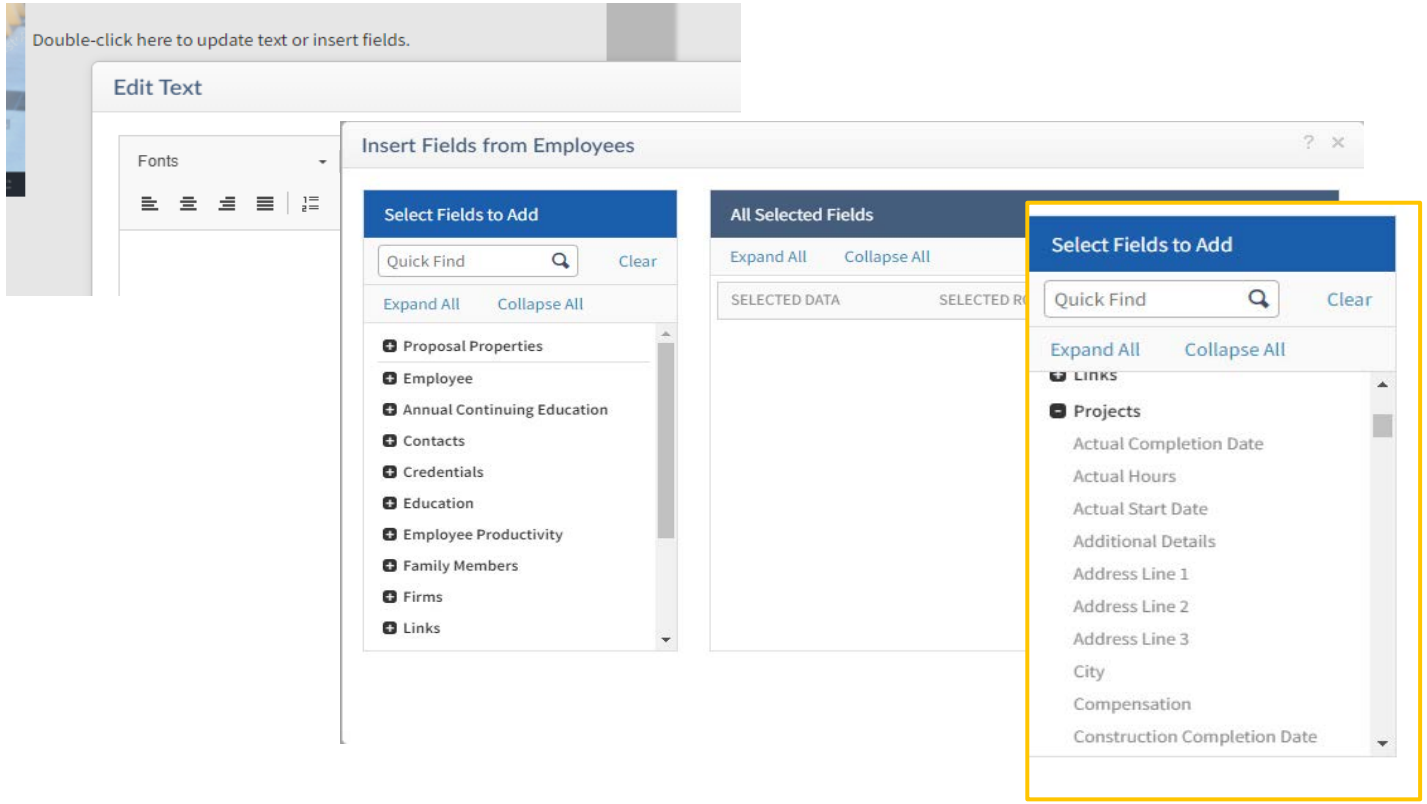
Select images from network location..



Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposals: Resumes

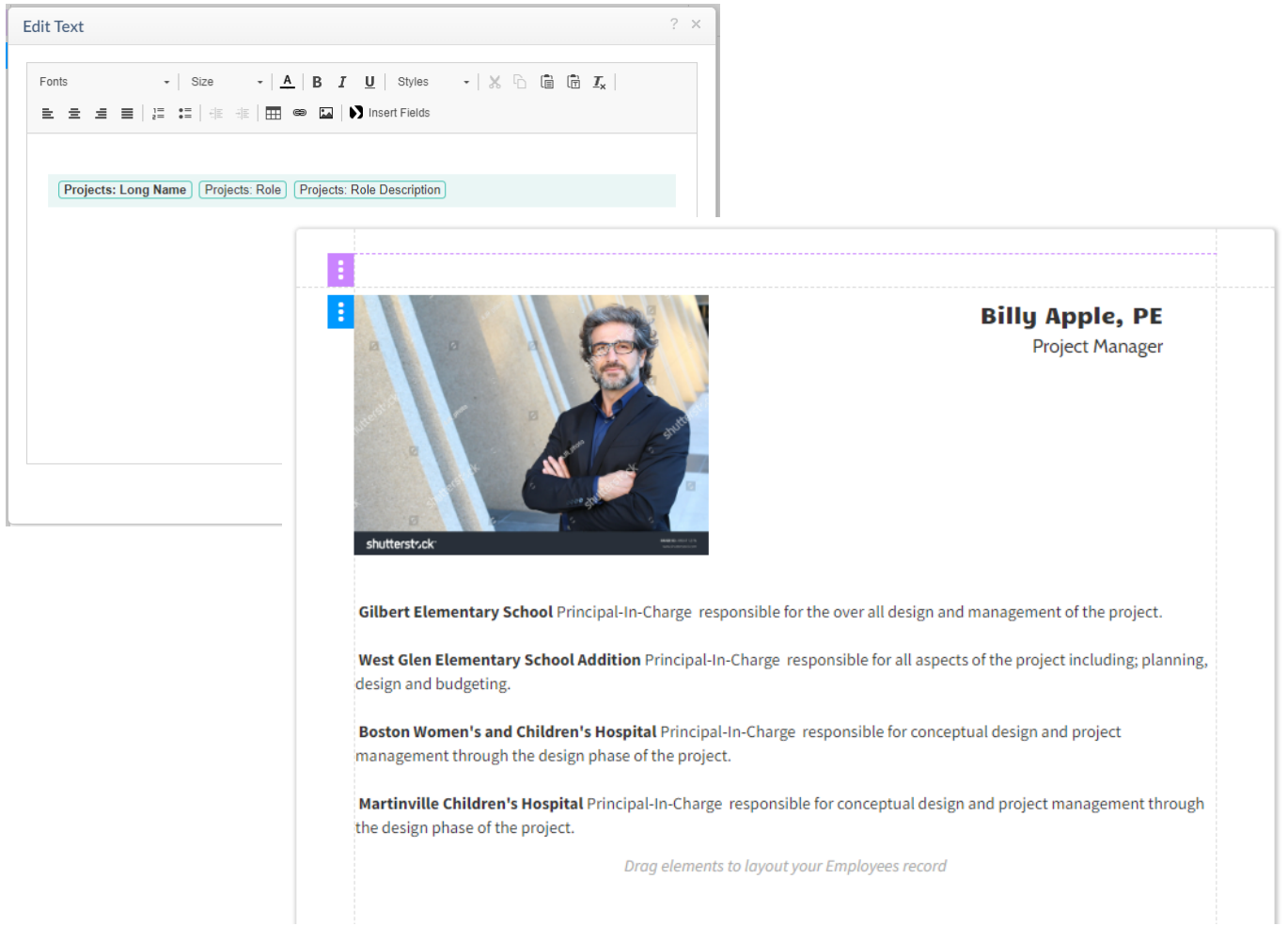


- Additional text can be added by dragging the “Text” General Element to the location you want.
- Select the text you want to include from the dialog.
- Quick Find is very helpful to find the fields you want.

Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposals: Resumes

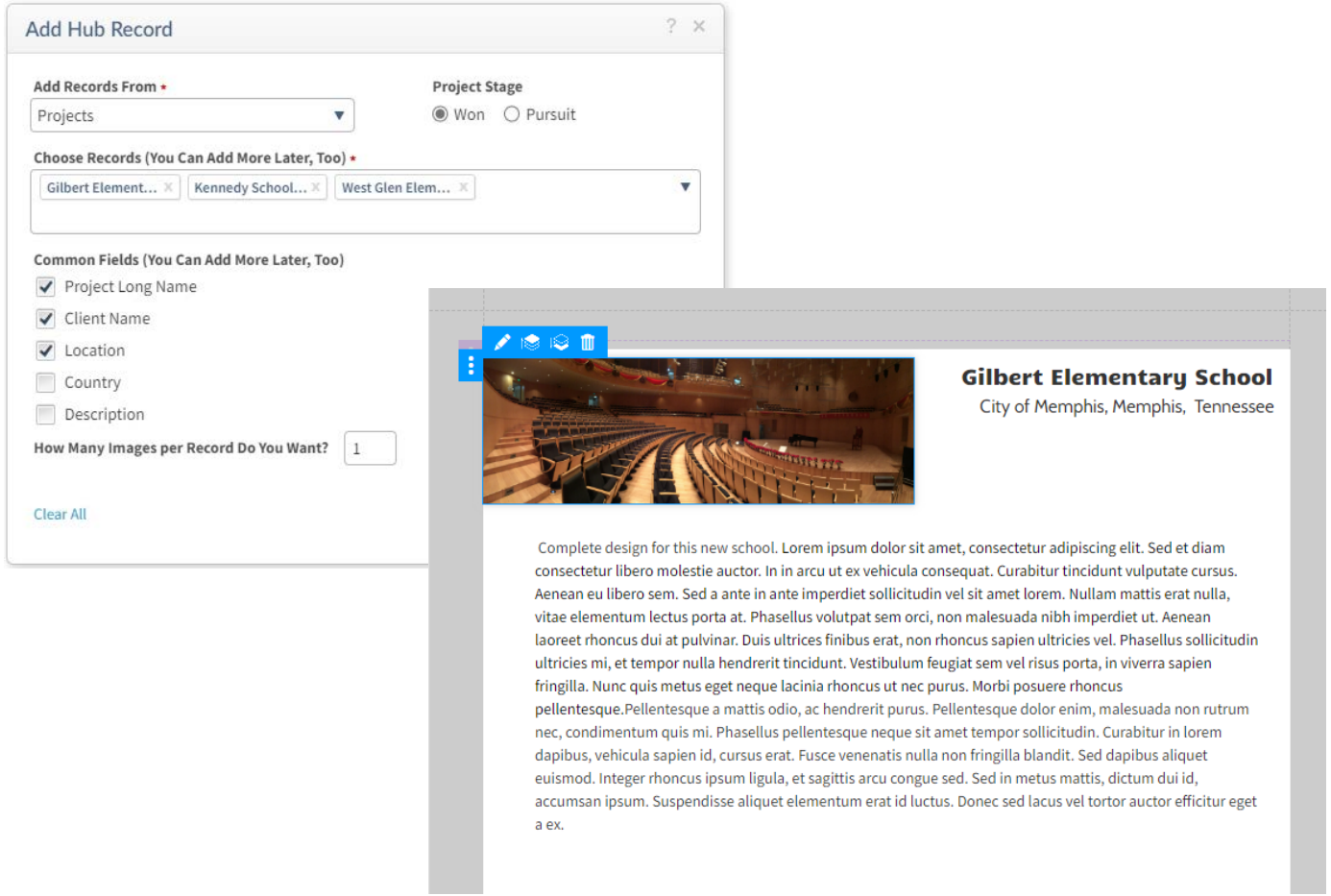


- Text can be formatted after merge.
- Images can be added and resized.

Deltek
Premier Partner

Stambaugh Ness

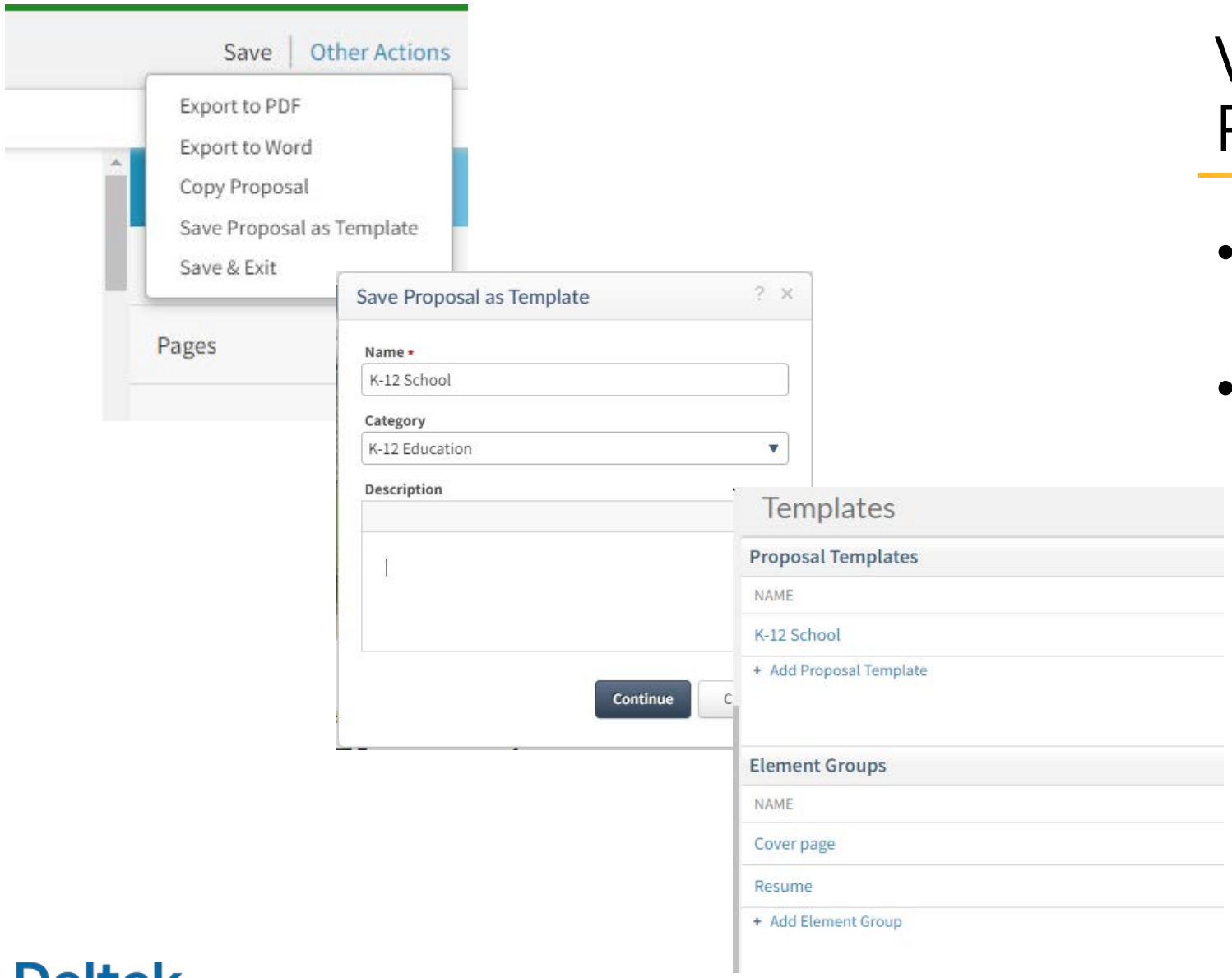
Vantagepoint Proposals: Projects



- Projects work the same way as Resumes.
- Select the projects you want, along with the fields you want to include.
- Choose the number of images you want to include.

Deltek
Premier Partner

Stambaugh Ness



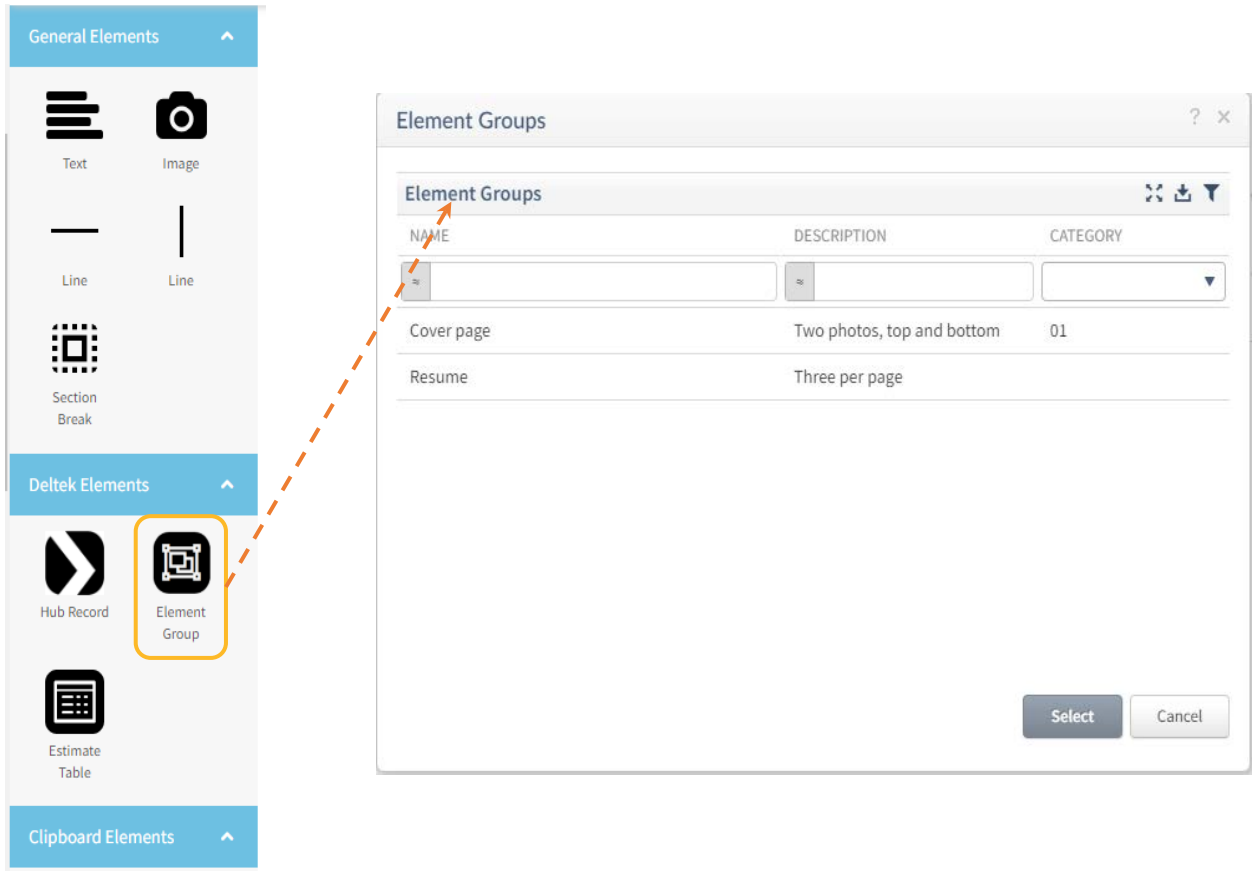
Vantagepoint Proposals: Proposal Templates

- Proposals can be saved as templates.
- Templates are useful in creating new proposals that are similar to previous efforts.

Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposals: Element Groups



- Element Groups are “mini templates” for various groups of items you may reuse regularly.
- Element Groups can be added to an existing or new proposal.
- They can also be edited in the Templates module.

Deltek
Premier Partner

Stambaugh Ness

Vantagepoint Proposal Resources

Vantagepoint Video Files

Introduction to Proposals

Proposal Templates

Element Groups

Deltek
Premier Partner

Stambaugh Ness

Questions?

Deltek
Premier Partner

Stambaugh Ness

Contact

Susan Patrick

Director, Client Solutions

spatrick@stambaughness.com

(717) 757-6999

Deltek
Premier Partner

Deltek
Premier Partner

Stambaugh Ness

Thank You!

Stambaugh Ness

www.stambaughness.com