

Deltek Vision Master
Certification Study
Guide

January 2020

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What is the Deltek University Costpoint Certification Program?

The Deltek University Vision Certification Program provides an opportunity for Deltek clients, partners and employees to enhance their current Vision system knowledge, and use Deltek tools to allow them to grow their skills and remain competitive in the workforce.

The Deltek Professional Vision Master Certification Exam validates skills within the Vision product suite. Successful completion of the Certification exam is required to receive the Professional Certification.

What does the Certification Mean?

A candidate who passes the Deltek Vision Master Certification exam has demonstrated proficiency within multiple areas of Deltek Vision. To receive Deltek Vision Certification, you must pass the knowledge based exam.

Benefits to individuals include:

- ✓ Improved use of current systems
- ✓ Valuable experience and confidence
- ✓ Proof of skills and differentiator employers are looking for in the hiring process

Benefits to employers include:

- ✓ Better return on system investment and employee satisfaction
- ✓ Process improvements and efficiency
- ✓ Ability to identify qualified employment candidates and ensure their users have a certain level of knowledge

Preparing for the Exams

Training is not required to be certified. Passing the exam confirms you have practical application knowledge required to be a Deltek Vision.

Requirements

Knowledge Based Exam

This is a 150 question exam comprised of multiple choice questions to test your knowledge of Vision. This exam is randomly generated and provided via the Deltek Learning Zone.

Conditions

No written or online reference materials may be used during the exam.

The exams are taken online via the Deltek Learning Zone. Access to the exam is included for all users who have a subscription to use the Deltek Learning Zone. If you are not a subscribed customer, the course can be requested and purchased by following the steps shown on the screen. The exam must be completed in a single session of up to 120 minutes, with up to two attempts to successfully pass the exam.

Terms and Conditions

Following the purchase (if applicable) and launch of the exam, you must read and accept the Deltek Certification Program Terms and Conditions.

Maintaining Deltek Costpoint Certification

Certification will be valid for up to 2-years and can be renewed by passing the New Release exam. The exam will be available at least 90-days following the release of new Vision training series by Deltek.

Recommended Training or Background

All questions in the exam are tied to training series found on the DLZ; this includes all training types, such as, Virtual Live Classes (VLC), Recorded Sessions (RS), Self-Paced Learning (SPL), Click Guides (CG), Infographics (IF), and Quick Reference Guides (QRG). The following series are recommended. Go to the Deltek Learning Zone (Deltek.com\Learn) for more information on the certification program, Vision courses, and how to register.

- Vision Accounting and Accounts Payable Processing Series
- Vision CRM
- Vision Billing Processing Series
- Vision Time Processing Series
- Vision Expense Series
- Vision Project Planning and Resource Management Series
- Vision Standard Reporting Series
- Vision User Fundamentals Series
- Vision Security Series
- Vision for Project Manger Series

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Study Suggestions:

You will need knowledge in all areas of Vision to pass the exam. Use your knowledge from work, co-workers, Deltek University's Vision Series trainings, and Knowledge Base Articles. Here are some suggestions of areas to study that will help with taking the exam. While this is not a complete list, use it as a springboard into your studies.

Accounting and Accounts Payable

Focus on:

You need a strong understanding of AP processing, AP configuration and reporting, period setup, closing periods, creating new periods and accounting related reporting. Also, knowledge of processing vendor AP checks, EFTs, voiding vendor invoices and payments, general setup and usage of Multi-company, Multi-currency, Revenue Generation, adjust salary job cost, Labor Cross Charge, Overhead allocation, Organizational setup, and consultant accruals, as well as a complete understanding of the setup options and abilities that control these areas and related organizational reporting and financial reports.

DLZ Assets:

Vision Accounting and Accounts Payable Processing Series: Utilities	VLC	RS	IF	-
Vision Accounting and Accounts Payable Processing Series: Info Centers	VLC	RS	IF	-
Vision Accounting and Accounts Payable Processing Series: Transaction Center	VLC	RS	IF	-
Vision Accounting and Accounts Payable Processing Series: AP Processing Part 1	VLC	RS	-	-
Vision Accounting and Accounts Payable Processing Series: AP Processing Part 2	VLC	RS	-	-
Vision Accounting and Accounts Payable Processing Series: Advanced Concepts Part 1	VLC	RS	-	-
Vision Accounting and Accounts Payable Processing Series: Advanced Concepts Part 2	VLC	RS	-	-

CRM

Focus on:

You need a strong understanding of CRM-related reporting, primarily on Info Center relations with CRM components such as Opportunities, Marketing Campaigns, Contacts, Leads and Activities. Also, knowledge of creating projects from opportunities, and qualifying leads.

DLZ Assets:

Vision CRM Series: Introduction and Info Centers	VLC	RS	-	-
Vision CRM Series: Processing Part 1 - CRM Info Centers	VLC	RS	-	-
Vision CRM Series: Processing Part 2 - Calendar, Reports, and Touch CRM	VLC	RS	-	-

Billing

Focus on:

You need a understanding of the configuration setup for running the billing process and the procedures for creating an invoice through interactive billing, batch billing and group billing usage. Also, knowledge of how the various billing tables work and how these are configured, the invoice templates and billing terms and billing transfers, write-off, holds, voids, and credit memos.

DLZ Assets:

Vision Billing Series: Billing Processing Overview and Billing Tables	VLC	RS	IF	-
Vision Billing Series: Billing Terms Part 1	VLC	RS	IF	-
Vision Billing Series: Billing Terms Part 2	VLC	RS	IF	-
Vision Billing Series: Interactive Billing Part 1: Without Invoice Approval Processing	VLC	RS	-	-
Vision Billing Series: Interactive Billing Part 2: With Invoice Approval Processing	VLC	RS	-	-
Vision Billing Series: Interactive Billing	VLC	RS	IF	-
Vision Billing Series: Invoice Template Editor	VLC	RS	IF	-
Vision Billing Series: Pre-Billing	VLC	RS	IF	-

Time & Expense

Focus on:

You need an understanding of the settings controlling the way in which time and expenses are entered and/or approved and posted. Also, knowledge of how both Labor and Expense categories, as well as establishing timesheet calendars, use labor codes and how and where labor costs and accounts are derived.

DLZ Assets:

Vision Time Processing Series: Overview and Completing a Timesheet	VLC	RS	-	SPL
Vision Time Processing Series: Processing Timesheets	VLC	RS	IF	-
Vision Expense Series: Company Expense Configuration	VLC	RS	-	-
Vision Expense Series: Expense Approvals	VLC	RS	-	-
Vision Expense Series: Expense Processing Part 1 - Overview, Actions, and Transaction Entry	VLC	RS	-	-
Vision Expense Series: Expense Processing Part 2 - Expense Payment Processing	VLC	RS	-	-
Vision Expense Series: Expense Categories Setup	-	-	-	SPL

Project Planning and Resource Management

Focus on:

You need an understanding of the pre-planning and planning considerations when configuring and creating project plans in Vision. Also, knowledge of how to use the Accordion Calendar, resource utilization tools, and Project Planning Reports, along with converting iAccess plans for implementation and execution.

DLZ Assets:

Vision Project Planning and Resource Management Series: Initial Setup Consideration	VLC	RS	IF	-
Vision Project Planning and Resource Management Series: Plan Templates, Security, and Plan Settings	VLC	RS	IF	-
Vision Project Planning and Resource Management Series: Overview Creating Plans and Processes	VLC	RS	IF	-
Vision Project Planning and Resource Management Series: Assign Resources to Plan and Other Options	VLC	RS	IF	-
Vision Project Planning and Resource Management Series: Overview of iAccess in Vision	VLC	RS	IF	-
Vision Project Planning and Resource Management Series: Resource Management and Reports	VLC	RS	IF	-

Standard Reporting

Focus on:

You need an understanding of the basic report usage and features consisting of creating saved favorites and saved searches. Also, a understanding of the Report Builder, report options, and custom reporting are required.

DLZ Assets:

Vision Standard Reporting Series: Overview and Authoring	VLC	RS	-	-
Vision Standard Reporting Series: Delivered Standard Reports	VLC	RS	-	-

User Fundamentals

Focus on:

You need an understanding of info center and field usage, dashboards including web and system, user-defined fields, info center designer and Vision security rights with password policy. Also, knowledge of what each utility is used for and how they are used. This includes understanding how code tables and labels are used in Vision.

DLZ Assets:

Vision User Fundamentals Series: Overview, Navigation and User Options	VLC	RS	-	SPL
Vision User Fundamentals Series: Dashboards	-	-	-	SPL
Vision User Fundamentals Series: Reporting and User Defined Component	VLC	RS	-	SPL

Security

Focus on:

You need an understanding of the Vision Security and Roles configuration, the different tabs and functions of Roles, Windows integrated security, and security implications of Vision Tab Designer. Also, knowledge of how to configure the Users and Password Policies and how to configure reports and audit trails.

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DLZ Assets:

Vision Security Series: Overview and Roles	VLC	RS	-	-
Vision Security Series: Users, Password Policies, and Other Concepts	VLC	RS	-	-

Vision for Project Manager

Focus on:

You need an understanding of security settings needed to gain access to the information needed as a project manager; Info Centers including Leads, Contacts, Opportunities and Projects; Core reporting functionality using searches, layout, column selection and options to design reports (AR Aged, Unbilled Detail & Aging, Project Earnings, Project Progress and Top/Bottom performers) specific to project manager's needs.

Also, knowledge of how to set up personalized User Options, locate important information in Vision using Lookups and List View, create custom fields and dropdown values for tracking data unique to your company, keep track alerts that can inform the status of your clients, projects, budgets and/or opportunities, utilize project templates to save time, create/analyze/compare budgets. You will also need to understand Vision's mobile tools and be able to access existing data, synchronize newly added data with Vision core, and enter Project Plan data in iAccess without the use of the Project Planning module.

DLZ Assets:

Vision for Project Manager Series: User Options and Fundamentals	VLC	RS	-	-
Vision for Project Manager Series: Info Centers: Leads, Contacts, Opportunities & Projects and Project Templates	VLC	RS	-	-
Vision for Project Manager Series: Budgets and Project Review	VLC	RS	-	-
Vision for Project Manager Series: Invoices, Reporting and Dashparts	VLC	RS	-	-
Vision for Project Manager Series: Touch Time & Expense and Touch CRM	VLC	-	-	-
Vision for Project Manager Series: Planning with iAccess	VLC	-	-	-

Sample Questions

The Deltek Vision Master Certification exam contains multiple choice questions that cover a broad range of product topics and areas. Below are some examples of the types of questions you will find in the exam.

1. How can dashparts be displayed on your dashboard?
 - a. Vertically
 - b. Horizontally
 - c. Cascase
 - d. Grid
 - e. **All answers are correct**

2. What does Revenue Method W do?
 - a. **It will recognize revenue on unbilled labor at Billing values.**
 - b. It will recognize revenue based on write-ups.
 - c. It will recognize revenue based on billed labor only.
 - d. It will recognize revenue on fixed fee billing.

3. Which type of Workflow is triggered by an event or action in Vision?
 - a. Scheduled Workflow
 - b. **User Initiated Workflow**
 - c. Approval Workflow
 - d. Web Service

4. The original version of a Plan is known as the _____.
 - a. Proposal
 - b. Original plan
 - c. Plan Budget
 - d. **Baseline**

5. Which of the following is NOT a Workspace in iAccess?
 - a. **Planning Workspace**
 - b. Project Workspace
 - c. Employee Workspace
 - d. Business Development Workspace