Stambaugh Ness

Vantagepoint/Vision Virtual User Group

April 19, 2023

PRESENTED BY:

Stambaugh Ness

www.stambaughness.com

Meet Your Presenters

Susan Patrick

Director, Client Solutions

Mike Williams

Senior Solutions Advisor

Meeting Moderator: Kayleigh Engle, *Marketing & Business Development*

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Upcoming UG Meetings

Virtual

When: May 17, 2023
Time: 2:00 – 3:00PM
Where: At Your Desk
Topic: TBD – Please fill out the survey to get your voice heard!

Pittsburgh

When: April 20, 2023
Time: 9:00 – 11:00AM
Where: RIG Consulting, Inc.

South Central PA

When: TBD
Time: 9:30 – 11:30AM
Where: RLPS Architects

AE Firm Valuations: M&A's Crucial Opening Act

May 16, 2023 | 2:00 p.m. - 3:00 p.m. EDT | GoToWebinar

Whether your AE firm is a start-up, is in growth mode, or is considering an ownership transition, knowing and understanding your worth has significant benefits. The truth is that most business owners have an inaccurate perception of their firm's value.

A formal valuation provides you with accurate numbers that can be leveraged to meet your goals around ownership transition, whether as the current owner or a future owner.

Join SN's Transition Solutions expert Jeff Adams as he delves into a conversation with AE Valuation expert Becky Carlson and AE M&A experts Hobson Hogan and Lucas Klein for a look at AE industry-specific valuations, their drivers, and the role they play in your transition strategies.

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Agenda

SN Upcoming Events & Updates

Our Main Event:

Vantagepoint 6.0

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Reminder to Fill out Survey!

Polling Question

What system are you on today?

- Vision
- Vantagepoint
- Ajera
- Other

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Polling Question

If you are not on Vantagepoint when do you plan to upgrade?

- By End of September
- By End of 2023
- First half 2024
- After June 2024
- When We have to

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What's New in Vantagepoint 6.0

Role Based Security

You can now apply role based security settings for dashpart bases and for columns of the employee dashpart base. You configure this new security setting on the Access Rights tab of the Roles form (**Settings » Security » Roles**).

You can configure access rights for dashpart bases by role:

- You can identify which dashparts display in a dashboard by dashpart base. When you display a dashboard that contain dashparts restricted by the dashpart base security setting, the contents of those restricted dashparts are replaced with an access restriction message.
- You can, when using edit mode on the Dashboards form, still create dashparts that are restricted to you and you can see the restricted dashparts in the Dashpart Library, but you are unable to view those restricted dashparts on a dashboard.

You can configure access to specific columns in the employee dashpart base by role:

- You can identify the specific columns that are available for a role, to restrict which columns display in the dashpart when members of that role display a dashboard. If all columns are restricted for the dashpart, the contents of the dashpart are replaced with an access restriction message.

With the update to Vantagepoint 6.0, roles that don't have Save for All Roles setup in **Dashboards and Dashparts** field, in the overview tab of the Roles form, still do not have access to the employee dashpart base. An administrator needs to assign employee dashpart base and column access for these roles before the dashparts with the employee dashpart base can display on a dashboard.

If the columns in a dashpart are dependent on, or linked with, a restricted column, then the dashpart content is also replaced with an access restriction message. Column dependency is a factor when a restricted column is used for any of the following:

- Grouping
- Sorting
- Filtering (with the exception of hidden columns)
- Table dashparts with conditional formatting

You can also restrict which columns are available while you are creating and modifying dashparts in the edit mode of the Dashboards form.

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Dashboards – Find Dashparts

Use the new Quick Find field at the top of the Dashpart Library pane to find available dashparts more efficiently. When you enter a criterion in the Quick Find field, the Available Dashparts list updates with dashparts that match your entry, use dashpart titles as the basis for finding matches. (If you have the appropriate access rights, you can access the Dashparts Library while working in edit mode on the Dashboard form.)

Dashboards – Employee Base

In addition to **user-defined** fields from the Employees hub, the following columns are now available as columns for the employee dashpart base:

- Firm Indicator
  - This column displays Y or N, to indicate whether or not the record is associated with a firm.
  - If you select the Firm checkbox on the Overview tab of the Employee hub to indicate that the employee is a firm (vendor or client), the Firm field displays instead of the Organization field.
- Firm Name
  - Only populated if employee is a vendor or client
- Firm Number
  - Only populated if employee is a vendor or client
- Location
  - Select the location from which the employee works. For example, your enterprise might have corporate headquarters in Minnesota and other offices in Maryland, San Diego, and Atlanta.
  - A system administrator defines the list of employee locations on Settings > Labels and Lists > Lists.
- Disable Timesheet Revision Auditing
  - This column displays Y or N, to indicate if the record has timesheet revision auditing enabled or disabled.

- City
- Country
- Hire Date
- Raise Date
- Row Count
- Social Security Number
- Tax Reg. #
- Termination Date
- State
- Zip Code

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Dashboards – AR Detail Base

The **AR Comment** column was updated so that AR comments are displayed at the Invoice grouping level.

Previously, AR comments and the option to add a comment were displayed with the transaction lines under the Invoice grouping. With this update, you can now see the AR comments without expanding the Invoice grouping. If there are no AR comments for the Invoice, you can add an AR comment from the Invoice group level.

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Dashboards – New Dashparts

The following columns are now available for the project dashpart base:

- Weighted Percent Complete Total Compensation
- Committed Purchase Order Expense Billing
- Committed Purchase Order Expense Cost

To access the **Committed Purchase Order Expense Billing** and **Committed Purchase Order Expense Cost** columns, you must enable the Purchasing module.

You set the default presentation currency for these columns with the **Use Billing (Not Project) Currency for Reporting** option in **Settings » Accounting » Labor Options**, but you can change the presentation currency in Dashpart Designer.

Dashboards – New Dashparts

The following new, predefined dashparts are available if the Accounting module or the PSA module is enabled:

- **Top 10 Clients - Receivables**: Use this dashpart to display billing clients with invoices that have not been fully paid.
- **Top 10 AR by Billing Client with Drill To**: Use this chart dashpart to display the top 10 billing clients with invoices that are not yet fully paid. Click an AR amount to display a drill to dialog box that provides more information about the record.

The following new, predefined dashparts are available if the CRM module enabled:

- **Weighted and Estimated Fee by Stage with Drill To**: Use this chart dashpart to display the weighted and estimated fees for projects that you are actively pursuing, grouped by stage. Click a fee value to display a drill to dialog box that provides more information about the record.
- **Pursuits by Probability with Drill To**: Use this chart dashpart to view the weighted and estimated fees of in pursuit projects, by probability.

Dashboards – Calculated Fields

Custom Multipliers for Calculated Fields

- You can now configure the **Multiplier** field while working with a percentage data type on the Calculated Fields dialog box of the Dashpart Designer.

Billing - Draft Invoice Approvals

You can now view supporting documents from the Draft Invoice Approvals form, if you have the appropriate role security access rights. To display the Supporting Document dialog box from the Draft Invoice Approvals form and print all supporting documents to a single file, click **Other Actions » View Supporting Documents**.

To activate the feature, navigate to **Settings » Security » Roles**, click the Accounting tab, and in the Billing Security: Interactive Billing and Invoice Approvals section select the **Allow Changes to Support Documents** checkbox.

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Billing – Draft Invoice

Changing the Period Start/End Dates on a Submitted Draft Invoice No Longer Requires You to Resubmit

This enhancement applies for projects that use an approval process for billing invoices.

In previous versions of Vantagepoint, if you submitted or approved a draft invoice and then changed the period start or end dates in the Invoice Presentation Dates section on the Billing Session Options dialog box in Interactive Billing, you had to resubmit the draft invoice for approval. This step was required even though the period start and end dates do not affect the transactions included on the invoice.

Now, after you submit or approve a draft invoice and you change the period start or end dates, you can choose whether or not to resubmit the invoice. To do this you must change the period start and end dates on the Billing Session Options dialog box in Interactive Billing, without changing the transaction bill-through dates at the same time. When you click **OK** on the Billing Session Options dialog box to save the changes to the period start or end dates, you can choose either **Resubmit** or **Save** on the Resubmit dialog box. The new **Save** button enables you to update the period start and end dates without having to submit the draft invoice for approval again.

If you change the period start and end dates and the transaction bill-through dates at the same time, you are required to resubmit the draft invoice for approval again.

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Billing – Interactive Billing

The following columns are now available on the Invoice History tab of the Interactive Billing form:

- Amount Due
- Amount Paid
- Applied Retainer
- Credit Memos
- Invoice Total
- Retainage

Billing – Invoice Template Editor

The Invoice Template Editor is now available in the browser application. Use the Invoice Template Editor form to create and update invoice templates, which determine the format and content of your invoices.

Planning - Units

Support for Units in Project Planning

To make it possible to develop full plans for your projects, Vantagepoint now offers the ability to plan and manage units on the new Units tab in Project Planning (**Hubs » Projects » Plan**).

If you have the Resource Planning module, you enable the Unit Planning feature for a company in **Settings » Resource Planning » Plan Settings**.

Use the Units tab to assign units to the lowest-level work breakdown structure (WBS) elements in a branch of the project's plan and enter planned quantities for those unit assignments. As you enter unit quantities, Vantagepoint automatically updates the totals and other planned values for the individual unit assignment and for each WBS element above the assignment in the plan structure.

Microsoft Teams Chat

Employee Picture Icons: Show Users Editing Records or Initiate a Microsoft Teams Chat

When you open a record in Vantagepoint, you can view the employee picture icons to quickly assess who is editing or view a record.

- **Picture with Orange Outline**: When another employee is currently editing a record, that employee's picture displays with an orange circle around the icon. The person actively editing the record always displays as the first picture.
- **Picture with Blue Outline**: When other employees are viewing the record, their pictures display with a blue outline.

You can also click an employee picture icon to open an info bubble that contains additional information about that employee.

- **Email**: Click the employee's email address to send an email message directly from the form. Vantagepoint opens your email application.
- **Microsoft Teams Chat**: Click this option to initiate a one-on-one chat from Vantagepoint to another employee on your team. This option displays if you select the **Enable Microsoft Teams Chats from Deltek** Vantagepoint option in **Settings » General » Communications**.

As edits are made and saved to a record, color-coded status messages display at the top of the form to alert all employees of the changes to the record. These updates display if you select the **Enable Real-Time Notifications and Interactions** option in **Settings » General » Options**.

Project Review

Planned Units in Project Review

Any amounts planned for units in the project are now included in the Key Performance Indicators grid at the bottom of the Project Review form.

Total Billed Field in Project Review

A new Total Billed field in the Revenue section of the grid indicates the total amount billed for the project.

Pre-Aware Project Numbering

New Pre-Award Project Numbering Feature

If you use a different numbering system for pre-award (in-pursuit) projects and awarded (won) projects, you can now set up Vantagepoint to allow a regular project's number to be changed when the project is awarded. You turn on the Pre-Award Project Numbering feature with the new **Update project number when approved for use in processing** checkbox on the Numbering form in **Settings » Workflow » Numbering**.

With this feature turned on, if your security role is an accounting type role, you are prompted to change a project's number on the new Assign New Project Number dialog box that displays when you select the **Approved for Use in Processing** checkbox for a project on the Accounting tab of the Projects form in the Projects hub. To use this feature, you must own CRM, or Resource Planning and Accounting, or PSA.

This checkbox is the trigger for the number change because typically when a project is awarded, someone from the Accounting department does both of the following:

- Changes the project number.
- Selects the **Approved for Use in Processing** checkbox to make the project available for processing in accounting transactions throughout Vantagepoint.

Also, when you change a project's stage to **Won** (in the **Stage** field on the Summary pane in the Projects hub), the **Approved for Use in Processing** checkbox is automatically selected for the project if you are an accounting user. The Assign New Project Number dialog box displays automatically.

If other users are working with a project record in the Projects hub or in other applications in the Projects hub (such as Contract Management) when the project's number is being changed, those users will not be able to save any changes they made to the project. They must reload the project and re-enter any changes that were previously made and lost. For this reason, it is best to change a project's number after work hours or when other users are not editing the project record.

After you assign and save the new project number, you see the original pre-award number displayed in the new **Pre-Award Number** field in the Pursuit Details section of the Summary pane. The new awarded number displays in the **Project Number** field in the Summary pane.

See the following help topics for more information about this new feature:

Screen Designer

Set the Number of Columns on a Tab

Use the new **Display Columns** field on the Tab Properties form in **Settings » General » Screen Designer** to set the number of columns that display on a tab. In Screen Designer, select a tab and then specify a value in the **Display Columns** field. By default, a tab displays 3 columns; you can display up to 5 columns.

If you want to reduce the number of columns displayed on a tab, you must first delete, move, or resize elements on the tab before you enter the new value.

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Screen Designer

Lock an Image

In **Settings » General » Screen Designer**, you can now lock an image to restrict employees from changing the image when it is associated with a record.

If an image is locked, employees cannot change the image in the following areas:

On the Summary pane of the Employee hub

On the Image tab of the My Preferences dialog box

In addition, if your organization uses Vantagepoint Mobile CRM, employees cannot change or delete the image on the Contacts screen.

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Search

Lock an Image

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My Preferences

Preferred Application View

The General tab of the My Preferences dialog box now includes a **Preferred Application View** option. Use this option to specify the preferred view that displays in all Vantagepoint applications that support both Detail View and List View. Select one of these settings:

- **Always Open in Detail View**
- **Always Open in List View**
- **Always Open in View Last Used**

Role-based User Education in the Application

Vantagepoint now displays targeted in-app information about feature enhancements, common tasks, and communications based on your selected role in the new My Education Interests field on the My Preferences dialog box.

By default, the following roles are selected: Time and Expense User, Project Manager, Finance, CRM, Executive, and System Administrator (if the role was granted administrator rights). To change the selection, click ▼ in the My Education Interests field, select or clear the checkbox next to a role, and click Save.

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Purchasing

Purchasing » Item Review: New to the browser application in 6.0; currently still available in the desktop application.

Purchasing » Receiving: New to the browser application in 6.0; formerly located in the desktop application.

Purchasing » Purchase Requisitions: Moved to the browser application in 5.5.

Purchasing » Purchase Orders: Moved to the browser application in 4.5.

Purchasing » Items: Formerly known as the Items Master application and located in **Settings » Purchasing & Inventory » Items Master** in the desktop application; moved to the browser application in 4.5.

Purchasing

All Purchasing Reports Now in the Browser Application

You can now work with the complete set of purchasing reports in the browser application, in **My Stuff** » **Reporting**:

- Request for Price Quote Status
- Request for Price Quote Form
- Purchase Requisition Status
- Purchase Requisition Form
- Purchase Requisition and Price Quote
- Purchase Order Status
- Purchase Order Form
- Purchase Order Detail
- Purchase Order Cost Distribution Detail
- Item by Vendor
- Blanket Purchase Orders
- Open Purchase Orders
- Vouchered Purchase Order Items
- Received Purchase Order Items

Mobile Time & Expense

You can now view the summary of your benefit hours or absence accruals in Mobile Time and Expense. Tap and select the **View Benefit Hours** option to display the Benefit Hours screen. The Benefit Hours screen displays the summary of PTO/personal, Sick, Holiday, and any other type of benefit hours that you have accumulated for the year or used for the year. The View Benefit Hours option is available on all Timesheet screen menus.

Improved Date Navigation on the Start/End Times Screen

When you add or edit start and end times by day in Timesheet Hours, you can now use a date carousel on the Start/End Times screen to navigate to a different day, or to tap a different day. By reducing the number of taps needed to enter time on multiple days, the date carousel enables you to enter time more quickly.

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Mobile CRM

Support Date/Time Fields in Mobile CRM
The **Date/Time** fields created in the Screen Designer of Deltek Vantagepoint are now available in Vantagepoint Mobile CRM, on the Misc/User-Defined (UDF) tab of all hubs. Tap the calendar icon to add a date, tap the clock icon to add a time, or use the keypad to enter the date and time directly in the fields. If one field is populated, you must enter details in both fields.

Support Phone UDFs in Mobile CRM
Phone user-defined fields (UDFs) created in the Screen Designer of Deltek Vantagepoint are now available in Vantagepoint Mobile CRM, on the Misc/User-Defined (UDF) tab of all the hubs. You can add or edit phone numbers in the new **Phone UDF** field or tap the phone number to start a call.

Display the Pre-Award Number Field in Mobile CRM
The **Pre-award Number** field is now available in Mobile CRM. The **Pre-award Number** is the project number assigned at the time the project was originally created. If pre-award numbering is enabled and a pre-award number is assigned to the project, the **Pre-award Number** field is displayed under the **Number** field on the Details screen of Projects. (This read-only field is not available on the Add Project screen.) The **Pre-Award Number** field uses the field properties set in the Screen Designer of Deltek Vantagepoint.

Mobile CRM

Support for User-Defined Fields in Activities of Mobile CRM
The user-defined fields (UDFs) created for the Activities hub in the Screen Designer of Deltek Vantagepoint are now available in Mobile CRM, on the Misc/UDF tab of the Add Activity screen and the Edit Activity screen.

Improved Add Projects function from the Contacts and Firms Hubs in Mobile CRM
When you add projects in the Contacts and Firms hubs, you now experience more consistent behavior and the process ensures proper business logic.

Start and End Time Fields for all Activity types in Mobile CRM
The **Start Time** and **End Time** fields are now available for all **Activity** types in Mobile CRM, whether or not you set a reminder for the selected **Activity** type.

Support Image Icon Configuration in Mobile CRM
To conform with the General Data Protection Regulation (GDPR) laws of EU countries, the **Edit** link on the image icon of Contacts, Firms, and Projects is hidden if the image icon was configured to be locked in the Screen Designer of Deltek Vantagepoint. If the image icon is locked, you cannot add a new photo or replace an existing photo in the record.

Questions?

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Thank You!

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