

Deltek WorkBook - DLZ Starter Guide



Asset Name	Description	Role
WorkBook Basic User Introduction - Starter Guide	In this introductory course, get started with WorkBook by learning about basic navigation and functionalities, and an overview of the WorkBook system. [Keywords and Related Searches - Overview, Logging In, Docked Items, Receipt Archive, Quick Search, Introduction to Reports, Whiteboard, Favorites, My Dashboards]	Super User, End User, Project Manager, Resource Manager
WorkBook My Settings - Starter Guide	In this introductory course, you will learn how to navigate through the various settings in WorkBook and configure them to your preferences. [Keywords and Related Searches - Personal Information, Language Formatting, Login, Notification, Conversations, Themes and Templates, Mileage Types, Client, List, Jobs, Email, Import, Outlook, Calendar, Comment]	Super User, End User, Project Manager, Resource Manager
WorkBook Find What You Need: Filters and Search - Starter Guide	This course will teach you how to utilize the following WorkBook tools to quickly find what you need and access current jobs and tasks with ease. [Keywords and Related Searches - Filters, Search, Functions, Date Picker, Global Search, Quick Links, Docked Items, Filtering, Jobs List, Jobs Filter, Scheduling Filter, Search in Grid, Favorites]	Super User, End User, Project Manager, Resource Manager
WorkBook Power Launch Series: Employee - Starter Guide	In this course for employees, you will learn you how to navigate through the WorkBook employee workspace, create conversations in your Inbox, manage your Tasks, and add Time, Expense, Mileage, and Absence entries. You will also learn how to configure your WorkBook settings based on your personal preferences. This course is part of the Power Launch series. [Keywords and Related Searches - Overview, Roles, KPI, Navigating, Navigation, Workspace, Creating, Conversation, Task Card, Kanban View, Calendar View, Grid View, Grid Toolbar, Time Entry, Absence Entry, Statistics, My Settings, Personal Information]	Super User, End User, Project Manager, Resource Manager
TrafficLIVE to WorkBook Migration - Starter Guide	This course provides an overview on migrating from TrafficLIVE to WorkBook. Learn about WorkBook and its features, and how the existing TrafficLIVE functions are improved in WorkBook. [Keywords and Related Searches - Introduction to WorkBook, Advantages of WorkBook, System Comparison, Migrating into WorkBook, WorkBook Basic Navigation, Jobs, Quotes, Budget, Invoice, Timesheet, Scheduling, Reporting, Module Walkthrough Process, FAQ, functional]	End User, Project Manager, Resource Manager
What's New in WorkBook 12 - Starter Guide	In this course, learn about the updates in WorkBook 12 including CRM, Finance and Accounting, User Access Management, Scheduling and Resourcing, and Jobs. [Keywords and Related Searches - Updates, version, pipeline, creditor, invoice, payment settings, NRF, PO Line, Financial Reports, Danish Holiday Act, Databoards]	Super User, End User, Project Manager, Resource Manager

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WorkBook Time and Expense - Starter Guide	In this introductory course, learn about the Time and Expense module and how to complete your timesheet, expenses, mileage, and absence entries within WorkBook. [Keywords and Related Searches - Daily, Suggestions, Reminder, Tasks, To Do List, Grid View, Kanban View, Week View, Approve, WorkBook Share, App, Holiday, Status, Flex Day, Personal Expense Status, Personal Information]	Super User,Time and Expense End User,Time and Expense Manager,End User,Project Manager

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WorkBook Series: What's New In Workbook 11 - Infographic	This infographic will orient you on the updates in WorkBook 11 including Net Revenue Forecast changes, User Access Management, Scheduling and Resourcing, and Job administration. [Keywords and Related Searches - Integrations, Performance, Finance, Accounting, User, Access, Management, Scheduling, Resourcing, Jobs, Net Revenue, Forecast, Changes, Updates, PO, Activity, Tracking, Sales, Tax, scope, activities]	Super User,End User,Project Manager,Resource Manager
WorkBook v10 What's New: Interface and Navigation - Recorded Session	Watch this 3-minute video to learn about the updates and changes made to the WorkBook Interface and Navigation structures in WorkBook 10. This session looks at the previous system and shows comparisons with WorkBook 10. This course is part of the WorkBook v10 What's New series. [Keywords and Related Searches -Interface, Navigation, Update]	Super User,End User,Project Manager,Resource Manager
WorkBook v10 What's New: Net Revenue Forecast - Recorded Session	Watch this 6-minute video to learn about the Net Revenue Forecast feature and the updates made in WorkBook 10. This course is part of the WorkBook v10 What's New series. [Keywords and Related Searches - Net Revenue Forecast, Pipeline]	Super User,End User,Project Manager,Resource Manager
WorkBook v10 What's New: HTML Specific Features - Recorded Session	Watch this 5-minute video to learn about the HTML Specific Features now available in WorkBook 10. This session looks at new columns in the various job lists, the task list in a Kanban view, easy time entry via tasks and conversations, and cash flow forecast. This course is part of the WorkBook v10 What's New series. [Keywords and Related Searches - Silverlight changes, Job Lists, Kanban View, Tasks, Conversations, Cash flow forecast]	Super User,End User,Project Manager,Resource Manager
WorkBook v10 What's New: Global Grid Control - Recorded Session	Watch this 1-minute video to learn about the Global Grid Control feature in WorkBook 10. This course is part of the WorkBook v10 What's New series. [Keywords and Related Searches - Global Grid Control, Grid Control]	Super User,End User,Project Manager,Resource Manager
WorkBook v10 What's New: Access Right Framework - Recorded Session	Watch this 2-minute video to learn about the new WorkBook 10 Access Right Framework. This session looks at how the Access Right Control Panel works to provide levels of access to pages in the system. This course is part of the WorkBook v10 What's New series. [Keywords and Related Searches - Access Right, Read Only access, Control Panel]	Super User,End User,Project Manager,Resource Manager
WorkBook v10 What's New: Time and Expense - Recorded Session	Watch this 1-minute video to learn about Time and Expense features within WorkBook 10. During this session, we will look at completing Time and Expenses for other users. This course is part of the WorkBook v10 What's New series. [Keywords and Related Searches - Completing Time and Expense for other users, Timesheets, Expenses]	Super User,End User,Project Manager,Resource 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.

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WorkBook v10 What's New: Card Framework - Recorded Session	<p>Watch this 2-minute video to learn about WorkBook 10's Card Framework. This covers the updates to this feature which now allows ease of access anywhere in the system. This course is part of the WorkBook v10 What's New series.</p> <p>[Keywords and Related Searches - Card Framework, Document Control]</p>	Super User,End User,Project Manager,Resource Manager
WorkBook Basic User Series: Inbox and Collaboration - Self-Paced Learning	<p>This 15-minute course will teach you how to use Conversations to collaborate with colleagues via WorkBook, how to make the most of Notifications, how to approve and reject items via Approvals, and utilize the search feature. This course will also cover how to enter time information via your Inbox. This course is part of the WorkBook Basic User Series.</p> <p>[Keywords and Related Searches - Inbox, Conversations, introduction, notifications, approvals, search, find, attach file, Timesheet, mentions, add, chat, tasks, resource, jobs, collaboration, reports]</p>	Super User,End User,Project Manager,Resource Manager
WorkBook Power Launch Series: Project Management - Self-Paced Learning	<p>In this 1 hour and 30 minute course for project management, learn how to navigate WorkBook, manage job visibility, kickoffs, execution and financials. This course is part of the Power Launch series.</p> <p>[Keywords and Related Searches - Jobs List, Price Quote, Briefing, Task Management, Collaboration, Invoicing, WIP Adjustment, Job Reports, Approval of Hours and Expenses]</p>	Super User,Resource Manager
WorkBook Power Launch Series: Resource Management - Self-Paced Learning	<p>This 1-hour course on resource management will teach you how to navigate through the planning process, identify and manage tasks and resources, and report on potential revenue of the job. This course is part of the Power Launch series.</p> <p>[Keywords and Related Searches - Jobs List, Price Quote, Briefing, Task Management, Collaboration, Invoicing, WIP Adjustment, Job Reports, Approval of Hours and Expenses]</p>	Super User,Resource Manager
WorkBook Basic User Series: Absence - Self-Paced Learning	<p>In this 5-minute course, find out how to request absence and learn about the shortcuts available to make requesting absence quicker and easier. This course is part of the WorkBook Basic User Series.</p> <p>[Keywords and Related Searches - Absence, Holidays, PTO, Paid Time Off, request, shortcuts]</p>	Super User,End User,Project Manager,Resource Manager
WorkBook Basic User Series: Time and Expense - Self-Paced Learning	<p>In this 10-minute course, learn how to complete your timesheet and expenses within WorkBook along with shortcuts to quickly complete entries.This course is part of the WorkBook Basic User Series.</p> <p>[Keywords and Related Searches - Timesheets, Expenses, Mileage, Claim, Expense, Absence, Jobs, App, Shortcut, Reports, Entry]</p>	Super User,End User,Project Manager,Resource Manager

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WorkBook Basic User Series: Tasks - Self-Paced Learning	<p>This 10-minute course will teach you how to customise the Task Grid view, how to use the Tasks feature, and how to view the Task Card within the WorkBook Tasks feature. You will also learn how to enter time to your timesheet via Tasks. This course is part of the WorkBook Basic User Series.</p> <p>[Keywords and Related Searches - Timesheets, Time Entry, Customise WorkBook, Task Grid, Overview, Introduction, To Do List, Task Card, Follow-up yesterday]</p>	Super User, End User, Project Manager, Resource Manager
WorkBook Series: TrafficLIVE to WorkBook Migration - Clickguide	<p>This course provides an overview on migrating from TrafficLIVE to WorkBook. Learn about WorkBook and its features, and how the existing TrafficLIVE functions are improved in WorkBook.</p> <p>[Keywords and Related Searches - Introduction to WorkBook, Advantages of WorkBook, System Comparison, Migrating into WorkBook, WorkBook Basic Navigation, Jobs, Quotes, Budget, Invoice, Timesheet, Scheduling, Reporting, Module Walkthrough Process, FAQ, functional]</p>	End User, Project Manager, Resource Manager
WorkBook Series: Find What You Need: Filters and Search - Clickguide	<p>This course will teach you how to utilize the following WorkBook tools to quickly find what you need and access current jobs and tasks with ease. This Clickguide is part of the WorkBook series.</p> <p>[Keywords and Related Searches - Filters, Search, Functions, Date Picker, Global Search, Quick Links, Docked Items, Filtering, Jobs List, Jobs Filter, Scheduling Filter, Search in Grid, Favorites]</p>	Super User, End User, Project Manager, Resource Manager
WorkBook Power Launch Series: Employee - Clickguide	<p>In this course for employees, you will learn you how to navigate through the WorkBook employee workspace, create conversations in your Inbox, manage your Tasks, and add Time, Expense, Mileage, and Absence entries. You will also learn how to configure your WorkBook settings based on your personal preferences. This course is part of the Power Launch series.</p> <p>[Keywords and Related Searches - Overview, Roles, KPI, Navigating, Navigation, Workspace, Creating, Conversation, Task Card, Kanban View, Calendar View, Grid View, Grid Toolbar, Time Entry, Absence Entry, Statistics, My Settings, Personal Information]</p>	Super User, End User, Project Manager, Resource Manager
WorkBook Power Launch Series: Client Services - Self-Paced Learning	<p>This self-paced learning course on Client Services is made for project managers, client services, and account managers. This course will teach you about WorkBook's client management process.</p> <p>[Keywords and Related Searches - Manage Client Processes, Full Client Overview, Managing the Single Opportunity, Opportunity Overview, Client Revenue Forecasting]</p>	Super User, Project Manager, Account Manager, Client Manager

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WorkBook Series: Month-End Process - Self-Paced Learning	This scenario-based training on WorkBook's Month-End Process is made for Financial Controllers, Accounts Receivable/Payable, and other similar financial roles. This course will give you an overview on WorkBook's Finance Management and teach you about WorkBook's Month-End Process. [Keywords and Related Searches -Project Posting, WIP, Bank, Reconciliation, Closing, Accounting Period, Post, Closure, Adjustment, Costs, Follow, Scenario, Based, Training, SBT]	Super User, Finance/Accounting Administrator