



Deltek Vantagepoint >

User Fundamentals Series

Quick Reference Guide

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Overview and Navigation

Overview

Common System Icons

Here are some of the commonly used icons found throughout the Deltek Vantagepoint browser interface.



Applications

Used to display applications in the Navigation menu.



List View/Detail View Toggle

Used to switch between one record and grid view of multiple records.



Calendar

Used to open and select a date from a popup calendar.



Settings

Used to access Timesheet and Expense Report Print Settings.



Filter

Used to filter records.



Export

Used to export data into .CSV file. (Comma-separated value)



Project Structure

Used to access project Work Breakdown Structure (WBS).



Scroll Forward/Backward

Used to view previous or next record.



Dropdown

Displays and selects a value from a pre-defined list of values.



Maximize/Minimize

Used to export data into .CSV file. (Comma-separated values)



Edit

Used to open the Deltek Text Editor and to enter or edit text.



Help

Used to display instructions for a specific field or form.



Info Bubble

Used to display more information about specific fields.



Gear

Used to access My Preferences, Grid Settings, and Log Out.



Find

Used to open and select a value from a lookup list.

Log on to Deltek Vantagepoint Demonstration

01

Open Web Browser

03

Enter Login Credentials

02

Navigate to Deltek Vantagepoint

04

Select Database

Overview and Navigation



Navigation

Overview

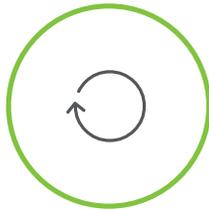
<div data-bbox="175 304 342 510"> <p>MY STUFF</p> <ul style="list-style-type: none"> Dashboards Timesheet Calendar Expense Report Self Service Approval Center Reporting </div> <div data-bbox="203 541 316 573"> <p>My Stuff</p> </div> <div data-bbox="113 598 402 695"> <p>Contains links for Dashboards, Timesheets, Expense Reports, Reporting, Calendar, and more.</p> </div>	<div data-bbox="467 304 678 510"> <p>HUBS</p> <ul style="list-style-type: none"> Activities Boilerplates Contacts Employees Firms > Marketing Campaigns > Projects > </div> <div data-bbox="527 541 600 573"> <p>Hubs</p> </div> <div data-bbox="446 617 701 667"> <p>Links to Hub records and custom Hubs</p> </div>	<div data-bbox="768 304 1044 457"> <p>RESOURCE MANAGEMENT</p> <ul style="list-style-type: none"> Resource View Project View Reporting </div> <div data-bbox="755 541 1057 573"> <p>Resource Management</p> </div> <div data-bbox="808 617 1002 667"> <p>Links to Resource Management tools</p> </div>	<div data-bbox="1157 304 1450 510"> <p>UTILITIES</p> <ul style="list-style-type: none"> Periods > Transactions > Analysis > Integrations > Imports & Exports > Updates > History Loading > Key Conversions > Key Formats > Process Server > <p>SETTINGS</p> <ul style="list-style-type: none"> Security > Workflow > Time > Expense > Cash Management > Accounting > General Ledger > Currency > Billing > Rate Tables > Resource Planning > Project > CRM > Labels and Lists > General > </div> <div data-bbox="1153 541 1430 573"> <p>Utilities and Settings</p> </div> <div data-bbox="1185 617 1421 667"> <p>Links to applications to customize Deltek</p> </div>
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Hubs



Search

Used to Search



Actions

Dropdown menu that contains actions such as: Edit, Copy, Delete, Export, Design



Summary Pane

Collapsible pane that has information



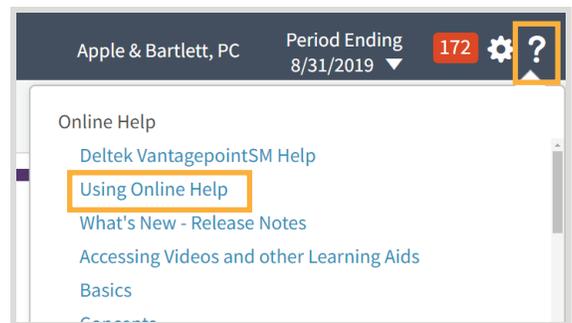
Tabs

Contains the tabs in the Hubs

Access Online Help

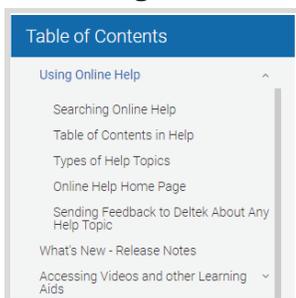
01 From anywhere in the application, click on the **Global Help** icon located in the global menu and select **Using Online Help**.

This will direct you to the **Deltek Vantagepoint Help** page in a new tab.

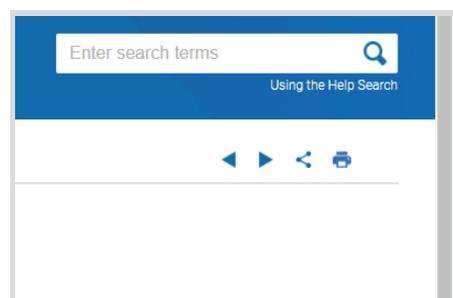


02 Find the information you need in either of the following ways:

a. Select the Table of Contents on the left sidebar and navigate to the topic you want.



b. Type a keyword on the Search field to find related information.



Hubs



What is a Hub?

Hubs serve as the “file cabinet” of Deltek Vantagepoint



Hubs store instructions

- A hub is the file cabinet of Deltek Vantagepoint, where all clients, contacts, projects, vendor, employee, and account information is stored.
- Hubs can be customized to include user defined fields, tabs, and grids. You can also create customized Hubs.

- Hubs also store instructions that drive other Deltek Vantagepoint accounting processes.
- Once this information has been set up in Hubs, it can be utilized in other areas such as time and expense entry, reporting, and data entry.

Hubs is the main areas for viewing and entering data related to:



Firms



Boilerplates



Employee



Projects



Activities



Marketing



Contacts



Equipment

Parts of a Hub Screen

Search

Used to search for specific records.

Summary Panel

Collapsible pane that has information.

The screenshot shows a web application interface for a 'Medical Facilities Campaign' hub. At the top, there is a search bar with the text 'Find marketing campaign' and a dropdown menu set to 'Active'. Below the search bar, the hub title 'Medical Facilities Campaign' is displayed, along with a 'New Marketing Campaign' button and an 'Actions' dropdown menu. The main content area features a tabbed interface with tabs for 'OVERVIEW', 'RESPONSES', 'ACTIVITIES', 'OPPORTUNITIES & PROJECTS', and 'FILES & LINKS'. The 'OVERVIEW' tab is active, showing a description of the campaign and a table with columns for 'Number', 'Project', and 'Universe'. Below the table, there are sections for 'Ownership', 'Organization', 'Marketing Campaign Manager', 'Marketing Manager', and 'Marketing Coordinator'. At the bottom, there is an 'Actions' section with 'First: Send Invitation', 'Current: Send Invitation', and 'Next: Develop Content'.

Actions

Dropdown menu that contains actions such as:

- Edit
- Copy
- Delete
- Export
- Design

Tabs

Contains the tabs in the hub.

Hubs



Searching in Hubs

The Search dropdown is broken up into sections:

Predefined Searches
Search the database for a specific type of record.

Saved Searches
Basic or advanced searches that you create to find the records that match your business requirements.

Add a New Project Search

Search Options

- Select an existing search using the **Select Search** dropdown.
- **Apply** your non-saved search.
- Select the **Save Options** to create a saved search.

Search Parameters

- Equals
- Not Equal
- Greater than or equal to
- Less than or equal to
- Starts with
- Contains
- Does not contain
- Is not Empty
- Is Me
- Is Mine
- Etc...

Hub Views

Hubs can be viewed in two ways:

Detail View

- Default Hub view that displays all tabs for the Hub and the fields on each of these tabs.
- The Tab view is the format that is referenced within the Deltek Vantagepoint Online Help System.

List View

- Displays several Hub records at one time in a list format.
- You can customize the columns and fields that display within the grid to quickly locate and evaluate Hub data.

Change to List View to view or edit many records at once.

Hub Reporting

- All Hub Reporting is performed through the Browser application under **My Stuff > Reporting**.
- Hub reports can include user defined fields.



Reporting

Lookups, Searches, & Report Selection

Perform a Quick Find Search

1. Click once inside the **Find** field of the applicable area. 
2. Enter either a single character (for example, the letter "a" or the number 3) or a string of characters ("ab" or "13"). 
3. Click **Enter**. 
4. Click on the appropriate record to access. 

Perform a New Search

1. In the Search List field, select **+ New Search** at the bottom of the list.
2. Select a field from the **Select a Field** dropdown list.
3. Enter a comparative operator using the dropdown list for the **Operator** field.
4. Type a value in the **Add Value** field or click the dropdown to display the values available.
5. Click the **Show Preview** button to display the records that meet the conditions.
6. Click the **Apply All** to use all of the records in the Results dialog, or select the record manually and select **Apply Selected**.

Use a Saved Search on a Report

1. From within the Reports grid, click in the **Selection** column of the desired report to display.
2. Select the **Record Search** list at the top of the screen. This will display all records currently available.
3. Click the **Search Text** at the bottom of the screen. This will display the **New Search** dialog window.
4. Click the **Select Search** dropdown arrow. This will display the personal searches, shared searches, and Legacy Searches.
5. Click the desired search from the list to apply towards the report. Either select **Apply All** or individually select records from the list and select **Apply Selected**.
6. Preview, print, or email the report as needed.

Use a Saved Search for Hubs Records

1. Click the dropdown search list at the top center of the screen. This will display personal and shared searches currently available as well as those organized into folders.
2. Click the personal or shared saved search to apply.
3. The records meeting the search parameters will now be displayed in your batch of records. Use the arrow keys to toggle from record to record.



Reporting

Standard and Custom Reporting

Standard Reporting

Deltek Vantagepoint Standard reporting comes with default features allowing users to:

- Generate reports for previewing onscreen.
- Print the report right away or schedule it to run at a later time.
- Set report options.
- Select data with which to populate reports.
- Save sets of report options and selection criteria for future reporting session.
- Create and save favorite report formats.
- Drill down to another report for detail on certain types of data.
- Export Deltek Vantagepoint data directly to an Adobe PDF, Microsoft Excel, or RTF file.

Custom Reporting

SQL Server Reporting Services (SSRS) Report Designer allows you to create customized reports and load them into Deltek Vantagepoint. **Report Designer** is a report authoring tool that supports a rich set of features to help you create customized reports for Deltek Vantagepoint.

Schedule a Report



Scheduling reports to run or print in a process server queue frees up the Deltek application to perform other functions.



Reports can be submitted to run at a specified future, recurring, or immediate time. Reports can also be added to a report archive based on a desired number of hours before they expire.



An alert can be set in the **Schedule** dialog to inform a user when the process has completed.