

Vantagepoint/Vision Virtual User Group

January 18, 2023

PRESENTED BY:

Stambaugh Ness

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!

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.



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.



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.

Polling Question

Do you currently generate proposals from Vision or Vantagepoint?

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



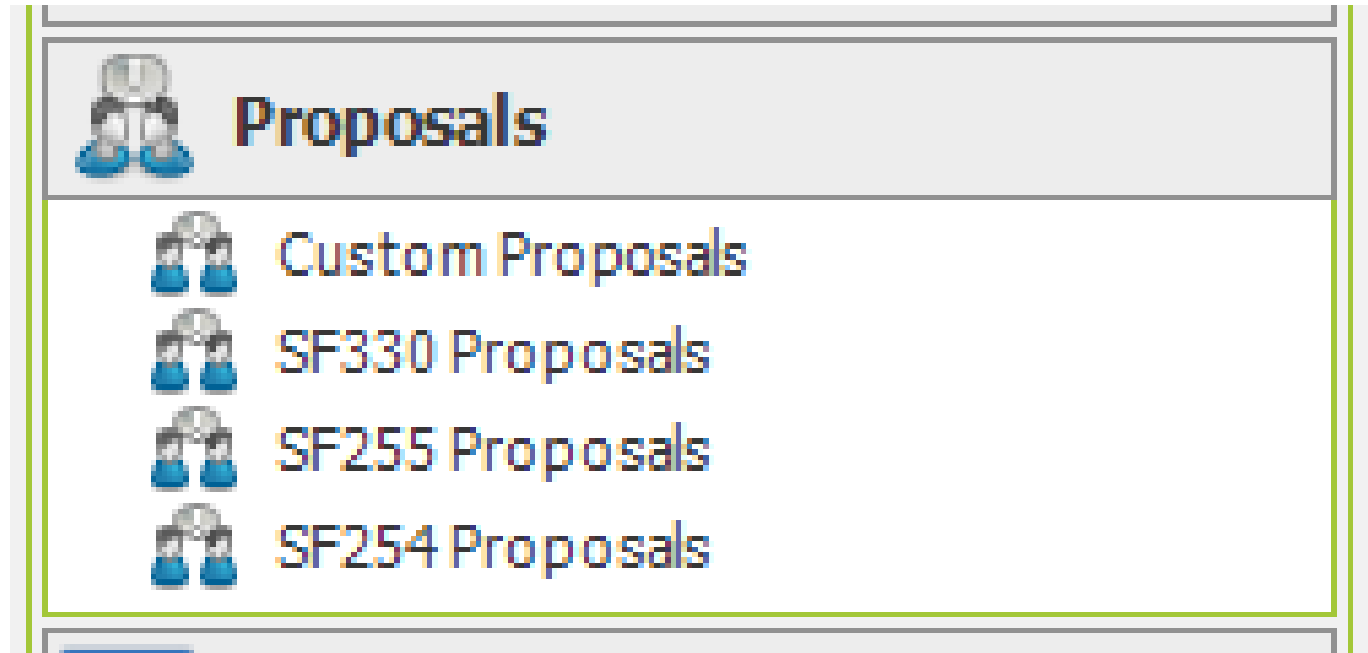
Vision / Vantagepoint Proposals



Vision Proposals

Vision Proposals

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



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

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.



Include Graphics

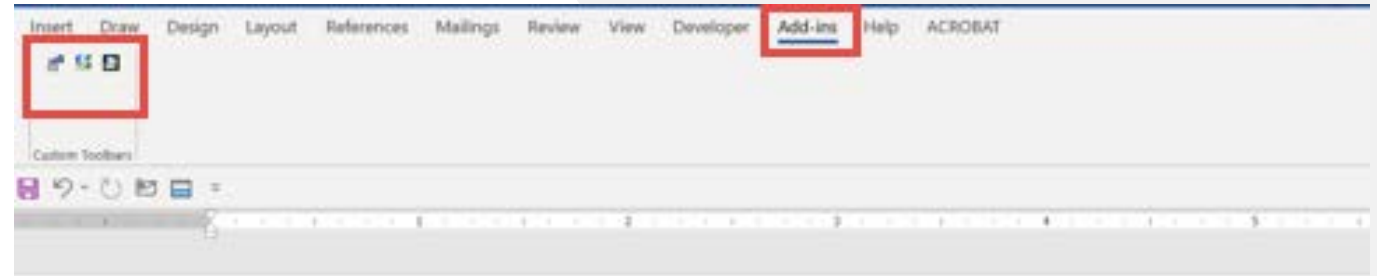
Links ▾		
Description	Link Path	Graphic
ER - nurses station / patients	C:\Users\SFerrell\Pictures\Vision\Emergency Room\ER.jpg	<input checked="" type="checkbox"/>
Nurses Station	C:\Users\SFerrell\Pictures\Vision\Emergency Room\nurses-station.jpg	<input checked="" type="checkbox"/>

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

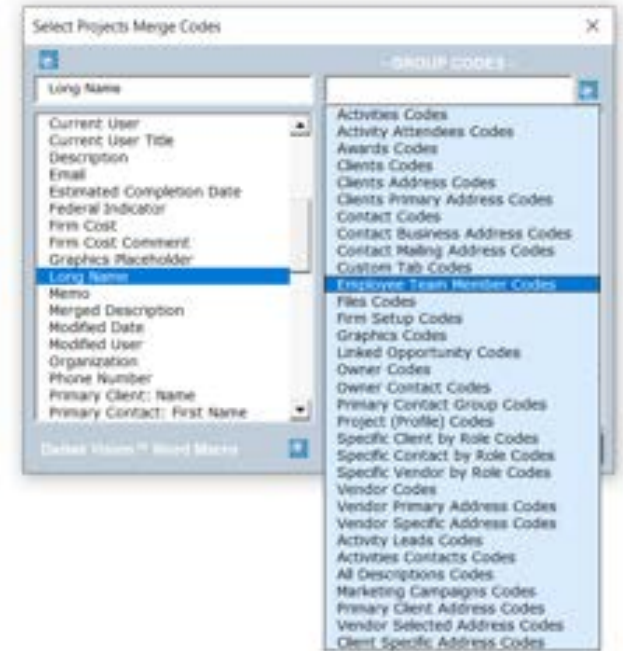


Merge Template Macro (Word)

- 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).

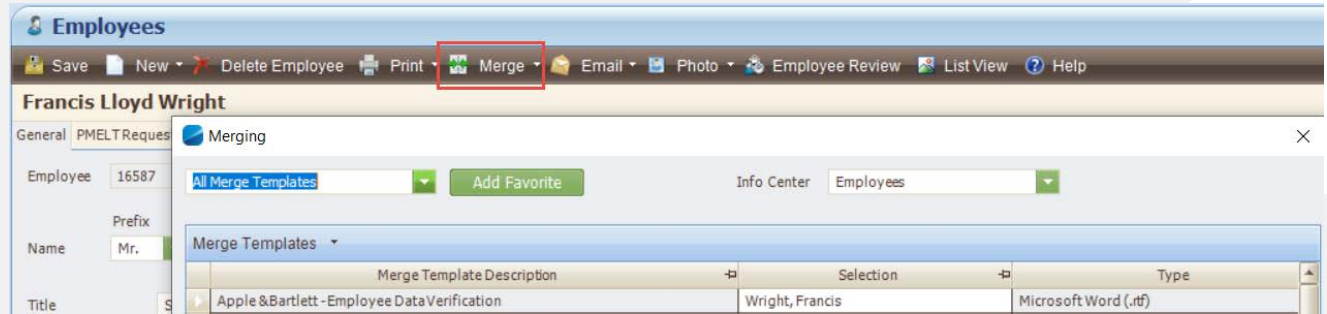


[Begin Projects][**Longname**]



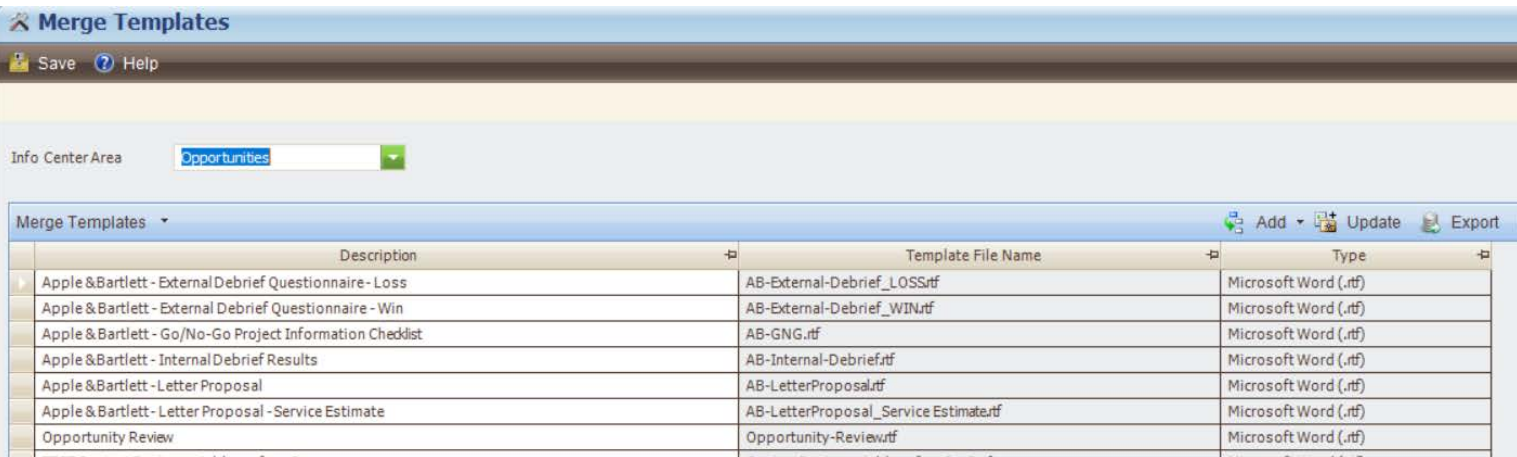
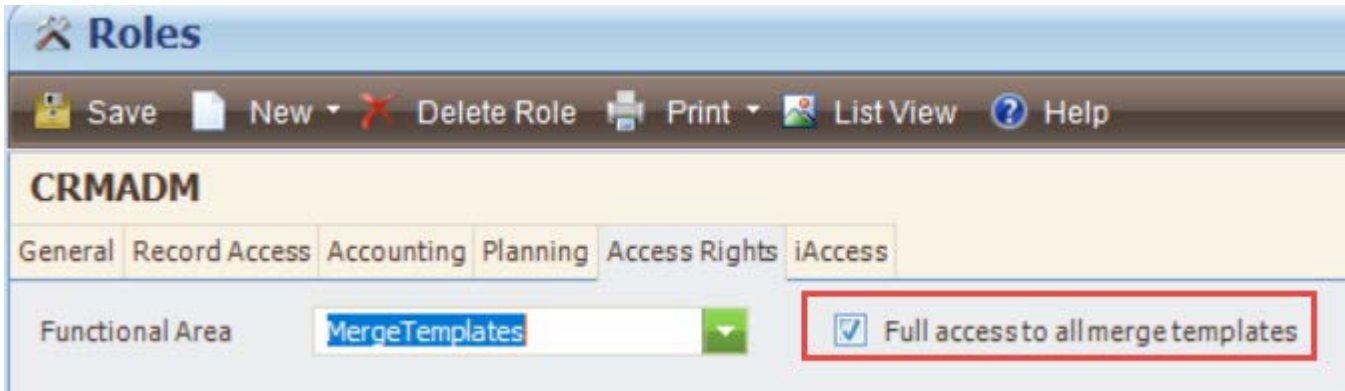
Merge Templates

- 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][{' / <u>PRIMARY?</u> : `(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.

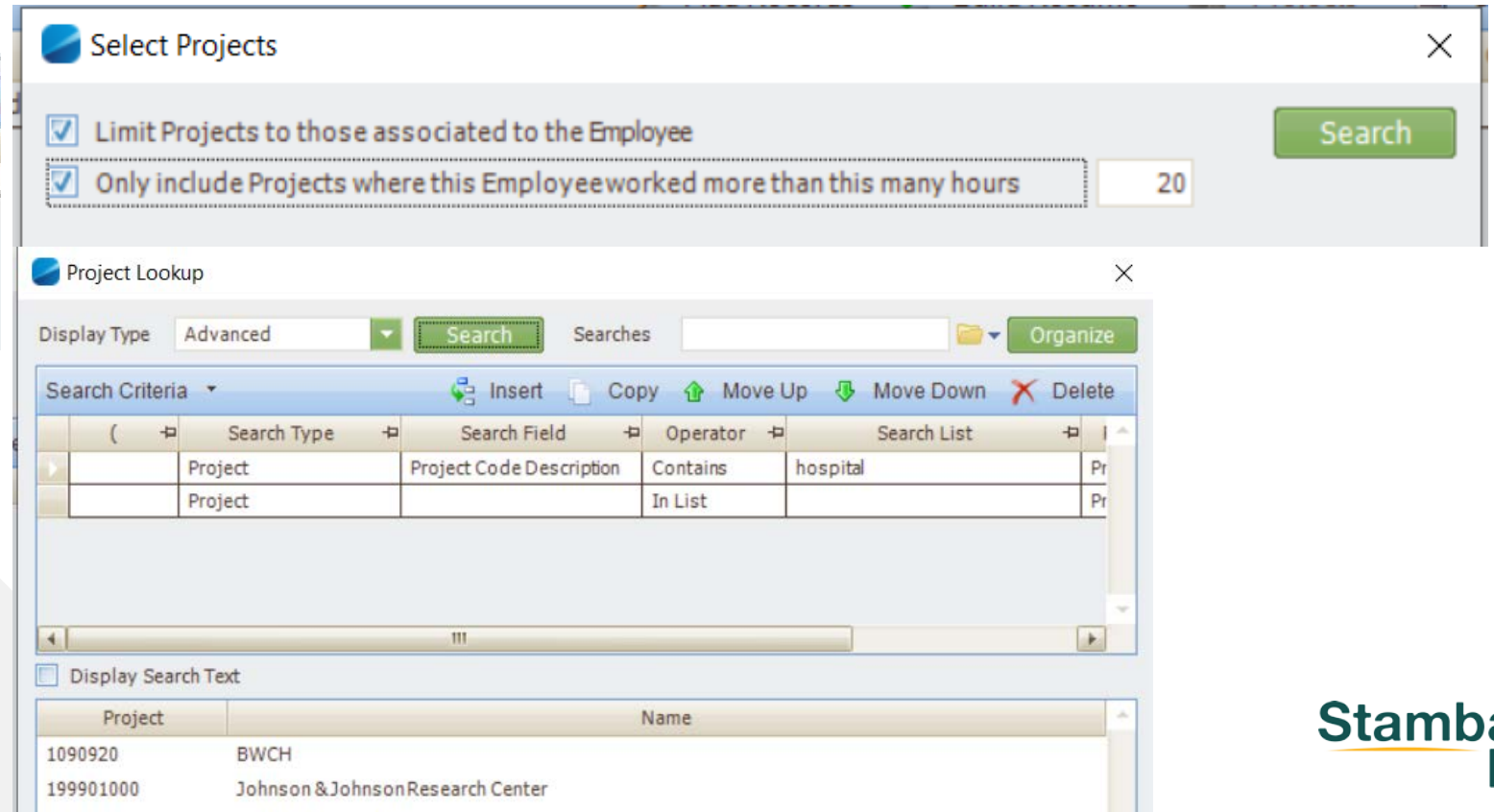
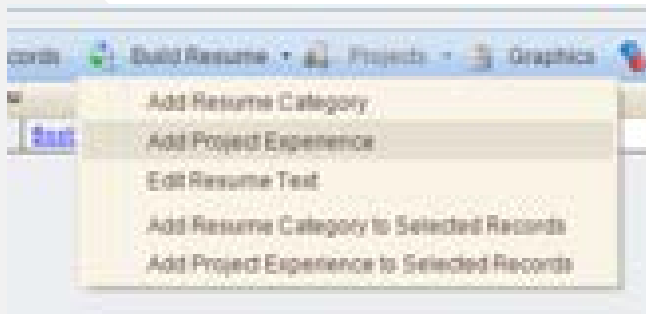
Merge Templates



- 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.

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.



The image shows two overlapping windows from a software application. The top window is titled 'Select Projects' and contains the following options:

- Limit Projects to those associated to the Employee
- Only include Projects where this Employee worked more than this many hours: 20

A 'Search' button is located to the right of these options. The bottom window is titled 'Project Lookup' and features a search interface with the following elements:

- Display Type: Advanced
- Search button
- Searches: []
- Organize button
- Search Criteria dropdown
- Actions: Insert, Copy, Move Up, Move Down, Delete
- Search List table:

(Search Type	Search Field	Operator	Search List	
	Project	Project Code Description	Contains	hospital	Pr
	Project		In List		Pr

At the bottom of the 'Project Lookup' window, there is a checkbox for 'Display Search Text' and a table with the following data:

Project	Name
1090920	BWCH
199901000	Johnson & Johnson Research Center

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.

330 Proposals

Save New Delete SF330 Open Edit Create Proposal Log Merge Help

demo

Page 1 Section E Section F Section G Section H Part II

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT Page 1 of 3
(Complete one Section E for each key person.)

12. NAME William Richard Apple	13. ROLE IN THIS CONTRACT Principal-In-Charge	14. YEARS EXPERIENCE	
		a. TOTAL 34	b. WITH CURRENT FIRM 29
15. FIRM NAME AND LOCATION <i>(City and State)</i> Apple & Bartlett, PC, San Francisco, CA			
16. EDUCATION <i>(Degree and Specialization)</i> MS /Structural Engineering /College of William and Mary /1988 BS /Structural Engineering /University of Florida /1985 BS /Civil Engineering /University of Florida /1982		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> VA /Professional Engineer /65485.345 /1992	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> William Apple has extensive experience in all aspects of civil engineering design, including wastewater management, utilities relocation, stormwater management, erosion control, drainage, site planning, and surveying. He also has extensive			
19. RELEVANT PROJECTS			
(1) TITLE AND LOCATION <i>(City and State)</i> Adelphi BioMed Research Lab Design and Construction Management Lexington, MA		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2009	CONSTRUCTION <i>(If applicable)</i> 2009
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> The new 14-story, 462,000 sq ft facility quadruples the size of the existing facility. The new lab changed the Lexington skyline and raised the profile of research in Massachusetts. All systems within the Adelphi Research Lab (ARL) are built with engineered and human redundancies in place to assure safe options at all levels. The ARL uses double High-Efficiency Particulate Air (HEPA) filters and contains redundant systems within the utility, power and mechanical		<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Johnson & Johnson Medical Research Center San Francisco, CA		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

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



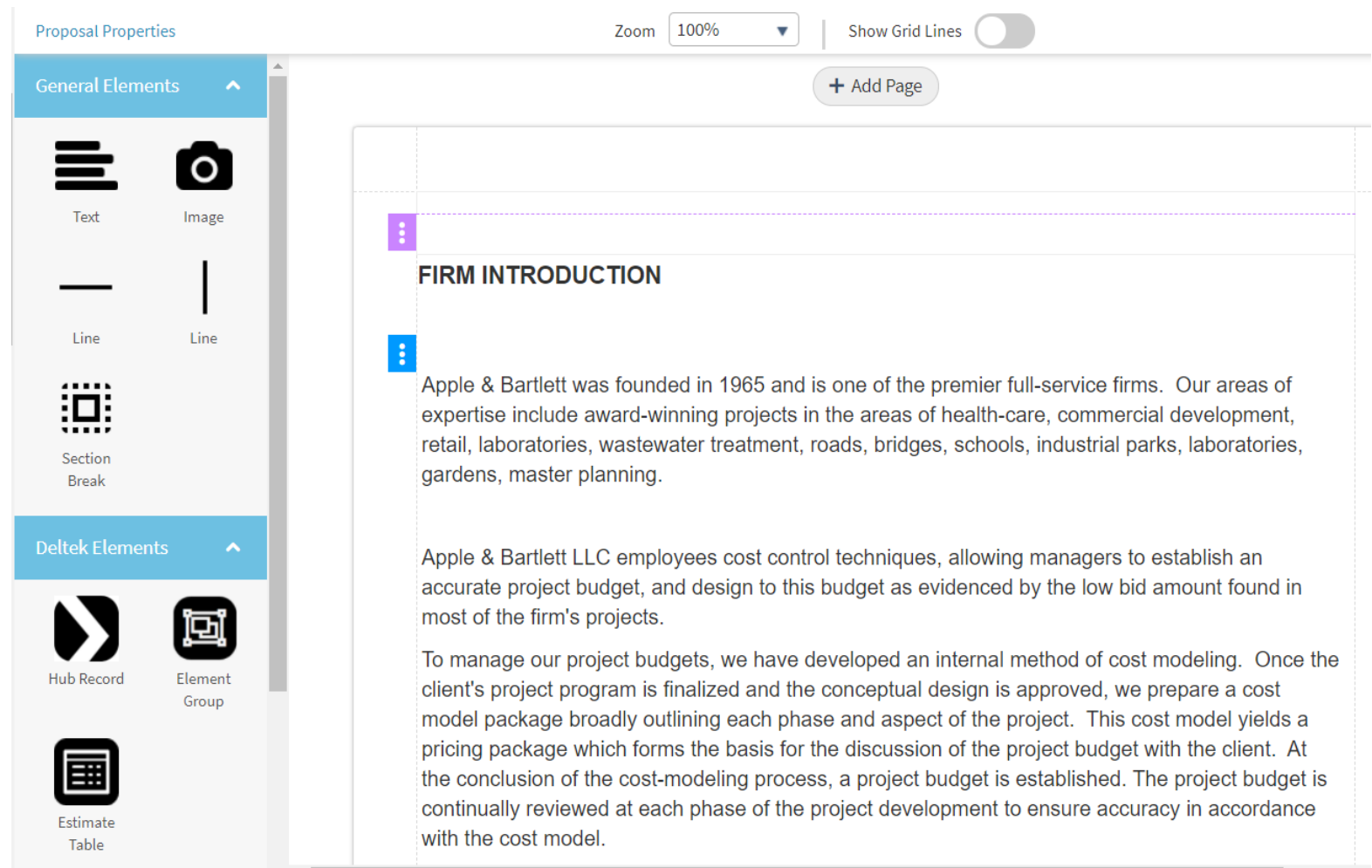
Vantagepoint Proposals

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.



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.






Templates

Proposal Templates					
NAME	DESCRIPTION	CATEGORY	CREATED BY		
AB - Proposal Format	General Proposal Format - Apple & t	Apple & Bartlett General Tr	Frank Wright, Jr.		
Letter Proposal Format	Letter Proposal Format	Apple & Bartlett General Tr	Frank Wright, Jr.		
+ Add Proposal Template					
Element Groups					
NAME	DESCRIPTION	CATEGORY	CREATED BY	LAST UPDATED	LAST UPDATED BY
IE from Custom Grid	IE Project Experience Custom Grid		Frank Wright, Jr.	3/29/2021 09:46 am	Frank Wright, Jr.
Intro - Apple & Bartlett	Introduction to the Firm	Boilerplates	Frank Wright, Jr.	4/28/2020 12:40 pm	Frank Wright, Jr.
Ohio Stadium	test of description	Project Profiles	Frank Wright, Jr.	5/13/2020 11:40 am	Frank Wright, Jr.
Profile - Boston Women and Childrens	Boston Women and Children's Hosp	Project Profiles	Frank Wright, Jr.	5/24/2021 12:55 pm	Frank Wright, Jr.
+ Add Element Group					



← Profile - Boston Women and Childrens (Element Group)

Element Properties Zoom 100% | Show Grid Lines

General Elements

-  Text
-  Image
-  Line
-  Line
-  Section Break

Deltek Elements

-  Hub Record
-  Estimate Table

Clipboard Elements



Boston Women's and Children's Hospital

Boston Women's and Children's Hospital is the largest community-based obstetric facility in the country with over 12,000 deliveries annually. The new hospital is a 30,000-square-foot facility designed to consolidate the location of Obstetric and GYN Services, Diagnostic, Educational and Specialty Retail Women-Related Services such as:

Perinatal Diagnostic Center, Breast-Care Center, 45 Labor Delivery Recovery Rooms, 50 Postpartum Rooms, New-Born Nurseries, 26-Bed Level-III Neonatal Intensive-Care Unit, Lactation Center, 22 GYN Patient Rooms

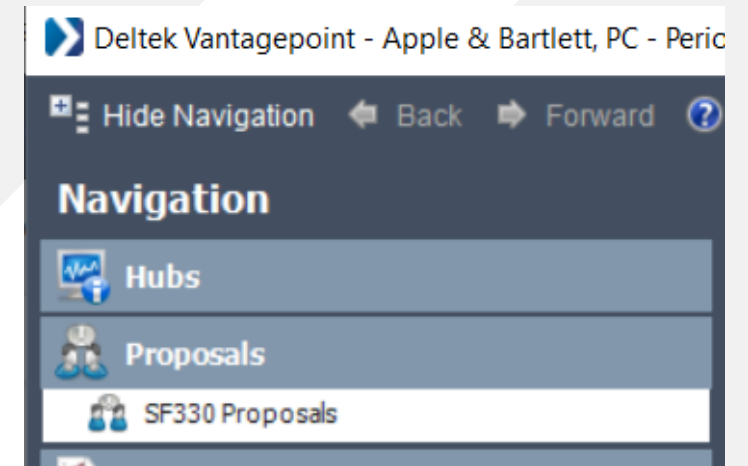
The design for this comprehensive medical campus introduces new, more efficient operational concepts and a more flexible facility design to support optimum patient care. The technological expression of stainless steel is balanced with traditional architectural elements.

The building is designed to provide a less institutional and a more patient and family oriented environment. Major departments are organized into small clusters or "pods" to increase a sense of privacy and to assist in way finding.

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



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

Vantagepoint Proposals

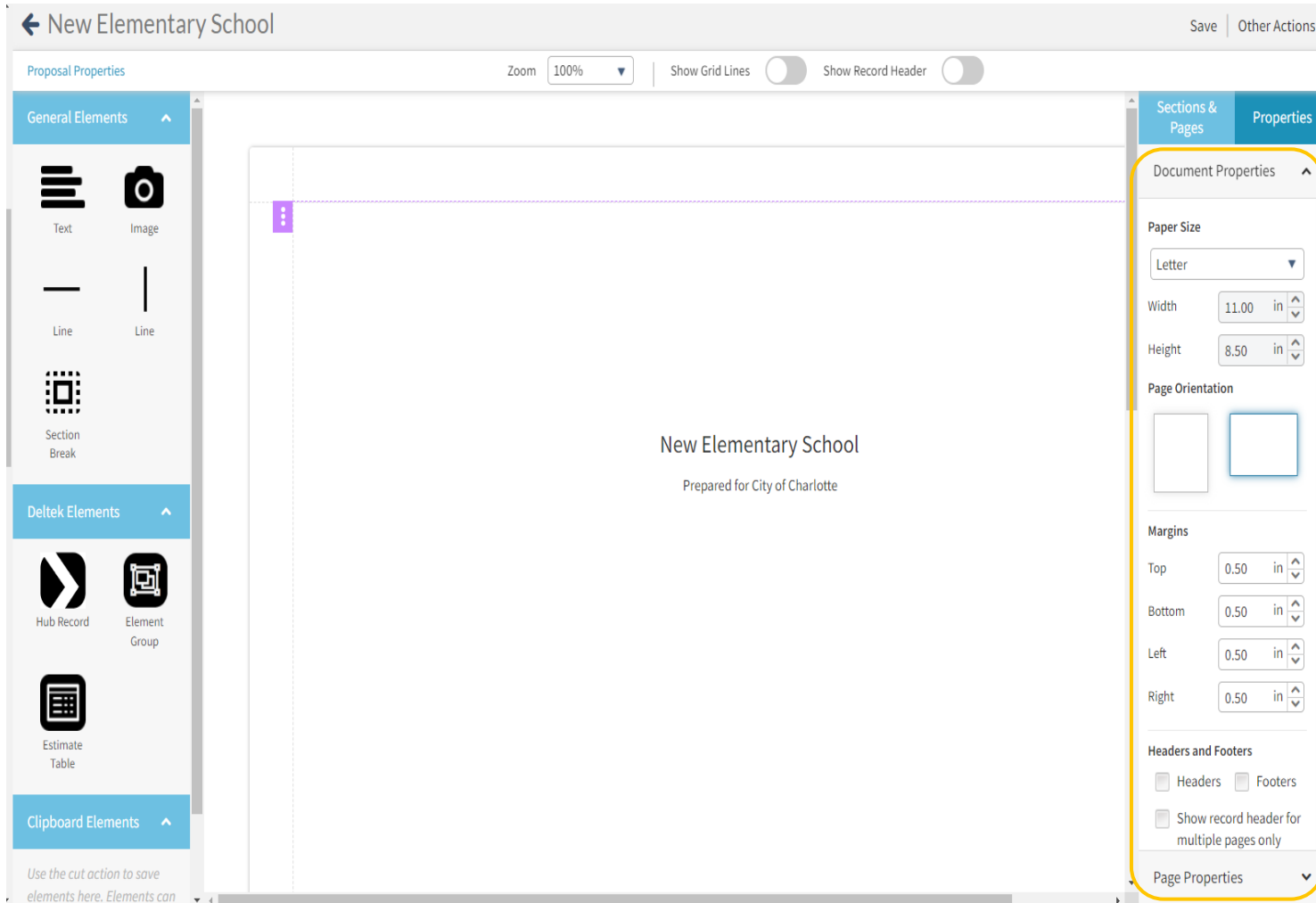
- New proposals can be created “from scratch” or from a template.
- New Proposals dialog allows entry of basic important information about the Proposal.
- Additional Properties are also available if needed.
- If templates are available, can be chosen from dropdown.

The screenshot displays the Deltek Vantagepoint web application interface. The top navigation bar includes the Deltek logo and user information. The main content area shows a 'Custom Proposals' section with a search bar and a table header. The table columns are: NAME, DUE DATE, PROPOSAL MANAGER, STATUS, CLIENT, ORGANIZATION, NUMBER, and DATE ADVERTISED. Below the table, a message states 'There are no records to show in this grid.' A 'New Proposal' dialog box is open in the foreground, containing the following fields:

- Template:** A dropdown menu with a 'Preview' button next to it.
- Name:** A text input field containing 'New Elementary School'.
- Number:** A text input field containing '12345'.
- Project:** A dropdown menu containing 'Abington Elementary School'.
- Due Date:** A date picker field showing '2/3/2023'.
- Client:** A dropdown menu containing 'City of Charlotte'.
- Organization:** A dropdown menu containing 'Boston Architecture'.
- Proposal Manager:** A dropdown menu.

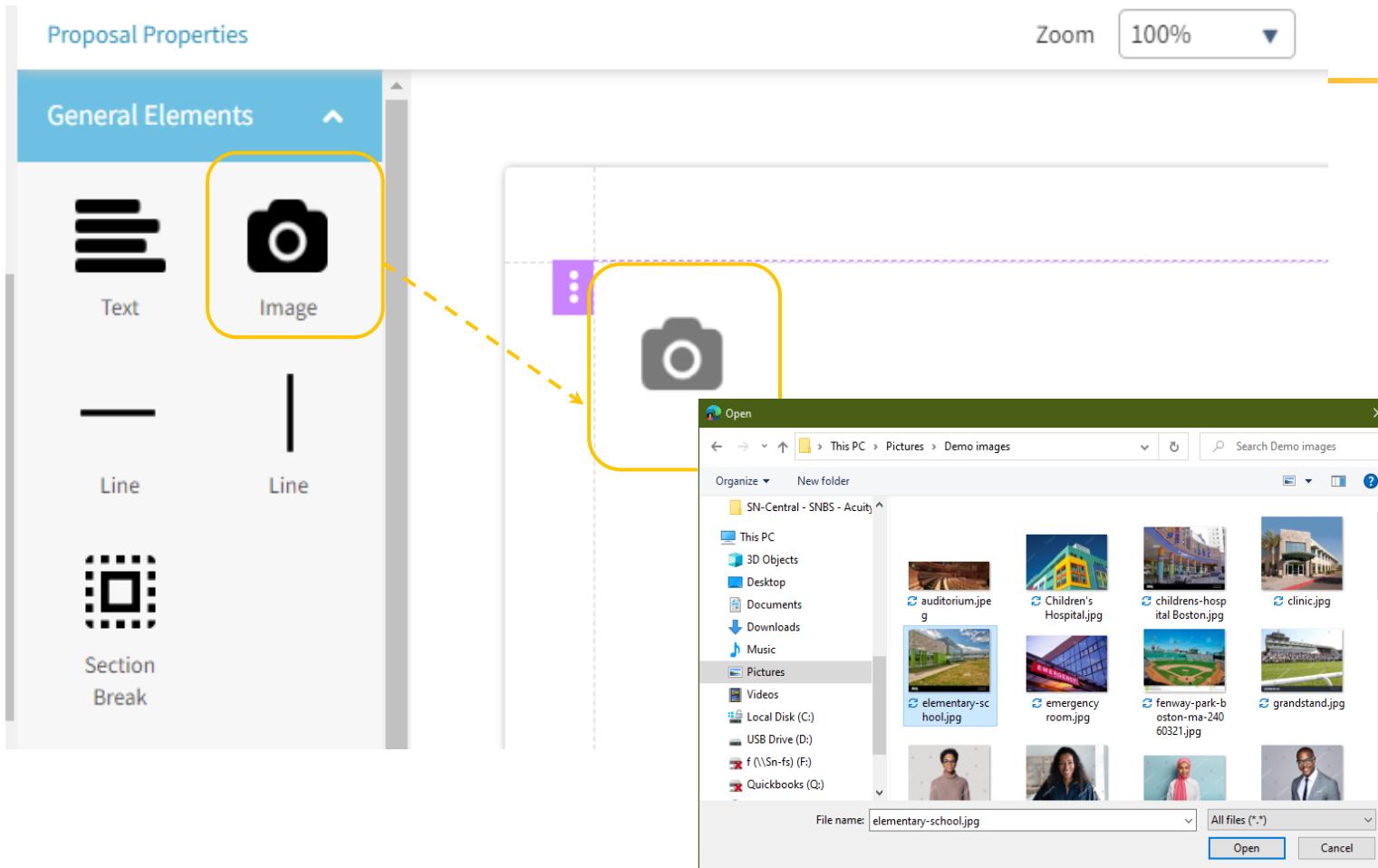
At the bottom of the dialog box, there is a 'Show Additional Properties' link and two buttons: 'Continue' and 'Cancel'.

Vantagepoint Proposals



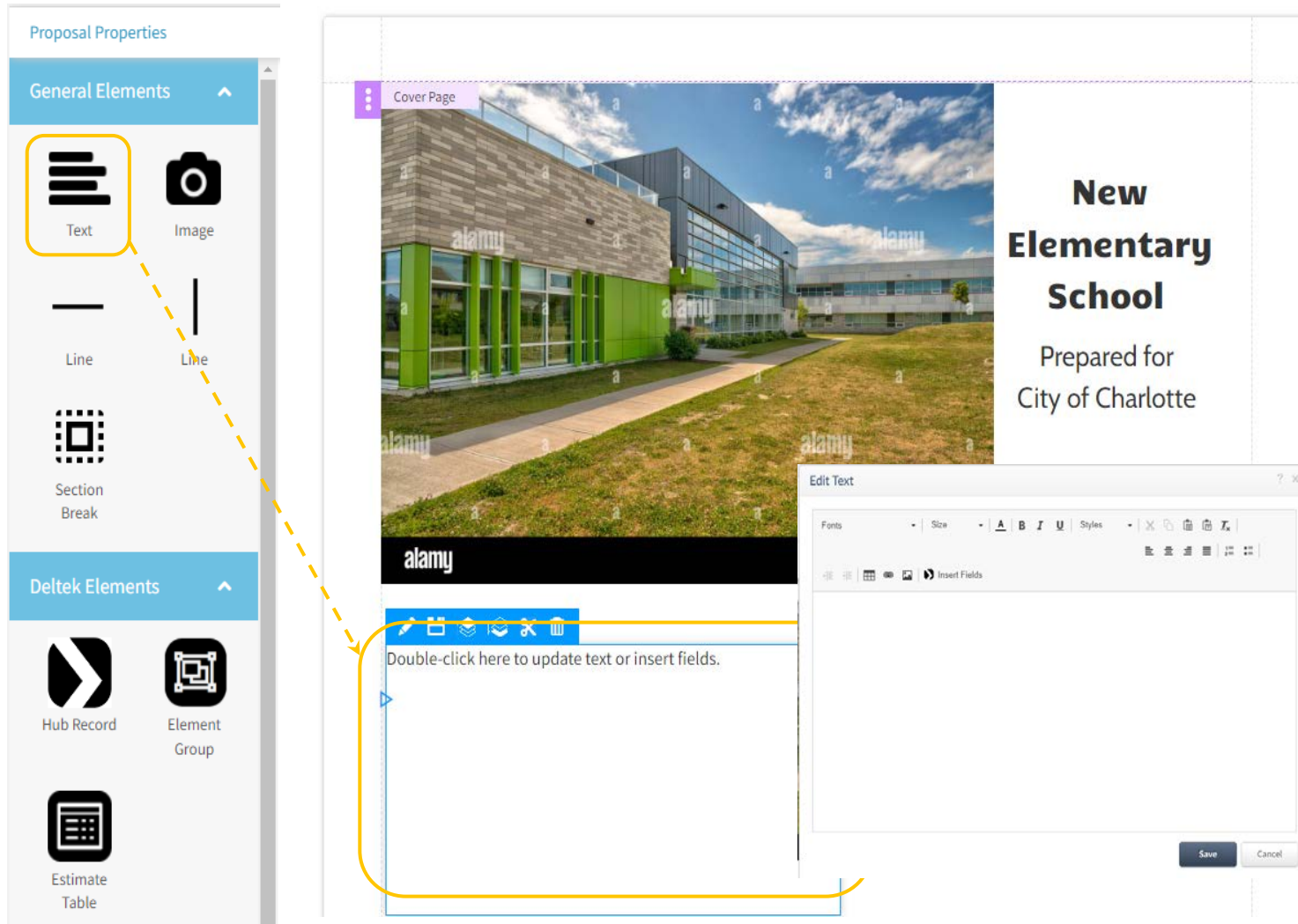
- Proposal Name and Client are inserted automatically on the Cover Page.
- Begin by setting up document format.
- All new proposals are formatted in landscape orientation by default.

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.

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

Vantagepoint Proposals

The screenshot displays the 'Edit Text' window in the Vantagepoint Proposals application. The 'Insert Fields' dialog is open, showing a list of fields to add and a table of all selected fields. The 'Edit Text' window shows the text 'Proposal: Due Date' and 'Proposal: Organization' with red boxes around them, indicating they are selected for editing. The 'Save' and 'Cancel' buttons are visible at the bottom of the 'Edit Text' window.

Select Fields to Add

Quick Find Clear

Expand All Collapse All

- Awarded Date
- Client
- Date Advertised
- Fee
- Notes
- Number
- Project
- Proposal Manager
- Source
- Status
- Submittal Date
- Type

All Selected Fields

Expand All Collapse All

SELECTED DATA	SELECTED ROWS	FIELD OPTIONS
Proposal: Due Date	January 12, 2023	
Proposal: Organization		
Proposal: Name		X

Edit Text

Proposal: Due Date Proposal: Organization

Save Cancel

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



Submitted
to City of
Charlotte
February 3, 2023

Qualifications to Provide Architectural and Engineering Services For

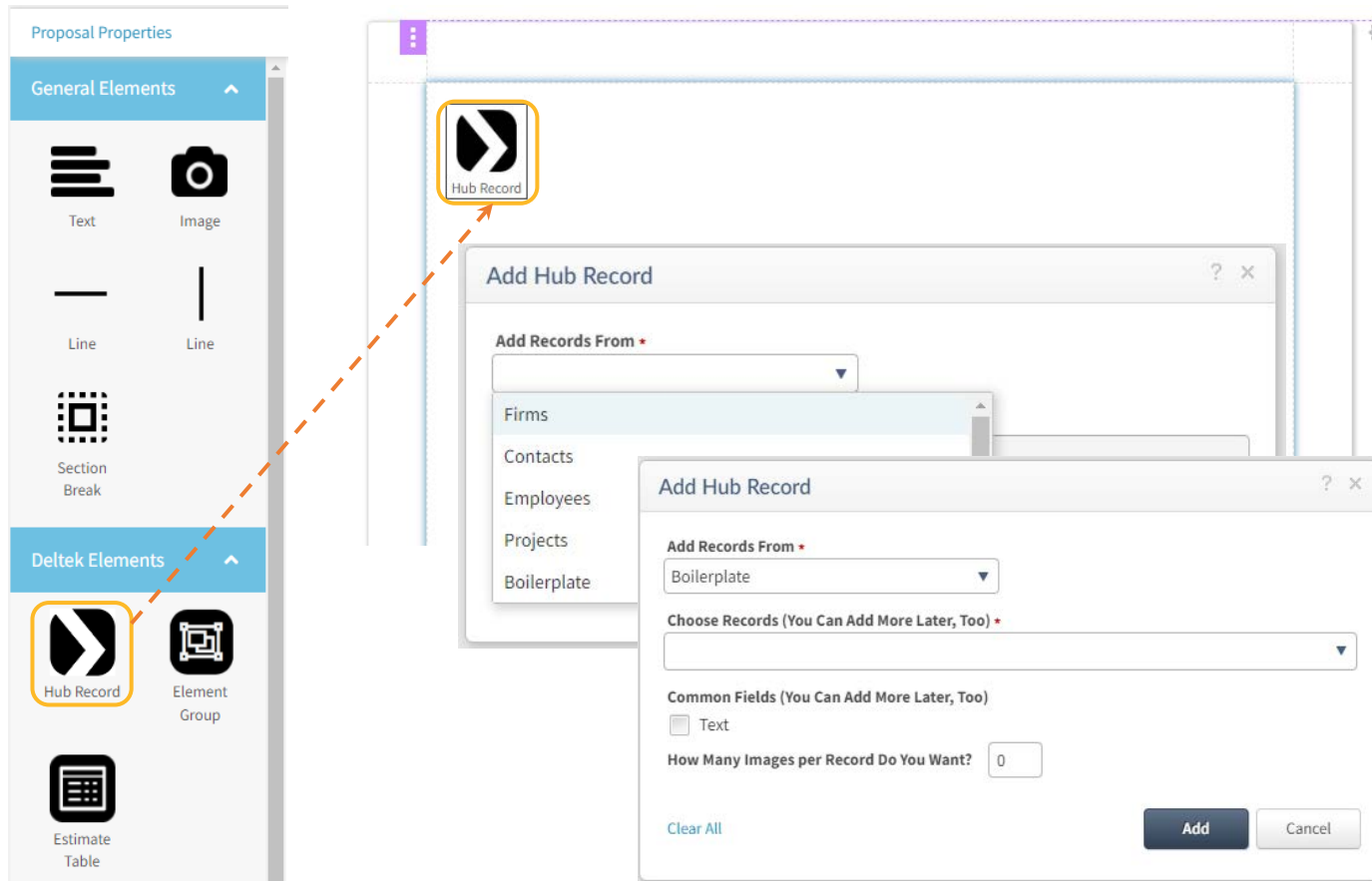
New Elementary School



Vantagepoint Proposals

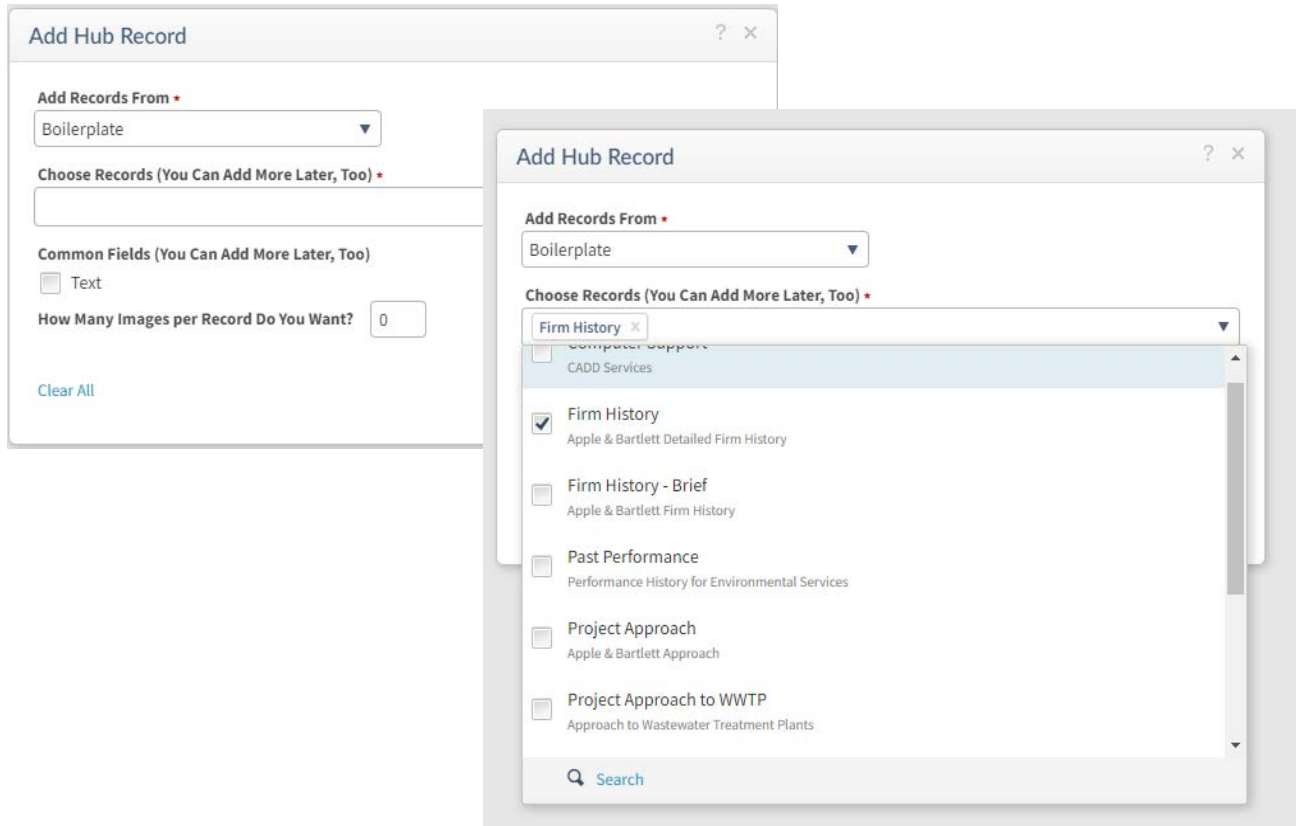
- Once the section is complete, it be saved as a draft or finalized and saved.
- “Save as Draft” allows continuing changes
- Once finalized, no further edits can be made.

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.

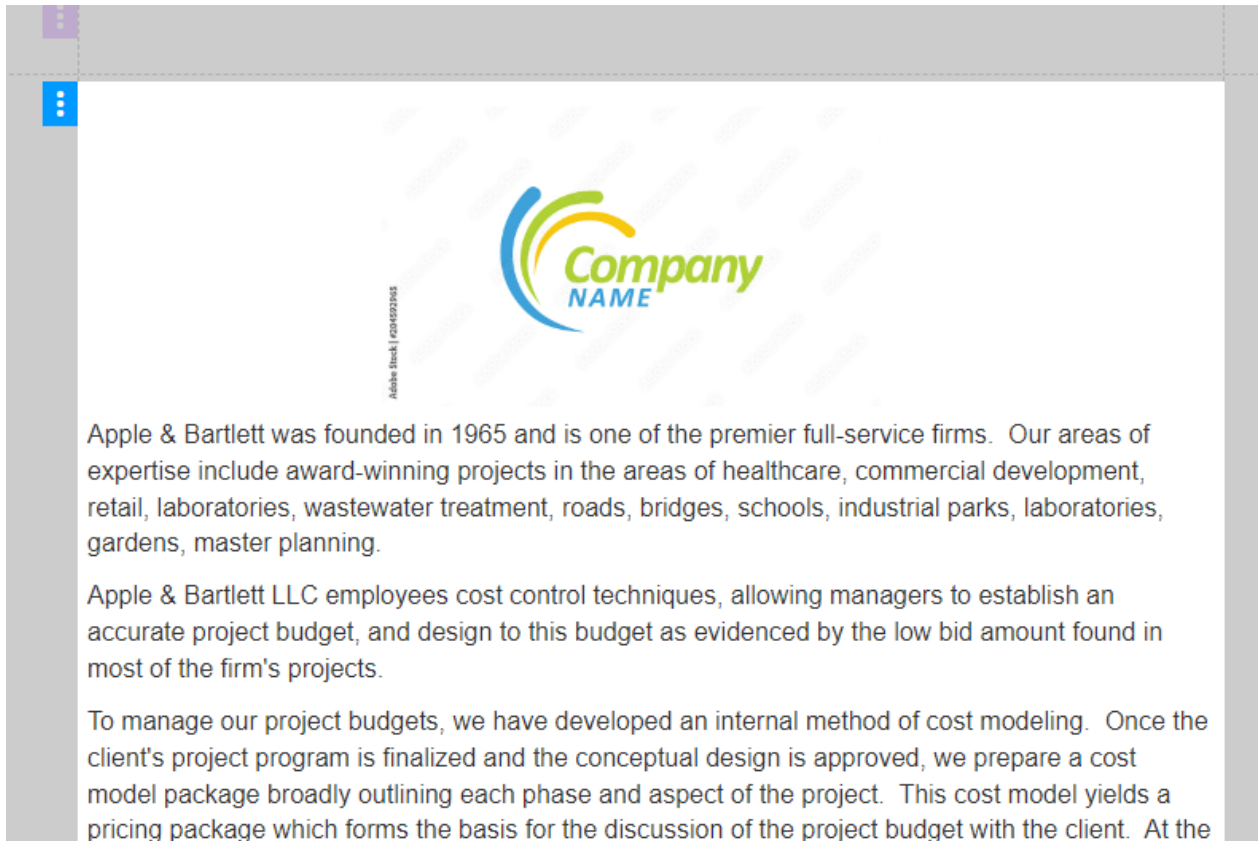
Vantagepoint Proposals



- 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.

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.

The image shows two overlapping dialog boxes from the Vantagepoint software. The background dialog is titled 'Add Section' and has a 'Section Name' field containing 'Key Personnel'. The foreground dialog is titled 'Add Hub Record' and contains the following elements:

- Add Records From ***: A dropdown menu with 'Employees' selected.
- Choose Records (You Can Add More Later, Too) ***: A multi-select field containing four items: 'Billy Apple, PE', 'Grace Cohen, AIA', 'Stephen Wills', and 'Steve Anderson, ...'.
- Common Fields (You Can Add More Later, Too)**: Two checked checkboxes for 'Full Name' and 'Title'.
- How Many Images per Record Do You Want?**: A text input field with the value '1'.
- Buttons: 'Clear All' (text), 'Add' (dark blue), and 'Cancel' (light grey).

Vantagepoint Proposals: Resumes

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

Add Hub Record ? x

Add Records From *
Employees ▼

Choose Records (You Can Add More Later, Too) *
Billy Apple, PE x Grace Cohen, AIA x ▼

Common Fields (You Can Add More Later, Too)
 Full Name
 Title

How Many Images per Record Do You Want?

[Clear All](#) **Add** **Cancel**

Edit Record Layout

Adjust

Space between records
0.50 in ▲▼

Page Break for each record

Add multiple pages to record
2 ▲▼

Save Record Layout as Draft

Merge and Finalize Records

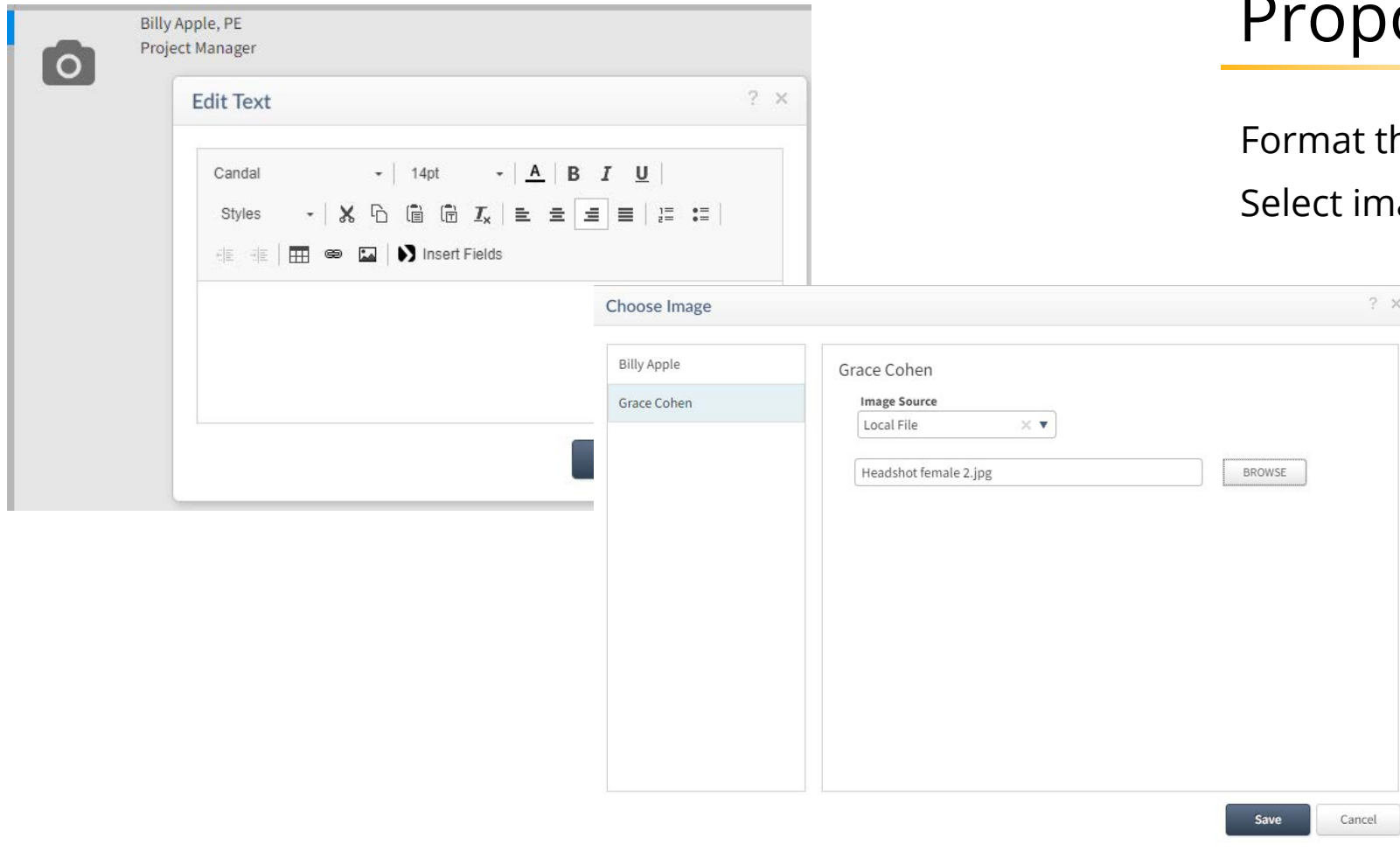
Cancel and Revert Changes

[Manage Records](#)

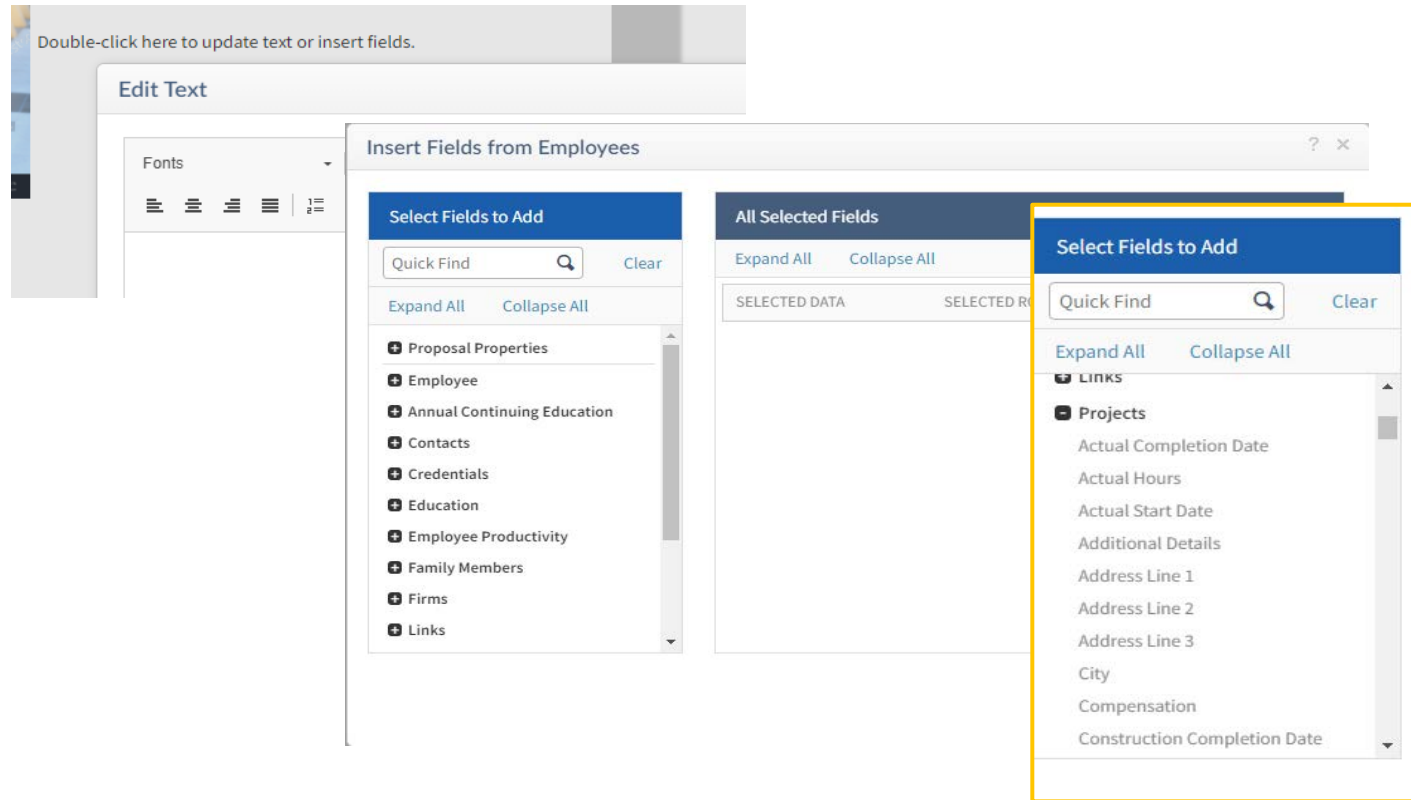
Vantagepoint Proposals: Resumes

Format the text as appropriate.

Select images from network location..



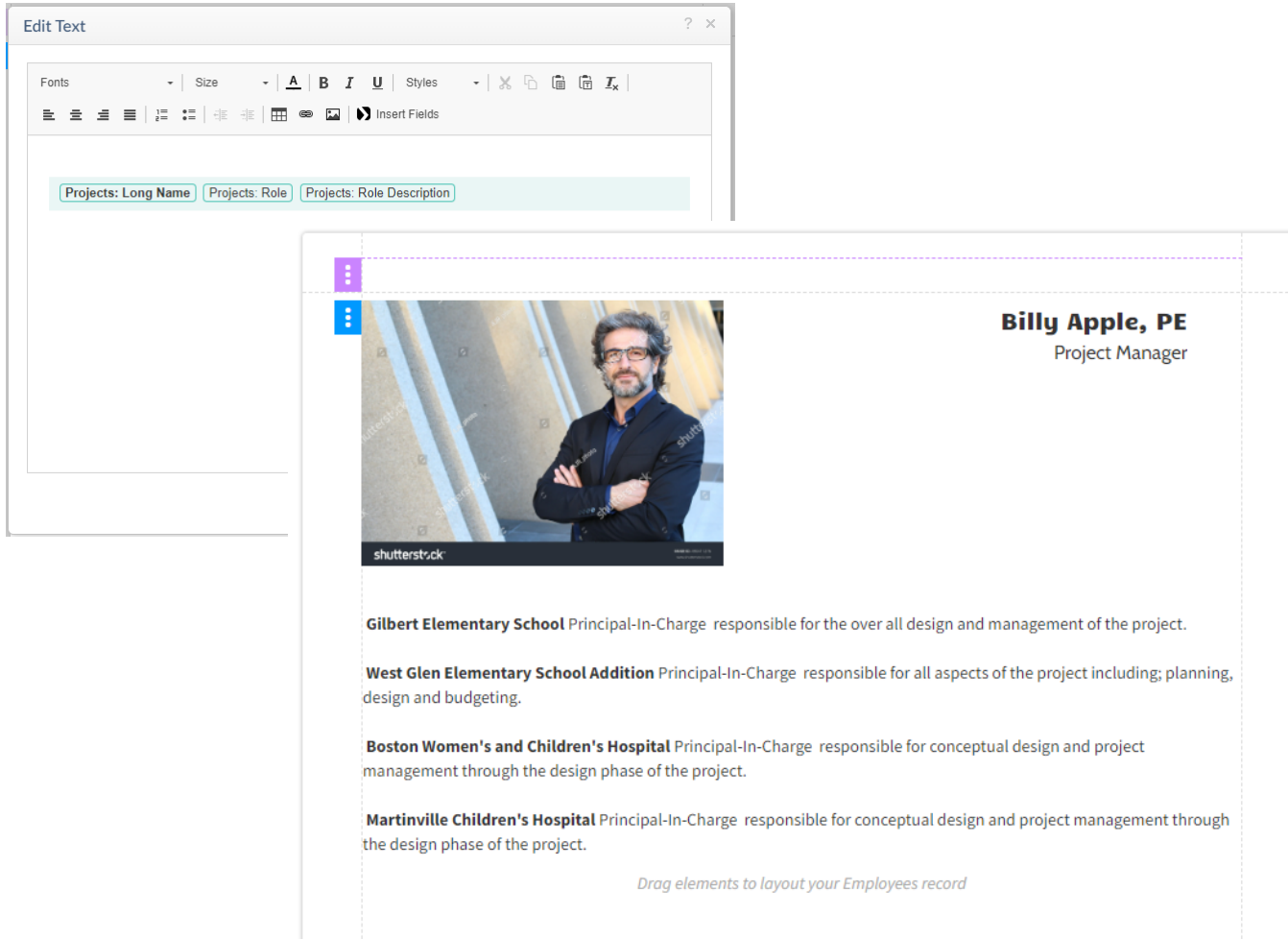
Vantagepoint Proposals: Resumes



- 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.

Vantagepoint Proposals: Resumes

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



The screenshot displays the Vantagepoint software interface for creating resumes. On the left, an 'Edit Text' window is open, showing a rich text editor with a toolbar containing options for font size, bold, italic, underline, and styles, as well as icons for undo, redo, and insert fields. Below the toolbar, there are three text boxes labeled 'Projects: Long Name', 'Projects: Role', and 'Projects: Role Description'. The main content area on the right shows a resume template for 'Billy Apple, PE', Project Manager. It features a professional photograph of Billy Apple, PE, with a 'shutterstock' watermark. Below the photo, there are four project descriptions, each starting with a project name and role, followed by a brief description of responsibilities. At the bottom of the template, there is a note: 'Drag elements to layout your Employees record'.

Vantagepoint Proposals: Projects

Add Hub Record

Add Records From ▾ Projects

Project Stage
 Won Pursuit

Choose Records (You Can Add More Later, Too) ▾
Gilbert Element... × Kennedy School... × West Glen Elem... ×

Common Fields (You Can Add More Later, Too)

Project Long Name
 Client Name
 Location
 Country
 Description

How Many Images per Record Do You Want? 1

Clear All

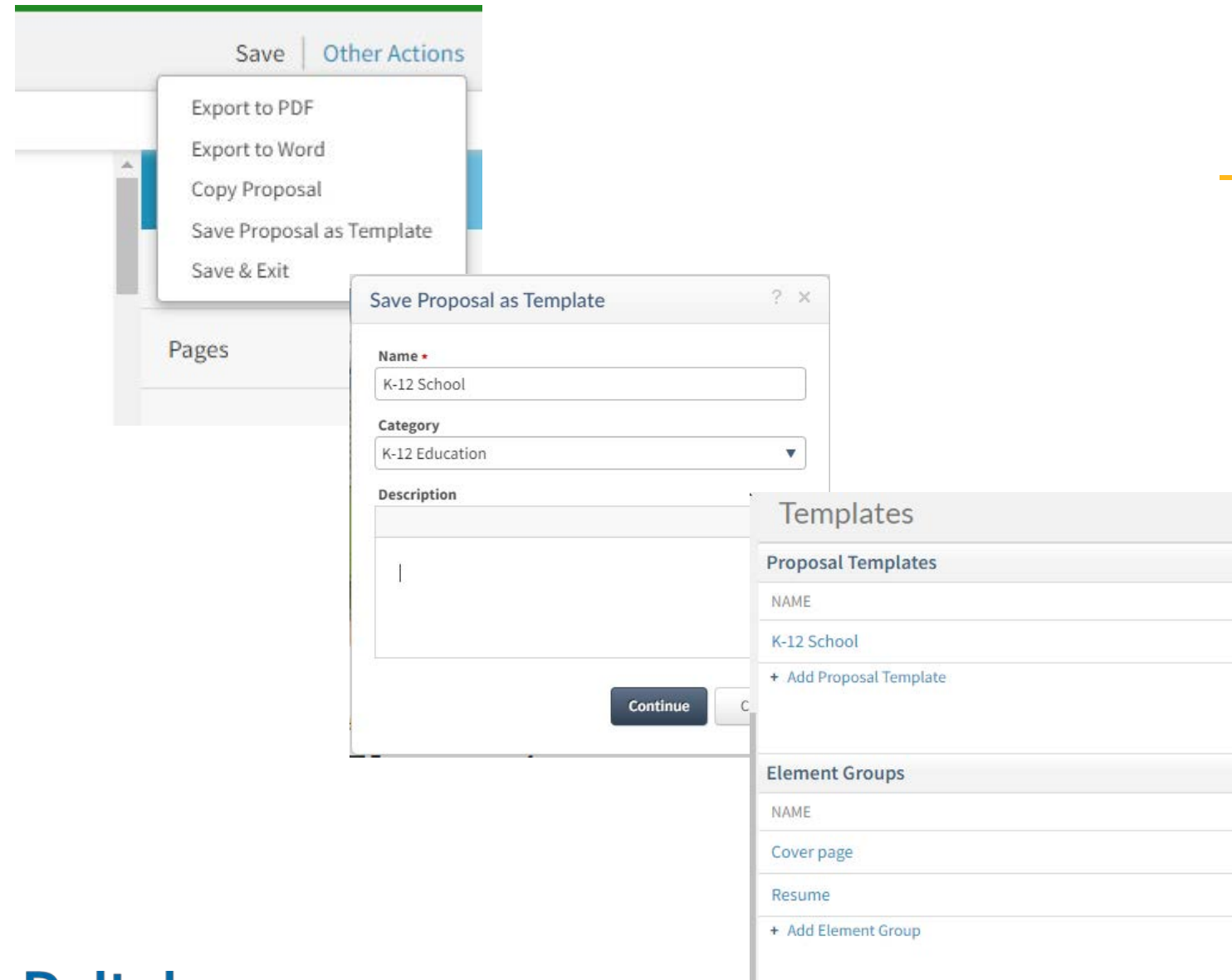
Gilbert Elementary School
City of Memphis, Memphis, Tennessee

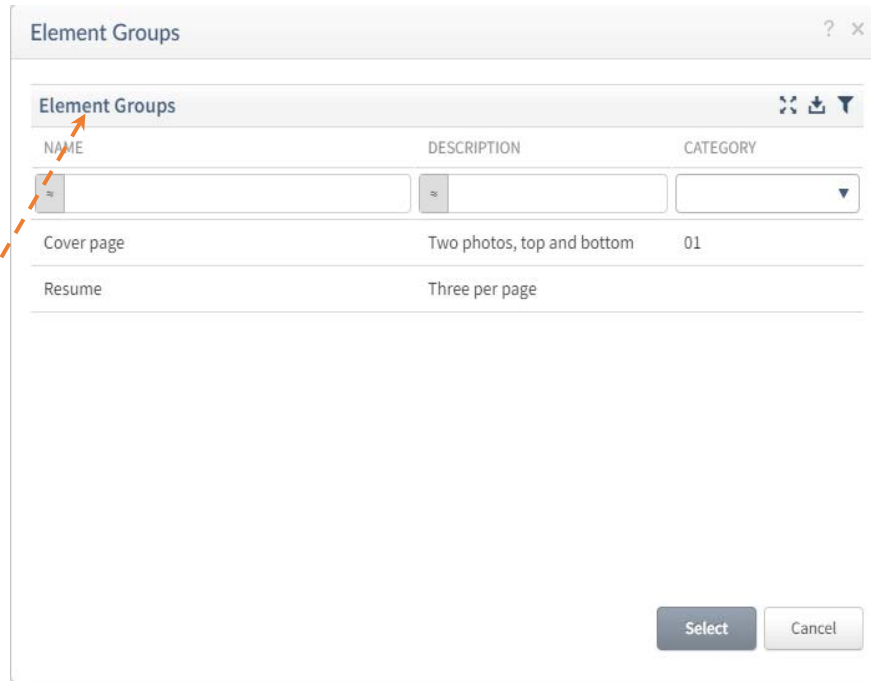
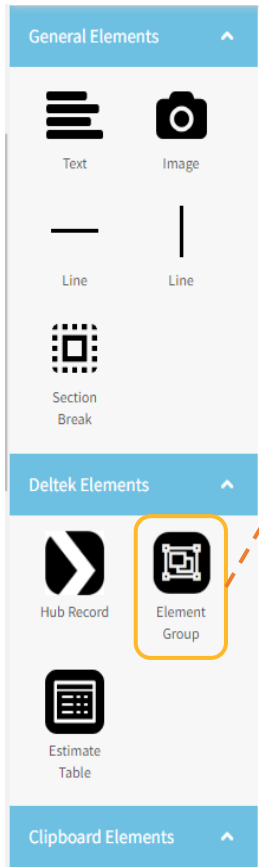
Complete design for this new school. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed et diam consectetur libero molestie auctor. In in arcu ut ex vehicula consequat. Curabitur tincidunt vulputate cursus. Aenean eu libero sem. Sed a ante in ante imperdiet sollicitudin vel sit amet lorem. Nullam mattis erat nulla, vitae elementum lectus porta at. Phasellus volutpat sem orci, non malesuada nibh imperdiet ut. Aenean laoreet rhoncus dui at pulvinar. Duis ultrices finibus erat, non rhoncus sapien ultricies vel. Phasellus sollicitudin ultricies mi, et tempor nulla hendrerit tincidunt. Vestibulum feugiat sem vel risus porta, in viverra sapien fringilla. Nunc quis metus eget neque lacinia rhoncus ut nec purus. Morbi posuere rhoncus pellentesque. Pellentesque a mattis odio, ac hendrerit purus. Pellentesque dolor enim, malesuada non rutrum nec, condimentum quis mi. Phasellus pellentesque neque sit amet tempor sollicitudin. Curabitur in lorem dapibus, vehicula sapien id, cursus erat. Fusce venenatis nulla non fringilla blandit. Sed dapibus aliquet euismod. Integer rhoncus ipsum ligula, et sagittis arcu congue sed. Sed in metus mattis, dictum dui id, accumsan ipsum. Suspendisse aliquet elementum erat id luctus. Donec sed lacus vel tortor auctor efficitur eget a ex.

- 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.

Vantagepoint Proposals: Proposal Templates

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





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.

Vantagepoint Proposal Resources

Vantagepoint Video Files

Introduction to Proposals

Proposal Templates

Element Groups

Questions?




Contact

Susan Patrick

Director, Client Solutions

 spatrick@stambaughness.com

 (717) 757-6999



**Stambaugh
Ness**

Thank You!

Stambaugh Ness

www.stambaughness.com