Deltek Vision - DLZ Starter Guide

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Asset Name	Description	Role
Vision User Fundamentals - Starter Guide	This covers the introduction and the basic understanding on how to get started in Deltek Vision. Throughout this course, users will spend time configuring personal User Options, and setting up the Dashboard; learning how to navigate within Vision and how to save favorite searches; setting report options, selecting fields, sorting and grouping data, and formatting graphs; and saving report options and searches to create favorite reports. [Keywords and Related Searches - eLearning, online Learning, online course, logging on, icons, navigation menu, global toolbar, help system, dashparts, system dashparts, web dashparts, dashboard, dashpart records, user options, change password, printing, info centers, view, data grid, text editor, instant message presence, smart grid, code tables, lookups, standard search, advanced search, SQL, quick find, reporting, asset management, iAccess, collaboration, user-defined components, search operators]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Time Processing - Starter Guide	This covers the overview of Vision Timesheet and discusses how to enter and submit timesheets for processing based on a firm's unique business requirements; the steps involved in processing timesheets including how to review, modify, and approve timesheets; and how to view other employees' timesheets and how to post a timesheet once complete. [Keywords and Related Searches - eLearning, online Learning, online course, checklist, mobile application, touch time & expense, form, standard overtime, secondary overtime, meal times, breaks taken, timer, status, absence request, in progress, progress group, hours group, comments, unit quantities, system security warning, printing reports, line item approval, employees, administrator]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

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Asset Name	Description	Role
Vision Standard Reporting - Starter Guide	This covers the functions of the reporting toolbar, tabs and grid in the reporting menu applications, the procedure of creating and saving standard report options and advanced search record selections, and the steps in creating and saving favorite standard reports to system and web dashparts on the dashboard; and the three report writing tools based on SQL Server Reporting Services. [Keywords and Related Searches - eLearning, online Learning, online course, report writer, report builder, report designer. BIDS, application toolbar, preview, search types, generic operators, saved searches, info center audit trail, configuration reporting, original project, employee reporting]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Payroll Overview and Navigation - Starter Guide	This covers the process flow and processing applications of Vision Payroll, how to set up security roles for a payroll administrator/users, and the payroll processing configuration options. [Keywords and Related Searches - eLearning, online Learning, online course, recommended menu options, record access options, read only, modify only, add/modify, full, transaction type, payroll module, checks tab, FICA, other pay, pre-tax, withholding, user defined rules, tax locales, contribution code, contribution rate]	HR Specialist,Super User,Staff Accountant
Vision Expense - Starter Guide	This covers the expense configuration, expense report, and expense categories; the different processes on how to configure, attach, reconcile, charge, and import credit card data; the expense processing application - completing expense reports, expense report actions, reporting, and Transaction Entry, and Employee Payment, Direct Deposits, and Void Payments. [Keywords and Related Searches - eLearning, online Learning, online course, automatic, manual, form, employee review, modify employee expense report, payment printing and numbering, checklist, transaction posting, transaction list, admin, employee repayment, ledger report, form design, employees info center, split charges, multicurrency, AP disbursement, vendor, summary tab, charges tab, missing charges, cash journal entry, import value, validation]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

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Asset Name	Description	Role
Vision Customer Relationship Management - Starter Guide	This covers the CRM basics such as overview, CRM types, and functionality, and the CRM Info Centers: Opportunities, Employees, Vendors, Clients, and Text Libraries. We will cover an overview of these Info Centers and their functionality, and CRM actions that you can perform within the Info Centers. [Keywords and Related Searches - eLearning, online Learning, online course, clients, contacts, leads, marketing campaigns, opportunities, employees, projects, vendors, record, toolbar options, phone format, activities tab, activity manager, files and links tab, hierarchy tree, vendor, proposals, text libraries, qualify, convert leads]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Billing - Starter Guide	This covers the pre-billing and billing process flow, setting up Billing tables to be used for processing billing, and the Batch Billing steps; the Interactive Billing process that doesn't involve approvals, with a special emphasis on invoices; Transaction Document Management, as well as Billing Terms setup for Time and Expense Billings and Billing Terms setup for Fixed Fee Projects, sublevel terms, and establishing Billing Groups. [Keywords and Related Searches - eLearning, online Learning, online course, labor billing, labor rate, labor category, labor code, labor override, expense account, expense category, vendor, running draft invoices, unbilled detail, aging report, invoice, update billing status]	Billing Specialist,Super User,Client Executive
Vision Accounting and Accounts Payable Processing - Starter Guide	This covers the Accounting and AP process flows, and accounting-related functionality within the different Vision Info Centers; the Transaction Center, its process flow, as well as actions users can perform within the application; Accounting and AP Utilities and actions that users can perform within the Utilities applications and the different Vision Info Centers; and payment processing, bank reconciliation, void payment, and online check review functions. [Keywords and Related Searches - eLearning, online Learning, online course, list view, detail view, employees, clients, projects, vendors, units, accounts, chart of accounts, account groups, group table, transaction entry, types, grid, recurring, voucher, lookup, transaction list, reviewing, printing, implicit, explicit, toolbar, AP, disbursement, posting effects, posting log, change period, period setup, locked transaction files, vendor, key conversion, history, 1099 initialization, EFT, wire transfer]	Accounts Payable,Controller,Super User,Staff Accountant

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Asset Name	Description	Role
Vision Expense Configuration Series: Expense Configuration - Infographic	This covers Expense Payment Processing, and illustrates Expense Setting tabs and Expense Categories actions. This is part of the Vision Expense Configuration series. [Keywords and Related Searches - print out, cheat sheet, quick reference, employee info center, expense report categories, employee group, category]	Accounts Payable,Super User
Vision Expense Series: Expense Report Overview - Infographic	This covers Expense Processing application with special emphasis on completing expense reports. This is part of the Vision Expense series. [Keywords and Related Searches - print out, cheat sheet, quick reference, functionality, checklist, creating an expense report, toolbar options, form, credit card, company paid, approval, merchant description]	Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Expense Series: Expense Payment Processing - Infographic	This covers the Expense Report actions, reporting, and Transaction Entry. This is part of the Vision Expense series. [Keywords and Related Searches - print out, cheat sheet, quick reference, employee payment processing, automatic payment, manual payment, expense payment, process payment, printing, direct deposits, void payments, unpaid, ledger balance, check numbers]	HR Specialist,Super User,Department Manager,Staff Accountant
Vision Time Series: Configuration Overview - Infographic	This covers the different Time Configuration Settings and how it affects the Timesheets for Vision Setting up Time Periods, Activity Codes, and Holidays. This is part of the Vision Time Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, administrator role, expense report, process flow, accounting settings, posting, labor, expense, labor credit for posting, conclusions, non-work days, company holidays, labor period calendar, global comments, ratios, line item approval, alerts, special categories, overtime, OVT, holidays, employee types, timesheet comments, non work days, holiday calendar]	Controller,HR Specialist,Super User,Staff Accountant

Asset Name	Description	Role
Vision Time Series: Timesheet Overview - Infographic	This covers the navigation of Timesheets and other functions used in time entries. This is part of the Vision Time Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, accessing timesheet, form, period selection, project, phase, task, labor category, units]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Time Series: Completing a Timesheet - Infographic	This covers the process of completing a timesheet: how to enter hours and units and completing and submitting a timesheet. This is part of the Vision Time Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, conclusions, start and end times, system security, printing timesheet reports, option, detailed report, entering, entry, regular hours, overtime, OVT, comments, start/end, breaks, meals, vacation, pto, sick leave, holiday, ovt-1, ovt-2, project, phase, task, labor category, day/date, number of breaks, meal-2, resubmitting, re-submit, System Administrator, approval, rejected, summary report, summarized report]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Project Planning and Resource Management Series: Resource Management and Reports - Infographic	This covers the difference between hard and soft booking designation; and ways to change resource hours, employee search, and copying and moving hours. This is part of the Vision Project Planning and Resource Management Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, checklist, plans, hard booked, soft booked, employee assignments, availability, employee search, move hours, swap hours, copy hours]	HR Specialist,Super User,Business Developer,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision Purchasing Series: Overview and Configuration - Infographic	This covers the Purchasing Business Process Flow, Purchasing Configuration Checklist and Purchasing Options. This is part of the Vision Purchasing Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, purchase orders, item categories, reason codes, ship-to, bill- to, approvers, buyers, units of measure, quality codes, requisition, request for price quote, purchasing orders, receiving, template editor, item review, purchasing, checklist, PR, RPQ, receive, PO]	Accounts Payable,Controller,Super User,Project Manager,Staff Accountant
Vision Purchasing Series: Processing Part 1 - Purchase Requisition and Request for Price Quote - Infographic	This covers the process and functionalities in both Purchase Requisition and Request for Price Quotes. This is part of the Vision Purchasing Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, open, create, print, approve, manage, RFQ, purchase order, PO, PR, approver, vendors, bids]	Accounts Payable,Super User,Project Manager
Vision Purchasing Series: Processing Part 2 - Purchase Orders, Receiving, and Vouchers - Infographic	This covers the process and functionalities in both Purchase Order and Purchase Order Approval. This is part of the Vision Purchasing Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, vendors, price quote, track, create, print out, apply, maintain, RFQ, PO, PR, blanket orders, service orders, change orders, committed expenses, ship-via, ship-to, cost distribution, delivery dates, approvers, buyers]	Accounts Payable,Super User,Project Manager
Vision Purchasing Series: Reporting and Purchase Template Editor - Infographic	This covers the different templates used and Purchasing report types. This is part of the Vision Purchasing Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, template, report, PO, purchase order, PR, purchase requisition, voucher, RPQ, request for price quote]	Accounts Payable,Super User,Project Manager
Vision Tips and Tricks - Self-Paced Learning	• Enumerate AP processes that users can perform in Vision	Controller,HR Specialist,Super User,Project Manager
Vision Resource Management Series: Initial Setup Considerations - Infographic	This covers the ten main attributes to consider when initially creating Plans in Vision. This is part of the Vision Resource Management Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, plan number, cost, billing, both cost and billing, rates, generic resources, provisional rate, labor, labor category, labor codes, labor rate, resources, resource management, planning, plans, numbering system, activity codes, budget method, budgeting method, budget type, units, expense tables, expense category, top down, top-down, percent complete, % complete, formulas]	Super User,Business Developer,Client Executive,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision Time Series: Processing Timesheets - Infographic	This covers the steps necessary for processing timesheets such as reviewing, modifying, and approving timesheets; viewing other employees' timesheets, and posting timesheets. This is part of the Vision Time Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, checklist, line item approval, summary reports, approvals, Administrator, process flow, approve, projects, phases, tasks, reject, reset all, unapproved, rejected, approved, timesheet status, posted, timesheet detail, timesheet summary, summarized timesheet, detailed timesheet]	HR Specialist,Super User,Department Manager
Vision Utility Series: AP Utilities - Infographic	This covers the use and application of the AP Voucher History utility and the 1099 Initialization utility. This is part of the Vision Utility series. [Keywords and Related Searches - print out, cheat sheet, quick reference, historical, outstanding, vendor, paid this year, paid last year, initialize, reset, accounts payable, 1099, utilities]	Controller,Super User,Staff Accountant
Vision Utility Series: Project Utilities - Infographic	This covers the utilities that are specific to projects, including Project Closeout and Refresh PRSummary Table. This is part of the Vision Utility series. [Keywords and Related Searches - print out, cheat sheet, quick reference, completed, dormant, advanced utility, receiving project, organization, automatic posting project, billing group, consolidate, consolidation, project reports, office earnings, project earnings, project summary]	Super User,Project Manager
Vision Utility Series: Transaction Files - Infographic	This covers how to view and fix transaction files in Vision using the following utilities: Posted Transaction File, Undo Posting, Incomplete Postings and Locked Transaction Files. This is part of the Vision Utility series. [Keywords and Related Searches - print out, cheat sheet, quick reference, reset, failed, archived, recreate, re-create, unpost, un-post, removed, posting log, in use, incomplete,un-do, advanced utilities]	Controller,Super User,Staff Accountant
Vision Utility Series: Search and Replace Utility - Infographic	This covers the use of the Vision Search and Replace Advanced Utility to update fields globally for multiple Info Centers. This is part of the Vision Utility series. [Keywords and Related Searches - print out, cheat sheet, quick reference, find, change, update, modify]	Controller,Super User

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Asset Name	Description	Role
Vision Time Series: Overview and Completing a Timesheet - Virtual Live Class	In this 1.5-hour course, you will learn about the Vision timesheet business process flow, accessing the Vision Timesheet form, identifying parts of the Vision timesheet, completing a timesheet, submitting and signing a timesheet for approval, resubmitting a timesheet, printing multiple timesheet reports, and setting up a timesheet report to print automatically. This course is part of the Vision Time Processing series. [Keywords and Related Searches - instructor led class, training, overtime, comments, time fields, mobile timesheet, unit quantities, units, absence request, request absence, time off, benefit hours, iphone, mobile, phone, android, overtime, OT, OVT, OVT-1, OVT-2, OVT1, OVT2, holiday, sick, PTO, meals, breaks, missing timesheet, detailed report, summarized report, start/end]	Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

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Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: Transaction Center - Virtual Live Class	This 1 hour course is part of Deltek University's Accounting and Accounts Payable Processing Series. It focuses on the Transaction Center, its process flow, as well as actions users can perform within the application. It is intended for users who manage and maintain accounting records for their organization. Learning Objectives: • Describe the transaction processing flowchart • List the steps for processing a transaction in Vision. • Review creating a transaction entry file. • Define implicit and explicit postings. • Discuss the steps in creating a recurring transaction entry. • Review transaction files posting Level: Entry Training Hours: 1 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Computer Software & App CPE Credit/s: 1.0Prerequisites: NoneAdvance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com.Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, AP, accounting, accounts payable, transaction center]	Accounts Payable,Super User,Staff Accountant

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Asset Name	Description	Role
Vision Purchasing Series: Processing Part 2 - Purchase Orders, Receiving, and Vouchers - Virtual Live Class	This 1 hour course is part of Deltek University's Billing Processing Series. It focuses on Interactive Billing process that uses invoice approvals. It is intended for users who manage and maintain accounting and billing processes within their organization. Learning Objectives: • Identify applications where Invoice Approvals can be enabled • Describe each step of the Invoice Approval Process • Discuss Interactive Approvals • Recall steps in running Refresh Billing Extensions • Recall steps in looking up invoice in Invoice Review Level: Entry Training Hours: 1 Hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Business Mgmnt & Org CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, billing, interactive, interactive billing,	Accounts Payable,Super User,Project Manager

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Asset Name	Description	Role
Vision Purchasing Series: Processing Part 1 - Purchase Requisition and Request for Price Quote - Virtual Live Class	In this 1-hour course, you will learn to create a Purchase Requisition, which includes providing general, shipping, comments, and cost distribution information; approve a Purchase Requisition; create and approve a request for price quote; and use the Price Request Response dialog in selecting a Vendor. This course is part of the Purchasing Series. [Keywords and Related Searches - instructor led class, training, class, training, general tab, line detail, shipping, notes, cost distribution, comments, vendors, toolbar, report, list, detail, view, progress, PR, RFQ]	Accounts Payable,Super User,Project Manager
Vision User Fundamentals Series: Overview, Navigation, and Dashboards - Virtual Live Class	In this 1-hour course, you will learn how to Navigate through Vision using the global icons, select a database and log on to Vision, and access and Navigate through Vision Help Contents. This course is part of the Vision User Fundamentals series. [Keywords and Related Searches - instructor led class, training, icons, help, dashboard, dashparts, user options, reset password, username, global toolbar, navigation, startup, tip of the day, set color, unsubscribe, hide dashpart, unused dashpart]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

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Asset Name	Description	Role
Vision User Fundamentals Series: User Options - Virtual Live Class	This 2 hour course is part of the Deltek University's User Fundamentals Series. This course demonstrates how to work with Info Centers and grids, and utilize Instant Messaging Presence. It is intended for new and staff users. Learning Objectives: • Review the functionality of Info Centers and Grids. • Recall steps to utilize the Instant Messaging presence. • Identify functionality of the Vision Screen and Navigation Designers. Level: Entry Training Hours: 2 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Computer Software & App CPE Credit/s: 2.0 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources.	CEO,Controller,HR Specialist,Super User,Business Developer,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

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Asset Name	Description	Role
Vision User Fundamentals Series: Reporting and User Defined Components - Virtual Live Class	In this 2-hour course, you will learn how to review the functionality of the User-defined Components application, access the User-defined Tabs application, identify functionality of the Vision Screen and Navigation Designers, review how Lookups and Searches are used to find records, find records using the Quick Find option, and define Standard and Custom reporting. This course is part of the Vision User Fundamentals series. [Keywords and Related Searches - instructor led class, training, custom fields, udif, user defined info centers, screen designer, navigation menu designer, reporting, report, report builder, standard reporting, report designer, UDF, UDIC, custom grid, searching, is me, is mine, saved search, schedule report, scheduling, email report, e-mail report, emailing report, archive, archived, archiving]	CEO,Controller,HR Specialist,Super User,Business Developer,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Payroll Series: Payroll Processing - Virtual Live Class	In this 2-hour course, you will learn the difference between an automatic and manual payroll processing run; how to review employee payroll information, modify pay hours, specify other pay amounts, and override a withholding for an employee; and the steps in processing a check run including printing checks, assigning check numbers, and posting payroll. This course is part of the Payroll Series. [Keywords and Related Searches - instructor led class, training, class, training, tab, checklist, methods, screens, tab, general, employee review, GL, FICA, AP Voucher, journal, posting log, direct deposit, bonus, tax implications, adjustment, payroll, payment, expense, void, W2, W3, state ID, electronic filing, quarterly processing, quarter, QTR, w-2, w-3, 940, 941, HR, human resources, regular hours, overtime, ovt, pay hours, time hours, other pay, job cost variance, reprint, reprint check, bank account, net to gross, check margins]	HR Specialist,Super User,Department Manager
Vision Payroll Series: Payroll Reports and Utilities - Virtual Live Class	In this 2-hour course, you will learn the options and selection criteria for Payroll reports, the steps in previewing and printing Payroll reports, the different Payroll reports that you can generate for your organization, and the different payroll utilities and its functions. This course is part of the Payroll Series. [Keywords and Related Searches - instructor led class, training, class, training, startup application, views, configure, security, types, customizing, records, HR, human resources, 940, 941, unemployment, tax worksheet, insurance, quarterly, 401, 125, cafeteria, withheld, w2 quarter, QTR, benefit year, undo posting, unpost, un-post, un-do, key convert, key conversion, history loading]	Controller,HR Specialist,Super User,Department Manager

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Asset Name	Description	Role
Vision Purchasing Series: Reporting and Purchase Template Editor - Virtual Live Class	In this 1.5-hour course, you will learn to create a Vision Purchase Template that can be used to generate a Purchase Order and request for price quote forms and manage the different Purchasing reports. This course is part of the Purchasing Series. [Keywords and Related Searches - instructor led class, training, class, training, assigning, buyers, vendors, editor screens, general tab, image, order detail info, signature, Misc, assignment, blanket purchase orders, form request for price quote, requisition, item by vendor, open, cost distribution, detail, status, received, vouchered, columns, grid, toolbar, PR, RFQ, PO, upload]	Accounts Payable,Super User,Project Manager
Vision for Project Manager Series: User Options and Fundamentals - Virtual Live Class	In this 1.5-hour course, you will learn to setup User Options tabs and functions, efficiently locate important information using Lookups and List View and create custom fields and dropdown values for tracking data, security settings needed to gain access to the information needed and alerts that can be configured to help keep you informed about the status. This course is part of the Project Manager Series. [Keywords and Related Searches - instructor led class, training, class, training, toolbar, display settings, dialog, change password, options, searching, quick find, standard search, advanced, operators, cross info center, multiple records, detail view, columns, filter, grouping, saving searches, organize save options, user defined, code tables, AR Aging, opportunity, resource planning, timesheet, approvals, due, role, general tab, record access, accounting, planning, access rights, iAccess. default printer, pop up reminders, lookups]	Project Manager
Vision for Project Manager Series: Planning with iAccess - Virtual Live Class	In this 1.5-hour course, you will learn to enter a Project Plan data in iAccess without the use of the Project Planning module. This course is part of the Project Manager Series. [Keywords and Related Searches - instructor led class, training, class, training, benefits, workspaces, plans, management, dashpart, process flow, conditions, settings, configure, edit, start, end, grid, labor, add resources, generic, hours, billing, cost, save, publish, graphs, employee timesheet, review, reports, progress, summary, ipad, tablet, info button, i bubble, generic resources, shift hours, convert plan, create, summary view, calendar view, published, budget source, ETC, EAC, estimate to complete, estimate at completion]	Business Developer,Department Manager,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision for Project Manager Series: Info Centers: Leads, Contacts, Opportunities & Projects and Project Templates - Virtual Live Class	In this 2-hour course, you will learn to setup and configure the different Info Centers' fields and the basic functionalities and use of Project Templates to save time. This course is part of the Project Manager Series. [Keywords and Related Searches - instructor led class, training, class, training, overview, descriptions, toolbar, options, qualify and convert, marketing campaigns, WBS, Work Breakdown Structure levels, Project, Phase, Task, accounting, time and expense, budget, revenue, Clients, Contacts, Leads, opportunities, employees, vendors, unqualified, disqualify, photo]	Business Developer,Project Manager
Vision for Project Manager Series: Invoices, Reporting and Dashparts - Virtual Live Class	In this 2-hour course, you will learn to use search, layout, column selection and options to design reports specific to your needs and add these reports to the dashboard for quick and easy access. This course is part of the Project Manager Series. [Keywords and Related Searches - instructor led class, training, class, training, invoice, template editor, general tab, images, project info, section, totals and signature, AR aged, unbilled detail & aging, project earnings, project progress, top/bottom performers, calculated field, selection criteria, executive, system, web, dashparts, top client, top project, logo, billing phases, billing status, KPI, top performers]	Project Manager
Vision for Project Manager Series: Budgets and Project Review - Virtual Live Class	In this 2-hour course, you will learn to create budgets in Vision and demonstrate how to quickly compare budgets to actual costs to help you stay on track. This course is part of the Project Manager Series. [Keywords and Related Searches - instructor led class, training, class, training, building the planned project budget, strategies, advantages, settings, budgeting decisions, worksheet, phase, labor, expense, costs, summary, WBS, procedures, revenue, WBS1, WBS2, validation, review, actuals, direct, billing, profit, source, compare, update percent, job to date, accounts receivable, AR grid, profitability, performance, KPI, key performance indicators, guidelines, budget validation,EAC, ETC, estimate to complete, estimate at completion, WBS tree, compensation, invoice comments]	Business Developer,Department Manager,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision for Project Manager Series: Touch Time and Expense and Touch CRM - Virtual Live Class	In this 1.5-hour course, you will learn to use Vision's mobile tools to access existing data and synchronize newly added data with Vision core and benefit from the Touch CRM and Touch Time & Expense apps features to quickly enter timesheet and expense report data when you are not in the office. This course is part of the Project Manager Series. [Keywords and Related Searches - instructor led class, training, class, training, features, PIN, login, opening screen, navigation, settings, change, logout, dropdown options, project selection, line details, units, copy, delete, save, submit, favorite, expense, reports, edit, receipts, time approval, summary, quick reference card, contacts, clients, opportunities, calendar, activity, notification, ipad, iphone, ios, android, cell phone, tablet, mobile device, app, URL, approve, reassign, re-assign, activities,]	Business Developer,Department Manager,Project Manager
Vision Accounting and Accounts Payable Series: Info Centers - Infographic	This covers the Accounting and AP Processing business process flows, Info Centers related to Accounting and AP, and Accounting and AP elements in the different Info Centers. This is part of the Vision Accounting and Accounts Payable Processing series. [Keywords and Related Searches - print out, cheat sheet, quick reference, projects, accounts, employees, vendors, clients, work breakdown structure, wbs, chart of accounts, pwp, vendor review, account group names, account group tables, job cost, pay rate, adjusted salaried job cost, ASJC, overtime, job cost variance, hierarchy, phase, task, project defaults, opportunity, opportunities]	Accounts Payable,Controller,Super User
Vision Accounting and Accounts Payable Series: Transaction Centers - Infographic	This covers the transaction processing flowchart, the steps for processing a transaction in Vision, creating a transaction entry file, implicit and explicit postings, the steps in creating a recurring transaction entry, and transaction files posting. This is part of the Vision Accounting and Accounts Payable Processing series. [Keywords and Related Searches - print out, cheat sheet, quick reference, transaction entry, transaction posting, cash receipts, ap voucher, ap disbursement, recurring transactions, transaction list, posting logs, automatic posting, recurring, reoccurring, reoccurring, approve, creator, timesheet, labor adjustment, journal entry, journal entries, JE, units, invoices, expenses, expense report, repayments, payments]	Accounts Payable,Controller,Super User
Vision Accounting and Accounts Payable Series: Utilities - Infographic	This covers the list of Accounting and AP Utilities and the steps in processing these functions. This is part of the Accounting and Accounts Payable Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, open new, period, change account, transaction files, access, undo, posting, complete, incomplete, resubmit, create, search and replace, project closeout, considerations, unlock, numbers, key conversions, AP Voucher, history, 1099, un-do, search & replace, locked, key convert, unpost, posted, initialization, initialized, key format, accounting period, re-submit, advanced utility, vendor, project number]	Accounts Payable,Controller,Super User,Staff Accountant

This document serves as a guide on the available learning assets for the given product. Note that additional assets may have been added since this document was produced.

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: Advanced Concepts - Infographic	This covers the list of advanced concepts of Accounting and AP Processing and the steps in running the functions of concepts. This is part of the Accounting and Accounts Payable Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, overhead allocation, project budgeting and review, labor cross charges, organizational reporting, revenue generation, consultant accrual, approval workflow, reasons, cycle, run, create, submit, view, status, invoice, x-charge, rev gen, OH, cost budget, %complete, contract type, labor adjustment, journal entry, transaction, financial statements, absence requests, approvers, time off]	Accounts Payable,Controller,Super User,Staff Accountant
Vision Billing Series: Billing Processing Overview and Billing Tables - Infographic	This covers the benefits and processing options of Vision Billing, the billing processing business workflow, differentiate the types of billing tables, and the steps in setting up different billing tables. This is part of the Vision Billing series. [Keywords and Related Searches - print out, cheat sheet, quick reference, mobile timesheet, time fields, billing terms, draft invoice, final invoice, batch billing, interactive billing, accept, post, labor rate table, labor category table, labor code table, labor override table, Planning, expense account billing tables, expense category, expense categories, vendor]	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager
Vision Billing Series: Invoice Template Editor - Infographic	This covers the benefits of using the invoice template editor, the different tabs within the Invoice Template Editor application, the steps in using Invoice and Purchasing images self-service function, and the steps in creating a new invoice template and assigning them to projects. This is part of the Vision Billing series. [Keywords and Related Searches - print out, cheat sheet, quick reference, creating new invoice templates, accounting process, billing process, purchasing images, upload, logo, header, footer]	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager
Vision Billing Series: Billing Terms - Infographic	This covers the steps in setting up the Billing Terms for time and expense, fixed fee, and billing groups. This is part of the Vision Billing series. [Keywords and Related Searches - print out, cheat sheet, quick reference, transaction document management, tdm, time and expense, supporting documents, attach, filestream, invoices on file, revenue, rev gen, revenue generation, work breakdown structure, wbs, consolidated terms, sub level terms, sublevel, interactive billing, add-on, add ons, additional fees, extra fees, default terms]	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Billing Series: Pre-Billing - Infographic	This covers the pre-billing functions, pre-billing process flow and screens, the steps in running a draft invoice, and the steps in generating an Unbilled Detail and Aging Report. This is part of the Vision Billing series. [Keywords and Related Searches - print out, cheat sheet, quick reference, batch billing, draft invoice, unbilled detail report, aging report, invoice numbers, invoice no]	Accounts Receivable,Billing Specialist,Super User,Department Manager,Project Manager,Resource Manager
Vision Billing Series: Interactive Billing - Infographic	This covers the interactive billing process flow and the actions that users can perform during interactive billing. This is part of the Vision Billing series. [Keywords and Related Searches - print out, cheat sheet, quick reference,invoice approval processing, employee realization, fee allocation, credit memos, retainage, draft invoice, final invoice, accept, billing session options, unbilled, fee terms, invoices on file, retainage, retainer, approve, alerts, delegate, delegation, refresh billing extensions, invoice review, ar aged, ar aging, ar comments]	Accounts Receivable,Billing Specialist,Super User,Project Manager
Vision Project Planning and Resource Management Series: Plan Templates, Security, and Plan Settings - Infographic	This covers the creation of a Template Plan that can be used as a starting point when creating new plans, configuration of the Planning Security, and completion of the Planning Configuration. This is part of the Vision Project Planning and Resource Management Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, calendar format, labor, expenses, consultant units, overhead rate, contingency percent, analysis tab, roles, plan settings, templates, plans, resources, configuration, security, planning, resource management]	Super User,Business Developer,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Assign Resources to Plan and Other Options - Infographic	This covers the Generic and Named Labor Resources: how to assign and forecast hours and understand shift hours; enter and forecast planned expense, consultants, and units; and review billing, compensation, cost, revenue, and multiplier information. This is part of the Vision Project Planning and Resource Management Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, forecasting, summary tab, estimated performance, cost analysis tab, billing analysis tab, spread copy, spread proportionally, spread evenly, parent row, child row, ETC, EAC, % complete]	Super User,Business Developer,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Overview of iAccess in Vision - Infographic	This covers how iAccess is implemented into Deltek Vision and how to use the Employee workspace, Timesheets, Expense Reports and Project Management workspace. This is part of the Vision Project Planning and Resource Management Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, flexibility, cross-platform, selection panel, options, components, project list, iAccess, expense reports, timesheets, projects, plans, resources, resource management]	HR Specialist,Super User,Business Developer,Project Manager,Resource Manager

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Project Planning and Resource Management Series: Overview of Creating Plans and Processes - Infographic	This covers the methods of creating project plans, entering information in the General and Rates Tab, and configuring the accordion calendar format. It also features the functionalities of the Labor Tab - Grid Menu. This is part of the Vision Project Planning and Resource Management Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, employee, generic, search, indent / outdent, shift, top scale, bottom scale, menu choices, plans, planning, resources, resource management, calendars]	Super User,Business Developer,Project Manager,Resource Manager
Vision Time Series: Processing Timesheets - Virtual Live Class		HR Specialist,Super User,Department Manager

This document serves as a guide on the available learning assets for the given product. Note that additional assets may have been added since this document was produced.

Deltek Vision - DLZ Standard

Deltek

Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: Utilities - Virtual Live Class	This 90 minute course is part of Deltek University's Accounting and Accounts Payable Processing Series. It focuses on Accounting and AP Utilities and actions that users can perform within the Utilities applications. It is intended for users who manage and maintain accounting records for their organization. Learning Objectives: • Discuss Accounting and AP Utilities functionality • Enumerate Accounting and AP Utilities • Briefly describe how each utility is used Level: Entry Training Hours: 1.5 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Computer Software & App CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, utilities, accounting, AP, accpounts payable]	Accounts Payable,Controller,Super User,Staff Accountant

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: Info Centers - Virtual Live Class	This 1.5 hour course is part of Deltek University's Accounting and Accounts Payable Processing Series. It focuses on the Accounting and AP process flows and accounting-related functionality within the different Vision Info Centers. It is intended for users who manage and maintain accounting records for their organization. Learning Objectives: • Describe Accounting and AP Processing business process flows • Enumerated Info Centers related to Accounting and AP • Discuss Accounting and AP elements in the different Info Centers Level: Entry Training Hours: 1.5 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Computer Software and App CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, AP, Accounting, accounts payable, info centers]	Accounts Payable,Super User

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: AP Processing Part 1 - Virtual Live Class	This 1 hour course is part of Deltek University's Accounting and Accounts Payable Processing Series. Part 1 focuses on basic AP Processing functions such as Vendor Review and Transactional Document Management. It is intended for users who manage and maintain accounting records for their organization. Learning Objectives: • Enumerate AP processes that users can perform in Vision • Discuss Vendor Review functionality • Recall the steps in reviewing vouchers using Vendor Review • List the steps in attaching supporting documents to AP vouchers Level: Entry Training Hours: 1 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Finance CPE Credit/s: 1.0 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, accounting, AP, accounts payable, vendor review, vendor, document management]	Accounts Payable,Super User,Staff Accountant

Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: AP Processing Part 2 - Virtual Live Class	This 1.5 hour course is part of Deltek University's Accounting and Accounts Payable Processing Series. Part 2 discusses payment processing, bank reconciliation, void payment, and online check review functions. It is intended for users who manage and maintain accounting records for their organization. Learning Objectives: • Review AP processes that users can perform in Vision • Explain Automatic and Manual Payment Processing • Enumerate payment processing types • Describe the basic process flows for each processing type • Discuss bank reconciliation • Recall the steps to void a payment and review a payment Level: Entry Training Hours: 1.5 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Finance CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, AP, accounts payable, bank, reconciliation, void, payment, check review, payment processing, bank reconciliation]	Accounts Payable,Super User,Staff Accountant

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: Advanced Concepts Part 2 - Virtual Live Class	This 1.5 hour course is part of Deltek University's Accounting and Accounts Payable Processing Series. Part 2 discusses revenue generation, consultant accrual and AR review, as well as accounting-related approval workflows. It is intended for users who manage and maintain accounting records for their organization. Learning Objectives: • Discuss basic concepts of Revenue Generation and Consultant Accruals • Recall the steps in running Revenue Generation and Consultant Accruals • Review Processing Approval Workflows for Absence Requests and AP Invoice Level: Entry Training Hours: 1.5 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Accounting CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please email DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, AP, accounting, accounts payable, approvals, approval workflow, rev gen, consultants, accrual, workflows]	Accounts Payable,Super User,Staff Accountant

Deltek Vision - DLZ Standard

Deltek

Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: Advanced Concepts Part 1 - Virtual Live Class	This 1 hour course is part of Deltek University's Accounting and Accounts Payable Processing Series. Part 1 focuses on running overhead allocation, project budgeting and review, labor cross charges, and organizational reporting. It is intended for users who manage and maintain accounting records for their organization. Learning Objectives: • Discuss basic concepts of Overhead Allocation, Project Budgeting and Review, Labor Cross Charges, and Organizational Reporting • Recall the steps in running Overhead Allocation and Labor Cross Charges Level: Entry Training Hours: 1 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Accounting CPE Credit/s: 1.0 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, accounting , overhead, allocation, budgets, budgeting, cross charge, labor cross charge, reporting, organizational reporting]	Accounts Payable,Super User,Staff Accountant

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Expense Series: Company Expense Configuration - Virtual Live Class	This 1.5 hour course is part of Deltek University's Expense Series. It focuses on the Expense functionality, expense report setup, credit cards configuration, Expense Report screens, and Expense Categories. It is intended for users who maintain and manage expense reports for their organization. Learning Objectives: • Describe Expenses and Transaction Center purpose and user benefits • List options relevant to Expense configuration within the General, Organization and Posting Tabs in Accounting Company Settings • Discuss Expense Report functionality • Describe the Expense Report form • Enumerate steps in configuring the Credit Card functionality • Review Expense Report options, groups, and preferences • Explain the Expense Category functionality • Recall steps in configuring expense categories Level: Entry Vendor: VLT, Deltek University Training Hours: 1.5 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Finance CPE Credits: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources.	Super User

Deltek Vision - DLZ Standard

Deltek

Asset Name	Description	Role
Vision Expense Series: Expense Approvals - Virtual Live Class	This course is part of Deltek University's Expense Series. It focuses on creating and using expense approval workflows, and expense approvals. It is intended for users who maintain and manage expense reports for their organization. Learning Objectives: •Discuss the different ways on how to setup Expense Approvals. •Discuss the impact of different types of setup in the resulting approval workflow screen. •Create an expense approval within the Vision 7.6 training environment. •Setup Expense Report alerts within the Vision 7.6 training environment. •Practice Expense Report Approval actions within the training environment. Level: Entry Vendor: VLT, Deltek University Training Hours: 1 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Finance CPE Credits: 1.0 Prerequisites: None Advance Preparation: None Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. [Keywords and Related Searches - instructor led class, training, expense, expenses, workflows, approvals,	HR Specialist,Super User,Department Manager

Deltek Vision - DLZ Standard

Deltek

Asset Name	Description	Role
Vision Expense Series: Expense Processing Part 1 - Overview, Actions, and Transaction Entry - Virtual Live Class	This 1 hour course is part of Deltek University's Expense Series. It focuses on Expense Processing application with special emphasis on completing expense reports, as well as expense report actions, reporting, and Transaction Entry. It is intended for users who maintain and manage expense reports for their organization, including employees who are tasked to complete expense reports. Learning Objectives: •Explain the scope of Vision Expense. •Describe the business process of an Expense Report. •Discuss Expense Reports functions, components and form. •Compare an Expense Report Form that includes basic features with a full-featured Expense Report Form. •Create an expense report based on training data. •Open an Existing Expense Report. Level: Entry Vendor: VLT, Deltek University Training Hours: 1 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Finance CPE Credits: 1.0 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. [Keywords and Related Searches - instructor led class, training, expense, expenses, expense reports, transactions, reports, expense ovewrview]	Super User,End User,Project Manager

Deltek Vision - DLZ Standard

Deltek

Asset Name	Description	Role
Vision Expense Series: Expense Processing Part 2 - Expense Payment Processing - Virtual Live Class	This 1.5 hour course is part of Deltek University's Expense Series. This is Part 2 of the Expense Processing course, and it focuses on Employee Payment, Direct Deposits, Void Payments, and Credit Card Charge processing. It is intended for users who maintain and manage expenses reports for their organization, as well as employees who are tasked to complete expense reports. Learning Objectives: • Submit an Expense Report using training data. • Enumerate steps in printing completed Expense Report manually and automatically. • Post Expense Reports using training data. • Enumerate steps to make modifications to transaction using Employee Transaction Entry. • Generate Employee Ledger Report to view outstanding balance details using training data. Level: Entry Vendor: VLT, Deltek University Training Hours: 1.5 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Finance CPE Credits: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of	Super User

Deltek Vision - DLZ Standard

Deltek

Asset Name	Description	Role
Vision Billing Series: Billing Processing Overview and Billing Tables - Virtual Live Class	This 1.5 hour course is part of Deltek University's Billing Processing Series. This course focuses on the Billing Process flow, and setting up Billing Tables to be used for processing billing. It is intended for users who manage and maintain accounting and billing processes within their organization. Learning Objectives: • Discuss the benefits and processing options of Vision Billing • Describe the billing processing business workflow • Differentiate the types of billing tables • Recall the steps in setting up different billing tables Level: Entry Training Hours: 1.5 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Business Mgmnt & Org CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, billing, workflow, labor, billing tables, tables, billing processing]	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Billing Series: Billing Terms Part 1 - Virtual Live Class	This 60 minute course is part of Deltek University's Billing Processing Series. Part 1 of this course focuses on Transaction Document Management, as well as billing terms setup for Time and Expense Billings. It is intended for users who manage and maintain accounting and billing processes within their organization. Learning Objectives: • Identify where in the Billing application can supporting documents be uploaded and viewed • Discuss the functions of billing terms • Describe the steps in setting up the Billing Terms for Time and Expense billings Level: Entry Training Hours: 1 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Business Mgmnt & Org CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, billing, processing, billing processing, document management, documents, transaction document, time and expense billing]	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Billing Series: Billing Terms Part 2 - Virtual Live Class	This 1 hour course is part of Deltek University's Billing Processing Series. Part 2 of Billing Terms focuses on billing terms setup for Fixed Fee Projects, sublevel terms, and establishing billing groups. It is intended for users who manage and maintain accounting and billing processes within their organization. Learning Objectives: • Discuss the different components of the Fees tab in the context of Fixed Fee project billings. • Explain the different options within the Sub-Level Terms tab of Billing Terms • Enumerate the steps in creating a new Billing Group Level: Entry Training Hours: 1 Hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Business Mgmt. & Org CPE Credit/s: 1.0 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, billing, processing, billing processing, fixed fee, fee, projects, sub level, terms, billing groups]	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Billing Series: Interactive Billing Part 1 - Without Invoice Approval Processing - Virtual Live Class	This 2 hour course is part of Deltek University's Billing Processing Series. It focuses on the Interactive Billing process that doesn't involve approvals, with a special emphasis on invoices. It is intended for users who manage and maintain accounting and billing processes within their organization. Learning Objectives: • Describe the interactive billing process flow • Enumerate the actions that users can perform during interactive billing Level: Entry Training Hours: 2 hours NASBA Delivery Method: Group Internet Based NASBA Field of Study: Business Mgmnt & Org CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. [Keywords and Related Searches - instructor led class, training, billing, processing, billing processing, interactive, interactive billing]	Accounts Receivable,Billing Specialist,Super User,Department Manager,Project Manager

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Billing Series: Interactive Billing Part 2 - With Invoice Approval Processing - Virtual Live Class	This 1 hour course is part of Deltek University's Billing Processing Series. It focuses on Interactive Billing process that uses invoice approvals. It is intended for users who manage and maintain accounting and billing processes within their organization. Learning Objectives: • Identify applications where Invoice Approvals can be enabled • Describe each step of the Invoice Approval Process • Discuss Interactive Approvals • Recall steps in running Refresh Billing Extensions • Recall steps in looking up invoice in Invoice Review Level: Entry Training Hours: 1 Hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Business Mgmnt & Org CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, billing, interactive, interactive billing,	Accounts Receivable,Billing Specialist,Super User,Department Manager,Project Manager

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Billing Series: Invoice Template Editor - Virtual Live Class	This 60 minute course is part of Deltek University's Billing Processing Series. It focuses on the steps in creating new invoice templates, as well as other related actions. It is intended for users who manage and maintain accounting and billing processes within their organization. Course agenda: • Discuss the benefits of using the invoice template editor • Describe the different tabs within the Invoice Template Editor application • Enumerate the steps in using Invoice and Purchasing images self-service function • Recall the steps in creating a new invoice template and assigning them to projects Level: Entry Training Hours: 1 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Business Mgmnt & Org CPE Credit/s: 1.0 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. [Keywords and Related Searches - instructor led class, training, billing, billing processing, invoice, templates, invoice templates] Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources.	Accounts Receivable,Billing Specialist,Super User,Client Executive

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Billing Series: Pre-Billing - Virtual Live Class	This 1 hour course is part of Deltek University's Billing Processing Series. It briefly touches on the pre-billing process flow, and focuses on the Batch Billing steps. It is intended for users who manage and maintain accounting and billing processes within their organization. Learning Objectives: • Discuss pre-billing functions • Describe pre-billing process flow and screens • Enumerate the steps in running a draft invoice • Enumerate the steps in generating an Unbilled Detail and Aging Report Level: Entry Training Hours: 1 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Business Mgmnt & Org CPE Credit/s: 1.0 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, billing, pre-billing, AR, accounts receivable, invoices, billing process, workflow, batch, batch billing]	Accounts Receivable,Billing Specialist,Super User,Department Manager,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision Standard Reporting Series: Overview and Authoring - Virtual Live Class	In this 2-hour course, you will learn about the functions of the tabs and grid in the reporting menu applications, the procedure of creating and saving standard report options and advanced search record selections, and the steps in creating and saving favorite standard reports to system and web dashparts on the dashboard. This course is part of the Vision Standard Reporting series. [Keywords and Related Searches - instructor led class, training, reporting toolbar, system dashparts, web dashparts, authoring reports, quick find, is me, is mine, personal favorite, global favorite, audit detail, audit trail]	Accounts Receivable,Billing Specialist,Controller,HR Specialist,Super User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Standard Reporting Series: Delivered Standard Reports - Virtual Live Class		Accounts Receivable,Billing Specialist,Controller,HR Specialist,Super User,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision CRM Series: Introduction to CRM and Info Centers - Virtual Live Class	In this 1-hour course, you will learn how the CRM module can benefit the organization, enumerate features included in each CRM type, and recall the steps in executing actions in CRM tabs within Info Centers. This course is part of the Vision CRM series. [Keywords and Related Searches - instructor led class, training, clients, contacts, leads, marketing campaigns, opportunities, employees, projects, vendors, module types, crm customer, customer relationship management, personnel, client relations, text library, text libraries, activities, activity, activity manager, files tab, links tab]	HR Specialist,Super User,Business Developer,Client Executive,Project Manager,Resource Manager
Vision CRM Series: Processing Part 1 - Customer Relationship Management Info Centers - Virtual Live Class	In this 1.5-hour course, you will learn how Explain the CRM functionality of the various Info Centers, describe Info Center screens, discuss the steps in performing CRM-related actions in the CRM Info Centers. This course is part of the Vision CRM series. [Keywords and Related Searches - instructor led class, training, clients, contacts, leads, marketing campaigns, opportunities, employees, projects, vendors, module types, crm customer, customer relationship management, personnel, client relations, text library, text libraries, activities, activity, activity manager, files tab, links tab, hierarchy, merge, socioeconomic status, firm history, qualify, qualified, disqualify, unqualified]	Super User,Business Developer,Client Executive,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision CRM Series: Processing Part 2 - Calendar, Reports, and Touch CRM - Virtual Live Class	In this 1.5-hour course, you will learn about Calendar functionality, the types of CRM reports and how they can be utilized, the features of Deltek Touch CRM, and how to configure CRM Alerts. This course is part of the Vision CRM series. [Keywords and Related Searches - instructor led class, training, clients, contacts, leads, marketing campaigns, opportunities, employees, projects, vendors, module types, crm customer, mailing labels, envelopes, newsletters, merge, activity, activities, text library, text libraries, employee assignments, opportunity, stage change, iphone, ipad, tablet, android, mobile, cell phone, hand held device]	Super User,Business Developer,Client Executive,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Initial Setup Considerations - Virtual Live Class	In this 2-hour course, you will learn how to establish a Plan Numbering System, budget a method for your firm, determine rate planning methods, create Labor Category and Labor Code Rate Tables for employees and generic resources, populate Employee Provisional Rates and assign Labor Categories in the Employee Info Center. This course is part of the Vision Project Planning and Resource Management series. [Keywords and Related Searches - instructor led class, training, pprm, generic resources, units, top-down plan, creating project, plans configuring, project plans, budget method, budgeting method, planning method, top down plan, top-down plan]	Super User,Business Developer,Client Executive,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Plan Templates, Security, and Plan Settings - Virtual Live Class	In this 2-hour course, you will learn how to discuss how to create a Template Plan as a starting point in creating new plans, explain discuss the different ways you can grant or restrict access to Planning users, break down Planning Configuration based on your needs, and identify Planning Configuration Forms. This course is part of the Vision Project Planning and Resource Management series. [Keywords and Related Searches - instructor led class, training, pprm, accordion calendar, planning grids, wbs mapping, summary grids, accounting calendar]	Super User,Business Developer,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Overview of Creating Plans and Processes - Virtual Live Class	In this 2-hour course, you will learn how to discuss the steps in creating a Project Plan, identify WBS structure based on organizational need, and discuss the steps in converting an iAccess plan to a Vision plan. This course is part of the Vision Project Planning and Resource Management series. [Keywords and Related Searches - instructor led class, training, resource planning, project management, iaccess, resources, budget calculator, pprm]	Super User,Business Developer,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Assign Resources to Plan and Other Options - Virtual Live Class		Super User,Business Developer,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision Project Planning and Resource Management Series: Overview of iAccess in Vision - Virtual Live Class	In this 2-hour course, you will learn how Vision Planning integrates with iAccess for Vision to make it possible for you to manage complex projects through an alternative, streamlined application. iAccess for Vision offers real-time planning, budget, invoice, and reporting statistics that are optimized to follow planning best practices. This course is part of the Vision Project Planning and Resource Management series. [Keywords and Related Searches - instructor led class, training, pprm, project management workspace, evm implementation, invoice review approvals, ipad, tablet, info button, i bubble, generic resources, shift hours]	HR Specialist,Super User,Business Developer,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Resource Management and Reports - Virtual Live Class		HR Specialist,Super User,Business Developer,Project Manager,Resource Manager
Vision Security Series: Overview and Roles - Virtual Live Class	In this 1.5-hour course, you will learn to configure the security options and workflow, the key security terms and the tabs and functions in Roles. This course is part of the Security Series. [Keywords and Related Searches - instructor led class, training, class, training, user access, process, terminology, change password, configuration, setup checklist, toolbar, form, tab, general, record access, record level view, accounting, period, cost rates, planning, access rights, iAccess, documentation management, system administrator, integrated, windows, ADMIN, policies, closed period, prior period, restrict access]	HR Specialist,Super User,System Administrator,End User
Vision Security Series: Users, Password Policies and Other Concepts - Virtual Live Class	In this 1-hour course, you will learn the security implications of Screen Designer and the configuration of Users, Password Policies, Windows Integrated Security, Reports and Audit Trails. This course is part of the Security Series. [Keywords and Related Searches - instructor led class, training, class, training, properties, access rights, iAccess, login process, list view, methods, tab, general, generate, copy current, ADMIN, administrator, user profile, requirements, maintenance, rules, expire, expiration, diable, audit trail]	HR Specialist,Super User,System Administrator

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Asset Name	Description	Role
Vision Advanced Series: Data Import - Virtual Live Class	In this 1.5-hour course, you will learn to configure Security relating to Data import, import General Journal Transactions using the Standard Data Import, update and import Employee Records and import Project Records using Advanced Data Import. This course is part of the Advanced Series. [Keywords and Related Searches - instructor led class, training, Class, Training, role, security, tab, general, record access, accounting, actions, depreciation, text file, field mapping, transaction center, entries, precautions, allow updates, results, error report, journal entry, journal entries, validation, validate, verify, utility, utilities, JE, delimiter, delimited, Excel, CSV, TXT, batch, salary, salaries, input table, pay rate, job cost rate, project, data dictionary]	Controller,Super User,Staff Accountant
Vision Expense Series: Credit Card with Import - Virtual Live Class	In this 1.5-hour course, you will learn the benefits of using Credit Cards in Deltek Vision and, the steps in enabling and setting up Credit Card configuration, attaching Credit Card charges to expense reports, and importing Credit Card charges. This course is part of the Expense Series. [Keywords and Related Searches - instructor led class, training, class, training, effects, electronic funds transfer, EFT, wire transfer, direct debit, summary view, reconcile a bank statement, imported, credit card reconciliation, missing charges, company paid, CC, ap disbursement, import validation]	Controller,Super User
Vision Payroll Series: Payroll Configuration Part 1 - Payroll Overview and General Payroll Configuration - Virtual Live Class		Controller,HR Specialist,Super User
Vision Payroll Series: Payroll Configuration Part 2 - Direct Deposit, Pay Rate Table, and Benefit Accrual - Virtual Live Class		Controller,HR Specialist,Super User
Vision Purchasing Series: Overview and Configuration - Virtual Live Class	• Recall the steps in reviewing vouchers using Vendor Review	Accounts Payable,Controller,Super User,Project Manager,Staff Accountant
Vision Utility Series: Key Convert Utility - Infographic	This covers the Key Convert Utility in Vision to change Project Numbers and Vendor Numbers. This is part of the Vision Utility series. [Keywords and Related Searches - print out, cheat sheet, quick reference, vendor, rename, re-name, renumber, re-number, combine, merge, utilities, key conversion, posting log review, 1099, budgets]	Super User,Staff Accountant

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Asset Name	Description	Role
Vision Time Series: Overview and Completing a Timesheet - Self-Paced Learning	In this 1.5-hour course, you will learn the business process flow of Vision Timesheet, and how to complete and submit timesheets for processing based on a firm's unique business requirements, and setup a timesheet report to print automatically. This course is part of the Time Series. [Keywords and Related Searches - eLearning, online Learning, online course, form, mobile, meal time, unit, quantities, lookup, resubmitting, system security, print, detailed report, summarized report, start time, end time, units, absence request, request absence, time off, benefit hours, overtime, OT, OVT, OVT-1, OVT-2, OVT 1, OVT 2, holiday, sick, PTO, meals, breaks, missing timesheet, start/end]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Expense Series: Expense Categories Setup - Self-Paced Learning	In this 1.5-hour course, you will learn how to use Expense Categories and know its functionalities, how to set up Expense categories as required on the Expense Report Form and Employee Groups in Company Expense, how to set up Expense Categories on Expense Report Categories, the steps in adding and copying an Expense Category to an existing Employee Group, and how to recognize the Expense Category fields and Edit Screen. This course is part of the Expense Series. [Keywords and Related Searches - eLearning, online Learning, online course, requiring use, category, detail type, bill by default, billable message, account number, general, business meals, travel, no detail, no message, warning, error, reimbursable, direct, indirect, editable, edit screen, distance override, reimbursement, per, disallow user, automatically calculate units, company paid, tax, mileage, per mile]	Controller,Super User,Project Manager
Vision User Fundamentals Series: Reporting and User Defined Components - Self-Paced Learning	In this 2-hour course, you will learn the functionalities and the tabs of the User Defined Components application; the purpose of the Vision Screen and Navigation Designers; and how to find records using the Quick Find option, Standard, Advanced, and SQL Where Clause lookups, and which Report to use and its features. This course is part of the User Fundamentals Series. [Keywords and Related Searches - eLearning, online Learning, online course, tab, standard, custom, fields, grids, UDIC, Info Center, saving searches, saved search, schedule, archiving, UDF, searching, is me, is mine, scheduling, email report, e-mail report, emailing report, archive, archived]	CEO,Controller,HR Specialist,Super User,Business Developer,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

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Asset Name	Description	Role
Vision User Fundamentals Series: Dashboard - Self-Paced Learning	In this 1.5-hour course, you will learn to navigate the dashboard parts and functions, the web and system dashparts, and demonstrate the dashparts and dashboard actions. This course is part of the User Fundamentals Series. [Keywords and Related Searches - eLearning, online Learning, online course, startup application, configure, security]	Accounts Payable,Accounts Receivable,CEO,Controller,HR Specialist,Super User,Business Developer,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

This document serves as a guide on the available learning assets for the given product. Note that additional assets may have been added since this document was produced.

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Asset Name	Description	Role
Vision Touch Time and Expense Approval - Self-Paced Learning	In this 1-hour course, you will learn how to Navigate through Vision using the global icons, select a database and log on to Vision, and access and Navigate through Vision Help Contents. This course is part of the Vision User Fundamentals series. Course Objectives: • Navigate through Vision using the global icons. • Select a database and log on to Vision • Access and Navigate through Vision Help Contents Level: Entry Training Hours: 1.5 hour NASBA Delivery Method: Group Internet Based NASBA Field of Study: Computer Software & App CPE Credit/s: 1.5 Prerequisites: None Advance Preparation: None For refunds, cancellation policy, and other concerns, please e-mail DeltekUniversity@DLZ.deltek.com. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. Deltek, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Instructors and participants can obtain the training materials and other helpful information for the course through the PDF file(s) displayed by Resources. [Keywords and Related Searches - instructor led class, training, icons, help, dashboard, dashparts, user options, reset password, username, global toolbar, navigation, startup, tip of the day, set color, unsubscribe, hide dashpart, unused dashpart]	CEO,Controller,HR Specialist,Super User,Department Manager,Project Manager

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Asset Name	Description	Role
Vision User Fundamentals Series: Overview, Navigation, and User Options - Self-Paced Learning	In this 1.5-hour course, you will learn to navigate around Deltek Vision and its basic functions ; the walkthrough on the different User Options, the different parts and process involved in Info Centers; and the functions of Instant Messaging (IM) Presence, Smart Grids and Code Tables. This course is part of the User Fundamentals Series. [Keywords and Related Searches - eLearning, online Learning, online course, help, locally, globally, change a password, data, single record, text editor, email]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Time Series: Frequently Asked Questions - Clickguide	This covers the frequently asked questions on the Vision Time Series. [Keywords and Related Searches - eLearning, online Learning, online course, timesheet period, employee job cost rate, vacation projects, start/end time feature, GL accounts, debit, credit, print timesheets detail report, approve timesheets, FAQs, time, time entry, timesheet, special category, special categories, unapprove, autofill, auto fill, holiday calendar, electronic signature, timesheet due alert, benefit hours taken, pay raise, pay increase]	Billing Specialist,HR Specialist,Super User,End User,Department Manager
Vision Payroll Series: Frequently Asked Questions - Clickguide	This covers the frequently asked questions on the Vision Payroll Series. [Keywords and Related Searches - eLearning, online Learning, online course, payroll module, frequencies, employee pay rate, labor expense account, post net payroll directly to bank, FAQs, pay frequency, pay raise, pay increase, adjust salaried job cost, ASJC, job cost variance, salaries payable]	HR Specialist,Super User,Department Manager
Vision Accounting and Accounts Payable Series: Frequently Asked Questions - Clickguide	This covers the frequently asked questions on the Vision Accounting and Accounts Payable Processing Series. [Keywords and Related Searches - eLearning, online Learning, online course, discount, AP, check format, payment terms, reports, 1099 initialization, 1099, print per page, run date, 2nd run, margins, split amount, print for vendors, EFT process, vouchers, invoices, remittance, bank statement, money transfer, GL cash, reconciliation statement, AP, FAQs, initialize, transfer funds, cash disbursement, reconciled, two part, three part, 2 part, 3 part, alignment, reconcile, voucher ledger, account analysis, electronic funds transfer, utility, utilities, paid this year, paid last year, box 7, 1099 required, unposted, duplicate payment, reverse lines, PWP, pay when paid, consultant ledger,remittances, re-print, reprint]	Accounts Payable,Super User,Staff Accountant

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Asset Name	Description	Role
Vision Time Series: Time Analysis Column Setup - Clickguide	This covers how to add User-Defined columns to the Time Analysis Report to display specified project hours separately and also to post the cost of those projects to a different cost account than the rest of the projects costs. This course is part of the Vision Time series. [Keywords and Related Searches - elearning, online course, online learning, headings, direct hours, indirect hours, label, benefit, setup tab, start project, end project, accrual code, options, time, analysis, project time, utilization, hours taken, employee time, staff time, billable hours, regular project, overhead projects, oh projects, promotional projects, promo projects, ratios]	Super User,Project Manager
Vision Accounting and Accounts Payable Series: Consultant Accruals - Clickguide	This covers the benefits and features, the process flows of Consultant Accruals, and the Vision reports which will display the Consultant Accrual results. This course is part of the Vision Accounting and Accounts Payable series. [Keywords and Related Searches - elearning, online course, online learning, posting, organization, project, budget, journal entry, transaction, calculation, etc, eac, percent complete, office earnings, project detail, project earnings, income statement, consultant ledger, expense detail, timing, AP, ETC, estimate to complete, EAC, estimate at completion, compensation, liability, accrued expenses, budgeted expenses, monitor expenses, profitability, direct consultants, reimbursable consultants, direct expenses, reimbursable expenses, indirect expenses, budget worksheet, rev gen, revenue generation, budget by vendor,overall % complete, expense % complete, basis for planning calculations, budget source, calculation methods, ConAcc, utility, utilities, JTD Spent, project progress, general ledger, project detail]	Accounts Payable,HR Specialist,Super User
Vision Expense Series: Frequently Asked Questions - Clickguide	This covers the frequently asked questions on the Vision Expense Series. [Keywords and Related Searches - elearning, online course, online learning, approvals, expense sheet, gl accounts, new rate, configuration settings, expense report, expense category, units detail, employee expenses, three part checks, process payments, expense, FAQs, expense entry, resubmit, re-submit, reimbursement, mileage, expense categories, units, 2 part checks, 3 part checks, stubs]	HR Specialist,Super User,End User,Department Manager

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Asset Name	Description	Role
Vision Purchasing Series - Frequently Asked Questions - Clickguide	This covers the frequently asked questions on the Vision Purchasing Series. [Keywords and Related Searches - elearning, online course, online learning, purchase order, purchase request, item category, committed purchase order, purchase template editor, freight, purchase requisition, receiving against purchase order, clause, blanket purchase order, voucher, vendor, FAQs, purchasing, PR, PO, RFQ, price quote, cost distribution, item category, item categories, capital items, buyer, approver, due date, order days, image, logo, upload, change order, freight, photo, import fees, mark as printed, PO number, purchase order number]	Accounts Payable,Super User
Vision Advanced Series: Data Import - Recorded Session	In this 1.5-hour course, you will learn to configure Security relating to Data import, import General Journal Transactions using the Standard Data Import, update and import Employee Records and import Project Records using Advanced Data Import. This course is part of the Advanced Series. [Keywords and Related Searches - training videos, role, security, record access, accounting, actions, depreciation, text file, field mapping, transaction center, entries, precautions, allow updates, results, error report, journal entry, journal entries, validation, validate, utility, utilities, JE, delimiter, delimited, Excel, CSV, TXT, batch, salary, salaries, input table, pay rate, job cost rate, project, data dictionary]	Controller,Super User,Staff Accountant
Vision CRM Series: Introduction to CRM and Info Centers - Recorded Session	In this 1-hour course, you will learn how the CRM module can benefit the organization, enumerate features included in each CRM type, and recall the steps in executing actions in CRM tabs within Info Centers. This course is part of the Vision CRM series. [Keywords and Related Searches - training videos, clients, contacts, leads, marketing campaigns, opportunities, employees, projects, vendors, module types, crm customer, customer relationship management, personnel, client relations, text library, text libraries, activities, activity, activity manager, files tab, links tab]	HR Specialist,Super User,Business Developer,Client Executive,Project Manager,Resource Manager
Vision CRM Series: Processing Part 1 - Customer Relationship Management Info Centers - Recorded Session	In this 1.5-hour course, you will learn how Explain the CRM functionality of the various Info Centers, describe Info Center screens, discuss the steps in performing CRM-related actions in the CRM Info Centers. This course is part of the Vision CRM series. [Keywords and Related Searches - training videos, clients, contacts, leads, marketing campaigns, opportunities, employees, projects, vendors, module types, crm customer, customer relationship management, personnel, client relations, text library, text libraries, activities, activity, activity manager, files tab, links tab, hierarchy, merge, socioeconomic status, firm history, qualify, qualified, disqualify, unqualified,]	Super User,Business Developer,Client Executive,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision CRM Series: Processing Part 2 - Calendar, Reports, and Touch CRM - Recorded Session	In this 1.5-hour course, you will learn about Calendar functionality, the types of CRM reports and how they can be utilized, the features of Deltek Touch CRM, and how to configure CRM Alerts. This course is part of the Vision CRM series. [Keywords and Related Searches - training videos, clients, contacts, leads, marketing campaigns, opportunities, employees, projects, vendors, module types, crm customer, mailing labels, envelopes, newsletters, merge, activity, activities, text library, text libraries, employee assignments, opportunity, stage change, iphone, ipad, tablet, android, mobile, cell phone, hand held device]	Super User,Business Developer,Client Executive,Project Manager,Resource Manager
Vision Standard Reporting Series: Delivered Standard Reports - Recorded Session	In this 1.5-hour course, you will learn the three Vision report writing tools based on the SQL Server Reporting Services, reporting toolbar functions and Standard Report configuration options. This course is part of the Standard Reporting Series. [Keywords and Related Searches - training videos, builder, designer, BIDS, application menu, review window, tabs, grid, authoring, general, options, activity, labor & expense, sorting, grouping, columns, calculated fields, layout, saving, graph, budget, custom, RDL, archive, archived, print layout, personal report, global report, financial analysis, calculations, page orientation]	Accounts Receivable,Billing Specialist,Controller,HR Specialist,Super User,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Expense Series: Company Expense Configuration - Recorded Session	In this 1.5-hour course, you will learn about Expense functionality, expense report setup, credit cards configuration, expense report screens, and expense categories. This course is part of the Vision Expense series. [Keywords and Related Searches - training videos, transaction center, expense configuration, expense setup, expense category, credit card alert, company paid, employee group]	Super User
Vision Expense Series: Expense Processing Part 1 - Overview, Actions, and Transaction Entry - Recorded Session	In this 1.5-hour course, you will learn about the Expense Processing application with special emphasis on completing expense reports, as well as expense report actions, reporting, and transaction entry. This course is part of the Vision Expense series. [Keywords and Related Searches - training videos, transaction posting, employee expenses, employee repayment, employee ledger, print expense report, detailed report, summarized report, post expense, posting, admin status report]	Super User,End User,Project Manager
Vision Expense Series: Expense Processing Part 2 - Recorded Session		Super User

This document serves as a guide on the available learning assets for the given product. Note that additional assets may have been added since this document was produced.

Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: AP Processing Part 1 - Recorded session	In this 1-hour course, you will learn how to enumerate AP processes that users can perform in Vision, discuss Vendor Review functionality, recall the steps in reviewing vouchers using Vendor Review, and list the steps in attaching supporting documents to AP vouchers. This course is part of the Vision Accounting and Accounts Payable Processing series. [Keywords and Related Searches - training videos, transactional document management, tdm, filestream, transaction document, file administration, upload]	Accounts Payable,Super User,Staff Accountant
Vision Accounting and Accounts Payable Series: Advanced Concepts Part 1 - Recorded Session	In this 1-hour course, you will learn about basic concepts of Overhead Allocation, Project Budgeting and Review, Labor Cross Charges, and Organizational Reporting. This course is part of the Vision Accounting and Accounts Payable Processing series. [Keywords and Related Searches - training videos, overhead allocation, project budgeting, review, labor cross charges, organizational reporting, percent complete, % complete, Xcharge]	Accounts Payable,Super User,Staff Accountant
Vision Accounting and Accounts Payable Series: Advanced Concepts Part 2 - Recorded Session	In this 1.5-hour course, you will learn about basic concepts of Revenue Generation and Consultant Accruals, Recall the steps in running Revenue Generation and Consultant Accruals, and review Processing Approval Workflows for Absence Requests and AP Invoice. This course is part of the Vision Accounting and Accounts Payable Processing series. [Keywords and Related Searches - training videos, ar review, approvals, Rev Gen, revenue method, upset limit]	Accounts Payable,Super User,Staff Accountant
Vision Standard Reporting Series: Overview and Authoring - Recorded Session	In this 2-hour course, you will learn about the functions of the tabs and grid in the reporting menu applications, the procedure of creating and saving standard report options and advanced search record selections, and the steps in creating and saving favorite standard reports to system and web dashparts on the dashboard. This course is part of the Vision Standard Reporting series. [Keywords and Related Searches - training videos, reporting toolbar, system dashparts, web dashparts, authoring reports, quick find, is me, is mine, personal favorite, global favorite, audit detail, audit trail]	Accounts Receivable,Billing Specialist,Controller,HR Specialist,Super User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

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Asset Name	Description	Role
Vision Payroll Series: Payroll Configuration Part 1 - Payroll Overview and General Payroll Configuration - Recorded Session	In this 2-hour course, you will learn the payroll processing flow and payroll application and, the steps in setting up security roles for a payroll administrator or user and configuring the payroll processing options. This course is part of the Payroll Series. [Keywords and Related Searches - training videos, benefit hours, pay hours, frequency, timesheet hours, recommended menu options, tab, general, record access, accounting, access rights, module, checks, FICA, Other Pay Setup, pre-tax, withholding, codes, user defined rules, tax, locale, form, contribution, rate table, HR, human resources, qtr, w2 quarter, w-2 quarter, accrual, employer, medicare, HSA, 401K, 125, cafeteria, federal, state, gross wages, deductions, matching, safe-harbor]	Controller,HR Specialist,Super User
Vision Payroll Series: Payroll Configuration Part 2 - Direct Deposit, Pay Rate Table, and Benefit Accrual - Recorded Session	In this 1.5-hour course, you will learn to configure direct deposits, how to associate payroll information with employees, and pay rate tables. It also includes discussions on benefit accrual configuration. This course is part of the Payroll Series. [Keywords and Related Searches - training videos, grid, social security numbers, withholding codes, employer contribution, tax locale, reference, types, project, info center, time analysis, accrual schedule, HR, human resources, ss#, nacha, ach, checking account, savings account, pay type, ovt pct, ovt2 pct, overtime percent, OT%, pre-accrue, carry over limit, unemployment]	Controller,HR Specialist,Super User
Vision Payroll Series: Payroll Processing - Recorded Session	In this 2.5-hour course, you will learn the difference between an automatic and manual payroll processing run; how to review employee payroll information, modify pay hours, specify other pay amounts, and override a withholding for an employee; and the steps in processing a check run including printing checks, assigning check numbers, and posting payroll. This course is part of the Payroll Series. [Keywords and Related Searches - training videos, checklist, methods, screens, employee review, GL, FICA, AP Voucher, journal, posting log, direct deposit, bonus, tax implications, adjustment, payroll, payment, expense, void, W2, W3, state ID, electronic filing, quarterly processing, quarter, Qtr, w-2, w-3, 940, 941, HR, human resources, regular hours, overtime, ovt, pay hours, time hours, other pay, job cost variance, reprint, re-print check, bank account, net to gross, check margins]	HR Specialist,Super User,Department Manager
Vision Payroll Series: Payroll Reports and Utilities - Recorded Session		Controller,HR Specialist,Super User,Department Manager

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Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: Info Centers - Recorded Session	In this 1.5-hour course, you will learn how to Describe Accounting and AP Processing business process flows, enumerate Info Centers related to Accounting and AP, and discuss Accounting and AP elements in the different Info Centers. This course is part of the Vision Accounting and Accounts Payable Processing series. [Keywords and Related Searches - training videos, projects info center, accounts, employees, vendors, clients, work breakdown structure, wbs, chart of accounts, pwp, vendor review, account group names, tables, p-w-p, job cost, target ratio, template,units, account groups,]	Accounts Payable,Super User
Vision Accounting and Accounts Payable Series: Transaction Center - Recorded Session	In this 1.5-hour course, you will learn how to describe the transaction processing flowchart, list the steps for processing a transaction in Vision, review creating a transaction entry file, define implicit and explicit postings, discuss the steps in creating a recurring transaction entry, and review transaction files posting. This course is part of the Vision Accounting and Accounts Payable Processing series. [Keywords and Related Searches - training videos, transaction posting, cash receipts, transaction file, ap voucher, ap disbursement, recurring transactions, transaction lists, posting log, automatic posting, implicit, explicit, reoccurring, cash disbursement, voucher lookup, reverse lines]	Accounts Payable,Super User,Staff Accountant
Vision Accounting and Accounts Payable Series: Utilities - Recorded session	NASBA Delivery Method: Group Internet Based	Accounts Payable,Controller,Super User,Staff Accountant
Vision Accounting and Accounts Payable Series: AP Processing Part 2 - Recorded Session	In this 1.5-hour course, you will learn to perform the AP processes in Deltek Vision, how to process automatic and manual payment and determine payment type, the walkthrough of the features of bank reconciliation function, and the steps to void a payment and payment review. This course is part of the Accounting and Accounts Payable Series. [Keywords and Related Searches - training videos, effects, electronic funds transfer, EFT, wire transfer, direct debit, summary view, reconcile a bank statement, print checks, remittance, ACH, NACHA, pre-note, pre-notification, opening balance, closing balance, check review, payment type]	Accounts Payable,Super User,Staff Accountant
Vision Project Planning and Resource Management Series: Overview of iAccess in Vision- Recorded Session		HR Specialist,Super User,Business Developer,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision Expense Series: Company Expense Configuration - Recorded Session	In this 1.5-hour course, you will learn about Expense functionality, expense report setup, credit cards configuration, expense report screens, and expense categories. This course is part of the Vision Expense series. [Keywords and Related Searches - training videos, transaction center, expense configuration, expense setup, expense category, credit card alert, company paid, employee group]	
Vision Project Planning and Resource Management Series: Resource Management and Reports - Recorded Session	In this 2-hour course, you will learn the resource management options and the function of generic resource assignments, designate hard and soft booking, hot to navigate and describe the different functions of the Resource Utilization tool, the Project Planning reports available and the steps in generating a Project Planning Report. This course is part of the Project Planning and Resource Management Series. [Keywords and Related Searches - training videos, toolbar, select resources, search results, panel, view by, organization, legend, change hours, employee, copy, move, availability, grid, labor plan, EVT, summary, actuals, forecast, planned, requirements, analysis, list, performance, schedule, organization, hard booked, soft booked, under utilized, generic assignments, generic resource, change assignment, move hours, re-assign, reassign, planning analysis]	HR Specialist,Super User,Business Developer,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Overview of Creating Plans and Processes - Recorded Session	In this 2-hour course, you will learn how to discuss the steps in creating a Project Plan, identify WBS structure based on organizational need, and discuss the steps in converting an iAccess plan to a Vision plan. This course is part of the Vision Project Planning and Resource Management series. [Keywords and Related Searches - elearning, online course, online learning, resource planning, project management, iaccess, resources, budget calculator, pprm]	Super User,Business Developer,Project Manager,Resource Manager
Vision Project Planning and Resource Management Processing Series: Initial Considerations in Creating Plans - Recorded Session	In this 2-hour course, you will learn about initial considerations and different ways to create project plans in Vision. This course is part of the Vision Project Planning and Resource Management series. [Keywords and Related Searches - training videos, pprm, task dependencies, lag, lead, float, accordion calendar, schedule tab, FS relationship, predecessors, MS project]	Super User,Business Developer,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision Project Planning and Resource Management Series: Initial Setup Considerations - Recorded Session	This covers the ten main attributes to consider when initially creating Plans in Vision. This is part of the Vision Resource Management Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, plan number, cost, billing, both cost and billing, rates, generic resources, provisional rate, labor, labor category, labor codes, labor rate, resources, resource management, planning, plans, numbering system, activity codes, budget method, budgeting method, budget type, units, expense tables, expense category, top down, top-down, percent complete, % complete, formulas]	Super User,Business Developer,Client Executive,Project Manager,Resource Manager
Vision Project Planning and Resource Management Series: Plan Templates, Security, and Plan Settings - Recorded Session	In this 2-hour course, you will learn how to discuss how to create a Template Plan as a starting point in creating new plans, explain discuss the different ways you can grant or restrict access to Planning users, break down Planning Configuration based on your needs, and identify Planning Configuration Forms. This course is part of the Vision Project Planning and Resource Management series. [Keywords and Related Searches - training videos, pprm, accordion calendar, planning grids, wbs mapping, summary grids, accounting calendar]	Super User,Business Developer,Project Manager,Resource Manager
Vision for Project Manager Series: User Options and Fundamentals - Recorded Session	In this 1.5-hour course, you will learn to setup User Options tabs and functions, efficiently locate important information using Lookups and List View and create custom fields and dropdown values for tracking data, security settings needed to gain access to the information needed and alerts that can be configured to help keep you informed about the status. This course is part of the Project Manager Series. [Keywords and Related Searches - training videos, toolbar, display settings, dialog, change password, options, searching, quick find, standard search, advanced, operators, cross info center, multiple records, detail view, columns, filter, grouping, saving searches, organize save options, user defined, code tables, AR Aging, opportunity, resource planning, timesheet, approvals, due, role, general tab, record access, accounting, planning, access rights, iAccess, default printer, pop up reminders, lookups]	Project Manager
Vision for Project Manager Series: Planning with iAccess - Recorded Session	In this 1.5-hour course, you will learn to enter a Project Plan data in iAccess without the use of the Project Planning module. This course is part of the Project Manager Series. [Keywords and Related Searches - training videos, benefits, workspaces, plans, management, dashpart, process flow, conditions, settings, configure, start, end, grid, labor, add resources, generic, hours, billing, cost, publish, graphs, employee timesheet, review, reports, progress, summary, ipad, tablet, info button, i bubble, generic resources, shift hours, convert plan, create, summary view, calendar view, published, budget source, ETC, EAC, estimate to complete, estimate at completion]	Business Developer,Department Manager,Project Manager,Resource Manager

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Asset Name	Description	Role
Vision for Project Manager Series: Info Centers: Leads, Contacts, Opportunities & Projects and Project Templates - Recorded Session		Business Developer,Project Manager
Vision Purchasing Series: Overview and Configuration - Recorded Session	In this 2-hour course, you will learn the functionality and workflow of the purchasing application; how to apply the recommended solutions security level access, configure general and company Purchasing options, and execute the steps in entering items for Purchasing into the database; and the steps in setting up purchasing alerts. This course is part of the Purchasing Series. [Keywords and Related Searches - training videos, tab, business process flow, configuration, checklist, role, general, menu, record, access, rights, system settings, item categories, U/M, reason, quality, print, company, accounts, ship, bill, clauses, buyer, vendor responses, approval workflows, organization, master, alerts, requisition, price quote, PR, RFQ, unit of measure, approvers, bill-to, ship-to]	Accounts Payable,Controller,Super User,Project Manager,Staff Accountant
Vision for Project Manager Series: Invoices, Reporting and Dashparts - Recorded Session	In this 2-hour course, you will learn to use search, layout, column selection and options to design reports specific to your needs and add these reports to the dashboard for quick and easy access. This course is part of the Project Manager Series. [Keywords and Related Searches - training videos, invoice, template editor, general tab, images, project info, section, totals and signature, AR aged, unbilled detail & aging, project earnings, project progress, top/bottom performers, calculated field, selection criteria, executive, system, web, dashparts, top client, top project, logo, billing phases, billing status, KPI, top performers]	Project Manager
Vision Purchasing Series: Processing Part 1 - Purchase Requisition and Request for Price Quote - Recorded Session	In this 1-hour course, you will learn to create a Purchase Requisition, which includes providing general, shipping, comments, and cost distribution information; approve a Purchase Requisition; create and approve a request for price quote; and use the Price Request Response dialog in selecting a Vendor. This course is part of the Purchasing Series. [Keywords and Related Searches - training videos, general tab, line detail, shipping, notes, cost distribution, comments, vendors, toolbar, report, list, detail, view, progress, PR, RFQ]	Accounts Payable,Super User,Project Manager

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Asset Name	Description	Role
Vision Purchasing Series: Processing Part 2 - Purchase Orders, Receiving, and Vouchers - Recorded Session	In this 1.5-hour course, you will learn to manage and process different Purchase Order tasks; how to receive goods and services and create back orders; and how to receive a Vendor Invoice and create a Voucher from a Purchase Order. This course is part of the Purchasing Series. [Keywords and Related Searches - training videos, toolbar, general tab, agreement, shipping, comments, line items, notes, cost, distribution, billing, clauses, default, progress, change order, approval, printing, release blanket PO, show committed expense, close, PR, RFQ, PO, receiving, blanket order, service order, goods, receipt, back order, backorder]	Accounts Payable,Super User,Project Manager
Vision for Project Manager Series: Budgets and Project Review - Recorded Session	In this 2-hour course, you will learn to create budgets in Vision and demonstrate how to quickly compare budgets to actual costs to help you stay on track. This course is part of the Project Manager Series. [Keywords and Related Searches - training videos, building the planned project budget, strategies, advantages, settings, budgeting decisions, worksheet, phase, labor, expense, costs, summary, WBS, procedures, revenue, WBS1, WBS2, validation, review, actuals, direct, billing, profit, source, compare, update percent, job to date, accounts receivable, AR grid, profitability, performance, KPI, key performance indicators, guidelines, budget validation,EAC, ETC, estimate to complete, estimate at completion, WBS tree, compensation, invoice comments]	Business Developer,Department Manager,Project Manager,Resource Manager
Vision for Project Manager Series: Touch Time and Expense and Touch CRM - Recorded Session	In this 1.5-hour course, you will learn to use Vision's mobile tools to access existing data and synchronize newly added data with Vision core and benefit from the Touch CRM and Touch Time & Expense apps features to quickly enter timesheet and expense report data when you are not in the office. This course is part of the Project Manager Series. [Keywords and Related Searches - training videos, features, PIN, login, opening screen, navigation, settings, change, logout, dropdown options, project selection, line details, units, copy, delete, save, submit, favorite, expense, reports, edit, receipts, time approval, summary, quick reference card, contacts, clients, opportunities, calendar, activity, notification, ipad, iphone, ios, android, cell phone, tablet, mobile device, app, URL, approve, reassign, re-assign, activities]	Business Developer,Department Manager,Project Manager

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Asset Name	Description	Role
Vision Purchasing Series: Reporting and Purchase Template Editor - Recorded Session	In this 1.5-hour course, you will learn to create a Vision Purchase Template that can be used to generate a Purchase Order and request for price quote forms and manage the different Purchasing reports. This course is part of the Purchasing Series. [Keywords and Related Searches - training videos, assigning, buyers, vendors, editor screens, general tab, image, order detail info, signature, Misc, assignment, blanket purchase orders, form request for price quote, requisition, item by vendor, open, cost distribution, detail, status, received, vouchered, columns, grid, toolbar, PR, RFQ, PO, upload]	Accounts Payable,Super User,Project Manager
Vision Expense Series: Expense Approvals - Recorded Session	In this 1-hour course, you will learn about creating and using expense approval workflows, and expense approvals. This course is part of the Vision Expense series. [Keywords and Related Searches - training videos, expense report, expense line, alerts, assignment type, workflow state, line approver]	HR Specialist,Super User,Department Manager
Vision Security Series: Overview and Roles - Recorded Session	In this 1.5-hour course, you will learn to configure the security options and workflow, the key security terms and the tabs and functions in Roles. This course is part of the Security Series. [Keywords and Related Searches - training videos, user access, process, change password, configuration, setup checklist, toolbar, form, tab, record access, record level view, accounting, period, cost rates, planning, access rights, iAccess, documentation management, system administrator, integrated, windows, ADMIN, policies, closed period, prior period, restrict access]	HR Specialist,Super User,System Administrator,End User
Vision Security Series: Users, Passwords Policies, and Other Concepts - Recorded Session	In this 1-hour course, you will learn the security implications of Screen Designer and the configuration of Users, Password Policies, Windows Integrated Security, Reports and Audit Trails. This course is part of the Security Series. [Keywords and Related Searches - training videos, properties, access rights, iAccess, login process, list view, methods, generate, copy current, ADMIN, administrator, user profile, requirements, maintenance, rules, expire, expiration, diable, audit trail]	HR Specialist,Super User,System Administrator
Vision Expense Series: Credit Card with Import - Recorded Session	Training Hours: 1 hour	Controller,Super User

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Asset Name	Description	Role
Vision Billing Series: Billing Terms Part 1 - Recorded Session	In this 2-hour course, you will learn how to identify where in the Billing application supporting documents can be uploaded and viewed, discuss the functions of billing terms, and describe the steps in setting up the Billing Terms for Time and Expense billings. This course is part of the Vision Billing series. [Keywords and Related Searches - training videos, online learning, transaction document management, tdm, time and expense, invoice on file, file administration, labor method, overtime method, labor multiplier, billing extension, rate table, expense terms, consultant terms, unit terms, fee terms, add-ons, add ons, extra charges, additional charges, sub-level, sub level, phase terms, task terms, billing limits, retainage, tax codes, BTD, billed to date, billed-to-date, billing backup report]	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager
Vision Billing Series: Billing Terms Part 2 - Recorded Session	In this 1.5-hour course, you will learn how to discuss the different components of the Fees tab in the context of Fixed Fee project billings, enumerate the steps on Scheduled Billing, explain the different options within the Sub-Level Terms tab of Billing Terms, and discuss Billing Groups. This course is part of the Vision Billing series. [Keywords and Related Searches - training videos, projects, sublevel, sublevel billing, add-on, fee method, fee rate, fee revenue allocation, fee basis, billing phases, WBS, phase terms, task terms]	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager
Vision Time Series: Overview and Completing a Timesheet - Recorded Session	In this 1.5-hour course, you will learn about the Vision timesheet business process flow, accessing the Vision Timesheet form, identifying parts of the Vision timesheet, completing a timesheet, submitting and signing a timesheet for approval, resubmitting a timesheet, printing multiple timesheet reports, and setting up a timesheet report to print automatically. This course is part of the Vision Time Processing series. [Keywords and Related Searches - training videos, overtime, comments, time fields, mobile timesheet, unit quantities, units, absence request, request absence, time off, benefit hours, iphone, mobile, phone, android, overtime, OT, OVT, OVT-1, OVT-2, OVT1, OVT2, holiday, sick, PTO, meals, breaks, missing timesheet, detailed report, summarized report, start/end]	Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Billing Series: Interactive Billing Part 1 - Without Invoice Approval Processing - Recorded Session	In this 2-hour course, you will learn how to describe the interactive billing process flow and enumerate the actions that users can perform during interactive billing. This course is part of the Vision Billing series. [Keywords and Related Searches - training videos, invoice approval, processing, employee realization, fee allocation, credit memos, billing retainage, invoicing, billing session options, billing extension, transfer labor, write off, write-off, invoice number, accept invoice, accepting invoice, batch billing, release holds, held transactions, reprint invoice, re-print invoice, delete invoice, edited invoice, upload invoice, email invoice, billing status]	Accounts Receivable,Billing Specialist,Super User,Department Manager,Project Manager

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Asset Name	Description	Role
Vision Time Series: Processing Timesheets - Recorded Session	In this 1-hour course, you will learn about processing timesheets including how to review, modify, and approve timesheets. This course will also cover how to view other employees timesheets and how to post a completed timesheet. This course is part of the Vision Time Processing series. [Keywords and Related Searches - training videos, approve timesheet, post timesheet, approval, approving, approver, line item approval, admin status report]	HR Specialist,Super User,Department Manager
Vision Billing Series: Interactive Billing Part 2 - With Invoice Approval Processing - Recorded Session	In this 1.5-hour course, you will learn to enable Invoice Approvals on the applications; the steps of processing Invoice Approval, running Refresh Billing Extensions, and looking up Invoice Review; the walkthrough of the Interactive Approvals function; and to print the Invoice Approval Report. This course is part of the Billing Series. [Keywords and Related Searches - training videos, alerts, submittal, comments, applications, update fees, batch, reporting default terms, accounts receivable, AR security setting, tab, general, sorting, grouping, layout, draft invoice, final invoice, accept invoice, alerts, reject invoice, batch billing, ar comment review, ar comment update]	Accounts Receivable,Billing Specialist,Super User,Department Manager,Project Manager
Vision Billing Series: Invoice Template Editor - Recorded Session	In this 1-hour course, you will learn how to discuss the benefits of using the invoice template editor, describe the different tabs within the Invoice Template Editor application, enumerate the steps in using Invoice and Purchasing images self-service function, and recall the steps in creating a new invoice template and assigning them to projects. This course is part of the Vision Billing series. [Keywords and Related Searches - training videos, creating new invoice templates, accounting process, billing process, purchasing images, company logo, upload image, signature line, invoice margins]	Accounts Receivable,Billing Specialist,Super User,Client Executive
Vision User Fundamentals Series: Overview, Navigation, and Dashboards - Recorded Session		Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

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Asset Name	Description	Role
Vision Billing Series: Pre-Billing - Recorded Session	In this 1-hour course, you will learn how to discuss pre-billing functions, describe pre-billing process flow and screens, enumerate the steps in running a draft invoice, and enumerate the steps in generating an Unbilled Detail and Aging Report. This course is part of the Vision Billing series. [Keywords and Related Searches - training videos, batch billing, final invoice, invoice number, assigned invoice number, previously run batches]	Accounts Receivable,Billing Specialist,Super User,Department Manager,Project Manager,Resource Manager
Vision User Fundamentals Series: User Options - Recorded Session	Level: Entry	CEO,Controller,HR Specialist,Super User,Business Developer,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Utility Series: Accounting Period Utilities - Infographic	This covers the Utilities used in Vision to create accounting periods, open previously closed accounting periods and change accounting periods. This is part of the Vision Utility series. [Keywords and Related Searches - print out, cheat sheet, quick reference, fiscal period, fiscal year, period setup, new period, current period, period selection, select period, periods per year, posting log review, re-open]	Controller,HR Specialist,Super User,Staff Accountant
Vision Project Planning and Resource Management Series: Assign Resources to Plan and Other Options - Recorded Session	In this 2.5-hour course, you will learn to assign, and forecast hours and understand shift hours for Generic and Named Labor Resources; enter and forecast planned expense, consultants and units; save and map a plan; describe how to use the Budget Calculator; set options and run the Spread Variance feature; and convert iAccess Plans to Deltek Vision. This course is part of the Project Planning and Resource Management Series. [Keywords and Related Searches - training videos, tab, summary, billing, compensation, cost, revenue, multiplier information, cost, billing, analysis, import, export, MS Project, PPRM alerts, shift hours, spread labor, estimated performance, mapping, mapped, converting, baseline]	Super User,Business Developer,Project Manager,Resource Manager
Vision Billing Series: Billing Processing Overview and Billing Tables - Recorded Session	NASBA Field of Study: Finance	Accounts Receivable,Billing Specialist,Super User,Client Executive,Project Manager

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Asset Name	Description	Role
Vision Accounting and Accounts Payable Series: AP Processing - Infographic	This covers the summary of AP Processing and the steps in running these processes such as Vendor Review, Transactional Document Management, Payment Processing and Void Payment. This is part of the Accounting and Accounts Payable Series. [Keywords and Related Searches - Print Out, Cheat Sheet, Quick Reference, lookup, vouchers, supporting document, AP, posting, EFT, bank statement, TDM, supporting documents, attach, upload, receipt, effects of posting, payment, check printing, print checks, ACH, reconcile, reconciliation]	Accounts Payable,Controller,Super User
Vision Accounting and Accounts Payable Series: Employee Costing Methods - Infographic	This covers the different methods and features of Employee Costing, the steps in enabling Cost Rate Tables, and the three types of Cost Rate Tables in Deltek Vision. This course is part of the Accounting and Accounts Payable Series. [Keywords and Related Searches - print out, cheat sheet, quick reference, fixed hourly rate, pay rate, adjusted salary job costing, direct personnel expense rate, effective date, labor rate, labor category, labor code, ASJC, salaried, job cost variance, DPE, benefits]	Accounts Payable,Controller,HR Specialist,Super User,Department Manager,Staff Accountant
Vision Expense Configuration Series: Expense Reports and Credit Cards - Infographic	This covers concepts such as Expense Business Process Flow, Credit Card Importing and Non Importing Workflows actions such as credit card and alerts setup. This is part of the Vision Expense Configuration series. [Keywords and Related Searches - print out, cheat sheet, quick reference, business process flow, functionality, workflow, alerts setup, processing, approver, revenue generation, rev gen, company paid, credit card reconciliation, missing charges, ap disbursement, enable use, activate, turn on, past due]	Accounts Payable,Controller,Super User,Client Executive
Vision Time Series: Benefit Hour Accrual Based on Hours Worked - Self-Paced Learning	In this 1-hour course, you will learn how to configure and setup benefit accruals based on the number of hours worked by employees as well as the creation of an accrual schedule to automatically calculate the rate of accrual based on length of employment. [Keywords and Related Searches - eLearning, online Learning, online course, Time, benefit accruals, hours, code, hours earned, hours worked, method, schedule, accrual schedules, exclude hours, processing journal]	HR Specialist,Super User
Vision Utility Series: Key Format - Infographic	This covers the Key Format Utility in Vision to modify the length or delimiters of record codes such as Project Numbers, Vendor Numbers, Labor Codes, etc. This is part of the Vision Utility series. [Keywords and Related Searches - print out, cheat sheet, quick reference, vendor, project, labor code, account number, client number, employee number, field length, decimal, delimiter, utilities, leading zeros, key format, KF]	Controller,Super User,Staff Accountant

Deltek Vision - DLZ Standard

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Asset Name	Description	Role
Vision Master Certification Exam	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. Deltek Training is not required to be certified. Passing the exams confirms you have practical application knowledge required to be a Deltek Vision Certified User. If you do not have access to the Read & Sign document, right-click on the below link and open in a new Tab on your browser to use the alternate entry form: https://education.deltek.com/web/dlz_request_form/product_certification/ If you are using alternate access, there will be a fee associated with the Certification Exam. After paying the fee, you will receive an email with information on accessing the Certification Exam. [Keywords and Related Searches - Vision, certification, test, exam, study guide, agreement, recommended training, study suggestions, sample questions, badge, certification badge, product certification]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Certification with Accounting Exam	The Deltek Professional Vision Certification with Accounting Exam validates skills within the Vision product suite. Successful completion of the Certification exam is required to receive the Professional Certification. Deltek Training is not required to be certified. Passing the exams confirms you have practical application knowledge required to be a Deltek Vision with Accounting Certified User. If you do not have access to the Read & Sign document, right-click on the below link and open in a new Tab on your browser to use the alternate entry form: https://education.deltek.com/web/dlz_request_form/product_certification/ If you are using alternate access, there will be a fee associated with the Certification Exam. After paying the fee, you will receive an email with information on accessing the Certification Exam. [Keywords and Related Searches - Vision, Accounting, certification, test, exam, study guide, agreement, recommended training, study suggestions, sample questions, badge, certification badge, product certification]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Vision Certification with Customer Relationship Management Exam	The Deltek Professional Vision Certification with Customer Relationship Management (CRM) Exam validates skills within the Vision product suite. Successful completion of the Certification exam is required to receive the Professional Certification. Deltek Training is not required to be certified. Passing the exams confirms you have practical application knowledge required to be a Deltek Vision with Customer Relationship Management Certified User. If you do not have access to the Read & Sign document, right-click on the below link and open in a new Tab on your browser to use the alternate entry form: https://education.deltek.com/web/dlz_request_form/product_certification/ If you are using alternate access, there will be a fee associated with the Certification Exam. After paying the fee, you will receive an email with information on accessing the Certification Exam. [Keywords and Related Searches - Vision, CRM, Customer Relationship Management, certification, test, exam, study guide, agreement, recommended training, study suggestions, sample questions, badge, certification badge, product certification]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision User Fundamentals Series: User Defined Components - Learning Video	In this 27-minute course, you will learn how to create User Defined Components in Deltek Vision including User Defined Tabs, Fields, Grids and Info Centers, the risks and benefits of creating custom components, and how to create and maintain the security requirements. [Keywords and Related Searches - training videos, online video, UDC, list of values, limit entry to values list, screen designer, training requests, security configuration, reports]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

Deltek Vision - DLZ Standard

Asset Name	Description	Role
Deltek Vantagepoint Readiness Portal for Vision Users	This portal is filled with content that explains the differences between Deltek Vision and Deltek Vantagepoint. If you are currently using Vision software, this information will help you prepare for your upgrade to Vantagepoint. You can watch these presentations and demonstrations by various experts on the Deltek Vision product, to get a better perspective on how things have changed between the two systems. All of the material is created with former Vision users in mind, so it makes a great first stop on your journey towards understanding Vantagepoint. [Keywords and Related Searches - Vision, Vantagepoint, Migration, Upgrade, Readiness, Portal]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Deltek Vision Online Help	Deltek Vision Online Help provides help for all features across the application. This service can also be found and launched from the help link within the Vision user interface, and it provides you with comprehensive online help for all functionality across all areas of the product. It includes a built in search, plus a section on how to get the most out of using Online Help. [Keywords and Related Searches - online help, documentation, vision, getting started, video library, what's new, basics, concepts, data dictionary, development guide]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant

Deltek Vision - DLZ Enhanced

Asset Name	Description	Role
Vision Improving Cash Flow by Reducing Days Sales Outstanding Series: Calculate and Interpret Days Sales Outstanding - Self-Paced Learning	In this 1-hour course, you will learn to use Deltek Vision reports to calculate Days Sales Outstanding (DSO) as well as to make decisions regarding your company's current cash flow situation. Additionally, you will learn how to compare your DSO to the industry averages. [Keywords and Related Searches - eLearning, online course, online learning, Cash Flow, Report, AR Aged, AR Ledger, Office Earnings, Key Financial Metrics, Total Outstanding AR, Billed, Revenue, Average Collection Period, Final Totals, Average Age of Receivables, Trend Lines, Deltek Clarity Report, Custom Calculated Field]	Controller,Super User,Staff Accountant
Vision - Learning Lab	This course provides you with up to 4 hours of hands-on experience, navigating the Vision interface in a Learning Lab sandbox environment. Please note that Learning Lab Courses require you to fill in and send a Request Form before the course can be made available to you. The Request Form will open on your screen when you click on the link to launch the course. Requests are processed within 24 hours of the form being submitted. [Keywords and Related Searches - Learning Lab, Sandbox, Vision, practice, environment, sample]	Accounts Payable,Accounts Receivable,Billing Specialist,CEO,Controller,HR Specialist,Super User,System Administrator,Business Developer,End User,Client Executive,Department Manager,Project Manager,Resource Manager,Staff Accountant
Vision Billing Series - Applied Learning	This course provides you with up to 4 hours of hands-on experience, navigating through the Vision system in a Learning Lab sandbox environment. This course covers how to set up Labor Rate Tables, Categories and Codes; create Expense Accounts Table, Expense Categories and Expenses by Vendor; modify and copy billing terms, as well as consolidate and display phases in sub-level terms; establish Billing Groups to submit all projects on one invoice; configure Pre-Billing for your Project Manager's review and enter changes to your invoice in Interactive Billing; process, accept, review and post invoices; configure the invoice template editor and assign template to projects; and enter comments in Deltek Vision. Applied Learning courses consist of a full product environment for you to work in, and an accompanying Guided Practice scenarios that you can download. [Keywords and Related Searches - Billing, Self-paced, Guided, Billing Processing, Billing Configuration, Sandbox, Interactive, Tutorial, Vision]	Accounts Receivable,Billing Specialist,Super User,Client Executive

Deltek Vision - DLZ Enhanced

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Asset Name	Description	Role
Vision Timesheets - Applied Learning	This course provides you with up to 4 hours of hands-on experience, navigating through the Vision system in a Learning Lab sandbox environment. This course covers how to update your Timesheet Configuration settings; configure the employee Time tab; add New Group Categories; create an automated Timesheet Due alert; enable Timesheet Line Item Approval; send an alert notification when time has been charged to projects; edit In Progress timesheet; update, edit and re-open timesheets; and review the time charged. Applied Learning courses consist of a full product environment for you to work in and an accompanying Guided Practice scenarios that you can download. [Keywords and Related Searches - self-paced learning, hands-on practice, time, guided, time processing, sandbox, time entry, time configuration, interactive, tutorial, vision]	HR Specialist,Super User
Vision Standard Reporting Series - Applied Learning	This course provides you with up to 4 hours of hands-on experience, navigating through the Vision system in a Learning Lab sandbox environment. This course covers how to configure the Project Summary Report, save report options for future reports, establish and save report selection criteria, display the necessary information in the Office Earnings Report, save reports to the dashboard, set up the Office Earning Report by PM, determine the top 5 clients, create a Dashpart and a Key Financial Metrics Dashpart for Management review, generate an AR Aged Report, design an Employee Time Analysis Report, search and filter employees configure your Income Statement, summarize balance sheets using account groups, run the Check Register and export the results to Excel, print the Chart of Accounts report and a copy your timesheet. Applied Learning courses consist of a full product environment for you to work in, and an accompanying Guided Practice scenarios that you can download. [Keywords and Related Searches - Reports, Self-paced, Guided, Reporting, Report Processing, Sandbox, Interactive, Tutorial, Vision]	HR Specialist,Super User,Department Manager

Deltek Vision - DLZ Enhanced

Deltek.

Asset Name	Description	Role
Vision Payroll Series - Applied Learning	This course provides you with up to 4 hours of hands-on experience, navigating through the Vision system in a Learning Lab sandbox environment. This course covers how to configure the Payroll settings, create a User Defined Tax Locale, setup Tax Withholding Code, add the Insurance Withholding Code, create an additional benefit accrual code to track PTOs, update the hours of PTO per year in the Accrual Schedule, assign the new benefit accrual code to the employee's record, setup the Direct Deposit, assign Withholding Code to employee, edit an automatic payroll run, process the payroll payments, direct deposits, bonuses, and adjustments, review employee wages, withholdings and payroll payments, void payroll payments, run a Payroll Labor Detail report, fix the Benefit Starting balances using the History Loading payroll utility, use the Change W-2 Qtr/Year, and fix the Benefit hours taken using the Benefit Adjustment feature. Applied Learning courses consist of a full product environment for you to work in, and an accompanying Guided Practice scenarios that you can download. [Keywords and Related Searches - Payroll, Self-paced, Guided, Payroll Processing, Payroll Configuration, Sandbox, Interactive, Tutorial, Vision]	HR Specialist,Super User
Vision Expense Series - Applied Learning	This course provides you with up to 4 hours of hands-on experience, navigating through the Vision system in a Learning Lab sandbox environment. This course covers how to configure the Accounting Company settings, enable Company Paid feature, enable the use of credit cards in Deltek Vision and add the Corporate Credit Card, define the settings in Expense Report Configuration, create a new employee group, assign a new Administrator as a Group Administrator with editing rights, create and copy an Expense Category, setup the Expense Approval Workflow; create, preview, submit, approve and post an Expense Report, generate the Employee Ledger Report, process Expense Payment and Direct Deposit Payment, and void payments. Applied Learning courses consist of a full product environment for you to work in, and an accompanying Guided Practice scenarios that you can download. [Keywords and Related Searches - Expense, Self-paced, Guided, Expense Processing, Expense Entry, Expense Configuration, Sandbox, Interactive, Tutorial, Vision]	HR Specialist,Super User