

Deltek.

What's New in Vantagepoint?

The latest new features and enhancements to power your project success



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What is Deltek Vantagepoint?

At Deltek, we focus on delivering features and functionality that helps you take your business to the next level and the latest releases of Vantagepoint are no different. Give your teams the latest tools and resources to power project success with Vantagepoint.



Complete View of Your Business

Gain visibility across your business with a single source of truth from project initiation through completion. Get actionable insights to make more informed decisions.



Project-Centric & People Focused

Proactively manage the complete project lifecycle in one place with greater visibility into costs, schedule and resources to ensure project success.



Streamline Cash Flow and Increase Profitability

Manage project costs and company financials with precision and control to boost profitability and cash flow. Automate time-consuming processes to improve accuracy and efficiency



More Efficient Way to Work

Empower users with a solution that is built for the everyday user with automation, workflows and extensibility to improve efficiency and productivity across the business

Deltek.

Dashboards and Business Intelligence

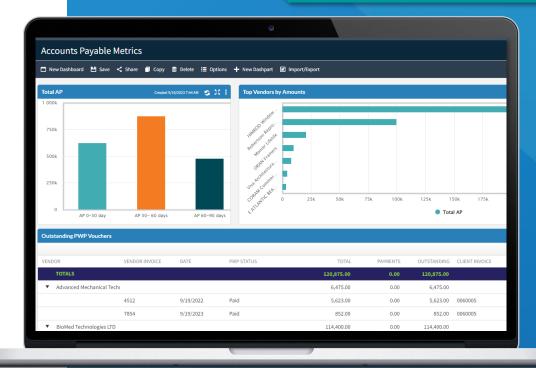


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Gain Insight into AP Details

- Deliver greater insight into accounts payable details on dashboards
- Quickly identify cash flow requirements, exception reporting and company purchases in one place
- » Give finance leaders clear visibility into key AP metrics
- » View details for pay when paid (PWP) and outstanding AP balances by vendor on a single dashboard

Deliver better visibility into AP details and metrics on the dashboard





KPIs on the Dashboard

» Provide leadership with clear visibility into key performance indicators including progress toward targets ≡ Deltek Vantagepoint > Find Application

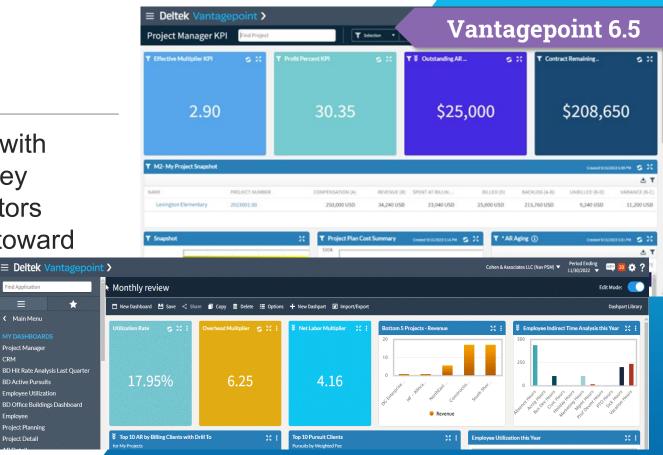
Main Menu

Project Manager CRM

BD Active Pursuits **Employee Utilization**

Employee **Project Planning**

Project Detail



Deltek

Improved Dashboard Calculations

- » Get the results you need by first filtering to the records and dates you need, then calculating your results on just those filtered amounts
- » New calculated field specific to a particular dashpart

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Vantagepoint 6.5

Firm Base Dashparts

- Firm base now available to build **>>** dashparts
- Continuing to extend flexibility of **>>** dashboards
- More details at their fingertips **>>**
- Great option to share with BD **>>** leaders who may not have been able to build out what they need on dashboards previously

LTK_Test Fest in USD

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American Express				Bartlett Enterprises America	San Diego		CA
Atlanta Falcons				Bartlett Enterprises America	Atlanta		GA
Atlantic Records			V	Bartlett Enterprises America : Bartlett Enterprises Europe	San Diego		CA
Billy Bob's Used Autos			V	Bartlett Enterprises America			
Boat Store of Orange Beach	MM-0001		V	Bartlett Enterprises America	Gulf Shores		AL
Butsko Utility Design, Inc			V	Bartlett Enterprises America			
CATHY Vendor 2			V	Bartlett Enterprises America			
DownEast Mechanical Consultant				Bartlett Enterprises America	Bar Harbor		ME
Firm - Demo4	123			Bartlett Enterprises America	Mobile	ß	AL
Firm Demo1	1234		V	Bartlett Enterprises America	Mobile		AL
Gibson Guitars			V	Bartlett Enterprises America	San Diego		CA
Grainger	0398		V	Bartlett Enterprises America	Mobile		AL
Les Paul Guitars			V	Bartlett Enterprises America : Bartlett Enterprises Europe	San Diego		CA
Ludwig Drums			V	Bartlett Enterprises America	San Diego		CA
MCA Records			V	Bartlett Enterprises America	Los Angeles		CA
New Firm - Demo2	MM-0002			Bartlett Enterprises America	Mobile		AL

Improve Employee Info for Dashboards

- » Increased visibility with more employee data on dashboards
- » New columns now available for dashboard from employee hub
- » Employee User defined fields available
- » New field level security

My Metrics Edit M 🗖 New Dashboard 💾 Save 🧻 Copy 🍈 Delete 🖽 Option: Top 10 Pursuits Employee Utilization for my Employees Employee Indirect Time w Weighted Fee Bedford Landii DG Enterprises Alabam Offic Bever Universit Expansio Alexander Floyd Glen Page Rick Weber Ronnie Craig Coyote Ridge Elementary Rhode Farguhar Middle Schoo **Employee Utilizatior** Leopald Elementar ±Τ Hamilton City Schoo TOTALS 2,749.00 849.370.45 853,506.90 10.03 72.66 Wilson Universit Tara Malley 0.00 0.00 160.00 160.00 Riemer for Offic 0.00 368.00 0.00 368.00 Amy Janny 0.00 96.00 0.00 96.00 DG Enterprises Large Employee Time Analysis - This Year Weighted Fee You do not have access to view the information on this dashpart. Please see your administrator to update your access.

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Vantagepoint 5.5

Personal Dashboards

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Main M

Project Mar Project Type

Grace's PM

Ellen's AR da In Pursuit Pr

Find Applicatio

- » Expand dashboard adoption by allowing users to create personal dashboards
- » Eliminate need for administrative time spent on individual needs
- » Give users the power to manage their own data and see what they need with pre-configured dashparts

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Drill-Down Path from Key Summary Metrics

- » Empower better decisions with ability to drill into detailed data
- » Define drill down path for table and chart dashparts
- » Allow for deeper dive and determine what the user will see

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Vantagepoint 5.5

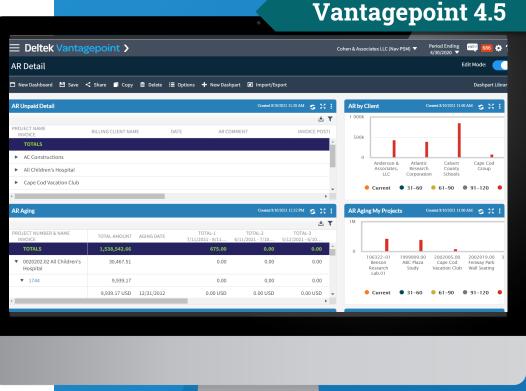
Update Percent Complete from Dashboard

- » Allow PMs to easily manage percent complete
- » View and update directly from dashboard
- » Improve project reporting and billing accuracy
- » Fewer clicks, better visibility = improved adoption

Project Manager JP										
Project Base Dashpart JP										
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More Detail at Your Fingertips

- » New AR Detail Base
- » Project Base Changes
- » Percentage data type calculated field
- Drill to detail for direct and reimbursable consultants and expenses from project base columns





Improved Project Status Visibility

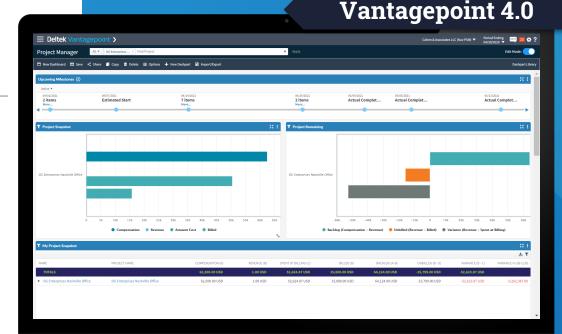
- » NEW project detail base for dashboards to create chart and table dashparts
- » Eliminates need for separate processes and spreadsheets
- » Delivers more detail to dashboard including labor, expense and reimbursable detail

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			Cape Cod Vaca	ation Club	5,150,00	00.00 USD	6,972,671.18 USD	1,145,133.64 USD	2,152,608.18 USD	-1,822,671.18 USD	4,820,063.00 USD	4,962,076.0
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 Barrett, Tina 		164.00	0.00 USD	2,624.00 US	b Da		pe Cod Vacation					186,316.14 USC
	1/15/2009	55.00	0.00 USD	880.00 USI	>	Ch					8	00,510.14 030
	2/14/2009	80.00	0.00 USD	1,280.00 US	0				Shipping Exp	ress 19898545	1/31/20	25.00 USD
									Bell Atlantic	Telephon 6523	3/31/20	59.95 USD
	3/18/2009	2.00	0.00 USD	32.00 US)				Dett Multime	relephon 6525	3/31/20	39.93 030



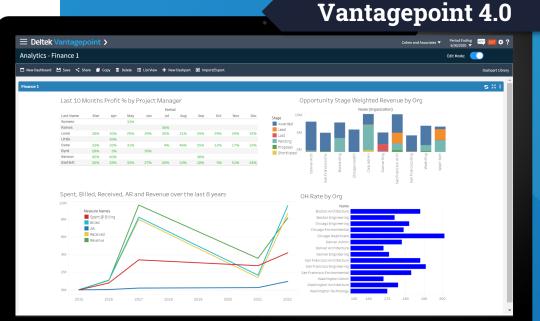
Focus Attention with Dashboard Filters

- » Dashboards typically have filter when created
- » Next level of filtering based on additional search criteria
- » Consistent search throughout system for improved usability
- » Focus on one project or subset to identify bright spots or challenges



Advanced Business Intelligence

- » NEW analysis cubes in Vantagepoint Intelligence
- Gain deeper insight into the business to drive better decisions
- » Delivers insight across the business
- » Real-time scrutiny now with analysis cubes
- » Built on Tableau





More Detailed Dashboards

- Drill to detail for hours, labor cost and labor billing on project dashparts
- » New options for planning data on dashparts
- Enhanced pipeline dashpart includes total compensation

Deltek Vantagepoin	t >			А	pple & Bartlett, PC (Na	v PSM) Period Endir 5/31/2020	
Project Planning Analysis						Edit	Mode:
Planning Hours							×
							± ₹
NAME	COMPENSATION	PLANNED HOURS	% PLANNED EXP HO	HOURS	PLANNED COST	% PLANNED EXP COST	COS
TOTALS							<u>^</u>
▶ 4 Season's Creative Learning Centers	50,000.00	302.00	0.00	0.00	45,300.00	0.00	0.0
Adelphi BioMed Research Lab	1,500,000.00	1,510.00	1,926.59	29,091.50	172,760.71	1,595.21	2,755,890.0
All Children's Hospital	3,562,352.00	0.00		17,516.00	0.00		1,225,223.9
Cape Cod Vacation Club	5,150,000.00	20,006.00	476.68	95,363.76	2,073,805.25	247.18	5,126,098.0
 DG Enterprises Austin 	30,000.00	898.00	121.60	1,092.00	112,177.90	41.02	46,020.0
Everest Shopping Complex	50,000.00	144.00	3,701.56	5,330.25	12,895.20	1,334.42	172,076.4
Pre-Design	14,440.39	0.00		1,763.50	0.00		51,894.7
 Schematic Design 	11,602.47	0.00		1,451.75	0.00		37,959.6
Design Development	7,829.95	0.00		750.00	0.00		21,395.4
Construction Documents	8,057.90	0.00		1,139.00	0.00		34,396.6
Bidding Negotiations	4,205.60	144.00	156.94	226.00	12,895.20	204.96	26,430.0
Construction Administration	3,863.69	0.00		0.00	0.00		0.0



Expanded Dashboards

- » NEW! Employee labor and utilization, project billing dashparts
- » Now add Web URL dashparts to add web pages to your dashboard
- Combine chart types into a single chart (ex. bar and line)
- » Share dashparts between databases

E Deltek Vantag	epoint >			Apple & Bartlett, PC 🔻	Period Ending 3/31/2016 ▼ 57 🔅
Employee Utilizatio	n				Edit Mode:
Utilization - This Year	*	Indirect Time Analysis - This Year	×	Utilization This Year by De	epartment
39%	61%	4k 2k 0 5 set - se	a trades ports	200 0 55 ⁵⁰ 5 ⁵⁰ 5 ¹⁰ 5 ¹⁰	steren start
Employee Time Analysis - This	Year				×
					± ▼
HOME COMPANY	EMPLOYEE NAME	REGULAR HOURS 1/1/2016 - 12/31/2016	OVERTIME 1 HOURS 1/1/2016 - 12/31/2016	DIRECT HOURS 1/1/2016 - 12/31/2016	DIRECT / STANDARD HO 1/1/2016 - 12/31/2016
Totals		283.00	5.00	235.00	0.30
 Apple & Bartlett, PC 		145.00	0.00	145.00	0.19
	Adam Freeney	0.00	0.00	0.00	0.00
	Bill Berry	0.00	0.00	0.00	
	Brenda Gray	0.00	0.00	0.00	0.00
	Brian Walton	0.00	0.00	0.00	0.00

Vantagepoint Intelligence

- » Advanced analytics and business intelligence
- Real-time access to critical business information to drive business forward
- Create new workbooks with
 Vantagepoint Intelligence Desktop
 Tool
- » Publish Workbooks in Vantagepoint





Dashboard Enhancements

- Provide clear visibility into your business with interactive dashboards
- » Build dashboards that put the right information front and center
- » Create charts, graphs, lists and more to display your data
- » Call attention to key areas with conditional formatting





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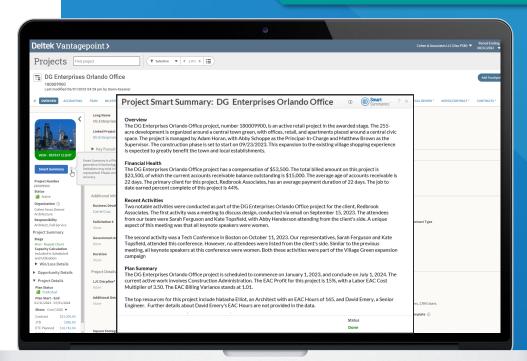
Project Management & Resource Management



Project Smart Summaries™

- >> Use GenAl to quickly create a project summary to review project details
- Easily understand project status without reviewing pages of reports or sifting through tabs
- Review summary of project financial health, recent activities, plan status and more

Vantagepoint 7.0



Transform Project Information to Project Intelligence with Generative AI

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21

Vantagepoint 7.0

Simplify PTO Updates for Plans

- Automatically update PTO/Absence Plans from approved absence requests
- » Make it easier for PMs to manage workload and plan for resource schedule gaps
- » Encourage teams to update PTO earlier and leverage absence requests for better project planning

7	an	Find project				Selection	 Not in s 	election 🕨							
1	0000) - Miami 1000004 > 00 adified 09/21/2023			✓ Plan is checker	fout to me.									
	Scale: E	ntire Project in	weeks 😰												
	CONTR	ACT SCH	EDULE	LABOR	EXPENSES	UNITS									
(D LEV	EL/RESOURCE		Show Less	PLAN START	PLAN END	ASSIGNME START	ASSIGNM END	ETC HOURS	SUB-ROW	2023 5 10/16 - 10/22	2023 10/23 - 10/29	2023 10/30 - 11/05	2023 11/06 - 11/12	2023 11/13 - 11/19
1	PTO	D - Miami			01/01/202:	12/31/202	01/01/2023	12/31/2023	360.00	Planned Hours		8.00	16.00	8.00	
	• /	Architecture			01/01/2023	12/31/2023	01/01/2023	12/31/2023	224.00	Planned Hours		8.00			
		A Cindy S	inow				01/01/2023	12/31/2023	80.00	Planned Hours					
		🧟 🛛 Dawn P	lessner				01/01/2023	12/31/2023	64.00	Planned Hours					
		Karen I	Rebrick				01/01/2023	12/31/2023	48.00	Planned Hours		8.00			
		Steph F	tusner				01/01/2023	12/31/2023	32.00	Planned Hours					
	•	Engineering			01/01/2023	12/31/2023	01/01/2023	12/31/2023	64.00	Planned Hours					
		Amy M	ller				01/01/2023	12/31/2023	16.00	Planned Hours					
		🕵 🛛 Jane H	ank				01/01/2023	12/31/2023	32.00	Planned Hours					
		Michell	e Perry				01/01/2023	12/31/2023	16.00	Planned Hours					
	•	nteriors			01/01/2023	12/31/2023	01/01/2023	12/31/2023	72.00	Planned Hours			16.00	8.00	
		🧕 🛛 Amy Ja	nny				01/01/2023	12/31/2023	24.00	Planned Hours				8.00	
		1 Tara Ma	lley				01/01/2023	12/31/2023	32.00	Planned Hours			16.00		
		1 Tiffany	Hart				01/01/2023	12/31/2023	16.00	Planned Hours					

Automatically update resource availability from absence requests for more accurate plans

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22

Easily Identify Critical Path

- Show Critical Path option (toggle) in plan
 - » "Critical path" is all work items that would impact project end if moved forward 1 day
- » Expand/Collapse All option within the Gantt chart

Deltek Vant	agepoint >								Cohen & Asso		od Ending 108 1/2022 👻 🛄 108	۰
lan Find project		▼ Selection ▼ ◄ 10f1 ►									+ Nev	n Proj
DG Enterprises	Marco Island									Check Out Save Base	eline Publish Other	Action
25 Last modified 07/20/2023 10:3	i am by Dawn Kessner 🛛 🖌 F	fan is checked out to me.										
	Scale: Entire Project	t in quarters 🛛 Expand/Collapse All	Show Critical Pat	h 🚺							Published Show: Co	əst (U
	CONTRACT	SCHEDULE LABOR EXPENSES	CONSULTANT	S UNITS								
						2023 Q1	2023 Q2 04/01 - 06/30	2023 Q3	2023 Q4	2024 Q1	2024 Q2	
WON - REPEAT CLIENT	1 V DG Ent	erorises Marco Island	PLAN START 04/01/2023	PLAN END DI 03/22/2024	254	01/01 - 03/31	D4/01 - 06/30	07/01 - 09/30	10/01 - 12/31	01/01 - 03/31	04/01 - 06/30	
	1.1 V PreE		04/01/2023	08/13/2023	94		PreDesign					
oject Number		sk 1	04/01/2023	08/13/2023	94		Task 1					
Active		isk 3	04/01/2023	05/10/2023	28		Task 3					
ganization		sk4	04/19/2023	05/10/2023	16		Task 4					
ihen Assoc Niami chitecture		sk 5	06/15/2023	07/26/2023	30		Task	<u></u>				
oject Type fice Buildings		matic Design	08/14/2023	12/22/2023	95 1.1			Schematic Design				
sponsibility		isk 6	09/12/2023	11/24/2023	54			Task 6				
chitect, Full Service bject Summary		isk 7	11/13/2023	12/08/2023	20				Task 7			
age		sk 8	08/14/2023	12/12/2023	87			Task 8				
on - Repeat Client spacity Calculation	12.4 Ta	sk 9	11/10/2023	12/07/2023	20				Task 9			
cluded in Scheduled id Utilization	1.2.5 Tr	isk 10	11/27/2023	12/22/2023	20				Task 10			
Win/Loss Details	1.2.6 Ta	isk 10.5	11/28/2023	12/22/2023	19				Task			
Opportunity Details	1.2.7 Te	isk 10.6	11/13/2023	12/22/2023	30				Task 10.6			
Project Details Ian Status	1.3 ¥ Desi	gn Development	12/25/2023	03/22/2024	65 1.2					sign Development		
Published	1.3.1 Tz	sk 11	02/19/2024	03/22/2024	25					Task 11		
an Start - End 01/2023 - 03/22/2024	1.3.2 Tr	isk 12	03/05/2024	03/22/2024	14					Tas		
row: Cost (USD)	1.3.3 Ta	isk 13	02/01/2024	03/01/2024	22					Task 13		
ntract \$0.00 D \$2,000.00	1.3.4 Ta	isk 14	02/16/2024	02/29/2024	10					T		
C Planned \$216.40	1.3.5 Te	sk 15	12/25/2023	02/29/2024	49					sk 15		

Expedite Labor Planning

- » Fill hours per day into a selected range
- Expedite entry of labor plan by filling hours or percent of hours per day for selected period
- » Example: Tom is going to work on this project each day for the next two weeks for 3 hours per day

Hours Per Day			? >
G Enterprises Austin copy / Design	Development / Plans	2	
ssignment Range	From *	To *	
TC Assignment Date Range	▼ 3/1/2023	4/28/2023	15
Assign % of Employee's Hours per I	Day to Each Work Day		

Expenses and Consultants Planning in Calendar Period

» Support more detailed, granular and accurate planning for expenses and consultants as needed with the flexibility to turn on/off calendar periods with sub-rows in project planning

NOTE: Resource planning module required

	Deltek Vantagepoint >												Cohen & Assoc	ciates LLC (Nav PS	M) V Period 8/31/20	
Pla	an Find project	Selection	▼ 4 1of1	Þ												
:	Paris Rail Construction M000000023 Last modified 7/26/2023 02:45 am by John Clarkson, PE 💙 Plan is check	ed out to me.												Check Out	Save Baseline	8
ľ	Scale: Entire Project in months														Publish	heo
	CONTRACT SCHEDULE LABOR EXPENSES	CONSU	ILTANTS UI	IITS												
0	D LEVEL/EXPENSE TYPE	STATUS	PLAN	PLAN END	ASSIGNMENT	ASSIGNMENT	PLANNED	PLANNED BILLING	ETC	SUB-ROW	2023 7/1 - 7/31	2023 8/1 - 8/31	2023 9/1 - 9/30	2023 10/1 - 10/31	2023 11/1 - 11/30	
,	Paris Rail Construction		6/2/2023	12/31/2023	6/2/2023	12/31/2023	22,500.00	47,500.04	15,748.62		2,516.70	2,844.39	3,573.82	3,743.99	3,743.98	
										Planned Billing (USD)	4,880.93	5,433.81	7,891.54	8,267.34	8,267.32	
	Predesign		6/2/2023	12/31/2023	6/2/2023	12/31/2023	12,500.00	20,500.04	9,457.23	Planned Cost (USD)	1,125.97	1,321.22	2,183.08	2,287.04	2,287.03	
										Planned Billing (USD)	1,125.97	1,321.22	4,136.58	4,333.56	4,333.55	
	▼ Task 1		6/2/2023	12/31/2023	6/2/2023	12/31/2023	12,500.00	20,500.04	9,457.23	Planned Cost (USD)	1,125.97	1,321.22	2,183.08	2,287.04	2,287.03	
										Planned Billing (USD)	1,125.97	1,321.22	4,136.58	4,333.56	4,333.55	
	2-Person Survey Crew				6/2/2023	12/31/2023	500.00	500.00	424.11	Planned Cost (USD)	13.39	102.68	93.75	98.22	98.21	
										Planned Billing (USD)	13.39	102.68	93.75	98.22	98.21	
	Fax Expense				9/1/2023	12/31/2023	4,000.02	12,000.06	4,000.02	Planned Cost (USD)			976.75	1,023.26	1,023.26	
										Planned Billing (USD)			2,930.25	3,069.78	3,069.78	
	Long Distance Telephone				6/2/2023	12/31/2023	4,000.02	4,000.02	2,516.57	Planned Cost (USD)	556.30	609.27	556.30	582.78	582.79	
										Planned Billing (USD)	556.30	609.27	556.30	582.78	582.79	
	Mileage				6/2/2023	12/31/2023	3,999.96	3,999.96	2,516.53	Planned Cost (USD)	556.28	609.27	556.28	582.78	582.77	
										Planned Billing (USD)	556.28	609.27	556.28	582.78	582.77	
	Schematic Design		6/2/2023	12/31/2023	6/2/2023	12/31/2023	9,000.00	27,000.00 <	5,662.25	Planned Cost (USD)	1,251.65	1,370.86	1,251.66	1,311.26	1,311.25	
										Planned Billing (USD)	3,754.96	4,112.59	3,754.96	3,933.78	3,933.77	
	 Design Development 		6/2/2023	12/31/2023	6/2/2023	12/31/2023	1,000.00		629.14	Planned Cost (USD)	139.08	152.31	139.08	145.69	145.70	

Plan Project Expenses & Labor with Unit Planning

- Plan in quantity in addition to hours or amounts to ensure you capture all project costs
- » Plan for project components like survey crews, tests, equipment, inspections, etc.
- » Plan units across calendar periods
- NOTE: Resource planning module required

T Selection	▼ < 1 of 1 ►						
Resort m by John Stevens							
Scale: Entire Project in months 🗵							
CONTRACT SCHEDULE LAB	OR EXPENSES CONSULTANTS	UNITS					
LEVEL/UNIT NAME Show Less	ACCOUNT	ACCOUNT TYPE	ASSIGN END	ASSIGN START	BASELINE BILLING	BASELINE QUANTITY	CALCULATED % COMPLETE BILLI
 2200067.00 HF - Turtle Island Reso 			4/21/2023	11/15/2022	465.00	111.00	0.
 000 Project Planning 			2/6/2023	11/15/2022	465.00	111.00	0.
 001 Work Planning 			2/6/2023	11/15/2022	425.00	61.00	0
2-Person Field Crew	Misc Direct Expenses - 629.00	Direct	11/20/2022	11/15/2022	225.00	1.00	0
Concrete Sample Test	Misc Reimbursable Expense - 529.00	Reimbursable	2/6/2023	11/15/2022	135.00	9.00	0
Concrete Sample Test	Travel, Meals & Lodging - 621.00	Direct	2/6/2023	11/15/2022			C
Pickup Truck	Misc Direct Expenses - 629.00	Direct	11/20/2022	11/15/2022	25.00	1.00	C
Reproductions	Reproductions - 522.00	Reimbursable	11/30/2022	11/15/2022	40.00	50.00	C
 002 Agreements 			12/20/2022	12/5/2022	40.00	50.00	C
003 BIM Execution Plan							0
001 Predesign			4/21/2023	3/27/2023			0
003 Schematic Design							0
004 Design Development							0
	Resort by John Stevens CONTRACT SCHEDULE LAB CONTRACT SCHEDULE LAB D LEVEL/UNIT NAME 2200067.00 HF - Turtie Island Resor 2000 Project Planning 2Person Field Crew Concrete Sample Test Concrete Sample Test Concrete Sample Test Pickup Truck Reproductions 002 Agreements 003 BIM Execution Plan 003 BIM Execution Plan 003 DIP design 003 Schematic Design	by John Stevens Scale: Entire Project in months 2 CONTRACT SCHEDULE LABOR EXPENSES CONSULTANTS DEVEL/UNIT NAME 2200067.00 HF - Turtle Island Resov COD Project Planning 2Person Field Crew Misc Direct Expenses - 629.00 Concrete Sample Test Misc Reimbursable Expense - 529.00 Concrete Sample Test Travel, Meals & Lodging - 621.00 Pickup Truck Misc Direct Expenses - 629.00 Reproductions Reproductions - 522.00 Pickup Truck Misc Direct Expenses - 629.00 Reproductions Reproductions - 522.00 003 BM Execution Plan 003 BM Execution Plan 001 Predesign 003 Schematic Design	Resort Inty John Strews Scale: Entire Project in months CONTRACT Schedult LABOR EXPENSES CONTRACT Schedult Show Less ACCOUNT ACCOUNT Misc Direct Expenses - 629.00 Direct Reproductions Reproductions Reproductions - 522.00	Resort http://uhm.stevens. Scale: Entire Project in months 2 CONTRACT SCHEDULE LABOR EXPENSES CONTRACT SCHEDULE LEVEL/UNIT NAME Account Account Account Project in months 2200067.00 HF - Turtie Island Resor 4/21/2023 Contract Account Project Planning 2-Person Field Crew Misc Direct Expenses - 629.00 Direct Concrete Sample Test Misc Reimbursable Expense - 529.00 Direct Pickup Truck Misc Direct Expenses - 629.00 Direct 1/20/2022 Reproductions Reproductions - 522.00 Reimbursable 2/6/2023 Pickup Truck Misc Direct Expenses - 629.00 Direct 1/20/2022 Reproductions Reproductions - 522.00 Reimbursable 1/30/2022 Mo2 Agreements 12/20/2022 1/2/20222 1/2/20/2022 Mo3 BiM Execution Plan	Resort Inty John Strews Scale: Entire Project in months 2 CONTRACT Schort Less CONTRACT Schort Less Account YPE ASSIGN Stort Less ACCOUNT YPE CON Project Inmonths 2/6/2023 1/15/2022 4/21/2023 001 Work Planning 2/6/2023 2-Person Field Crew Misc Direct Expenses - 629.00 Direct 11/20/2022 Concrete Sample Test Misc Reimbursable Expense - 529.00 Concrete Sample Test Travel, Meals & Lodging - 621.00 Direct 11/20/2022 11/15/2022 Pickup Truck Misc Direct Expenses - 629.00 Direct 11/20/2022 Pickup Truck Misc Direct Expenses - 629.00 Direct 11/20/2022 11/15/2022 Pickup Truck Misc Direct Expenses - 629.00 Direct 11/20/2022 11/15/2022 Pickup Truck Misc Direct Expenses - 629.00 Direct 11/20/2022 11/15/2022 Pickup Truck Misc Direct Expenses - 629.00 Direct 11/20/2022 11/15/2022 003 BM Executions Reproductions - 522.00 Reimb	State Entire Project in months Z O EVELUNIT NAME Shore Less ACCOUNT ACCOUNT YVE ASSIGN ASSIGN	Resort State Entire Project in months 2 State Entire Project in months 2 Show Less CONSULTANTS UNITS Show Less ACCOUNT MITS 0 LEVEL/UNIT NAME ACCOUNT ACCOUNT YPPE ASSIGN BASELINE BASELINE BASELINE BASELINE BASELINE BUILING QUAINTITY 2 200067.00 HF - Turtle Island Resor 4/21/2023 11/15/2022 465.00 111.00 V 001 Work Planning 2/6/2023 11/15/2022 425.00 61.00 2.Person Field Crew Misc Direct Expenses - 629.00 Direct 11/20/2022 11/15/2022 125.00 9.00 Concrete Sample Test Travel,Meals & Lodging - 621.00 Direct 2/6/2023 11/15/2022 25.00 1.00 Reproductions Reproductions - 522.00 Reimbursable 11/20/2022 11/15/2022 40.00 50.00 003 BM Execution Plan 12/20/2022 12/5/2022 40.00 50.00 • 002 Agreements 12/20/2022 12/5/2022 40.00

Schedule Dependencies

- » Manage project critical path
- » Build visual schedule and identify dependencies
- » Quickly understand, react and adjust project schedule
- » NOTE: Resource Planning module required

									V	ant	lag	epo	JIII	ເ ວ.ວ
eltek Vantage	point >											Cohen & Associates I	LC (Nav PSM) 🔻 Pe	riod Ending 16 🔅 ?
Find project		T	DG Enterprise	Projects 🔻 🔺 13 o	f 28 🕨									+ New Project
G Enterprises Mar 10000.25 modified 04/15/2022 05:52 pm by		Plan is cheriked on	d to me									Ched	Out Save Baseline	Publish Other Actions
Entire Project in months													Not Published Summar	ry Section: Cost (USD) *
RACT SCHEDULE	LABOR	EXPENSES	CONSULT	NTS .										
rEL .	PLAN START	PLAN END	DURATION	2022 04/01 - 04/30	2022 05/01 - 05/31	2022 06/01 - 06/30	2022 07/01 - 07/31	2022 08/01 - 08/31	2022 09/01 - 09/30	2022 10/01 - 10/31	2022 11/01 - 11/30	2022 12/01 - 12/31	2023 01/01 - 01/31	2023 02/01 - 02/28
Enterprises Marco Island	03/31/2022	03/03/2023	242	DG Enterprises Marco I	sland									
reDesign	04/04/2022	06/01/2022	43	PreDesign		h								
Task 1	04/11/2022	05/03/2022	17	Task 1										
Task 2	05/04/2022	05/18/2022	11		Task 2									
Task 3	05/04/2022	06/01/2022	21		→ Task 3	-								
Task 4	05/13/2022	06/01/2022	14		Task 4	+								
Task 5	04/04/2022	05/13/2022	30	Task 5										
chematic Design	06/09/2022	10/18/2022	94			Schematic Desig	n			•				
Task 6	08/11/2022	09/07/2022	20					Task 6						
Task 7	09/08/2022	10/18/2022	29						+ Task 7					
Task 8	09/08/2022	10/11/2022	24						Task 8					
Task 9	08/10/2022	10/11/2022	45					Task 9		•				
Task 10	06/09/2022	08/10/2022	45			Task 10		4					Task 14 (start)	
lesign Development	10/19/2022	03/03/2023	98							Design D	evelopment		Task 15 (end)	
Task 11	10/19/2022	12/26/2022	49							Task 11		-		
Task 12	12/27/2022	02/10/2023	34									÷1	ask 12	
Task 13	12/27/2022	01/21/2023	19									4	ask 13	
Task 14	11/15/2022	01/21/2023	49								-Task 14	-	•	
Task 15	10/19/2022	12/26/2022	49							Task 15				
					10									
					111									

Easily Monitor Upcoming Tasks & Access Key Data

- Easily see projects scheduled from dashboard in My Upcoming Assignments dashpart
- » Control what revenue amounts are used in pipeline
- Better visibility into invoice billing client and AR comments from dashboard

Deltek.

Employee					T 7							
🗏 New Dashboard 💾 Save < Share 🗐 Copy	y 🛍 Delete 🗄	Options	╋ New Dashp。		V	an	Ital	gel	201	nι	5 .U	
My Upcoming Assignments (j)								20 E				
Forecast Range: 6 months beginning January 2022 [2				Show	w Capacity	: Utilization	% • (i)				
LEVEL	2022	2022	2022	2022	2022			E				
Totals	9%	9%	57%	9%	6%			*				
🔻 🕎 🛛 Adelphi Research Lab	15	14	17	15	11			11				
▼ PreDesign	15	14	17	15	11			-11				
Code Analysis		14	17	15	11			<i>c</i> /	hon and Acc	ociator 🔽	Period En	
											6/30/201	
🗖 New Dashboard 💾 Save <	Share 🗐 Cop	y 前 Deleti	e 📰 Options	+ New Das	hpart 🗹	Import/Exp	ort					
Pipeline (i)												
	January 2022 Image: point image: poin											
Aviation												
Commercial	_											
Educational												
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			All • Find Project	_			•					_
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	ly Projects - Profit %		*	My Project Se	apshot							
Office Buildings	i0		_	PROJECT NAME		COMPENSATIO	REVENUE (B)	SPENT AT BILL	BILLED (D)	BACKLOG (A-B)	UNBILLED (B - D)	
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-	in Landstein Barblack Com	Cod Versilian CAL	and and the second s	Oakhurst Elen	ientary School	982,557.00 USD	36,850.00 USD	400,000.00 USD	36,850.00 USD	945,707.00 USD	0.00 USD	-763,150.00
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	abor Detail for My Projects						aimb Detail for My F	Projects				
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Vantagepoint 5.0

Improve Team Management and Project Analysis

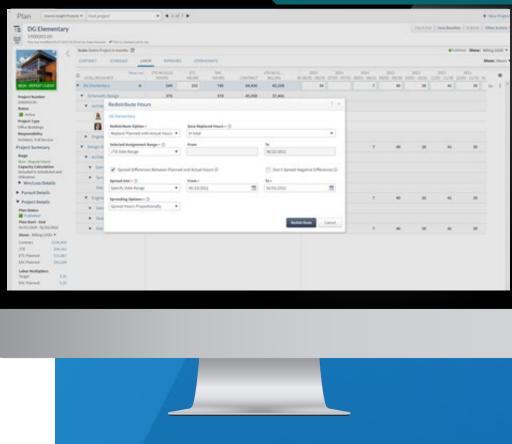
- Better evaluate and adjust team assignments with enhanced search and project filters
- » More specific searches to ensure the right people are available for your projects
- » In-depth project analysis: planned, actual and baseline in one view
- More proactive project management and insight into project performance

	Plan	ACTIVE V Search Proje	rts		▼ ◀ 1	of 352 🕨						
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t	Holbrook City	/ Plan										
	1825934.01 Last modified 02/02/2015 b	y Anders Vogt 🗸 🖌 Plan checked out to	ome								Sav	ve Ba
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							Planned Cost	2946	2946	2946	2946	
	Project Number: 2003005.00						Actual Hours					
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Administrative	▼ ^ `	0202001.00 SD Inc.	07/05/2023	02/12/2024								

Deliver More Power to Project Managers

Improve Resource Planning Accuracy

- » Redistribute Planned Hours
 - » Replace planned hours with actual hours and spread difference
 - » Changed planned hours
- » Update "JTD Through" date for resource planning applications
- » Save resource view search for others



Revenue Forecasting in Projects

- » More accurate and granular view of potential revenue
- » Create revenue forecasts for individual projects
- » Enter ETC Planned Revenue at any level
- » Easily update forecasts
- » Run reports to show pipeline and forecasted revenue by periods
- » Compares to Backlog

	E Deltek Vant	ager	ooint >							Cohen & Associ	ates LLC
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t	DG Elementary 1900003.00 Last modified 09/01/2020 10:13	1 am by Dav	wn Kessner								
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	004 Engineering Ta		09/18/2020	02/23/202	L 22,500		640	1,565	1,494	1,636	
	 004 Design Developm 		07/06/2021	03/02/202	43,500						
	003 Architecture Ta		07/08/2021	01/27/2022	31,500						
	004 Engineering Ta		09/06/2021	03/02/2022	12,000						

Project Review Drill Down

Empower PMs to better monitor **>>** project details

- Direct, indirect and reimbursable **>>** expenses
- Direct and reimbursable >> consultants
- Similar to labor drilling in a single **>>** place with expand/collapse functionality

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Project Review	Edit Search 🔻 🛛 Find project		▼ 4 50+ re	ecords 🛈 🕨							+ New Pr
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Reimbursable Consultants				8/13/2017	8.00	696.00	~	Tootsie ro	п.		
Total Reimbursables			Bailey Balanca		19.50	1,725.75	~	Cake gum	mi bears wafer muffi	n cake cheesecake	
Total	36,000.00	36,000.00	Cory Thames		22.50	1,605.38	~	Carrot cak	e toffee powder cake	e chupa chups bear claw	5,880
	4		Dean Swartz		33.00	2,390.85	~	Gum.			
Key Performance Indicators	s										
										Cl	ose
Revenue	Variance										
	JTD Earned Variance: -3.88	0.40	Realization Ratio:		JTD E	arned % Comple	rte:	В	udgeted Hours % Exp	ended: 13.33%	
JTD Earned Revenue:							: 11.11%		lanned Hours % Expe		



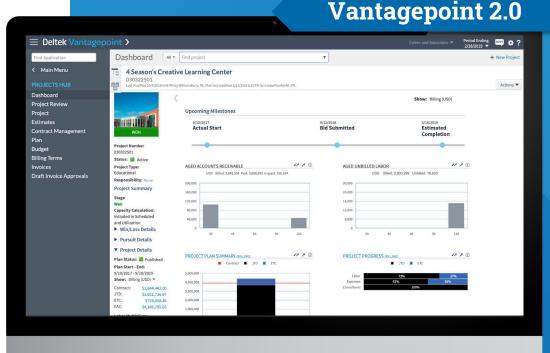
Visual Project Scheduling

- » Easier to view gaps and overlap in project schedule
- » Quickly shift and update schedule as deadlines and projects change
- » Improve project schedule and resource assignment accuracy
- » Export Gantt Chart
- » Plan labor to the labor code level

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	Design / Senior Engineer			66				/ Senior Engineer /						
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	▼ First Floor	3/6/2020	5/18/2020	63						First Floor				-
	Design / Senior Architect		5/18/2020	54							Senior Architect //	T.		
	Design / Senior Engineer		5/7/2020	54						Design / Senior En	1.			
	Second Floor	4/17/2020	8/5/2020	95						Configure and Co	Second F	loor		
	Design / Senior Architect		8/5/2020	95								Senior Architect / /		
	Design / Senior Engineer			95								Senior Engineer //		

One Project Command Center

- » Track the entire project lifecycle in one place
- » Eliminate duplicate records and processes with pursuits, project plan, invoices and more in one hub
- Easily review and approve draft invoices from projects hub
- » View project-specific metrics with a project-centric dashboard





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CRM and Pipeline Management



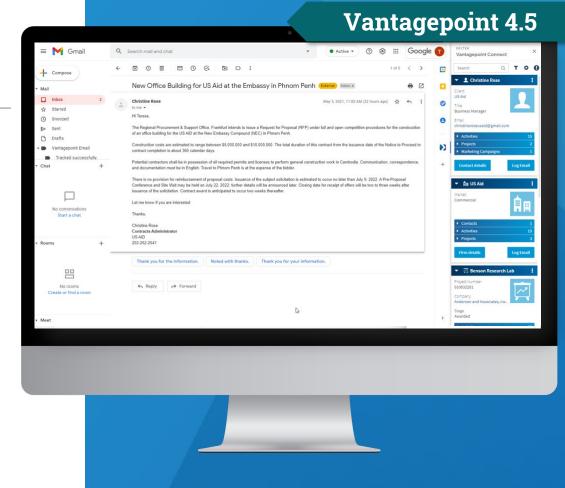
Pre-Award Number for Projects

- » Allow for separate project numbers for in-pursuit projects and billable projects
- Change project number when approved for use in processing
- » Use with or without auto-numbering
- » Supports customer desired intelligence in project number

	Projects Find proje	▼ My Active ▼ ≤ 38 of 55 ► ⋮Ξ	
*	Natick Mall Rend 2018300.00 > 3DD Des Last modified 1/7/2022 09:05 pm	ign Development	
ent	AWARDED-REPEAT CLIENT Phase Number 3DD Status Markine Project Type None Responsibility	Assign New Project Number A new project number will be assigned for Natick Mall Renovation because it is approved for use in processing. Because you are changing the project number, anyone currently working with this project in other areas, like contract management, budgeting or billing terms, will not be able to save their changes and will get an error. Would you like to continue? New Project Number •	×
vals	None Project Summary Stage Awarded - Repeat Client Capacity Calculation Included in Scheduled and	Assign New Number Keep Existing Number Cancel Revenue Methods	-

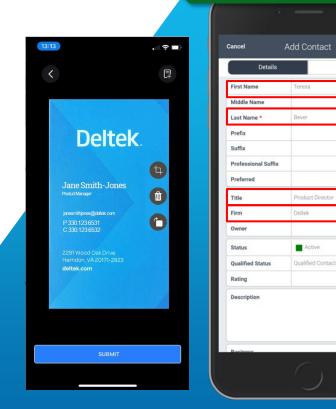
Vantagepoint Connect

- » Capture key data where BD and PMs live – in Outlook or Gmail
- » Contextual email pane in Outlook or Gmail
- » Eliminate duplicate entry of contacts and activities
- » Easily update from anywhere
- » NOTE: Included with Vantagepoint CRM



Capture Contact Info Faster

- » No more typing in stacks of business cards after in-person events
- » Quickly scan a business card
- Capture key contact details and automatically create a new contact in Vantagepoint CRM
- » Leverages ICR to read text from images to populate the form



Easily capture contacts with a simple scan

Deltek

Vantagepoint 5.0

Misc.

Save

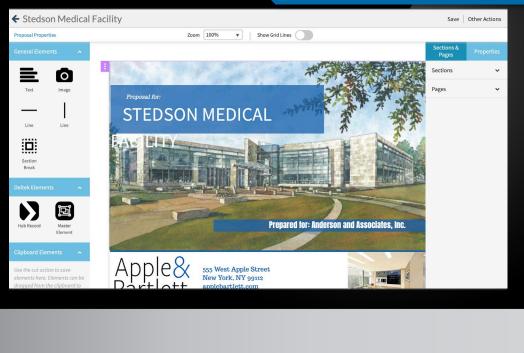
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5.7

New Proposal Builder

- » Create sleek, impressive proposals to position your firm to win
- » Visual proposal builder makes it easier to build the right proposal
- » Drag and drop proposal elements
- » Easily insert graphics and pictures
- » Merge project, employee and company details from Vantagepoint
- » Create templates to streamline proposal creation

Vantagepoint 2.0





Improve Proposal Flexibility

- » Leverage the power of the WYSIWYG Editor
- » Link Text Elements
- » Export Proposals to Word
- » Improve flexibility for content creation and collaboration with other team members and companies

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CRM & Proposal Enhancements

- » Save time for proposal creation and marketing campaigns
- » Quickly add estimates and format as needed for proposals
- » Add multiple contacts to a marketing campaign
- » SF330 now available in the Desktop client

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Deltek.

Project Accounting and Financial Management



Streamline Creating Billing Terms

- » Automate creating fee-based phase billing terms
- » Easily create terms from project work breakdown structure and compensation values in Project Hub

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	100	Geotechnical Investigation	0.0000	0.00	0.0000	0.00	001	
	200	Site Survey	0.0000	0.00	0.0000	0.00	001	
	20	Design Development	10.0000	20,000.00	20.0000	14,000.00	001	
	40	Bid and Negotiate	10.0000	2.000.00	2.0000	2.000.00	001	
				59,200.00		16,000.00		Þ

Automate time-consuming billing processes to improve accuracy and efficiency



Vantagepoint 7.0

Deltek

Vantagepoint 7.0

Timesheet Assist

- » Streamline timesheet entry with suggested projects based on user activity and resource assignments
- » Suggest projects for timesheets based on:
 - » Past timesheets
 - » Project plan assignments
- » Timesheet reminders

PE 9/1/2023 - 9/1	15/2023			Timesheet Updates Fo	or The Period Of 5/1	/2023 - 5/15/	2023		×	1			
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ct Name	Client Name	Phase	Phase N	General						Fri)/8	Sat 9/9	Sun 9/10	9
0				A Your timesheet is du									
son's Creative Learning Cente	Calvert County Schools	CH2	crh test	④ Your 2 day PTO is as									
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9				Project Suggestions									
				P000005.00	Please select one or mo PROJECT NAME Medical Facilities Professional Dev	PHASE NAME 006 005			C NAME				
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				P000001.00	Marketing	002	SF - Arch						
				P000005.00	Medical Campaigns	001	Boston - Arch						
				P000011.00	BJP School Proposal	011	Boston - Arch						

Streamline timesheet entry with project suggestions via Timesheet Assist

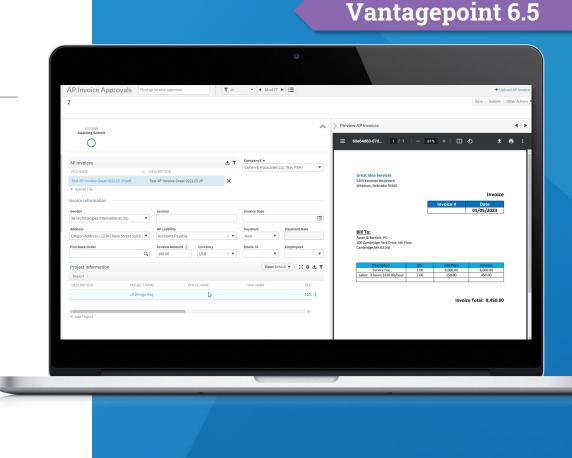


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Deltek.

ICR for AP Invoice Approvals

- » Automate the creation of AP invoice approval records with intelligent character recognition (ICR) technology
- » Eliminate manual data entry of AP invoice details
- » Improve approval review for project managers and accounting



Vantagepoint 6.5

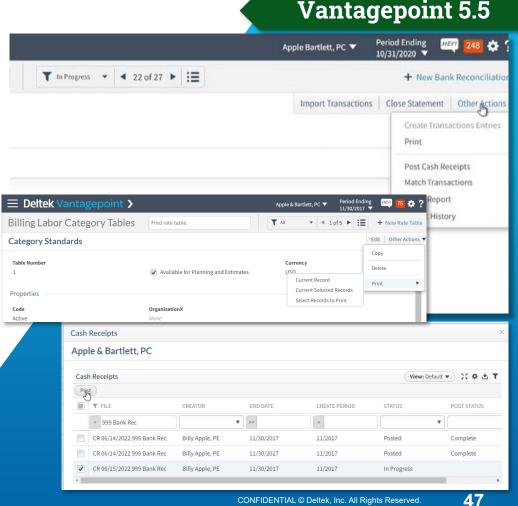
Retain Voided Invoices

- » Retain copies of voided invoices
- » The "VOID" watermark will show on all pages before and after posting
- » Will show on all pages including back-up documentation

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1/21/2011														
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Accounting & Financial Management Enhancements

- Streamline entry of deposits by posting cash receipt directly from bank
- Expanded reporting to support key details within timesheets and billing
- » Print billing category rate table report
- Overtime premium calculated using cost rates defined in the Billing Labor Override table



Deltek

Streamline Purchasing

- Enable purchasing requisitions in the browser
 - » Add vendor on the fly, attach documents at any status, approvals in the browser
- » Purchasing reports now available in the browser

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	NEED E QUOTE	ITEM	DESCRIPTION*	CATEGORY" ^	QTY*	UOM*	UNIT	TOTAL	DUE DATE*		DOCUMENTS	INV	SHIPPING		IBUTION		
PRIC		M-002 ▼	3hp Motor	3 HP Motor 🔻	2.00	Each 🔻	550.00	1,100.00	5/15/2022	15 6	90		UVERRIDES		E C	q	: ^
		P-004	25 HP Centrifical Pun	Pump	10.00	Each	950.00	9,500.00	5/15/2022	6	90						-
					12.00			10,600.00									
+ Add	Line Item														Þ		
Sugg	ested Vend	dors - 3hp M	Notor													25	±Ψ
s	VENDOR	ADDR	ESS VENDOR	ITEM	RESP	ONSE PRICE	UOM	RESPONSE D	ATE	RESP	PONSE PERSOI	Ň	APPLY RE		PRINTED		
	Atlantic Re	econ <defa< td=""><td>ault></td><td></td><td></td><td>0.00</td><td>Each</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></defa<>	ault>			0.00	Each										
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Vantagepoint 5.5

Vantagepoint 5.0

Streamline Vendor Payments

- » Deltek Payments for Vantagepoint
- » Optimize outbound payments with integration to Corpay
- » Digitally transform your cash flow
- » Cost savings and virtual card payment rebates
- » Note: does require initial onboarding with Corpay





Streamline Bank Reconciliation

- » Automate cash transaction even further
- » Create cash receipts for ACH and wire payments from automated bank transaction
- » Speed up final invoicing with email templates in interactive billing
- » Automated bank feed now available for on-prem customers in North America

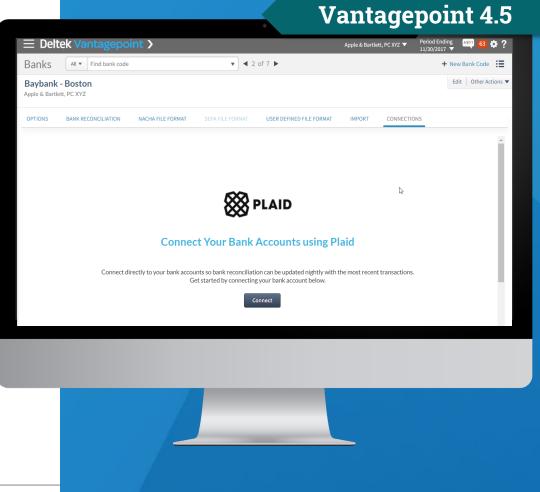
t >								Apple & Bartlett, PC 🔻	Period Ending 11/30/2017 V	62
ank Reconcili	ation	Edit Search 🔻	Find bank reconcilia	ition	•	◀ 8 of 8 ►			+ New Bank Reconc	liation
Saybank - Corpor scalPeriod - 11/2017 ople & Bartlett, PC	rate - 7/30/	2021						Import Transactio	ons Close Statement 0)ther Ac
UMMARY RECEIPTS	PAYMENTS	MISCE	ELLANEOUS IMPO	DRT						
Summary	Invoice Lookup						• • •	2 ×		
TYPE	invoice bookap									
Receipts	Type Receipt	None	Description ACH 15246231 Combridge	Data 05/25/2021	Amount 5500.00					
Payments	Suggested				XOLT					
Total	SELECT THE There are no records to		E DESCRIPTION	DATE	AMOUNT					
Import Records								σ±τ	23	± 1
MATCHED	INVOICE	DATE	T CUENT	MOJECT	PROJECT NUMBER	ANOUNT See	BALANCE - CLENT NUMBER		PAYMENT	
	00000001857	2/29/2008	City of Cambridge	Moulton Street Renovations	2002002.00		-2.000.00 CAMBRIDGE			
	00000001895	2/29/2008	City of Cambridge	Moulton Street Renovations	2002002.00	0.00	-2,000.00 CAMBRIDGE	0	0.00	1
(m)	000000001942	3/31/2008	City of Cambridge	Kennedy School Addition	2000023.00	145.66	145.66 CAMBRIDGE		0.00	
	000000001954	3/31/2008	City of Cambridge	Kennedy School Addition	2000022.00	145.66	145.66 CAMBRIDGE	2	0.00	
	00000001623	1/31/2006	City of Cambridge	Kennedy School Addition	2000023.00	329.12	329.12 CAMBRIDGE	0	500.00	
	00000001893	2/25/2008	City of Cambridge City of Cambridge	Kennedy School Addition Winchester Library	2000002-00	474.78	474.78 CAMBRIDGE 520.00 CAMBRIDGE	- 11		-
	4	11/30/2009	City or Camerioge	wroteser ustary	20200014	520.00	520.00 00000000	, 0	78.50	
							Create Cash Receipt Ca	O	12.00	
	roying	in.	JUIDUCIS		110120	V&A		00	4.33	
	Payme	nt	SparkFun		7/5/20	021		0.00	89.40	
				SETAPOOL	7/22/	2021		0.00	6.33	
(III)	Davina									



Vantagepoint 5.0

Automatic Bank Feed

- » Automate manual bank imports
- » Simplify bank reconciliation with direct connection to bank accounts
- » Updated nightly with recent transactions
- » NOTE: Currently Cloud Only and supporting North American banks
- » Integration with PLAID



Manage Purchase Orders More Easily

- Manage purchase orders and items in any browser (must enable)
- » Access purchase order form from browser
- » New "Mark Final" process
- » Add vendors on the fly
- » Attach documents regardless of PO status

Deltek Vantag	epoint >				Bartlett Enterprises
Purchase Orders	My Open Purchase Orders *	Find purchase order	▼ ◀ 21 of 30	۲	
Boat Store of Orange Number 163 (Standard) Bartlett Enterprises America	Beach				
Status: In Progress, Open					Save Can
GENERAL AGREEMENT	SHIPPING COMMENTS	LINE ITEMS BIL	LUNG CLAUSES	DEFAULT DISTRIBUT	TION
Purchase Order Informa	tion				
P.O. NUMBER 163	ition	RELEASE NUMBER			TVPE * Standard
P.O. NUMBER 163 OPDER DATE *		CURRENCY CODE			Standard BUVER*
P.O. NUMBER 163				•	Standard
P.O. NUMBER 163 ORDER DATE *		CURRENCY CODE		•	Standard BUYER * Tom Scholz
P.O. NUMBER 163 ORDER DATE * 7/23/2020		CURRENCY CODE		•	Standard BUYER * Tom Scholz
P.O. NUMBER 163 OROLE DATE * 7/23/2020 Vendor		CURREINCY CODE		•	Standard BUVER* Tom Scholz View Buyer Details

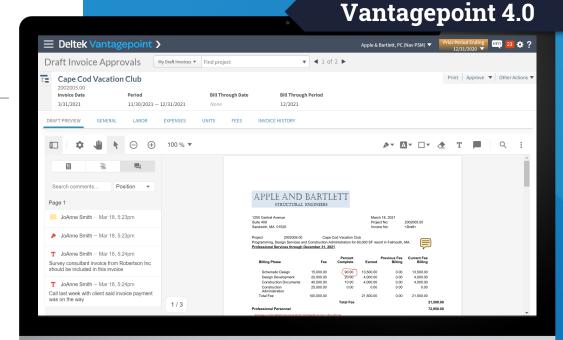


52

Vantagepoint 4.5

Digital Markup of Draft Invoice

- » Replace physical red lines with digital markups
- » Visually see markups and changes
- » Same view for PM and biller to improve communication
- » Improve PM adoption of Vantagepoint





Vantagepoint 3.5

Accounting and Billing Enhancements

- » More streamlined billing and invoicing
- » Cash receipt entry performance improvement
- » Better visibility of bill-through dates in interactive billing and approvals
- » Option to resubmit draft invoice with new dates

/antagep	oint >	Apple & Bartlett, PC 🔻	Period Ending 4/30/2017 ▼
	Interactive Billing All Find project	◀ 21 of 50+ ►	
5	Balboa Office Park 1999015.00 Invoice Date: 5/11/2020 Bill Through Date: 5/1/2017 Bill Through Date: 5/1/2017	Billing Session Options	Print Accept
	GENERAL LABOR EXPENSES UNITS FEES INVOICE HISTORY Draft Invoice Information Billing Currency USD		
vals e Posting	Notes None Billing Terms Summary	Invoice Number None	
MENT	✓ Terms on File Project Balboa Office Park - 1999015.00		N
nts	Fee Method Labor Method Overall Percent Complete Rate Table	Consultant Method By Account	2

Enhanced Accounting & Billing

- » Simplified draft invoice approvals with more details viewable to make the process easier
- » Expedite final billing by making the accept process simpler, if you choose
- » Improved experience for biller and approver
- Transactional document management (TDM) now available for journal entries

2	delphi Resea		11/1/2018 — 11	/30/2018								
GENER	AL LABOR	EXPENSES	UNITS	FEES IN	VOICE HISTORY	INVOICE PREVIEW	1					
Labo	or											
Bill	Hold Write-off	Delete	Modify Trans	sfer								
	INVOICE STATUS	STATUS	BILLABLE	DATE	PHASE	TASK	LABOR CODE	CATEGORY DESCRIPTION	EMPLOYEE	NAME	HOURS	RAT
	Submitted	Bill	~	11/30/2018	3DD		000	Architect	00987	Fitzgerald, Meg	16,890.00	0.000
	Submitted	Bill	~	1/1/2020	1PD	PRO	000	Architect	00987	Fitzgerald, Meg	3.00	250.000
	Submitted	Bill	~	1/2/2020	1PD	PRO	000	Architect	00987	Fitzgerald, Meg	4.00	250.000
	Submitted	Bill	~	1/10/2020	1PD	PRO	000	Architect	00987	Fitzgerald, Meg	8.00	250.000
	Submitted	Bill	~	1/14/2020	1PD	PRO	000	Architect	00987	Fitzgerald, Meg	8.00	250.000
	Submitted	Bill	~	7/7/2020	2SD	DOC	000	Architect	00987	Fitzgerald, Meg	8.00	0.000
	New	Hold	~	2/22/2012	5BD		190	Engineer	00019	Morgan, Dwayr	8.00	105.000
	New	Hold	~	3/20/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.000
	New	Hold	×	3/21/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.000
	New	Hold	×	3/24/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.000
	New	Hold	*	4/1/2012	1PD	SIT	030	Surveyor	00032	Replinger, Hanı	8.00	87.500
											17,898.00	
4	· · · · · · · · · · · · · · · · · · ·											

Vantagepoint 3.0

Vantagepoint 3.0

Streamlined Payroll

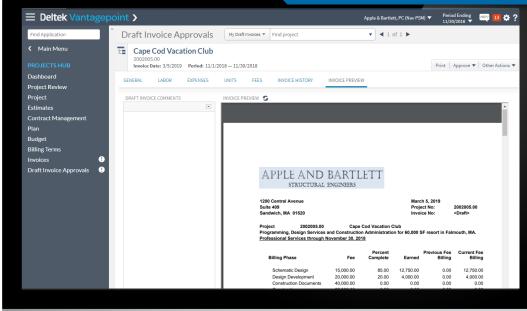
- Access payroll processing and direct deposit in Payroll Payments from the browser
- Streamlined and more consistent with employee payments and vendor payments
- » Employee pay details grid displays summary of selected employees to make review easier
- » Start automatic runs and edit to convert into manual run as needed

Payroll Payr	nents	ALL 🔻	Find payment run	•	◀ 1 of 1 ►			
Run Number 1 Payment Date: 10/8/ Cohen & Associates L	2019 - Paymen	t Run Tota		PE				Print Dr
Automatic Paymen	t 10/8/2019							
Employee Pay De	etails							X & ± T B
INCLUDE IN RUN	EMPLOYEE		EMPLOYEE NAME	TOTAL TIME HOURS	TOTAL PAY HOURS	BANK CODE	TOTAL GROSS PAYMENT	NET PAYMENT
~	00036		Peter O'Leary	0.00	0.00	BayBank Payroll	2,658.46	1,935.80
v	00037		Jay Castro	1,601.00	0.00	BayBank Payroll	0.00	0.00
	00041		Bret Tushaus	0.00	0.00	BayBank Payroll	2,584.62	1,930.85
~	00043		Kevin Nichols	0.00	0.00	BayBank Payroll	2,030.77	1,337.02
	00044		Martin Lee	0.00	0.00	BayBank Payroll	2,658.46	1,886.72
	00059		Grace Hamilton	0.00	0.00	BayBank Payroll	1,698.46	1,115.38
•	00061		Henry Carroll	0.00	0.00	BayBank Payroll	2,769.23	2,015.63
v	00063		Glen Page	0.00	0.00	BayBank Payroll	6,461.54	4,188.72
V	00065		Alexander Dane	0.00	0.00	BayBank Payroll	5,907.69	3,308.97
~	00066		Christine Benson	0.00	0.00	BayBank Payroll	3,267.69	1,975.28
1	00071		Sta Anderson	0.00	0.00	BayBank Payroll	2,843.08	1,783.38

Vantagepoint 2.0

Streamlined Billing

- » A more efficient overall billing process saves time for billers
- » Easily view and analyze unbilled transactions
- » Reduce time from draft to final invoice with draft invoice approvals
- » More information accessible and visibility into billing fee from interactive billing
- » Email final invoice to multiple contacts associated with projects





Improved Accounting

Save time creating transactions
 while maintaining strong audit trail

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Tin

- » Intuitive vendor payments
- » Single location for all actions related to transactions
- » Easily navigate between companies and fiscal periods
- » Key GL information available on dashboard

Deltek Vantage	point >				Apple & Bartlett,	, PC (Nav PSM) 🔻	Period Ending 11/30/2018 🔻	🗝 💶 🌣 ?
d Application	AP Vouchers							+ New AP Voucher
Main Menu	Apple & Bartlett, PC (Nav PS	SM)						
Transactions	AP Vouchers							X 0 0 T
Disbursements	Print Post Schedule To Post Ot	her Actions 🔻						
Vouchers	VENDOR	INVOICE		VOUCHER DATE	CREATE PE	CREATOR	STATUS	
sh Disbursements			AMOUNT					^
sh Receipts	Advanced Mechanical Technologie	14521	9,245.00	11/20/2018	11/2018	ADMIN	In Progress	- I.
ployee Expenses	Bell Atlantic Telephone	932533-00-1	356.00	4/20/2020	11/2018	ADMIN	Posted	
ployee Repayments	Bell Atlantic Telephone	85452-99	652.00	11/13/2018	Recurring	SMITH	In Progress	
pices	Diversified Electrical Technologies	3882-2828	5,678.00	4/20/2020	11/2018	ADMIN	Posted	
rnal Entries	Duplexx Printers	9288-22	980.00	4/20/2020	11/2018	ADMIN	Posted	- L.
or Adjustments	Fitzsimmons Engineering Inc.	89	765.00	4/20/2020	11/2018	ADMIN	In Progress	- L.
cellaneous Expenses nts and Reproductions							-	- 1
esheets	Five Star Travel	988221	3,512.00	11/8/2018	11/2018	ADMIN	In Progress	- 1
ts	General Office Supply	82222-21488	293.00	4/20/2020	11/2018	ADMIN	Posted	
ts By Project	Global Travel Consultants	9856423	982.00	11/7/2018	11/2018	SMITH	Posted	
a by moject	Global Travel Consultants	0002321	100.00	11/6/2018	11/2018	SMITH	In Progress	
	Haley Hart Consulting	848398-22	8,900.00	4/20/2020	11/2018	ADMIN	Posted	
	Haley Hart Consulting	8292-00	23,000.00	4/20/2020	11/2018	ADMIN	In Progress	
	KED Engineering Services	0000451	86,000.00	11/7/2018	11/2018	SMITH	In Progress	- H.
	Philips Surveying and Design	0005124	5,600,00	11/8/2018	11/2018	SMITH	In Progress	-
			5,000.00					+



Vantagepoint 2.0

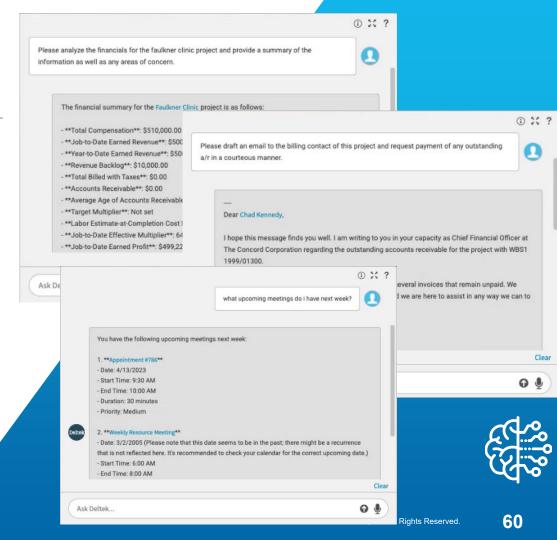
Deltek.

User Experience and Overall Usability



Interact with Your Data via Deltek Dela™

- » Engage with your digital assistant through natural language and prompts
- >> Use GenAI to draft emails to communicate project status, outstanding AR, client updates and more
- » Quickly get answers without running reports, viewing dashboards or opening specific records
- » Use Deltek Dela[™] to ask questions about projects, employees, firms, contacts, activities



Deltek

Improved User Interface

- » Updated user interface allowing easy navigation while maximizing screen real estate
 - » Updated navigation menu
 - » Fly-out menus
 - » Updated color scheme

	Project Revie	Find project		Active Billable US	Projects 🔻 ┥ 49 of	86 ►				
2	Kendall Yards Si 22.0036.00 Principal: Isaak Lavoie Pri	ite Assessment	Supervisor: Brenda W	illiams						
3	HUBS	l i								
	Activities									
	Boilerplates		n							
	Contacts	PROJECTS	_							
	Employees	Dashboard	Budgeted Billing	Planned Billing	Baseline Billing	Budgeted Variance	Planned Variance	JTD 4/10/2024 Billing	ETC Budgeted Billing	ETC Planned B
2	Firms >	Project Review								
1	Marketing Campaigns	Project		13,425.00	14,150.00	115,000.00	101,575.00	33,950.00 258.00		
	Master Service Agreements	Estimates		61.00 220.08	61.00 231.97			258.00		
- I I	Projects >	Contract Management		220.08	231.97			131.59		
	Compensation	Revenue Forecast		13,425.00	14,150.00	115,000.00	101,575.00	33,950.00		
2	Direct Consultants	Plan			- ,	5.000.00	5.000.00	,		
ī,	Total Directs	Budget		13,425.00	14,150.00	120,000.00	106,575.00	33,950.00		
ę	Reimbursables	Billing Terms								
	Reimbursable Expenses	Invoices		5,500.00	5,500.00	5,500.00		6,872.18		3,12
ŧ	Reimbursable Consultants	Draft Invoice Approvals		23,000.00	23,000.00	5,000.00	-18,000.00			23,00
	Total Reimbursables	10,500.00		28,500.00	28,500.00	10,500.00	-18,000.00	6,872.18		26,12
	Total	130,500.00		41,925.00	42,650.00	130,500.00	88,575.00	40,822.18		26,12



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Vantagepoint 7.0

Vantagepoint 7.0

Opt-In Features

- Allow administrators additional control to transition to enable subset of features for additional testing prior to production
- » Note that opt-in period is a finite amount of time and features will be automatically enabled for all users at a later date

🗐 Deltek	Vantagepoint >			Apple & E	artlett, PC 🔻 📍	eriod Ending /30/2017 👻 📖 🛐	\$?
Find Application	Opt-In	Features Find opt-in fea	atures Y Selection Y 4 records				
> Expense	A						
> Cash Manageme	t					X	\$
> Accounting	Area	Title	Enabled	Reversible	 Help Topic 		
> General Ledger	Purchasing	Create RFQ Only	Create RFQ Only Description		No		
> Currency	Purchasing	Create VO From PO	Create VO From PO Description		Yes		
> Billing	Architecture	Row Level Validation for Transaction Center	With the row level validation in transaction center feature, you can work up and down a grid, making multiple changes, without being		Yes		
> Rate Tables		Transaction Genter	interrupted by required field validations. These validations are now				
> Resource Plannin	g Hubs	Explicit Save In List View	moved to the save step. When the Explicit Save in List View feature is enabled the auto-save		Yes		
> Project	Hubs	Explicit save in List view	feature will be disabled in the Hub List Views. This allows you to		Tes		
CRM			update multiple records before choosing when to save those changes.				
Labels and Lists			When saving multiple records at a time with this feature enabled all				
✓ General			records that pass validation will be saved. If any records have errors, those records will not be saved and the errors will be shown.				
Options			crois, nosc records withic of saved and the crois will be shown.				
Firm Hierarchy							
Communications							
Audit Trail							
Modules							
Screen Designer							
Calculated Fields							
Intelligence							
Analysis Cubes							
Opt-In Features	× 4					_	E.

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General Usability

- » Updated User Interface
- » Enhanced Navigation Menu
- » Explicit Save in List View
- » Bulk Update

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- » Advanced WBS Search
- » Simplified Data Import for User Defined Hubs
- » Keyboard shortcuts
- » Mobile T&E absence requests
- » Mobile CRM touchpoints

	K vantag	jepoint >									
Firn	ns Find firm		T Active	▼ 649 records			V	anta	aen	oin	t 7
								anca	gcp	UIII	
Sulk Upd	1		Bulk Edit						×		
		Name								oject Las	at Activity Date
	ÂR	(AUTONUMBER)	Available	e Fields		Selected Fie	lds	Value	Blank		
~	- CLU	+Firm Vendor	~			~					
~		022805		e to Accounting Users	1	Name			1		
		1099 Undo vendor co	Availabl	e to CRM Users		Market					
		11 12 08 test		ddress Country		Owner			Period Ending		
		Deltek Vantage	epoint >					ha	nerica 👻 1/31/2022 🔻	🖙 🖬 🏟 ?	
		Find Application	Data Im	port Widgets			٣		•	Import Cancel	
		RESOURCE MANAGEMENT							Upload File	Other Actions •	
		PROPOSALS	Saved Options								
		E BILLING	saved options		٣					- 1	
	68	TRANSACTION CENTER	Field Mapping	Update Existing Records							
	63	CASH MANAGEMENT	Number	▼ Name	VD Dropdown	VD Character	♥ UD Check box	UD Num	eric 🛛 🛪 🛡 UD Accou	nt × ¥	
			Number	Name	UD Dropdown	UD Character	UD Cherk Box	UD Date			
		🗓 GENERALLEDGER	010	Mercury	e	test import	Checked	UD Dropdown UD Dropdown Description			
	-	PAYROLL	011	Magnet	f 8	test import	Checked	UD Employee			_
		utilities	012	Copper	8 h	test import	Checked	UD Employee Description 9/23/2023 23	101.00		
		> Periods	014	Chromium	i.	test import	Checked	9/23/2023 39	101.00		
			015	Nickel	i	test import	Checked	9/23/2023 9	101.00		
	Deltek Va									78	\$?
-		 Integrations Imports & Exports 									
☆ F	ind Application									5W	Project
		Imports Planning Data Export									ctions •
	tivities silerplates	Exports									0
	ontacts										-
	nployees	> Updates									
			New Pr	oject Search						? ×	
Fir		ALT THE	19 Selec	t Search V Hide Sea	ch Options +	Clear Search Sav	e Options Group Fields	Ungroup Fields Other Act	Advanced S	ettings:	
				Projects - Statu		n Project Level	-	Active	Cant		
		64	14			n Project Level	=				
	nages	WON	and the second								
	arketing Campaigns	Project Number	,								
	umbers rojects	01003.00 Status	Resul	ts To Display Projects	٣	List View Display		•		3 A T	
	ojects ashboard	Active		Project Numb Projects Phases			Primary Client	Project Manager	Organization	St	
	isnboard oiect Review	Project Type None	0	00001.00 Tasks				James Hetfield	Chicago	Ac	
	roject	Responsibility Prime		All Match					Chicago	Ac	
		Project Summa	ary	00005.00	Company Paid Ite				Chicago	Ac Ac	
		Stage Won	0	00020.00	Company Paid Ite Master of Puppets		Metallica	Bruce Springsteen	Chicago	Ac	
		Capacity Calcul Included in Sche		01003.00	Master or Puppets		Metallica	Bruce springsteen	chicago	AC	
		and Utilization Win/Loss D	Details								
	adget	► Pursuit Deta	ails Show # c	f Results: 15 results					Apply	All Cancel	
	lling Terms	▼ Project Deta				_					
		Plan Status	6	overnment Award Type		Governme	nt Competition Type	Govern	ment Contract Type		

Vantagepoint 6.5

Usability: Dark Mode

- » Give each user the flexibility to choose their display preferences with the new Dark Mode option for Vantagepoint
- » Will follow system settings by default
- » Can override in My Preferences

Usability: Simplify Timesheet Entry

- Pre-populate holiday hours in timesheet (Top 3 in Ideas Portal)
- Warning if entering hours in a different period than current period (Top 3 in Ideas Portal)

NOTE: These are also supported in mobile app

TIMESI	neets My TIMES	HEETS • Find	l timesheets		Van	tage	po	oint	: 6.	5
Billy Ap Apple & Bar Period Statu	tlett, PC	/2023 - 1/ sheet Status: Ir	15/2023 Progress							
LINE STATUS	PROJECT* Vacation	PROJECT NAME Vacation		CLIENT NAME		PHASE	SUN 1/1	MON 1/2	TUE 1/3	WEI 1/4
	Sick Leave	Sick Leave								
	Holiday	Holiday						8.00		
Times		MESHEETS ▼ 2023 - 4	Find timesheets		▼ ◀ 1	of 11 🕨				
	nterprises America	2023 - 4	/1/2023	🔥 Tod	ay's date is not i	in the curren	it timesł	heet perio	a d	
				_					Ju.	
Period Sta	tus: Open Ti	mesheet Statı	Is: Missing						Ju.	
	tus: Open Ti PROJECT NAME		CLIENT NAME	PHASE	PHASE NAME	S			TUE 3/28	WED 3/29
Period Sta	PROJECT		CLIENT		PHASE	S			TUE	

Usability: Marketing Campaigns

- Marketing campaigns are now available in activities on the Vantagepoint CRM mobile app
- » Make it easier to connect specific activities to the campaign they are supporting from the mobile app



Usability: **Editing Scheduled** Reports

- Edit scheduled reports as needed **>>** to adapt to changing needs of the firm
- Make changes to recipients or body **>>** of the email
- Update the report options or search **>>** criteria
- » Save time by simply editing rather than recreating scheduled reports

Find Application Reporting FAVORITES REPORTS RUNNING ARCHIVED SCHEDULED Dashboards Timesheet X ± 1 Scheduled Reports Calendar START AFTER FINISHED SUBMITTER Expense Report . **v** >= . Self Service Approval Center Waiting **Project List** 2/9/2023 04:30 pm Teresa Bever Reporting Edit Scheduled Report Billy A Waiting 2/9/2023 04:45 pm Hold Pursuit Hit List 2/1/2022 04:00 pm Billy A Recurring Release Activities Cancel Boilerplates Resubmi BoltHubs Delete **Business Lines** Contacts Depreciation Processing **Disposal Processing** Employees Entities Fee Templates Firm Types Firms Form W-2 Processing

General Ledger Groups

Another popular item from Idea Portal

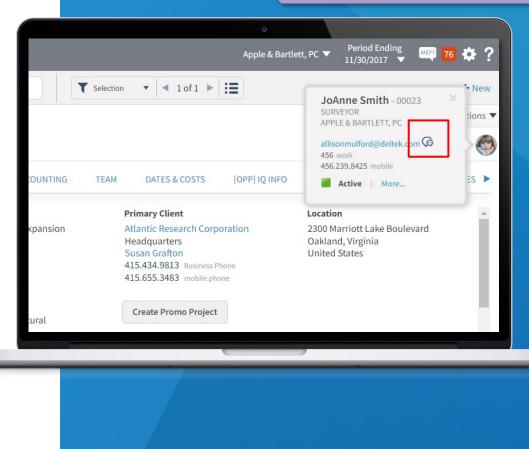
Deltek.

Vantagepoint 6.5

Vantagepoint 6.0

Improve Collaboration with Teams Integration

- » Make it easier for employees to start a Microsoft Teams chat from Vantagepoint to collaborate and expedite workflows
- » Save the extra step and make it easier to quickly interact to ask a question, get clarification or more



Transfer Settings from Preview to Production

- » Key settings can be transferred from one database to another
- » Save valuable time and significantly reduce manual work
- Critical for supporting Vision to Vantagepoint upgrades, but not just for upgrades
- » Example preview to production

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		should only be conducted outside of business hours. All active sessions fo then the import is complete, you will be automatically logged out as well.	

Empower Admins to Create a Better User Experience

- » More flexibility in screen designer to display up to 5 columns
- Enhanced security for employee dashparts enables admin more control on data available related to potential sensitive employee information

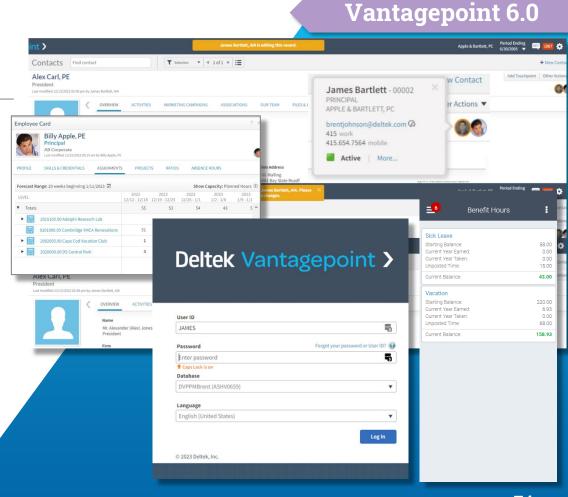
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Vantagengint 60

Make Everyday Use Even Easier

- » Select default list view
- » Concurrent editing notification
- » View benefit hours on Mobile T&E
- » New assignments for employee card
- » Show caps lock warning when logging in

» And Much More!

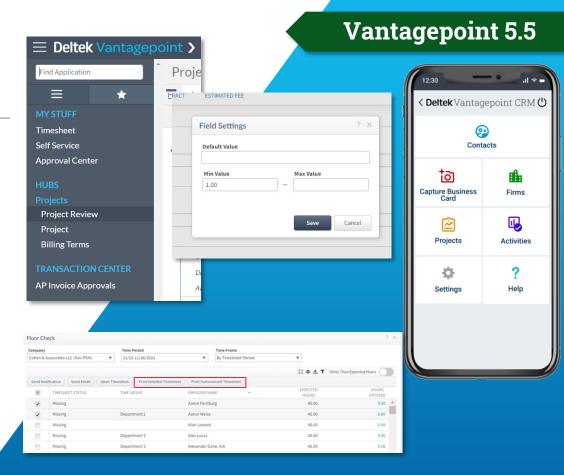


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Usability Improvements

- » New menu for Mobile T&E and CRM & navigation improvements for T&E
- » Set navigation menu favorites
- » Print reports from Timesheet floor check
- » Email templates for payment remittance
- » Allow Min/Max & Default Values to be Configured for Standard Numeric Fields via Screen Designer
- » Support Pre-Defined Searches in Advanced Search

» And Much More!



Usability Enhancements: Mobile

- » Edit directly in memo fields
- » Auto add expense line
- » View all timesheets needing approval
- » Improved performance for activities

	pproval	¹⁹ Timesheets Needing A
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*	1	02/01/2014 - 02/07/2014 Apple & Bartlett, PC XYZ
*	1	11/28/2015 - 12/01/2015 Apple & Bartlett, PC XYZ
*	1	09/14/2019 - 09/20/2019 Apple & Bartlett, PC XYZ
*	1	08/16/2020 - 08/31/2020 Apple & Bartlett, PC XYZ
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*	2	12/31/2020 - 01/07/2021 Apple & Bartlett, PC XYZ

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Usability Enhancements

- » Select any firm/contact combination to projects
- » Solves need for multiple firms per contact
- Can associate contact to project with firm other than firm in contact's hub
- » New grid in firms for contacts and project associations

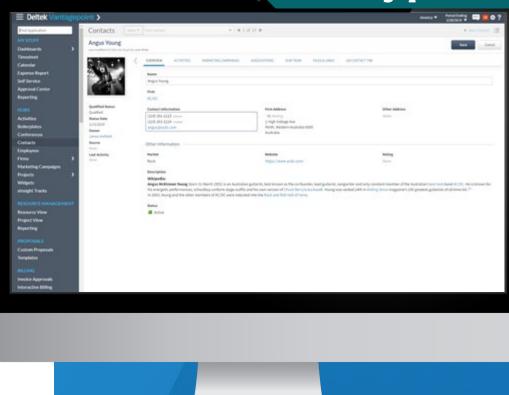
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Vantagepoint 4.5

Usability Enhancements

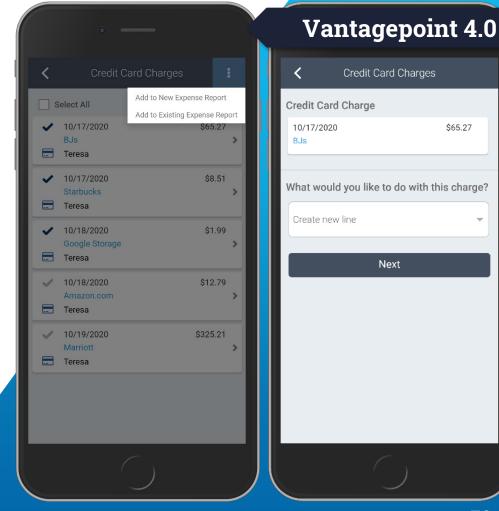
- » Track revisions for draft invoice markups
- » Track billing client on posted AR
- » Simplified editing & change indicators
- Screen designer: require a row in grids; move multiple fields at a time
- » Info bubbles for UDH Records
- » Multi-select dropdowns



Vantagepoint 4.5

Easily Match Credit Card Expenses

- » Automatically match credit card charges with expense items
- » Available desktop, tablet and mobile
- Close matches result in recommendations for close dates, amounts, etc.
- » Improve credit cards for users
- » Add to existing report or create new



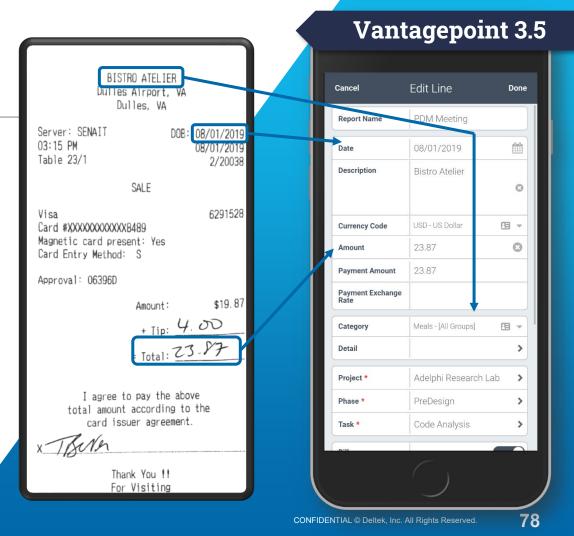
Increased Mobile Security

- » Leverage fingerprint ID or face ID
- » Increase security for Mobile Time & Expense and Mobile CRM
- » Must be enabled on mobile device

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	 Vou are now logged in How would you like to sign in the future? Using your face Using a PIN code Continue 	to the app in Change to "Using face or fingerprint ID"
L		

ICR for Expenses

- » Simplify expenses and improve accuracy
- » Intelligent Character Recognition
- » Reads text from receipt and populates mobile expense
- » Reads handwriting
- » Leverages machine learning



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- » Manage your email subscriptions to ensure you never miss a critical product email on Deltek.com

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Deltek Support Center

Learn More About Vantagepoint

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- » Register for upcoming town halls and join us for in-person events www.deltek.com/en/about/events
- » Join us for Deltek ProjectCon to learn, network and experience Vantagepoint www.deltekprojectcon.com

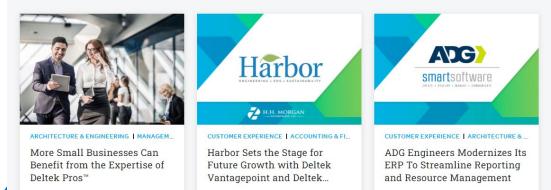
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Vantagepoint

Tips and tricks, best practices and product information.

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- » If you have questions, contact Vantagepoint@Deltek.com

Deltek. Vantagepoint > Upgrade Resources

Welcome to the Vantagepoint Upgrade Resources

The one place for everything you need to support your upgrade from Vision to Vantagepoint. .earn about resources available to help you on your journey to Vantagepoint including training esources, upgrade dates, what's new in Vantagepoint and much more in one place to make it aasy to get the answers you need from the Deltek experts.

Why Vantagepoint and Why Now?

Now is the time to get your teams excited about Vantagepoint! Check out this video to hear from Bret Tushaus on why now is the best time to upgrade, the value drivers for change and what other customers are saying about Vantagepoint.

Click here to the download PDF.



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