

Deltek

What's New in Vantagepoint?

The latest new features and enhancements to power your project success



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

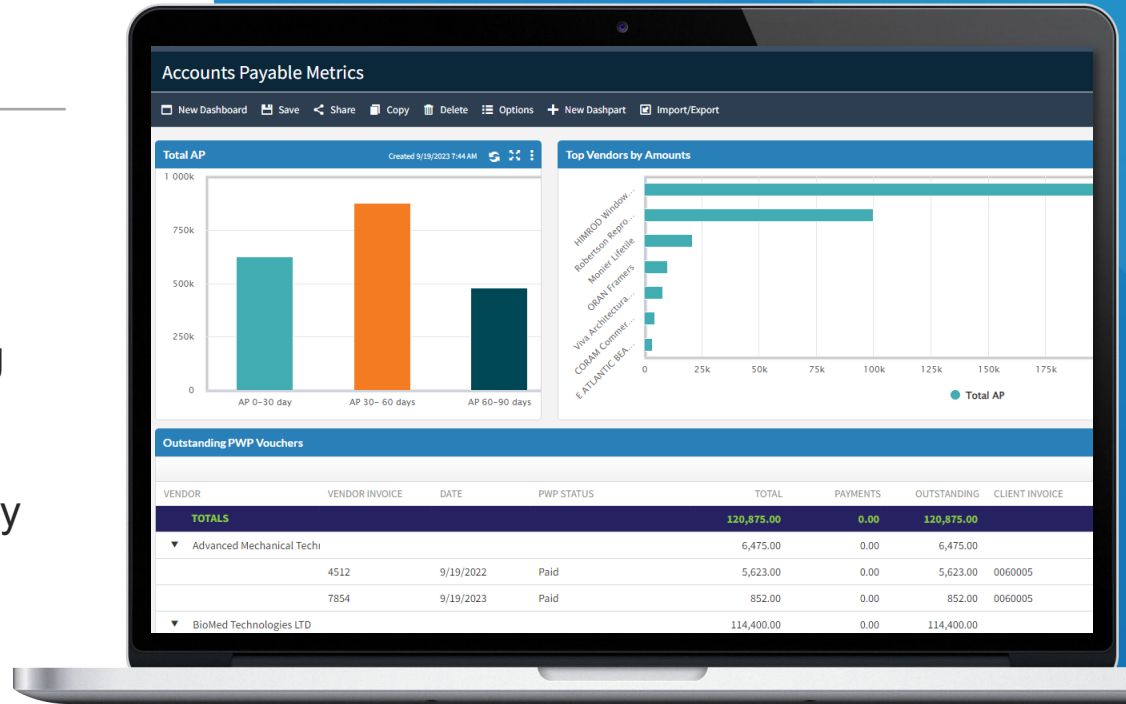
Deltek.

Dashboards and Business Intelligence



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

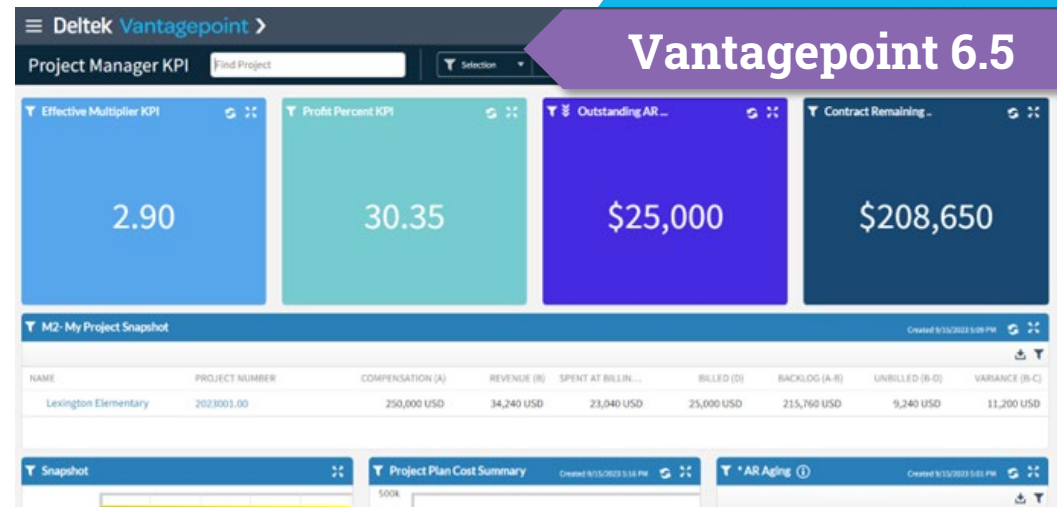


Deliver better visibility into AP details and metrics on the dashboard

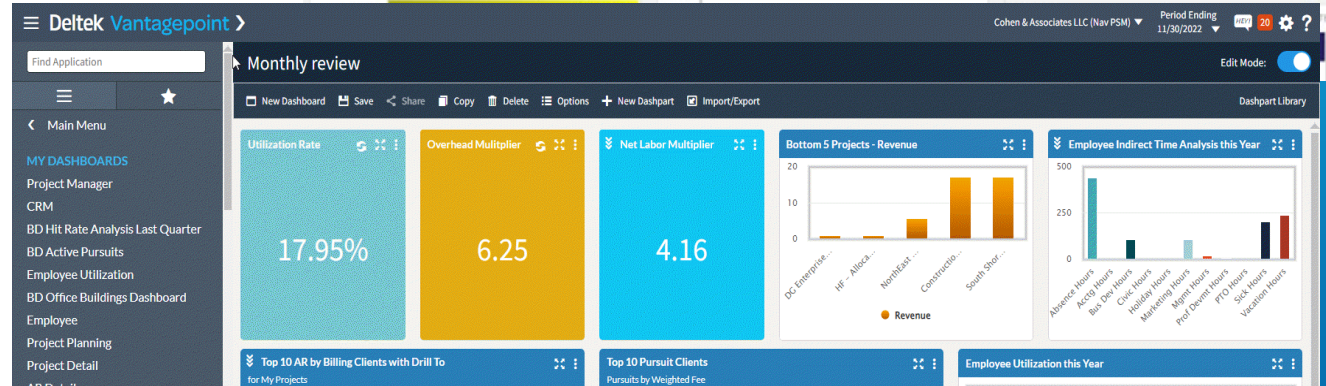


KPIs on the Dashboard

- » Provide leadership with clear visibility into key performance indicators including progress toward targets



Vantagepoint 6.5



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

The image displays two screenshots of the Dashpart Designer interface, illustrating the process of creating a calculated field.

Top Screenshot: Shows the 'Calculated Field Options' dialog box. The 'Calculated Fields' list includes '4.5 % Budget Exp Billing', '4.5 % Budget Expended Cost', '4.5 Variance %', 'Backlog for Won Projects', 'Balance Hours', 'Balance Labor Billing Amount', and 'New Calculation'. The 'New Calculation' option is highlighted with a red box.

Bottom Screenshot: Shows the 'Dashpart Calculation' dialog box. The 'Description' field is empty. The 'Field' dropdown is set to 'Project Name'. The 'Calculator' section shows a numeric keypad with the following values: 7, 8, 9, /, 4, 5, 6, *, 1, 2, 3, -, 0, +, =, and a 'Use This Calculation' button. The 'Data Type' is set to 'Numeric'.

Firm Base Dashparts

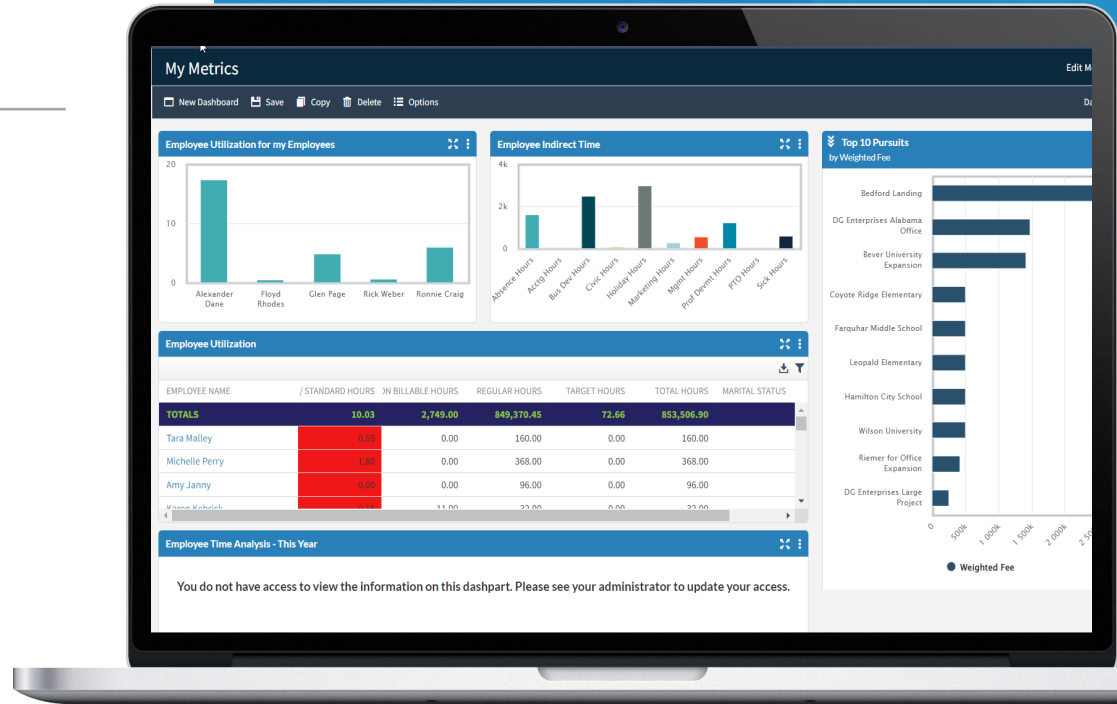
- » Firm base now available to build dashparts
- » Continuing to extend flexibility of dashboards
- » More details at their fingertips
- » Great option to share with BD leaders who may not have been able to build out what they need on dashboards previously

LTK_Test
Test in USD Created 6/1/2023 3:37 PM

FIRM NAME	FIRM NUMBER	IS CLIENT	IS VENDOR	AVAILABLE IN COMPANIES	PRIMARY CITY	PRIMARY STATE
TOTALS						
Add Firm From Items Master	T-001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America		
American Express		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	San Diego	CA
Atlanta Falcons		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Atlanta	GA
Atlantic Records		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America : Bartlett Enterprises Europe	San Diego	CA
Billy Bob's Used Autos		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America		
Boat Store of Orange Beach	MM-001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Gulf Shores	AL
Butsko Utility Design, Inc		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America		
CATHY Vendor 2		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America		
DownEast Mechanical Consultant		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Bar Harbor	ME
Firm - Demo4	123	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile	AL
Firm Demo1	1234	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile	AL
Gibson Guitars		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	San Diego	CA
Granger	0398	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile	AL
Les Paul Guitars		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America : Bartlett Enterprises Europe	San Diego	CA
Ludwig Drums		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	San Diego	CA
MCA Records		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Los Angeles	CA
New Firm - Demo2	MM-002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	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



Personal Dashboards

- » 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

The screenshot displays two overlapping dashboard windows from Deltek Vantagepoint 5.5. The top window is 'Ellen's AR dashboard' showing an AR Aging table. The bottom window is 'Grace's PM dashboard' showing a 'My Project AR' table and a pie chart.

Ellen's AR dashboard - *AR Aging

PROJECT INVOICE NUMBER	INVOICE	TOTAL AMOUNT	INVOICE DATE	TOTAL AMOUNT 5/21/2022 - 6/21/2022	TOTAL AMOUNT 4/21/2022 - 5/20/2022	TOTAL AMOUNT 3/22/2022 - 4/20/2022	TOTAL AMOUNT 2/20/2022 - 3/21/2022
TOTALS		702,092.24 USD		0.00 USD	0.00 USD	0.00 USD	0.00 USD
106322-01 Everest Shopping Complex		452,702.00 USD		0.00 USD	0.00 USD	0.00 USD	0.00 USD
No Invoice Number		-180.00 USD		0.00 USD	0.00 USD	0.00 USD	0.00 USD
		-180.00 USD	8/1/2014	0.00 USD	0.00 USD	0.00 USD	0.00 USD
52531		212,366.00 USD		0.00 USD	0.00 USD	0.00 USD	0.00 USD
		9,884.50 USD	8/24/2014	0.00 USD	0.00 USD	0.00 USD	0.00 USD

Grace's PM dashboard - My Project AR

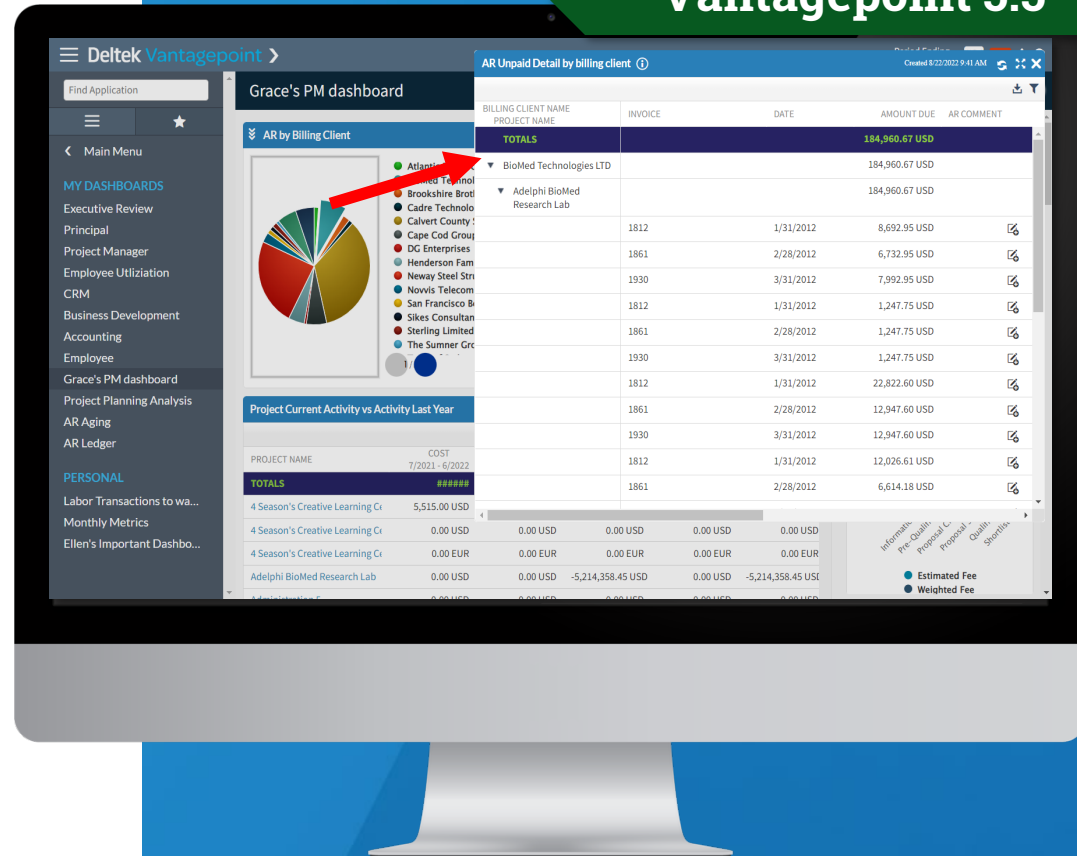
PROJECT NAME	BILLING CLIENT	JTD BILLED	JTD RECEIVED	STD AR AMOUNT
TOTALS		#####	#####	#####
Season 3 Creative Learning Center	Calvert County Schools	3,700,299.18	2,861,740.98	845,990.30
Highly Biomed Research	Biomed Technologies LTD	1,797,717.55	1,612,756.88	184,960.67
Children's Hospital	Atlantic Research Corporation	2,419,012.24	2,388,544.73	30,467.51
Embroid Lansing	Cadre Technologies, Inc.	29,720.60	0.00	29,720.60
Cape Cod Vacation Club	Cape Cod Group	2,152,608.18	2,009,164.90	143,443.28
5 Residence	The Summer Group	335,539.71	287,040.62	20,893.38
Enterprises Nashville	DG Enterprises	15,800.00	0.00	15,800.00
Electronic Records Management	Novis Telecom	123,249.59	55,715.99	67,533.60
Everest Shopping Complex	Neway Steel Structures Ltd	739,557.25	286,279.25	452,702.00
Services Inc. Building	Brookshire Brothers	205,679.72	156,229.36	49,450.36

AR by Billing Client

- DG Enterprises
- The Summer Group
- Sikes Consultants
- San Francisco Board of Education
- Cadre Technologies, Inc.
- Atlantic Research Corporation
- Sterling Limited Partnership
- Brookshire Brothers
- Cape Cod Group
- BiMed Technologies LTD
- Neway Steel Structures Ltd
- Calvert County Schools

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



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

WBS LEVEL NUMBER	WBS LEVEL NAME	BUDGETED BILLING	BUDGETED AMOUNT COST	WEIGHTED PERCENT COMPLETE BILL
TOTALS		642,875.00 USD	1,172,538.00 USD	
200300500	Adelphi BioMed Research Lab	642,875.00 USD	672,538.00 USD	14.45
200701500	Alexandria Westinghouse Office	0.00 USD	500,000.00 USD	35.00

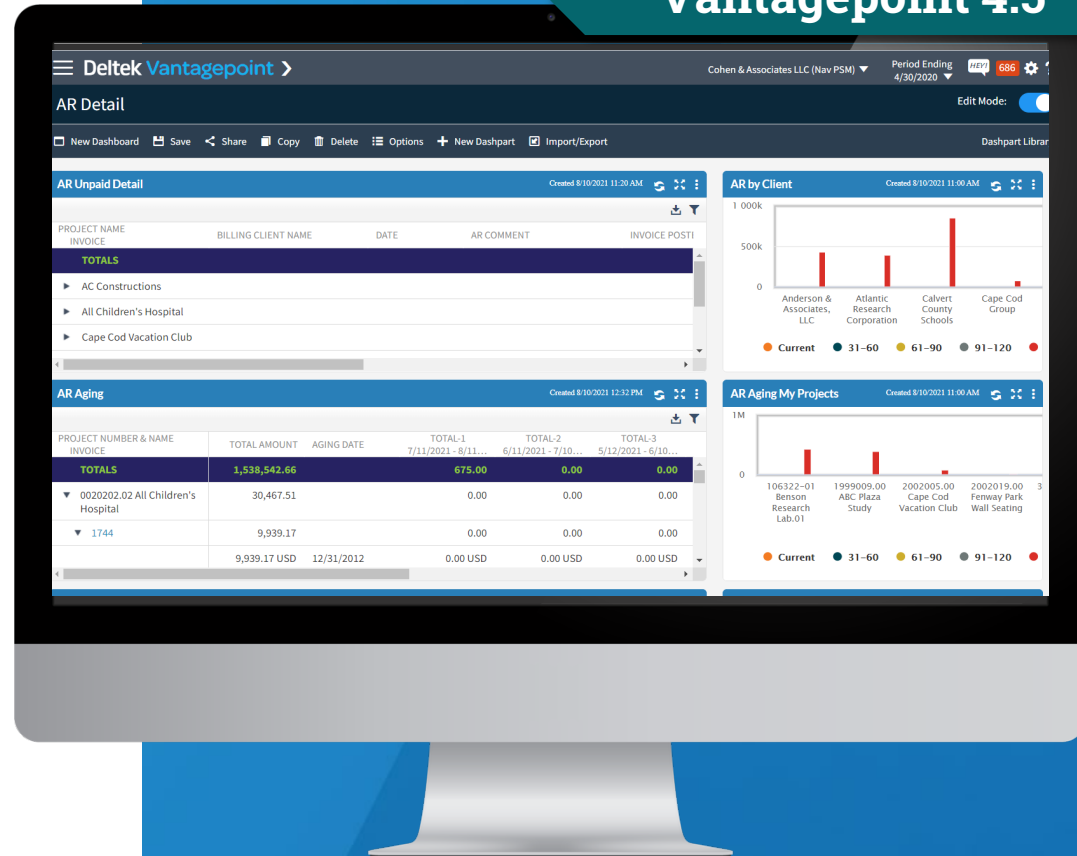
Cost Summary

PROJECT	PROJECT NAME	PHASE	PHASE NAME	TASK	TASK NAME	OVERALL % COMPLETE
200701500	Alexandria Westinghouse Offi					35.00

OK

More Detail at Your Fingertips

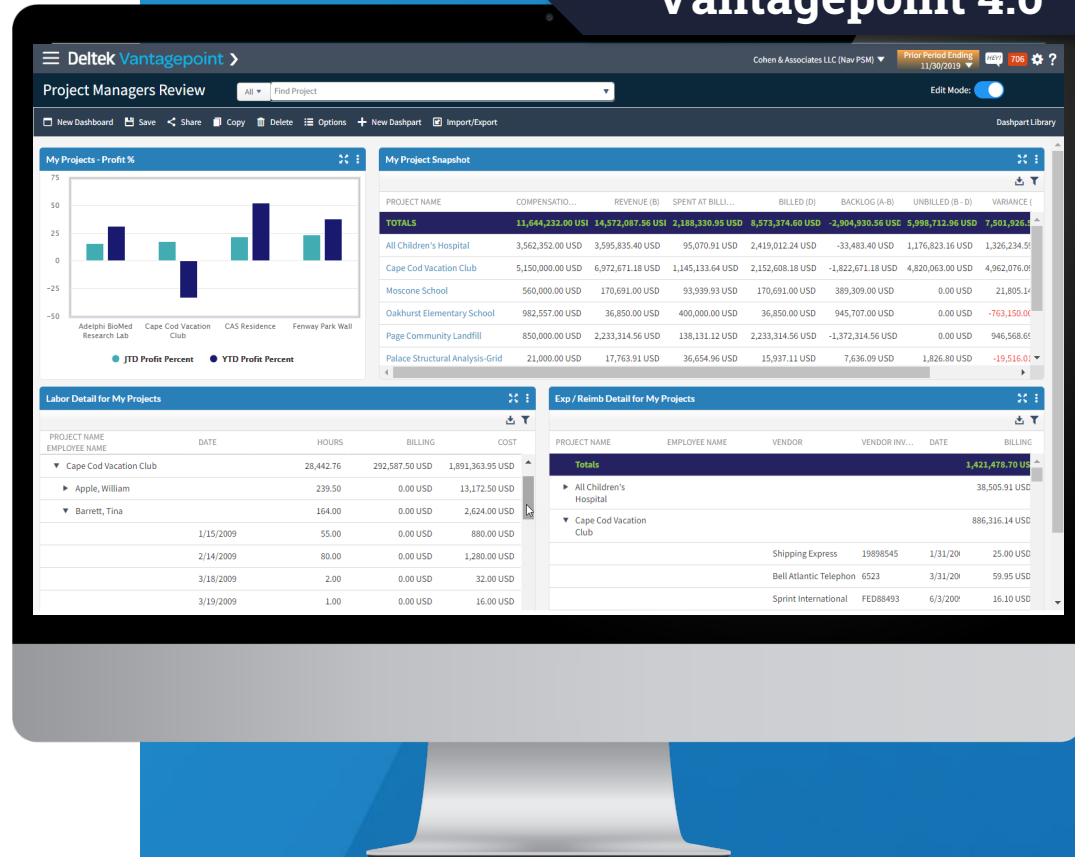
- » New AR Detail Base
- » Project Base Changes
- » Percentage data type calculated field
- » Drill to detail for direct and reimbursable consultants and expenses from project base columns



Improved Project Status Visibility

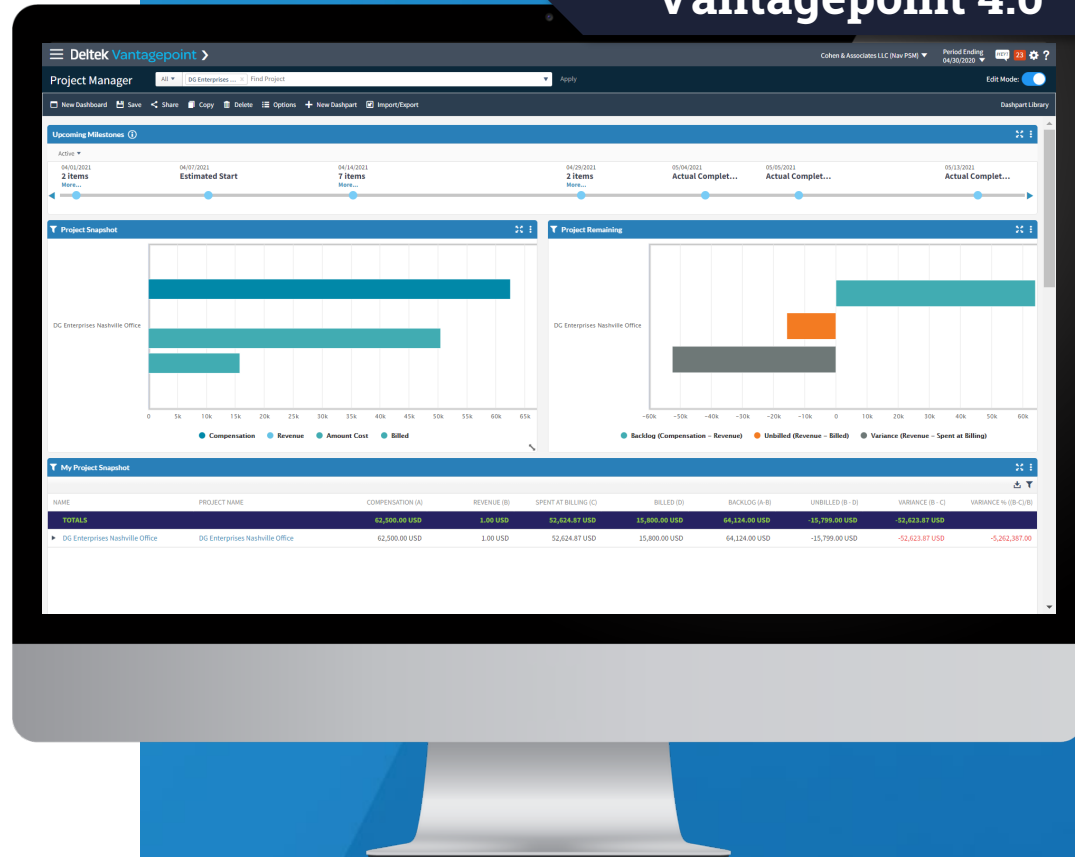
- » NEW project detail base for dashboards to create chart and table dashparts
- » Eliminates need for separate processes and spreadsheets
- » Delivers more detail to dashboard including labor, expense and reimbursable detail

Vantagepoint 4.0



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

Vantagepoint 4.0



More Detailed Dashboards

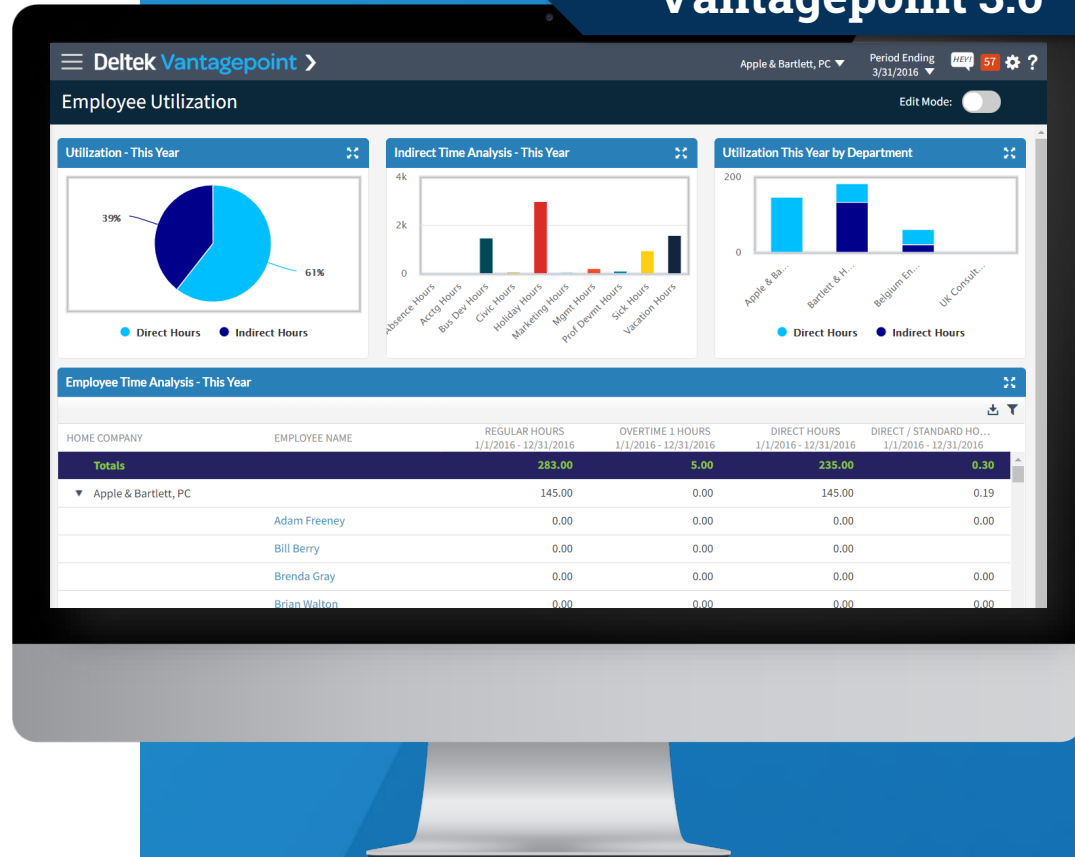
- » Drill to detail for hours, labor cost and labor billing on project dashparts
- » New options for planning data on dashparts
- » Enhanced pipeline dashpart includes total compensation

The screenshot displays the 'Project Planning Analysis' dashboard in Deltek Vantagepoint. The interface includes a header with the user name 'Apple & Bartlett, PC (Nav PSM)', the period ending '5/31/2020', and a notification for '165' items. The main content area is titled 'Planning Hours' and contains a table with the following data:

NAME	COMPENSATION	PLANNED HOURS	% PLANNED EXP HO...	HOURS	PLANNED COST	% PLANNED EXP COST	COS
TOTALS							
▶ 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

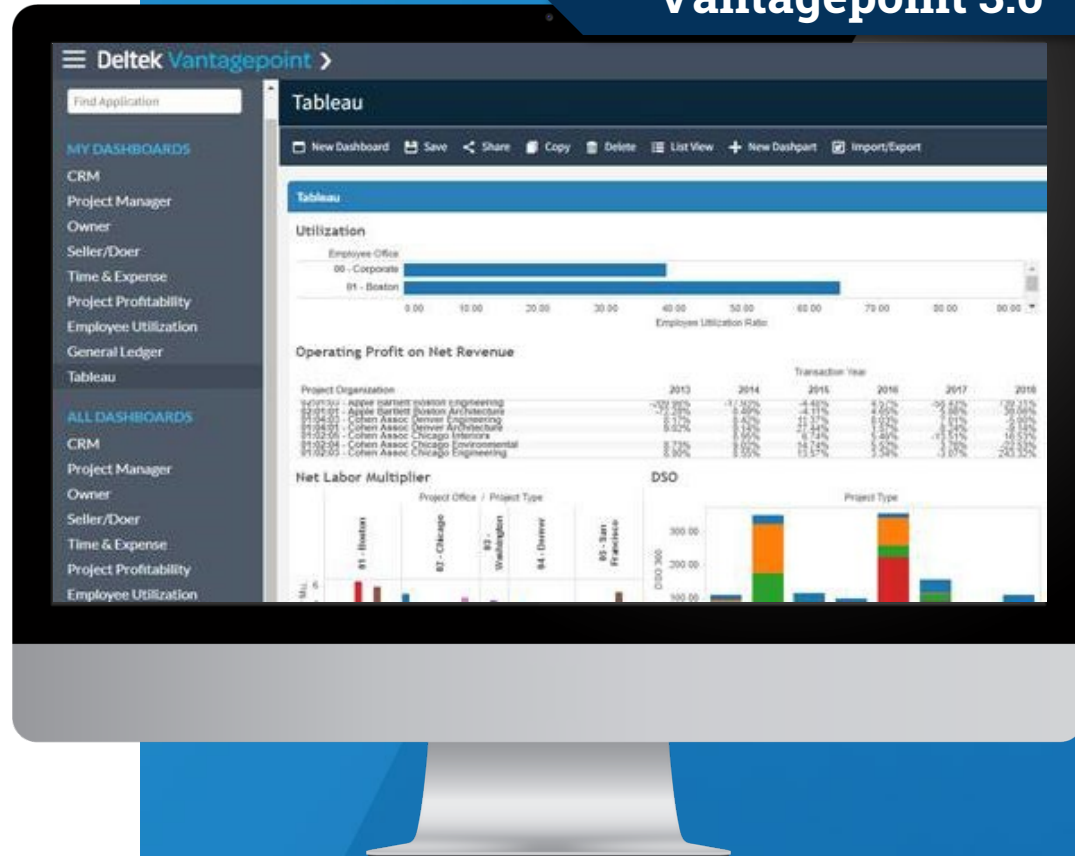
Expanded Dashboards

- » 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



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

Vantagepoint 2.0



Deltek.

Project Management & Resource Management



Project Smart Summaries™

- » Use GenAI 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

The screenshot displays the Deltak Vantagepoint 7.0 interface. The main content area shows a 'Project Smart Summary' for 'DG Enterprises Orlando Office' (Project Number 180009900). The summary is generated by AI, as indicated by the 'Smart Summaries' logo and a note: 'Smart Summary is a fully generative AI technology. Limitations may exist in representation. Please see our disclaimer.' The summary is divided into several sections:

- Overview:** The DG Enterprises Orlando Office project, number 180009900, is an active retail project in the awarded stage. The 255-acre development is organized around a central town green, with offices, retail, and apartments placed around a central civic space. The project is managed by Adam Horan, with Abby Schoppe as the Principal-in-Charge and Matthew Brown as the Supervisor. The construction phase is set to start on 09/23/2023. This expansion to the existing village shopping experience is expected to greatly benefit the town and local establishments.
- Financial Health:** The DG Enterprises Orlando Office project has a compensation of \$53,500. The total billed amount on this project is \$23,500, of which the current accounts receivable balance outstanding is \$15,000. The average age of accounts receivable is 22 days. The primary client for this project, Redbrook Associates, has an average payment duration of 22 days. The job to date earned percent complete of this project is 44%.
- Recent Activities:** Two notable activities were conducted as part of the DG Enterprises Orlando Office project for the client, Redbrook Associates. The first activity was a meeting to discuss design, conducted via email on September 15, 2023. The attendees from our team were Sarah Ferguson and Kate Topfield, with Abby Henderson attending from the client's side. A unique aspect of this meeting was that all keynote speakers were women. The second activity was a Tech Conference in Boston on October 11, 2023. Our representatives, Sarah Ferguson and Kate Topfield, attended this conference. However, no attendees were listed from the client's side. Similar to the previous meeting, all keynote speakers at this conference were women. Both these activities were part of the Village Green expansion campaign.
- Plan Summary:** The DG Enterprises Orlando Office project is scheduled to commence on January 1, 2023, and conclude on July 1, 2024. The current active work involves Construction Administration. The EAC Profit for this project is 15%, with a Labor EAC Cost Multiplier of 3.50. The EAC Billing Variance stands at 1.01. The top resources for this project include Natasha Elliot, an Architect with an EAC Hours of 165, and David Emery, a Senior Engineer. Further details about David Emery's EAC Hours are not provided in the data.

The interface also shows a sidebar with navigation options like Overview, Accounting, Team, and Milestones, and a top navigation bar with user information and period ending dates.

Transform Project Information to Project Intelligence with Generative AI

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

Plan Find project Selection Not in selection

PTO - Miami
000000004 > 001 Architecture
Last modified 10/21/2023 10:23 pm by Dawn Kessner ✓ Plan is checked out to me.

Scale: Entire Project in weeks

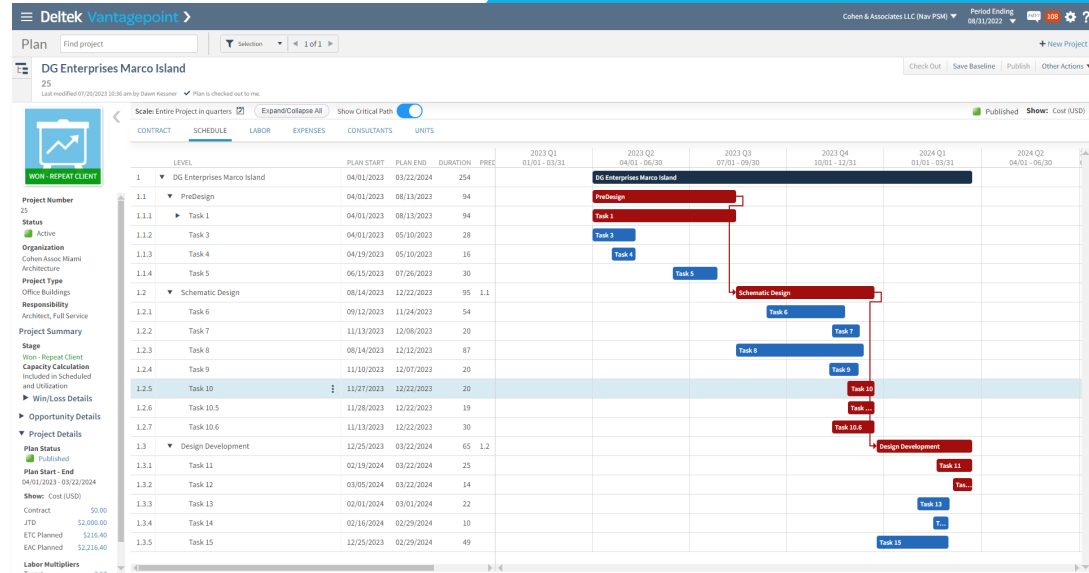
CONTRACT	SCHEDULE	LABOR	EXPENSES	UNITS	2023								
LEVEL/RESOURCE	PLAN START	PLAN END	ASSIGNME... START	ASSIGNM... END	ETC HOURS	SUB-ROW	5	10/16 - 10/22	10/23 - 10/29	10/30 - 11/05	11/06 - 11/12	11/13 - 11/19	11/20 - 11/26
PTO - Miami	01/01/2023	12/31/2023	01/01/2023	12/31/2023	360.00	Planned Hours			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				
Cindy Snow			01/01/2023	12/31/2023	80.00	Planned Hours							
Dawn Kessner			01/01/2023	12/31/2023	64.00	Planned Hours							
Karen Kebrick			01/01/2023	12/31/2023	48.00	Planned Hours			8.00				
Steph Rusner			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 Miller			01/01/2023	12/31/2023	16.00	Planned Hours							
Jane Hank			01/01/2023	12/31/2023	32.00	Planned Hours							
Michelle Perry			01/01/2023	12/31/2023	16.00	Planned Hours							
Interiors	01/01/2023	12/31/2023	01/01/2023	12/31/2023	72.00	Planned Hours				16.00	8.00		
Amy Janny			01/01/2023	12/31/2023	24.00	Planned Hours					8.00		
Tara Malley			01/01/2023	12/31/2023	32.00	Planned Hours				16.00			
Tiffany Hart			01/01/2023	12/31/2023	16.00	Planned Hours							

Automatically update resource availability from absence requests for more accurate plans



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



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

Fill Hours Per Day

DG Enterprises Austin copy / Design Development / Plans

Assignment Range: ETC Assignment Date Range

From: 3/1/2023

To: 4/28/2023

Assign to Each Work Day (hours)

Assign % of Employee's Hours per Day to Each Work Day

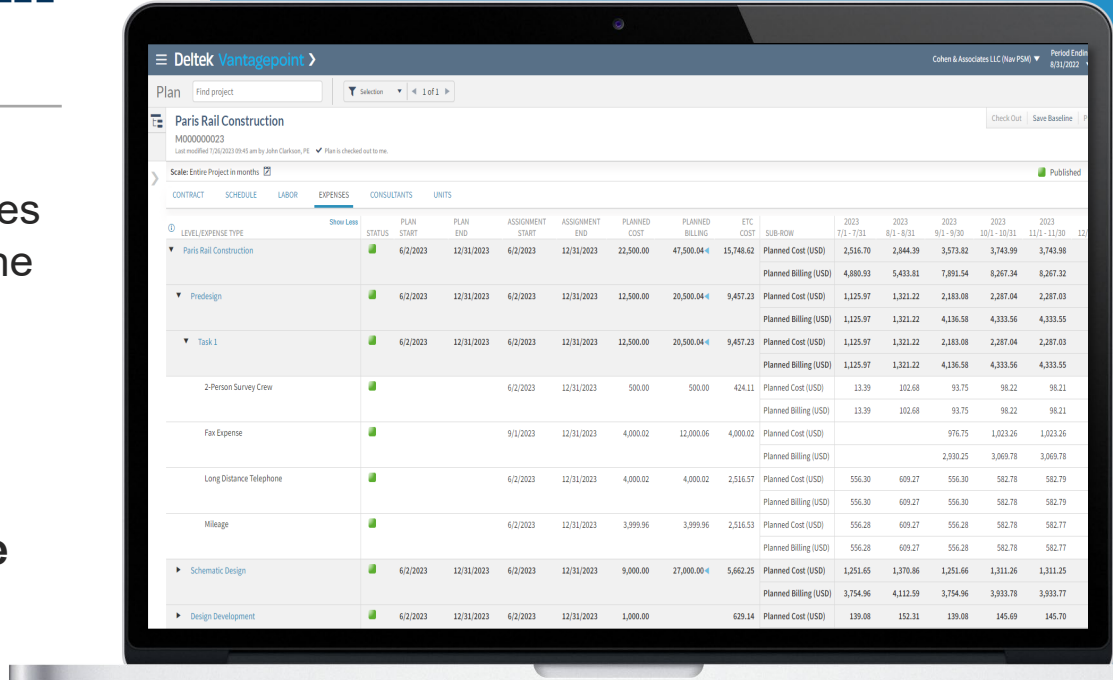
Fill Cancel



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



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

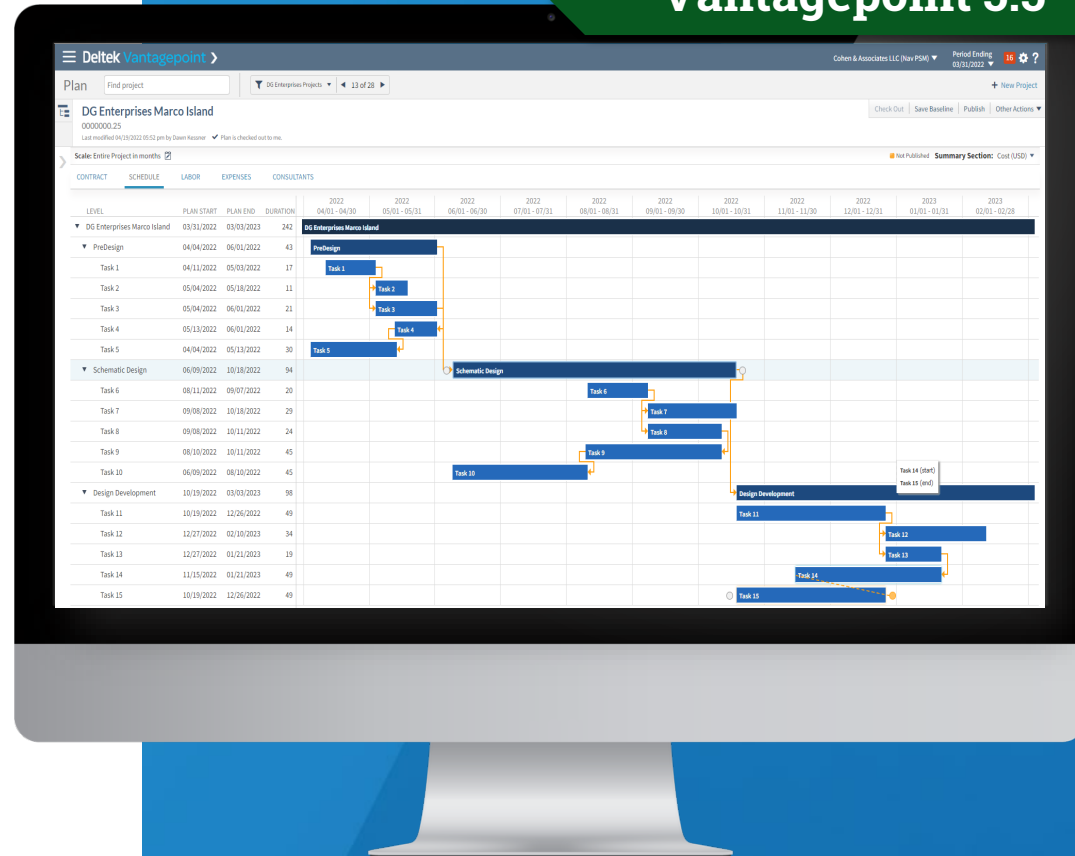
NOTE: Resource planning module required

The screenshot displays the 'UNIT' tab for a project named 'HF - Turtle Island Resort'. The table lists various units with columns for Level/Unit Name, Account, Account Type, Assign End, Assign Start, Baseline Billing, Baseline Quantity, and Calculated % Complete Billing. The units are organized into a hierarchy: 2200067.00 HF - Turtle Island Resort, 000 Project Planning, 001 Work Planning, 002 Agreements, 003 BIM Execution Plan, 001 Predesign, 003 Schematic Design, and 004 Design Development. Each unit has associated dates and monetary values.

LEVEL/UNIT NAME	ACCOUNT	ACCOUNT TYPE	ASSIGN... END	ASSIGN... START	BASILINE BILLING	BASILINE QUANTITY	CALCULATED % COMPLETE BILLING
2200067.00 HF - Turtle Island Resort			4/21/2023	11/15/2022	465.00	111.00	0.00
000 Project Planning			2/6/2023	11/15/2022	465.00	111.00	0.00
001 Work Planning			2/6/2023	11/15/2022	425.00	61.00	0.00
2-Person Field Crew	Misc Direct Expenses - 629.00	Direct	11/20/2022	11/15/2022	225.00	1.00	0.00
Concrete Sample Test	Misc Reimbursable Expense - 529.00	Reimbursable	2/6/2023	11/15/2022	135.00	9.00	0.00
Concrete Sample Test	Travel, Meals & Lodging - 621.00	Direct	2/6/2023	11/15/2022			0.00
Pickup Truck	Misc Direct Expenses - 629.00	Direct	11/20/2022	11/15/2022	25.00	1.00	0.00
Reproductions	Reproductions - 522.00	Reimbursable	11/30/2022	11/15/2022	40.00	50.00	0.00
002 Agreements			12/20/2022	12/5/2022	40.00	50.00	0.00
003 BIM Execution Plan							0.00
001 Predesign			4/21/2023	3/27/2023			0.00
003 Schematic Design							0.00
004 Design Development							0.00

Schedule Dependencies

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



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

Vantagepoint 5.0

Employee

My Upcoming Assignments

Forecast Range: 6 months beginning January 2022

LEVEL	2022 1/1 - 1/31	2022 2/1 - 2/28	2022 3/1 - 3/31	2022 4/1 - 4/30	2022 5/1 - 5/31	2022 6/1 - 6/30
Totals	9%	9%	57%	9%	6%	0%
Adelphi Research Lab	15	14	17	15	11	
PreDesign	15	14	17	15	11	
Code Analysis	15	14	17	15	11	

Deltek Vantagepoint

Executive

Pipeline

Aviation

Commercial

Educational

Educational Facilities

Environmental

Medical

Office Buildings

Transportation

Project Managers Review

PROJECT NAME	COMMITMENTS	REVENUE (B)	SPENT AT BILL	REVENUE (B)	BILLED (B)	BACKLOG (B)	UNBILLED (B)	WARRANTY
TOTALS	13,444,222.00 USD	14,372,087.00 USD	2,188,200.00 USD	8,277,374.00 USD	2,304,930.54 USD	6,996,771.36 USD	7,201,807.70 USD	
All Children's Hospital	3,562,352.00 USD	3,595,835.40 USD	95,070.91 USD	2,419,012.24 USD	-33,483.40 USD	1,176,823.36 USD	1,236,234.93 USD	
Cape Cod Vacation Club	5,100,000.00 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	4,362,076.00 USD	
Moscone School	560,000.00 USD	170,691.00 USD	93,939.93 USD	170,691.00 USD	389,309.00 USD	0.00 USD	21,805.14 USD	
Dakhurst Elementary 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 USD	
Page Community Landfill	850,000.00 USD	2,233,314.56 USD	138,131.12 USD	2,233,314.56 USD	-1,372,314.56 USD	0.00 USD	946,568.67 USD	
Palace Structural Analysis Grid	21,000.00 USD	17,763.81 USD	36,654.96 USD	15,937.11 USD	7,636.00 USD	1,826.80 USD	-19,516.00 USD	

My Projects - Profit %

My Project Snapshot

Labor Detail for My Projects

PROJECT NAME	EMPLOYEE NAME	DATE	HOURS	BILLING	COST
Cape Cod Vacation Club			28,442.76	292,587.50 USD	1,891,363.95 USD
Apple, William			239.50	0.00 USD	13,172.50 USD
Barrett, Tonia			164.00	0.00 USD	2,624.00 USD
		1/15/2009	55.00	0.00 USD	880.00 USD
		2/14/2009	80.00	0.00 USD	1,280.00 USD
		3/13/2009	2.00	0.00 USD	32.00 USD

Exp / Reimb Detail for My Projects

PROJECT NAME	EMPLOYEE NAME	VENDOR	VENDOR INV. #	DATE	BILLING
All Children's Hospital					1,431,476.70 USD
Cape Cod Vacation Club					18,505.51 USD
		Shipping Express	1898545	1/31/20	25.00 USD
		Bell Atlantic Telephone	0523	3/31/20	59.95 USD

Deltek

Improve Team Management and Project Analysis

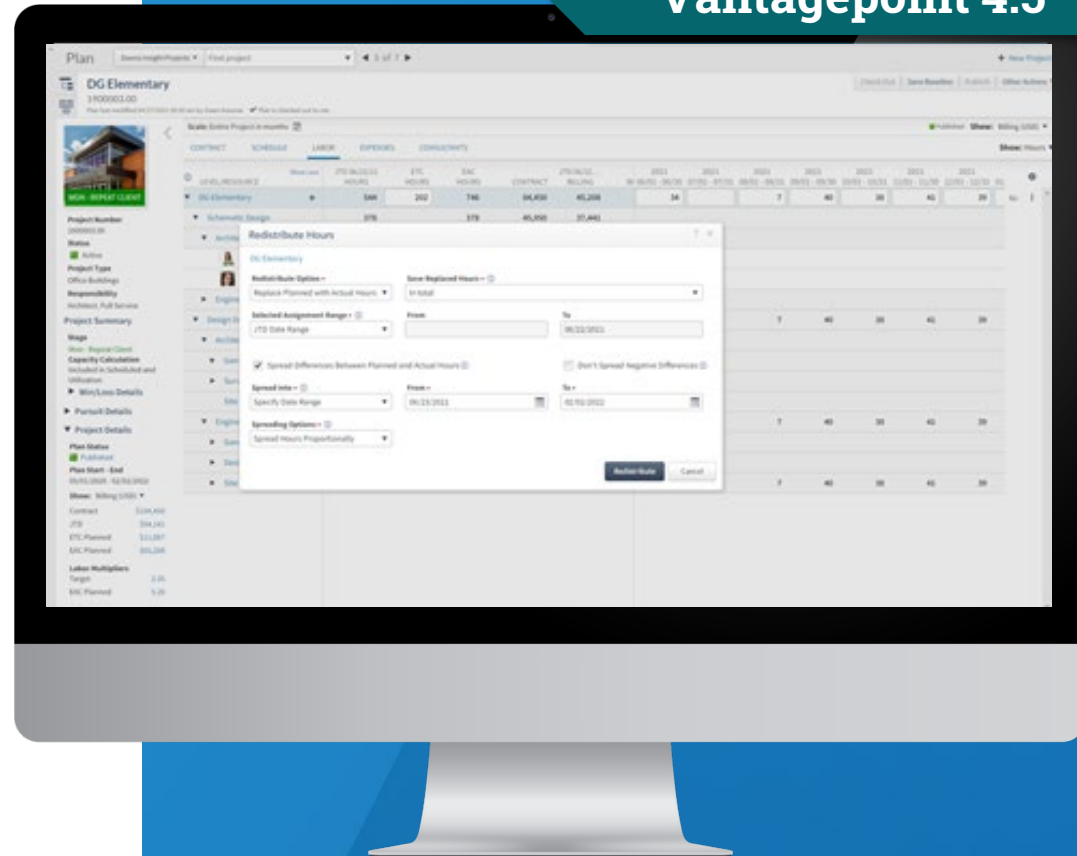
- » Better evaluate and adjust team assignments with enhanced search and project filters
- » More specific searches to ensure the right people are available for your projects
- » In-depth project analysis: planned, actual and baseline in one view
- » More proactive project management and insight into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

The screenshot displays the Vantagepoint 5.0 interface. At the top, there's a 'Plan' section for 'Holbrook City Plan' (1825934.01) with a search bar and a '1 of 352' indicator. Below this, a 'Scale: Project in months with April - May, 2017 in days' filter is visible. The main area shows a table with columns for 'CONTRACT', 'LABOR', 'CONSULTANTS', and 'EXPENSES'. A 'LEAD' button is present next to a project image. A 'Resource View' window is overlaid, showing a list of resources with columns for 'RESOURCE/LEVEL', 'ASSIGNMENT START', and 'PROJECTS FILTER'. A 'Filter Project' dialog box is also open, allowing users to filter by 'Project Status', 'Charge Type', 'Organization Name', 'Project Manager', 'Stage Step', and 'Probability'. The background shows a grid of data points for various months.

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

The screenshot displays the 'Revenue Forecast' section for the project 'DG Elementary' (ID: 1900003.00). The interface includes a search bar for 'Dawn's Insight Projects' and a 'Find project' button. The table below provides a breakdown of revenue forecasts by level, stage, and time period.

LEVEL	STAGE	FORECAST START	FORECAST END	COMPENSATION	J EA	2020 09/14 - 09/30	2020 10/01 - 10/31	2020 11/01 - 11/30	2020 12/01 - 12/31	2020 01/01 - 01/31
▼ 1900003.00 DG Element	Won - Rf	09/14/2020	03/02/2022	81,000		1,565	3,129	2,988	3,272	
▼ 003 Schematic Design		09/14/2020	05/12/2021	37,500		1,565	3,129	2,988	3,272	
003 Architecture Task		09/14/2020	05/12/2021	15,000		925	1,564	1,494	1,636	
004 Engineering Task		09/18/2020	02/23/2021	22,500		640	1,565	1,494	1,636	
▼ 004 Design Development		07/06/2021	03/02/2022	43,500						
003 Architecture Task		07/08/2021	01/27/2022	31,500						
004 Engineering Task		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

The screenshot displays the 'Project Review' interface for 'DG Enterprises Sydney Office' (1900001.00). The interface includes a search bar, navigation controls, and a main data table. The table is organized into sections: Directs, Direct Expenses, Reimbursables, and Key Performance Indicators. A detailed view of labor hours is shown, listing individual consultants like Andrea Greys, Bailey Balanca, Cory Thames, and Dean Swartz, along with their dates, hours, and amounts. A 'Labor at Burden' popup is also visible, showing a rate of 100.00.

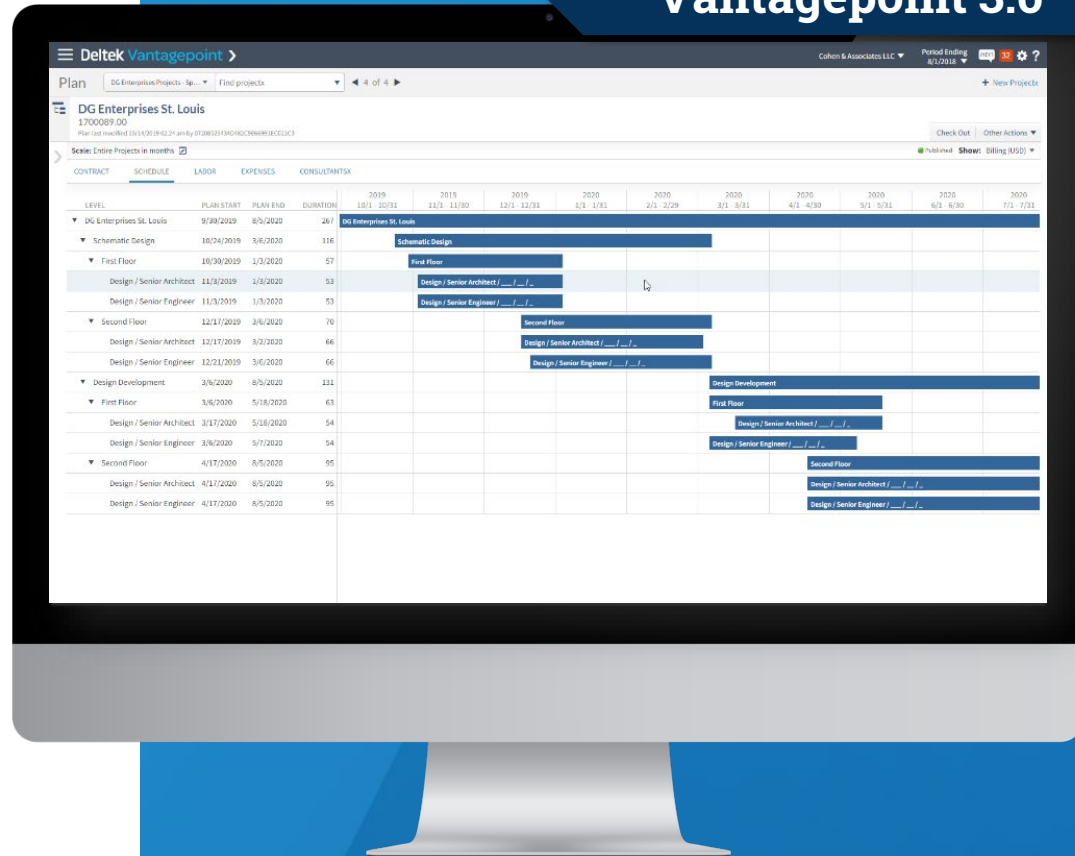
	CONTRACT/FEE	PLANNED BILLING	BUDGETED BILLING	PLANNED VARIANCE	BUDGETED VARIANCE	JTD BILLING	ETC PLANNED BILLING	ETC BUDGETED BILLING	EAC PLANNED BILLING
Directs									
Total Labor	30,000.00	30,000.00	30,000.00			3,880.40	26,000.00	26,000.00	29,880.40
Direct Labor Hours		300.00							300.00
Average Rate/Hour		100.00							99.60
Direct Expenses									
Compensation	30,000.00	30,000.00							9,880.40
Direct Consultants	6,000.00	6,000.00							6,000.00
Total Directs	36,000.00	36,000.00							5,880.40
Reimbursables									
Reimbursable Expenses									
Reimbursable Consultants									
Total Reimbursables									
Total	36,000.00	36,000.00							5,880.40

NAME	DATE	HOURS	AMOUNT	POSTED	COMMENT	
▼ Andrea Greys		23.00	2,001.00	✓	Cupcake ipsum dolor sit amet cotton candy candy	6,000.00
	8/14/2017	8.00	696.00	✓	Chupa chups tootsie roll pie. Chocolate bar muffin cake ro	
	8/14/2017	7.00	609.00	✓	Topping chupa chups lemon. marshmallow sweet roll.	
	8/13/2017	8.00	696.00	✓	Tootsie roll.	
▶ Bailey Balanca		19.50	1,725.75	✓	Cake gummi bears wafer muffin cake cheesecake	
▶ Cory Thames		22.50	1,605.38	✓	Carrot cake toffee powder cake chupa chups bear claw.	
▶ Dean Swartz		33.00	2,390.85	✓	Gum.	

Key Performance Indicators	
Revenue	Variance
JTD Earned Revenue:	JTD Earned Variance: -3,880.40
	EAC Budgeted Variance:
Realization Ratio:	Budgeted Ratio: 1.00
JTD Earned % Complete:	Budgeted % Complete: 11.11%
Budgeted Hours % Expended: 13.33%	Planned Hours % Expended: 13.33%

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



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



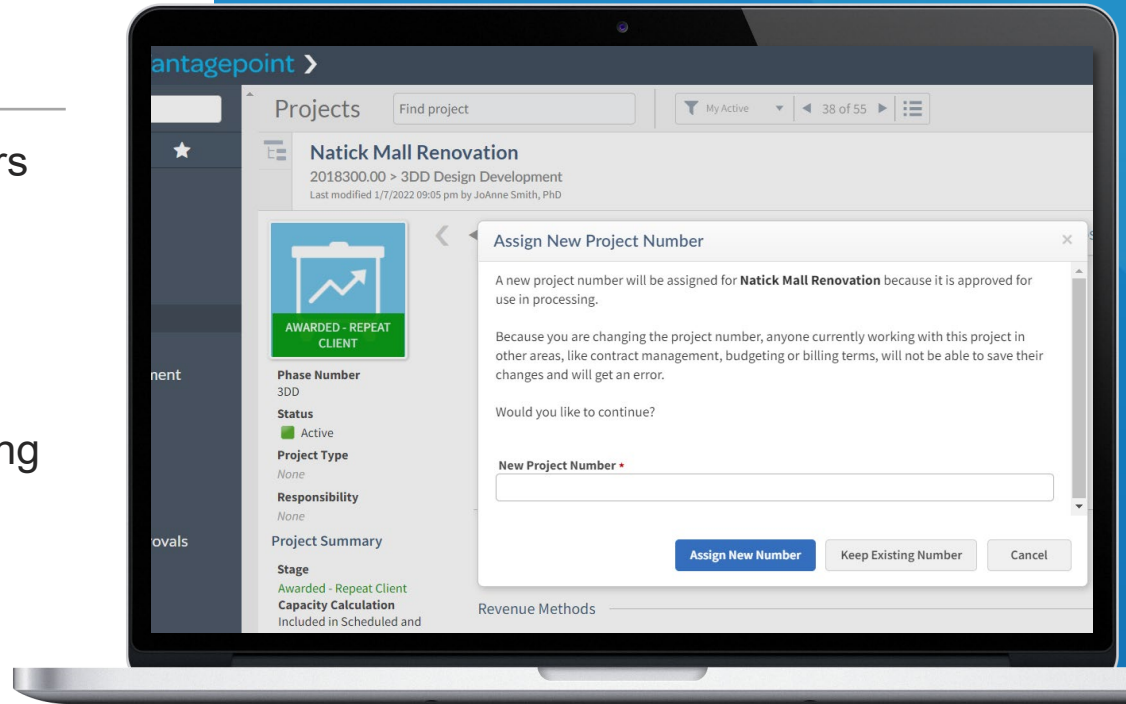
Deltek.

CRM and Pipeline Management



Pre-Award Number for Projects

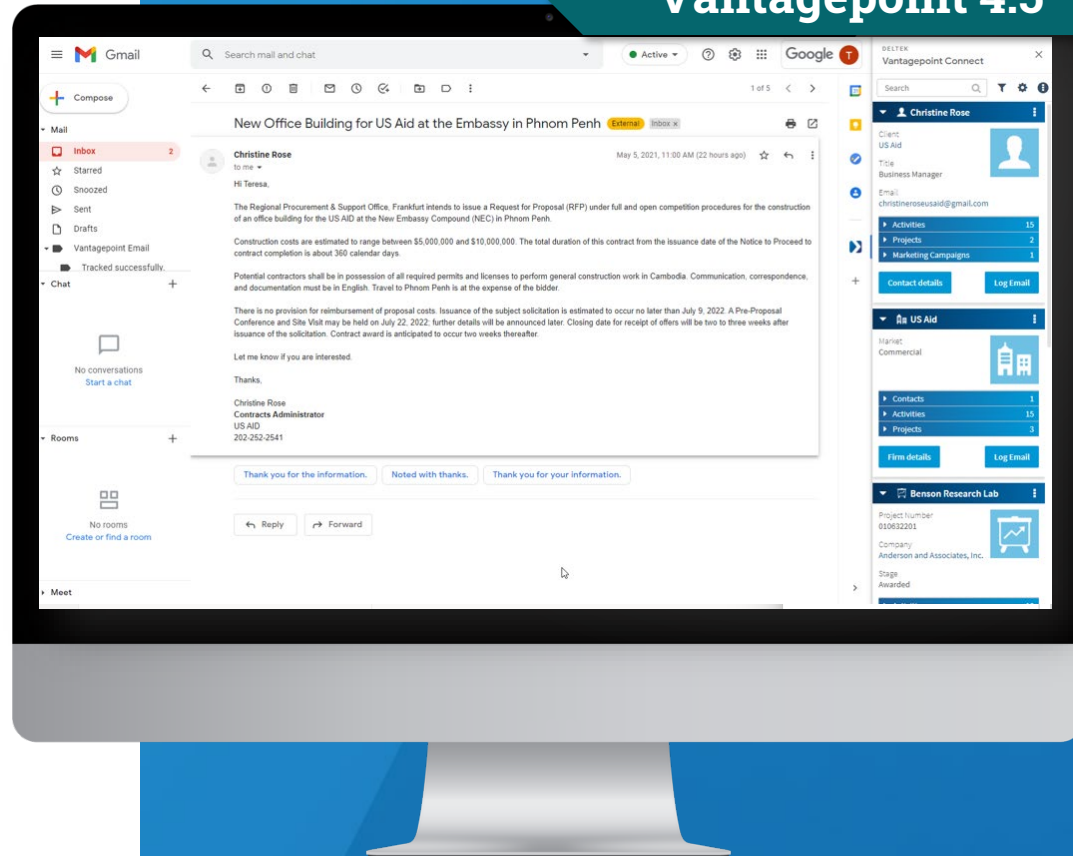
- » Allow for separate project numbers for in-pursuit projects and billable projects
- » Change project number when approved for use in processing
- » Use with or without auto-numbering
- » Supports customer desired intelligence in project number



Vantagepoint Connect

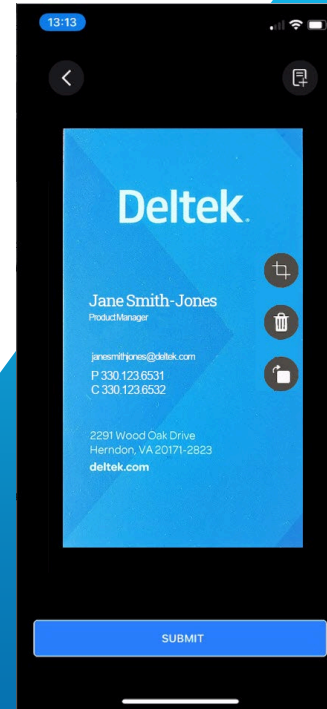
- » Capture key data where BD and PMs live – in Outlook or Gmail
- » Contextual email pane in Outlook or Gmail
- » Eliminate duplicate entry of contacts and activities
- » Easily update from anywhere
- » *NOTE: Included with Vantagepoint CRM*

Vantagepoint 4.5



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



Vantagepoint 5.0

Details		Misc.
First Name	Teresa	
Middle Name		
Last Name *	Bever	
Prefix		
Suffix		
Professional Suffix		
Preferred		
Title	Product Director	
Firm	Deltek	
Owner		
Status	Active	
Qualified Status	Qualified Contact	
Rating		
Description		

Easily capture contacts with a simple scan

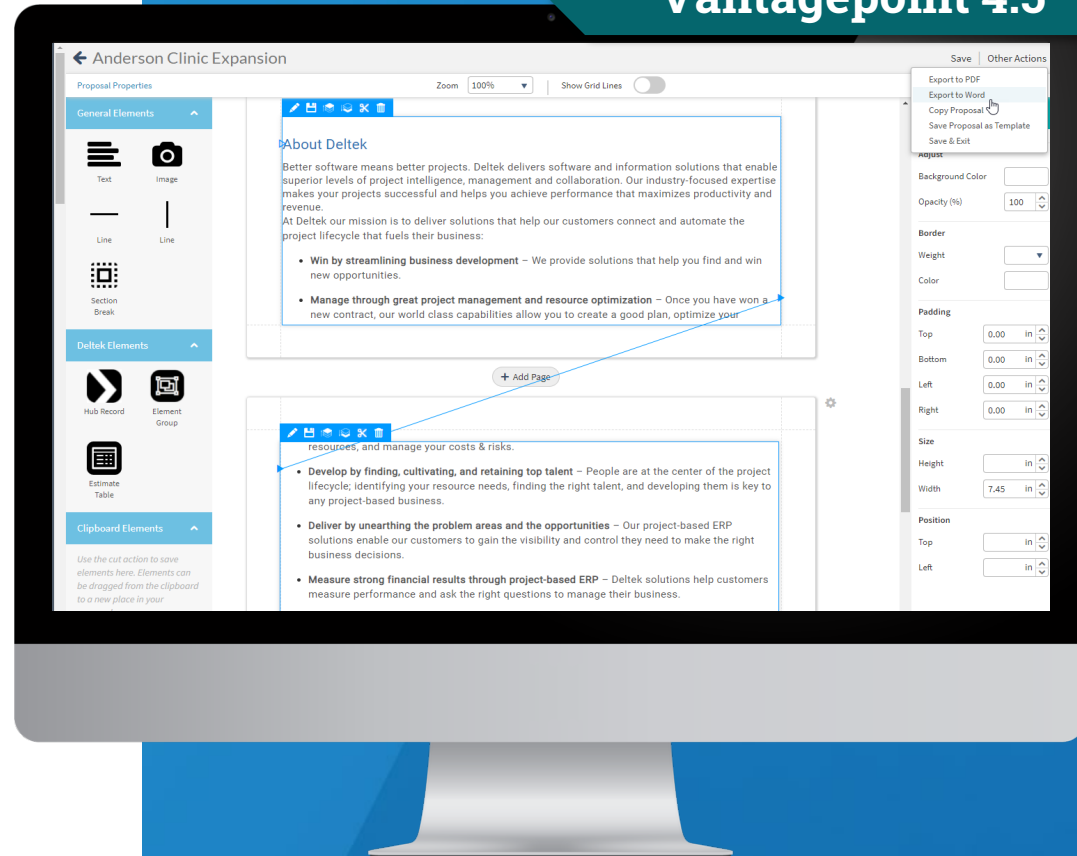
New Proposal Builder

- » 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



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



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

The screenshot displays the Deltek Vantagepoint 3.5 desktop client interface. The main window shows a proposal for "Bever High School" with a zoom level of 75%. The interface includes a left sidebar with "General Elements" (Text, Image, Line, Section Break) and "Deltek Elements" (Hub Record, Master Element, Estimate Table). The central workspace displays a table titled "SUMMARY - REIMBURSABLE" with the following data:

Description	Hours/Quantity	Planned Bill
Labor	419	119,700
Consultants	2	7,200
Expenses	2	1,000
UNITS	100	100

The right sidebar shows the "Table Properties" panel, which includes options for "Table Styling", "Selected Cells", "Color", "Alignment", "Border", "Weight", "Color", "Sides", "Color", "Background", and "Cell Padding".

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

The screenshot shows the 'Billing Terms' configuration page in Deltek Vantagepoint. The interface includes a search bar, navigation tabs (RATES, FEES, FORMAT, MORE CALCULATIONS, SUB-LEVEL TERMS, BILLING BACKUP, PRE-INVOICE), and a sidebar with client information (Billing Client: City of Lexington, Billing Currency: USD, Project Manager: James Bartlett, AIA). The main content area is divided into 'Fee Method' (Percent Complete by Phase, as Percent of Fee), 'Fee Basis' (Lump sum), and 'Fees' table. Below the fees table is a 'Fee Billing Phases' table with columns for Group, Phase Name, Percent Complete, Fee To Date, Percent Of Fee, Billed To Date, and Phase.

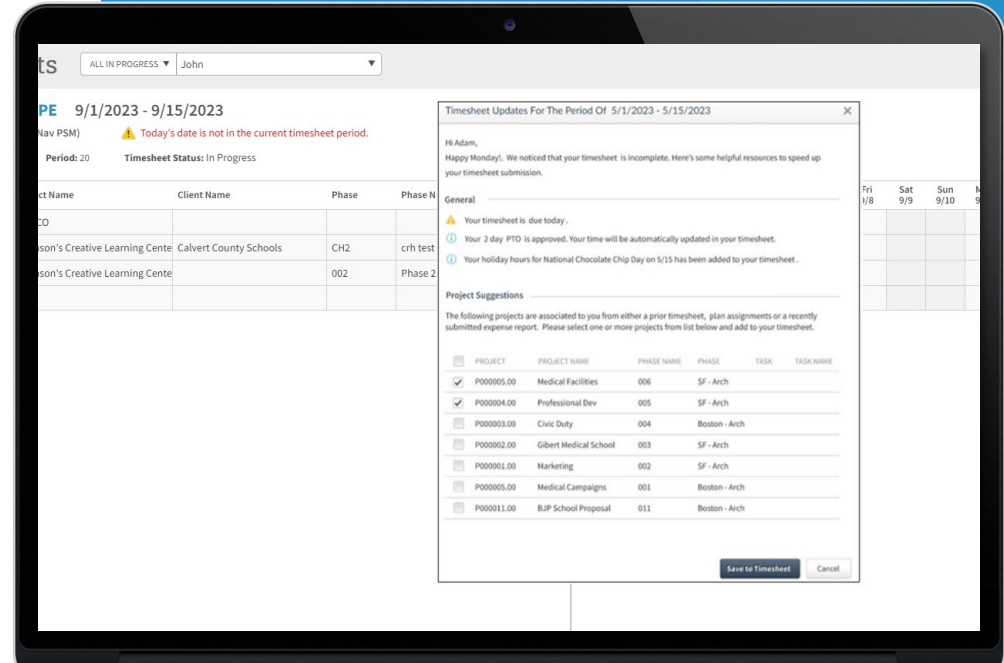
Group	Phase Name	Percent Complete	Fee To Date	Percent Of Fee	Billed To Date	Phase
50	Construction Administration	0.0000	0.00	29.0000	0.00	001
100	Geotechnical Investigation	0.0000	0.00	0.0000	0.00	001
200	Site Survey	0.0000	0.00	0.0000	0.00	001
20	Design Development	10.0000	20,000.00	20.0000	14,000.00	001
40	Bid and Negotiate	10.0000	2,000.00	2.0000	2,000.00	001
			59,200.00		16,000.00	

Automate time-consuming billing processes to improve accuracy and efficiency



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



Streamline timesheet entry with project suggestions via Timesheet Assist



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

The screenshot displays the 'AP Invoice Approvals' interface. The main window shows a list of invoices with columns for FILE NAME and DESCRIPTION. A preview window on the right shows an invoice from 'Great Idea Services' for \$8,450.00.

AP Invoices

FILE NAME	DESCRIPTION
Test AP Invoice Great 022123_IP.pdf	Test AP Invoice Great 022123_IP

Invoice Information

Vendor: Se Technologies International, Inc. Invoice: Invoice Date: []

Address: Oregon Address - 12345 Main Street Suite... AP Liability: Accounts Payable Payment: Next Payment Date: []

Purchase Order: Invoice Amount: 100.00 Currency: USD Route To: [] Employees: []

Project Information

DESCRIPTION	PROJECT NAME	PHASE NAME	TASK NAME	ACC
	JP Design Reg			515

Preview AP Invoices

60e64dc3-07d... 1 / 1 - 81% + [] [] [] []

Great Idea Services
5555 Eastman Boulevard
Wheaton, Nebraska 68465

Invoice

Invoice #	Date
	01/05/2023

Bill To:
Apple & Bartlett, PC
100 Cambridge Park Drive, 5th Floor
Cambridge, MA 02140

Description	Qty	Unit Price	Amount
Service Fee	1.00	8,000.00	8,000.00
Labor: 3 hours \$150.00/hour	3.00	150.00	450.00

Invoice Total: 8,450.00

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

The screenshot displays the Vantagepoint 6.5 software interface. On the left, the 'INVOICE HISTORY' table is visible, with a red box highlighting a row where the 'VOID DATE' is 8/9/2023. On the right, an invoice preview for 'APPLE AND BARTLETT STRUCTURAL ENGINEERS' is shown, featuring a large 'VOID' watermark.

Invoice History Table:

INVOICE DATE	VOID DATE	CREDIT MEMO NUMBER	FILE TYPE	PRE-INVOICE	DRAFT INVOICE
7/22/2021	8/9/2023				
8/20/2010					
1/28/2010					
3/19/2010					
7/20/2011					
7/20/2011					
1/17/2011					
1/16/2011					
1/18/2011					
7/17/2011					
7/23/2011					
7/24/2011					
1/15/2011					
1/21/2011					

Invoice Preview Summary:

Category	Total	Total this WBS2
Professional Personnel	2,880.00	2,880.00
Professional Personnel	0.00	0.00
Retainage	576.00 (20.00 % of 2,880.00)	-576.00
Current Retainage	576.00	
Retainage To-Carry	0.00	
Total this Invoice	\$2,404.00	

Outstanding Invoices Table:

Number	Date	Balance	Retainage	Now Due
52031	8/10/2014	-180.00	0.00	-180.00
52032	8/24/2014	212,366.00	0.00	212,366.00
52033	9/10/2014	24,332.00	0.00	24,332.00
52034	7/5/2014	51,482.00	0.00	51,482.00
52035	12/13/2014	41,160.00	0.00	41,160.00
52036	12/13/2014	87,528.00	0.00	87,528.00
52036	1/11/2014	33,600.00	0.00	33,600.00
Total		455,298.00	0.00	455,298.00
				443,702.00

TERMS: NET 30 DAYS 1.5% PER MONTH SERVICE CHARGE ON INVOICES OVER 30 DAYS.

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

The screenshot displays two overlapping windows from the Deltek Vantagepoint 5.5 software. The top window is titled 'Cash Receipts' and shows a table of transactions for 'Apple & Bartlett, PC'. The bottom window is titled 'Billing Labor Category Tables' and shows details for 'Table Number 1'.

Cash Receipts Window:

- Header: Apple & Bartlett, PC
- Table Columns: FILE, CREATOR, END DATE, CREATE PERIOD, STATUS, POST STATUS
- Table Data:

FILE	CREATOR	END DATE	CREATE PERIOD	STATUS	POST STATUS
999 Bank Rec					
CR 06/14/2022 999 Bank Rec	Billy Apple, PE	11/30/2017	11/2017	Posted	Complete
CR 06/14/2022 999 Bank Rec	Billy Apple, PE	11/30/2017	11/2017	Posted	Complete
CR 06/15/2022 999 Bank Rec	Billy Apple, PE	11/30/2017	11/2017	In Progress	

Billing Labor Category Tables Window:

- Header: Deltek Vantagepoint
- Table: Billing Labor Category Tables
- Table Number: 1
- Properties: Code Active, OrganizationX None
- Menu: Other Actions (Copy, Delete, Print)

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

The screenshot displays the Deltek Vantagepoint 5.5 web interface for a purchase requisition. The header shows the company name 'Bartlett Enterprises America' and the period ending '3/31/2018'. The main title is 'Purchase Requisitions' with a search bar and filters. The specific requisition is 'Requisition Number 152' with a status of 'In Progress, Open'. The requisition is dated '5/10/2022' and is 'Awaiting Submit'. The interface includes tabs for 'GENERAL', 'SHIPPING', 'COMMENTS', 'DEFAULT DISTRIBUTION', and 'DEFAULT VENDORS'. The 'GENERAL' tab is active, showing fields for 'Requested By' (Tom Scholz), 'Date' (5/10/2022), and 'Currency Code' (USD - US Dollar). Below this is a table of 'Line Items' with columns for 'NEED PRICE QUOTE', 'ITEM', 'DESCRIPTION', 'CATEGORY', 'QTY', 'UOM', 'UNIT PRICE', 'TOTAL', 'DUJ DATE', 'DOCUMENTS', 'INV', 'SHIPPING OVERRIDES', and 'DISTRIBUTION OVERRIDES'. A single line item is visible: 'M-002 3hp Motor' with a quantity of 2.00, unit price of 550.00, and total of 1,100.00. Below the line items is a section for 'Suggested Vendors - 3hp Motor' with columns for 'VENDOR', 'ADDRESS', 'VENDOR ITEM', 'RESPONSE PRICE', 'UOM', 'RESPONSE DATE', 'RESPONSE PERSON', 'APPLY RESPONSES TO ALL LINES', and 'PRINTED'. One vendor, 'Atlantic Recon', is listed with a response price of 0.00 and unit of 'Each'.

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

The screenshot displays the Vantagepoint 5.0 Bank Reconciliation interface. The main window is titled "Bank Reconciliation" and shows the account "Baybank - Corporate - 7/30/2021". A "Service Lookup" dialog box is open, displaying a table of transactions with columns for Type, Number, Description, Date, and Amount. The table lists various transactions from City of Cambridge, including "Hudson Street Renovations", "Kennedy School Addition", and "Winchester Library". The background interface shows a summary table with columns for Type, Amount, and Description, and a "PAYMENT" section on the right.

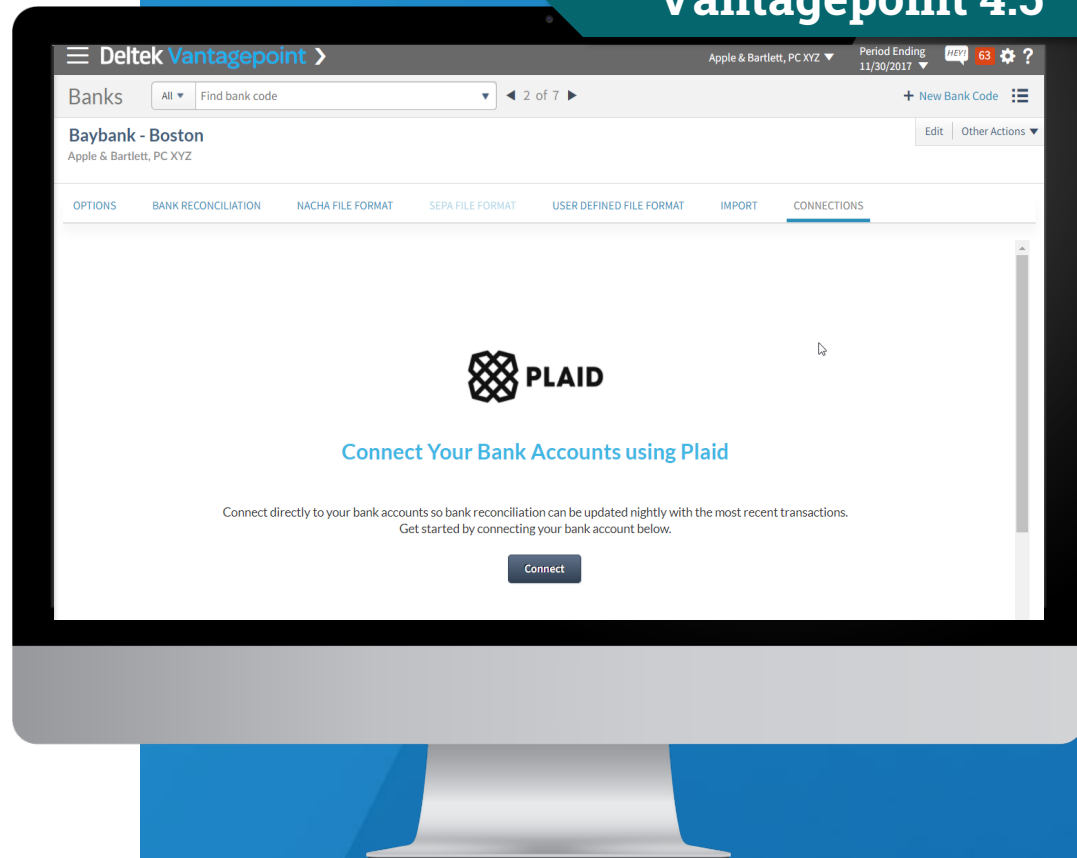
Type	Number	Description	Date	Amount
Receipt	ACH 8544231	Cambridge	08/15/2021	200.00

PROJECT	DATE	CLIENT	PROJECT	PROJECT NUMBER	AMOUNT	BALANCE	CLIENT NUMBER
00000001037	3/29/2004	City of Cambridge	Hudson Street Renovations	200200.00	0.00	-200.00	CAMBRIDGE
00000001045	2/23/2004	City of Cambridge	Hudson Street Renovations	200200.00	0.00	-200.00	CAMBRIDGE
00000001042	3/31/2004	City of Cambridge	Kennedy School Addition	200000.00	145.66	145.66	CAMBRIDGE
00000001054	3/31/2004	City of Cambridge	Kennedy School Addition	200000.00	145.66	145.66	CAMBRIDGE
00000001023	1/31/2004	City of Cambridge	Kennedy School Addition	200000.00	329.12	329.12	CAMBRIDGE
00000001053	2/23/2004	City of Cambridge	Kennedy School Addition	200000.00	474.76	474.76	CAMBRIDGE
0000000069	11/30/2020	City of Cambridge	Winchester Library	202000.00	520.00	520.00	CAMBRIDGE

TYPE	AMOUNT	DESCRIPTION
PAYMENT	0.00	
Payment	89.40	SparkFun 7/5/2021
Payment	6.33	Harbor 073515 SE**BOOK** 7/23/2021
	504.22	
	4,769.06	

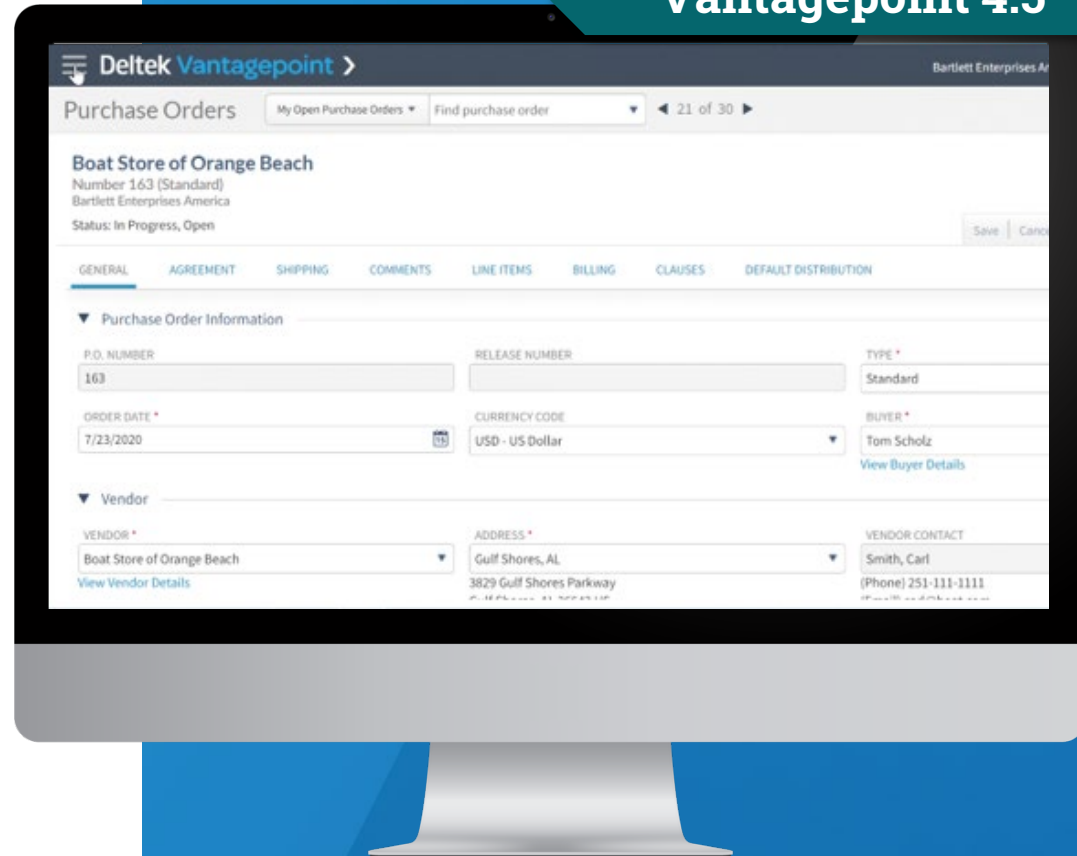
Automatic Bank Feed

- » 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



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

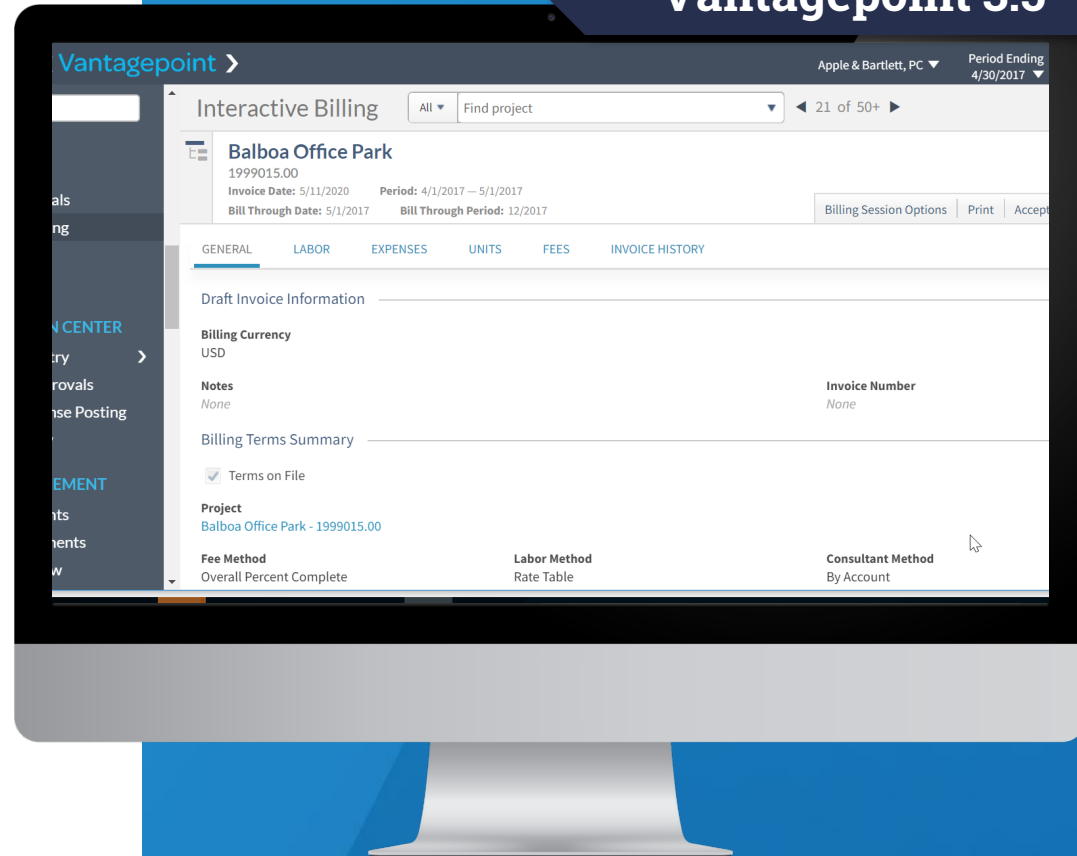
The screenshot displays the Deltek Vantagepoint software interface for a draft invoice approval. The top navigation bar shows the user is logged in as Apple & Bartlett, PC (Nav PSM) on 12/31/2020. The main header area displays 'Draft Invoice Approvals' for the project 'Cape Cod Vacation Club' (Invoice Date: 3/31/2021, Period: 11/30/2021 - 12/31/2021, Bill Through Date: None, Bill Through Period: 12/2021). The interface is divided into several sections:

- Comments Sidebar (Left):** Shows a list of comments from JoAnne Smith dated March 18, 2021. One comment is highlighted with a red 'T' icon, indicating a change or markup: 'Survey consultant invoice from Robertson Inc should be included in this invoice'.
- Invoice Preview (Right):** Displays the draft invoice for 'APPLE AND BARTLETT STRUCTURAL ENGINEERS'. It includes contact information for the firm and a table of billing phases.

Billing Phase	Fee	Percent Complete	Earned	Previous Fee Billing	Current Fee Billing
Schematic Design	15,000.00	80.00	13,500.00	0.00	13,500.00
Design Development	20,000.00	20.00	4,000.00	0.00	4,000.00
Construction Documents	40,000.00	10.00	4,000.00	0.00	4,000.00
Construction Administration	25,000.00	0.00	0.00	0.00	0.00
Total Fee	100,000.00		21,500.00	0.00	21,500.00
Professional Personnel					21,500.00
					72,950.00

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



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

The screenshot displays the 'Draft Invoice Approvals' interface for 'Adelphi Research Lab'. The interface includes a search bar, a dropdown menu, and a table of labor entries. The table has columns for Bill, Hold, Write-off, Delete, Modify, Transfer, Invoice Status, Status, Billable, Date, Phase, Task, Labor Code, Category Description, Employee Name, Hours, and Rate. The total amount for the labor entries is 17,896.00.

Bill	Hold	Write-off	Delete	Modify	Transfer	INVOICE STATUS	STATUS	BILLABLE	DATE	PHASE	TASK	LABOR CODE	CATEGORY DESCRIPTION	EMPLOYEE NAME	HOURS	RATE
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	Bill	✓	11/30/2018	3DD		000	Architect	00987 Fitzgerald, Meg	16,890.00	0.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	Bill	✓	1/1/2020	1PD	PRO	000	Architect	00987 Fitzgerald, Meg	3.00	250.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	Bill	✓	1/2/2020	1PD	PRO	000	Architect	00987 Fitzgerald, Meg	4.00	250.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	Bill	✓	1/10/2020	1PD	PRO	000	Architect	00987 Fitzgerald, Meg	8.00	250.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	Bill	✓	1/14/2020	1PD	PRO	000	Architect	00987 Fitzgerald, Meg	8.00	250.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	Bill	✓	7/7/2020	2SD	DOC	000	Architect	00987 Fitzgerald, Meg	8.00	0.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New	Hold	✓	2/22/2012	5BD		190	Engineer	00019 Morgan, Dwayr	8.00	105.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New	Hold	✓	3/20/2012	5BD		100	Engineer	00019 Morgan, Dwayr	8.00	105.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New	Hold	✓	3/21/2012	5BD		100	Engineer	00019 Morgan, Dwayr	8.00	105.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New	Hold	✓	3/24/2012	5BD		100	Engineer	00019 Morgan, Dwayr	8.00	105.0000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New	Hold	✓	4/1/2012	1PD	SIT	030	Surveyor	00032 Replinger, Han	8.00	87.5000
															17,896.00	

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

The screenshot displays the 'Payroll Payments' interface for 'Run Number 184 - Select Payments'. The interface includes a search bar, a 'Print Data' button, and a table of employee pay details. The table columns are: INCLUDE IN RUN, EMPLOYEE, EMPLOYEE NAME, TOTAL TIME HOURS, TOTAL PAY HOURS, BANK CODE, TOTAL GROSS PAYMENT, and NET PAYMENT. The data shows 11 employees with their respective payment details for the date 10/8/2019.

INCLUDE IN RUN	EMPLOYEE	EMPLOYEE NAME	TOTAL TIME HOURS	TOTAL PAY HOURS	BANK CODE	TOTAL GROSS PAYMENT	NET PAYMENT
<input checked="" type="checkbox"/>	00036	Peter O'Leary	0.00	0.00	BayBank Payroll	2,658.46	1,935.80
<input checked="" type="checkbox"/>	00037	Jay Castro	1,601.00	0.00	BayBank Payroll	0.00	0.00
<input checked="" type="checkbox"/>	00041	Bret Tushaus	0.00	0.00	BayBank Payroll	2,584.62	1,930.85
<input checked="" type="checkbox"/>	00043	Kevin Nichols	0.00	0.00	BayBank Payroll	2,030.77	1,337.02
<input checked="" type="checkbox"/>	00044	Martin Lee	0.00	0.00	BayBank Payroll	2,658.46	1,886.72
<input checked="" type="checkbox"/>	00059	Grace Hamilton	0.00	0.00	BayBank Payroll	1,698.46	1,115.38
<input checked="" type="checkbox"/>	00061	Henry Carroll	0.00	0.00	BayBank Payroll	2,769.23	2,015.63
<input checked="" type="checkbox"/>	00063	Glen Page	0.00	0.00	BayBank Payroll	6,461.54	4,188.72
<input checked="" type="checkbox"/>	00065	Alexander Dane	0.00	0.00	BayBank Payroll	5,907.69	3,308.97
<input checked="" type="checkbox"/>	00066	Christine Benson	0.00	0.00	BayBank Payroll	3,267.69	1,975.28
<input checked="" type="checkbox"/>	00071	Sta Anderson	0.00	0.00	BayBank Payroll	2,843.08	1,783.38

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

The screenshot displays the Deltek Vantagepoint interface for 'Draft Invoice Approvals'. The main content area shows a preview of a draft invoice for 'Cape Cod Vacation Club' (Project No: 2002005.00, Invoice Date: 3/5/2019, Period: 11/1/2018 - 11/30/2018). The invoice is from 'APPLE AND BARTLETT STRUCTURAL ENGINEERS' and is dated March 5, 2019. The project description is 'Programming, Design Services and Construction Administration for 60,000 SF resort in Falmouth, MA. Professional Services through November 30, 2018'. A table at the bottom of the invoice preview shows the billing phase breakdown:

Billing Phase	Fee	Percent Complete	Earned	Previous Fee Billing	Current Fee Billing
Schematic Design	15,000.00	85.00	12,750.00	0.00	12,750.00
Design Development	20,000.00	20.00	4,000.00	0.00	4,000.00
Construction Documents	40,000.00	0.00	0.00	0.00	0.00

Improved Accounting

- » Save time creating transactions while maintaining strong audit trail
- » Intuitive vendor invoices
- » Single location for all actions related to transactions
- » Easily navigate between companies and fiscal periods
- » Key GL information available on dashboard

The screenshot displays the 'AP Vouchers' page in the Deltak Vantagepoint 2.0 system. The page title is 'AP Vouchers' and the company is 'Apple & Bartlett, PC (Nav PSM)'. The interface includes a navigation menu on the left with options like 'Find Application', 'Main Menu', and 'TRANSACTION ENTRY'. The main content area shows a table of AP Vouchers with the following data:

VENDOR	INVOICE	AMOUNT	VOUCHER DATE	CREATE PE...	CREATOR	STATUS
Advanced Mechanical Technology	14521	9,245.00	11/20/2018	11/2018	ADMIN	In Progress
Bell Atlantic Telephone	932533-00-1	356.00	4/20/2020	11/2018	ADMIN	Posted
Bell Atlantic Telephone	85452-99	652.00	11/13/2018	Recurring	SMITH	In Progress
Diversified Electrical Technologies	3882-2828	5,878.00	4/20/2020	11/2018	ADMIN	Posted
Duplex Printers	9288-22	980.00	4/20/2020	11/2018	ADMIN	Posted
Fitzsimmons Engineering Inc.	89	765.00	4/20/2020	11/2018	ADMIN	In Progress
Five Star Travel	988221	3,512.00	11/8/2018	11/2018	ADMIN	In Progress
General Office Supply	82222-21488	293.00	4/20/2020	11/2018	ADMIN	Posted
Global Travel Consultants	9856423	982.00	11/7/2018	11/2018	SMITH	Posted
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
Philips Surveying and Design	0005124	5,600.00	11/8/2018	11/2018	SMITH	In Progress

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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

The screenshot displays the Deltek Dela AI assistant interface with three overlapping chat windows. Each window shows a user prompt and the AI's response.

Window 1 (Top):
User: "Please analyze the financials for the Faulkner clinic project and provide a summary of the information as well as any areas of concern."
AI: "The financial summary for the **Faulkner Clinic** project is as follows:
- **Total Compensation**: \$510,000.00
- **Job-to-Date Earned Revenue**: \$500...
- **Year-to-Date Earned Revenue**: \$50...
- **Revenue Backlog**: \$10,000.00
- **Total Billed with Taxes**: \$0.00
- **Accounts Receivable**: \$0.00
- **Average Age of Accounts Receivable**
- **Target Multiplier**: Not set
- **Labor Estimate-at-Completion Cost**
- **Job-to-Date Effective Multiplier**: 64...
- **Job-to-Date Earned Profit**: \$499,22

Window 2 (Middle):
User: "Please draft an email to the billing contact of this project and request payment of any outstanding a/r in a courteous manner."
AI: "Dear **Chad Kennedy**,

I hope this message finds you well. I am writing to you in your capacity as Chief Financial Officer at The Concord Corporation regarding the outstanding accounts receivable for the project with WBS1999/01300.

Several invoices that remain unpaid. We are here to assist in any way we can to

Window 3 (Bottom):
User: "what upcoming meetings do i have next week?"
AI: "You have the following upcoming meetings next week:

1. **Appointment #786****
- Date: 4/13/2023
- Start Time: 9:30 AM
- End Time: 10:00 AM
- Duration: 30 minutes
- Priority: Medium

2. **Weekly Resource Meeting****
- Date: 3/2/2005 (Please note that this date seems to be in the past; there might be a recurrence that is not reflected here. It's recommended to check your calendar for the correct upcoming date.)
- Start Time: 6:00 AM
- End Time: 8:00 AM



Improved User Interface

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

The screenshot displays the Deltak Vantagepoint 7.0 interface. The top navigation bar includes the Deltak logo, the text 'Deltak Vantagepoint', and a search bar for 'Project Review'. Below this, the project details for 'Kendall Yards Site Assessment' are shown, including the project ID '22.0036.00' and the names of the Principal, Project Manager, and Supervisor.

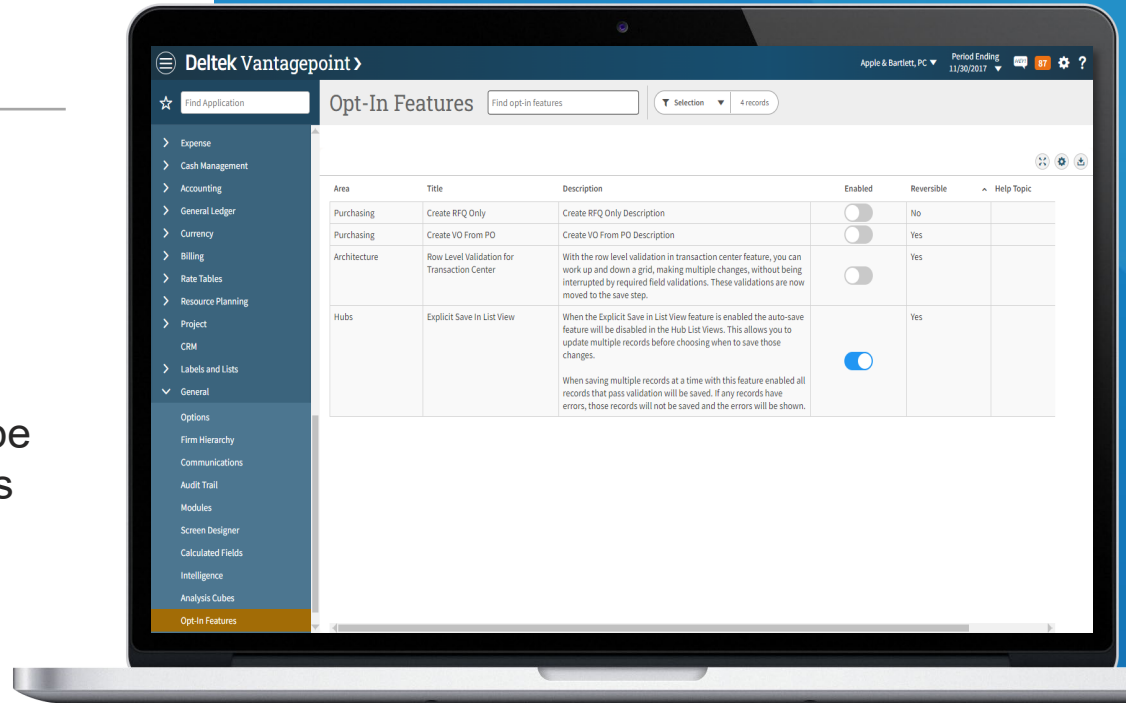
The main content area features a table with the following columns: Budgeted Billing, Planned Billing, Baseline Billing, Budgeted Variance, Planned Variance, JTD 4/10/2024 Billing, ETC Budgeted Billing, and ETC Planned Billing. The table data is as follows:

	Budgeted Billing	Planned Billing	Baseline Billing	Budgeted Variance	Planned Variance	JTD 4/10/2024 Billing	ETC Budgeted Billing	ETC Planned B
Project	13,425.00	14,150.00	115,000.00	101,575.00	33,950.00			
Estimates	61.00	61.00			238.00			
Contract Management	220.08	231.97			131.59			
Revenue Forecast								
Plan	13,425.00	14,150.00	115,000.00	101,575.00	33,950.00			
Budget	13,425.00	14,150.00	120,000.00	106,575.00	33,950.00			
Invoices	5,500.00	5,500.00	5,500.00		6,872.18	3.12		
Reimbursable Expenses	23,000.00	23,000.00	5,000.00	-18,000.00		23.00		
Draft Invoice Approvals								
Total	130,500.00	41,925.00	42,650.00	130,500.00	88,575.00	40,822.18		26,124.18

Below the table, there is a section for 'Key Performance Indicators' with a table showing Revenue, Variance, Ratios, % Complete, and % Expended.

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



General Usability

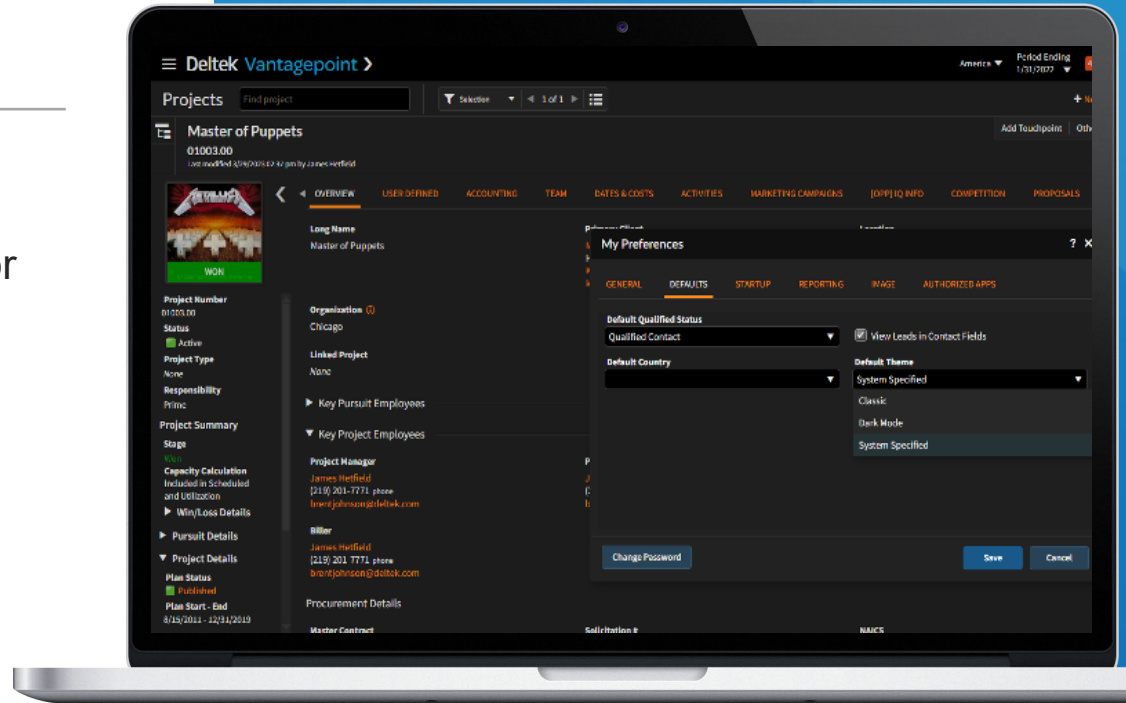
- » Updated User Interface
- » Enhanced Navigation Menu
- » Explicit Save in List View
- » Bulk Update
- » Advanced WBS Search
- » Simplified Data Import for User Defined Hubs
- » Keyboard shortcuts
- » Mobile T&E absence requests
- » Mobile CRM touchpoints

The screenshots illustrate the following features:

- Firms List View:** Shows a table of firms with columns for Image, Name, and Last Activity Date. A search bar and filters (Active, 649 records) are visible at the top.
- Bulk Edit:** A dialog box for updating multiple records, showing available fields and selected fields.
- Data Import:** A wizard for importing data, showing field mapping for a 'UD Numeric' field.
- New Project Search:** A search screen with filters and a results table showing project details.
- Navigation Menu:** A vertical menu on the left side of the application, listing various modules like Resource Management, Proposals, Billing, etc.

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

Vantagepoint 6.5

Timesheets MY TIMESHEETS Find timesheets

Billy Apple, PE 1/1/2023 - 1/15/2023
Apple & Bartlett, PC
Period Status: Open Timesheet Status: In Progress

LINE STATUS	PROJECT*	PROJECT NAME	CLIENT NAME	PHASE	SUN 1/1	MON 1/2	TUE 1/3	WED 1/4
	Vacation	Vacation						
	Sick Leave	Sick Leave						
	Holiday	Holiday				8.00		
	Marketing	Marketing						

Timesheets MY TIMESHEETS Find timesheets 1 of 11

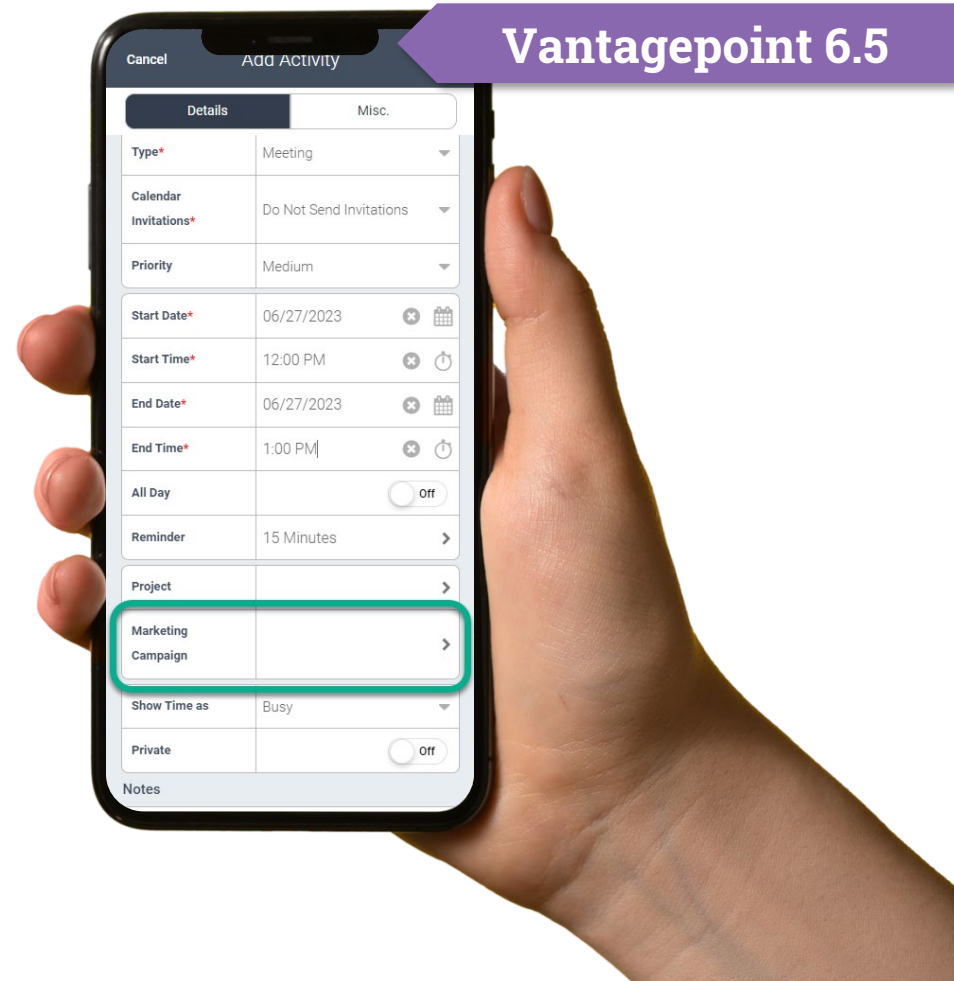
Tom Scholz 3/26/2023 - 4/1/2023
Bartlett Enterprises America ⚠ Today's date is not in the current timesheet period.
Period Status: Open Timesheet Status: Missing

PROJECT	PROJECT NAME	CLIENT NAME	PHASE	PHASE NAME	SUN 3/26	MON 3/27	TUE 3/28	WED 3/29
PTO	PTO							



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

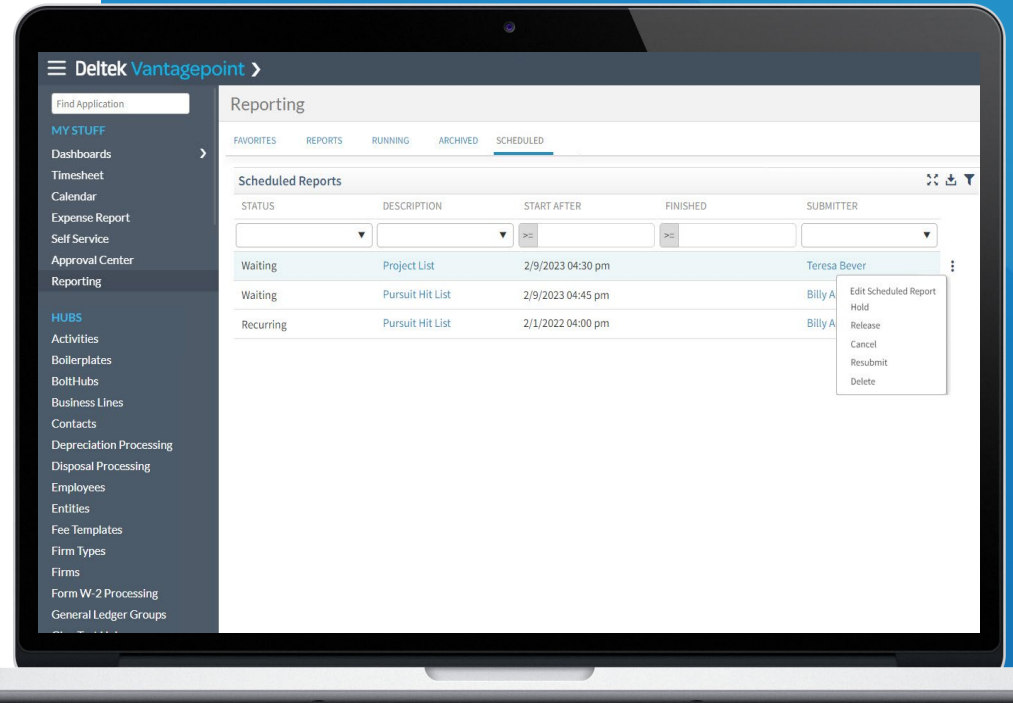


Usability: Editing Scheduled Reports

- » 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

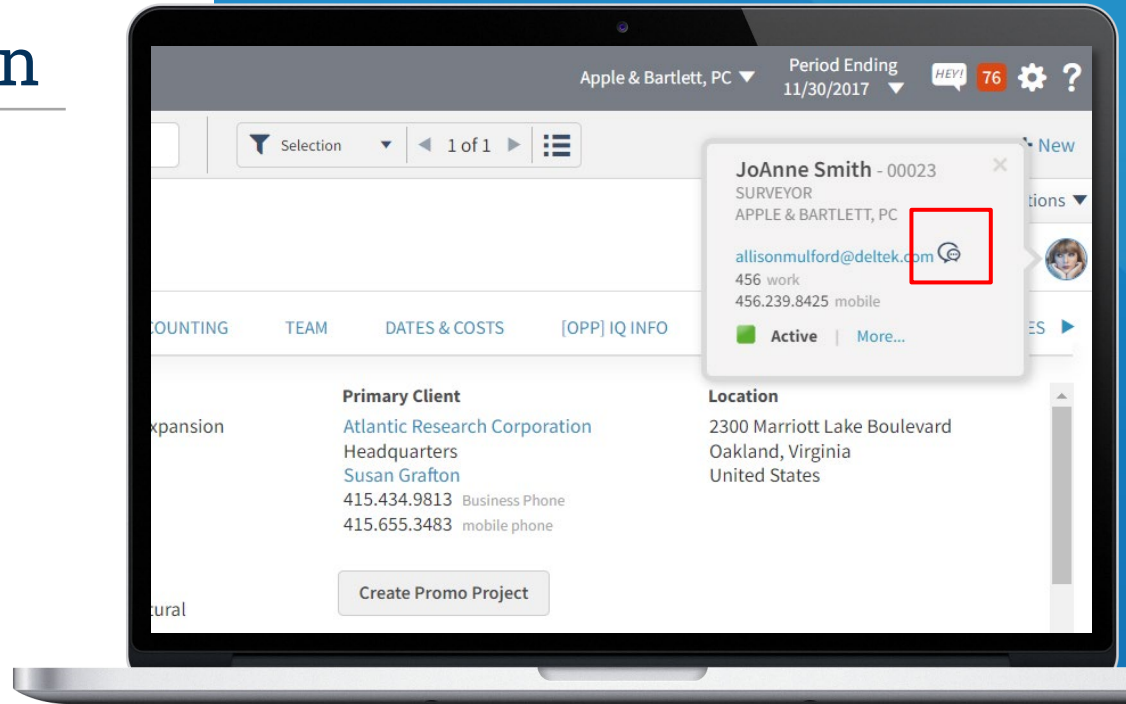
Another popular item from Idea Portal

Vantagepoint 6.5



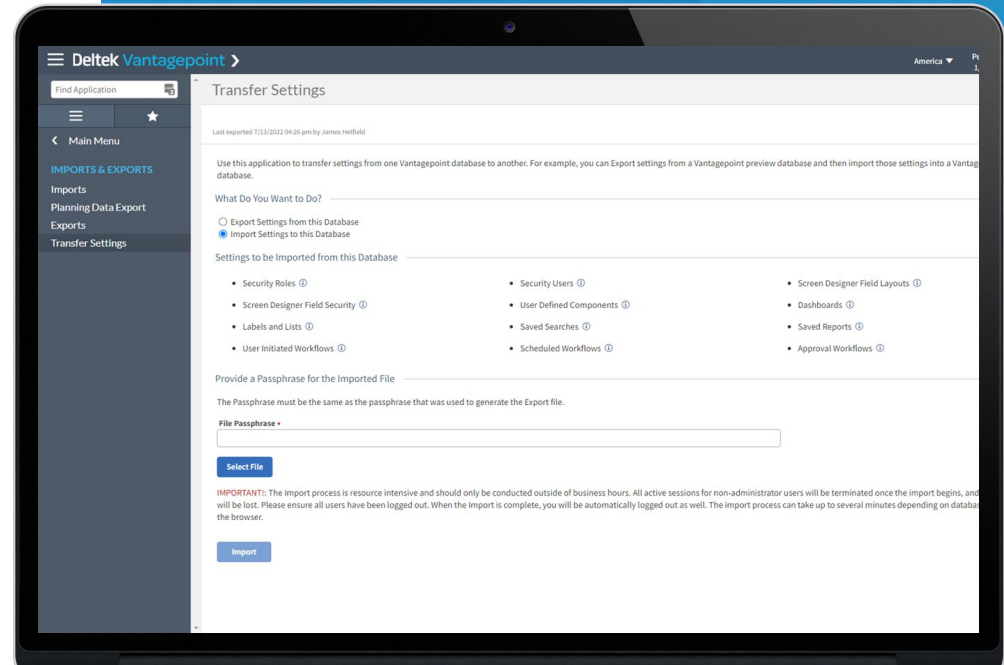
Improve Collaboration with Teams Integration

- » 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

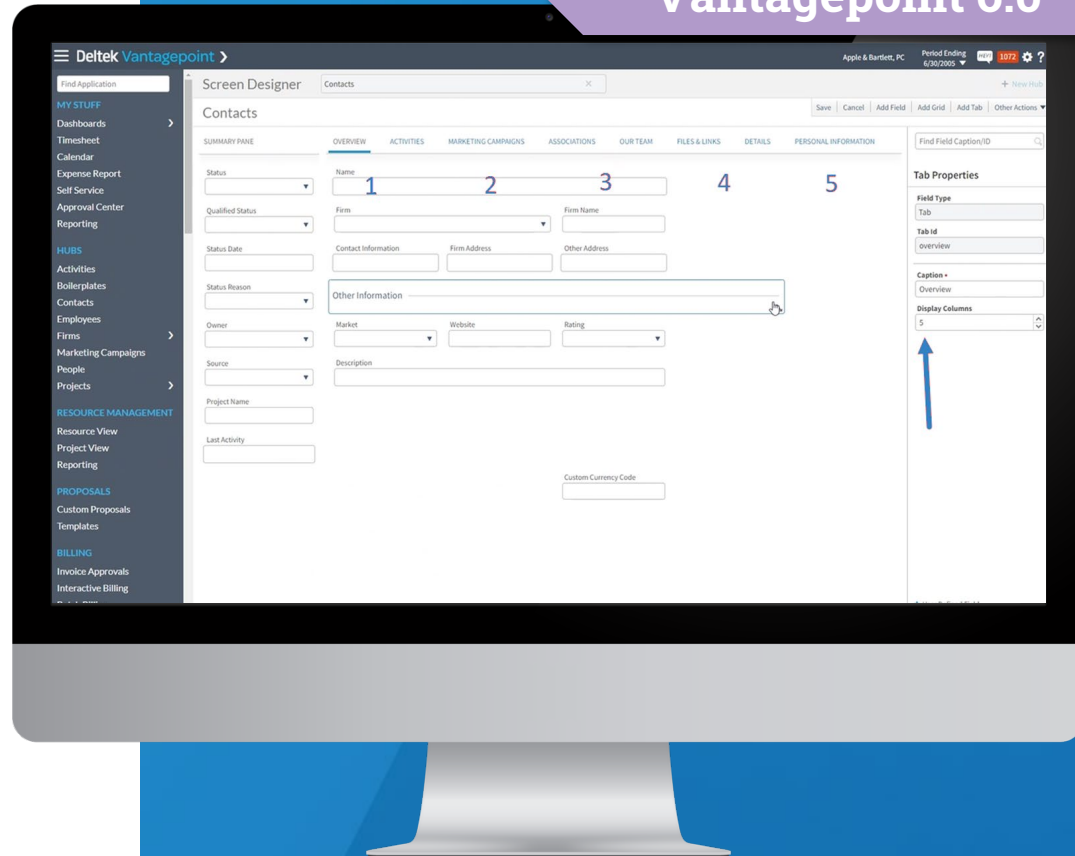
- » Key settings can be transferred from one database to another
- » Save valuable time and significantly reduce manual work
- » Critical for supporting Vision to Vantagepoint upgrades, but not just for upgrades
- » Example – preview to production



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

Vantagepoint 6.0



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!

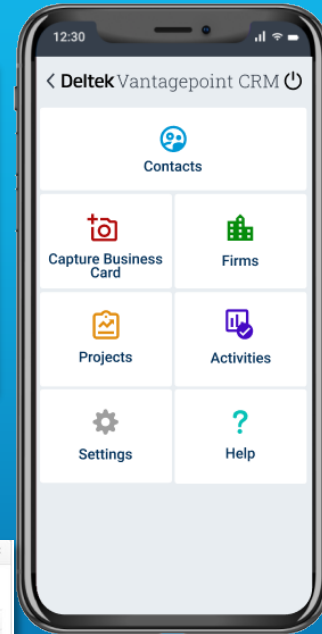
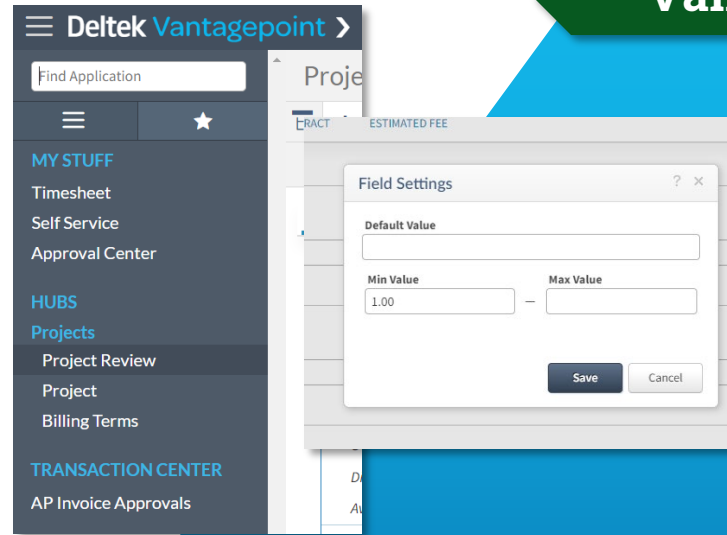
The image displays several key features of the Deltek Vantagepoint 6.0 interface:

- Contacts List:** Shows a list of contacts with a search bar and navigation options.
- Employee Card:** Provides a detailed view of an employee's profile, including their role (Principal), company (AB Corporate), and a table for forecasting and capacity planning.

LEVEL	2022	2022	2023	2023	2023
	12/12 - 12/18	12/19 - 12/25	12/26 - 1/1	1/2 - 1/8	1/9 - 1/15
Totals	55	53	54	43	5
2015105.00 Adelpi Research Lab					
0201900.05 Cambridge YMCA Renovations		51			
2002005.00 Cape Cod Vacation Club		1			
2020000.00 OS Central Perk		3			
- Benefit Hours:** A summary of employee benefits, including Sick Leave and Vacation, with starting, current, and unposted balances.
- Login Form:** A secure login interface with fields for User ID, Password, Database, and Language, and a 'Log In' button. It includes a 'Caps Lock is on' warning.

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!**



Floor Check

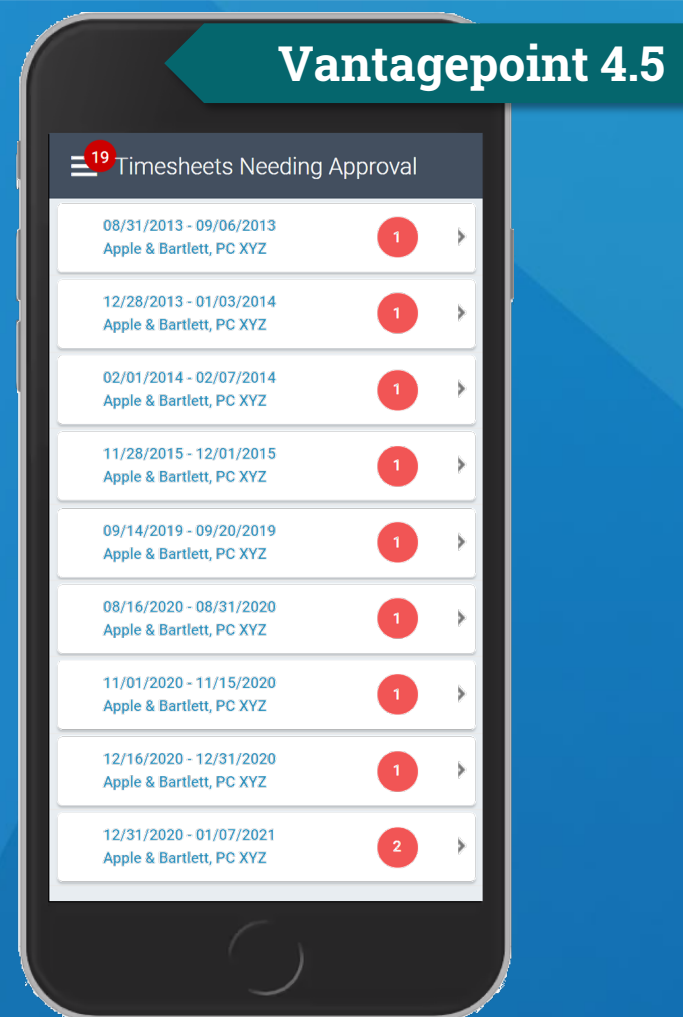
Company: Cohen & Associates LLC (Nav PSM) | Time Period: 11/22-11/28/2021 | Time Frame: By Timesheet Period

Send Notification | Send Email | Open Timesheet | **Print Detailed Timesheet** | Print Summarized Timesheet

TIMESHEET STATUS	TIME GROUP	EMPLOYEE NAME	EXPECTED HOURS	HOURS ENTERED
Missing		Aaron Fernburg	40.00	0.00
Missing	Department 1	Aaron Weiss	40.00	0.00
Missing		Alan Lowend	40.00	0.00
Missing	Department 5	Alex Lucas	40.00	0.00
Missing	Department 5	Alexander Dane, AIA	40.00	0.00

Usability Enhancements: Mobile

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



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

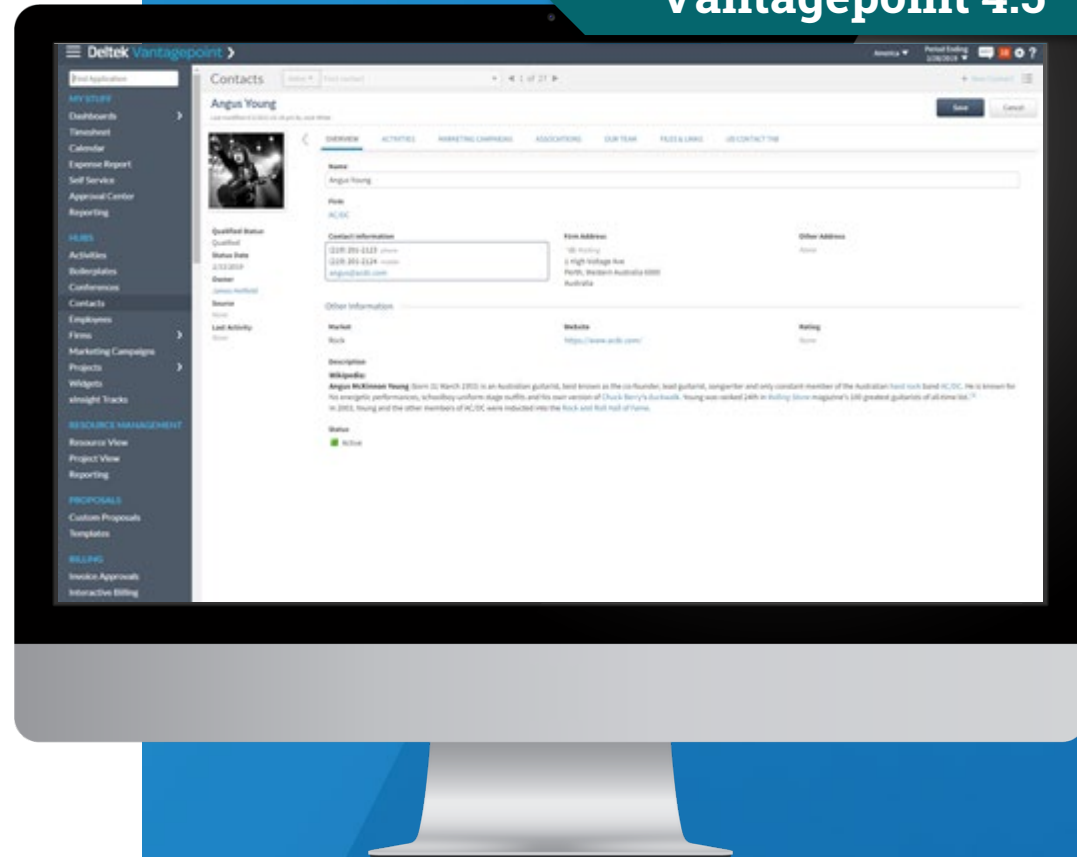
The screenshot displays the 'Firms' hub for 'Neway Steel Structures Ltd'. The interface includes a sidebar with navigation options like 'Main Menu', 'FIRMS HUB', 'Firms', 'AR Review', and 'Voucher Review'. The main content area displays a profile for 'Neway Steel Structures Ltd' with a logo, firm type, number, owner, website, and last activity. Below this, there are two tables: 'Firm Contacts' and 'Contacts from Project Associations'.

NAME	STATUS	TITLE	WORK PHONE	MOBILE PHONE	LOCATION	EMAIL
Mike Fenster	■	Contracts Administrat	321.234.2945	321.981.9301	Orlando Office	bflower@anderson.co
Dylan Zimmerman, P	■	Chief Executive Officer	713.920.7000	713.549.0537	Texas office	dzimmerman@anders
George DeRosa, AIA	■	Director of Marketing	212.549.6408	212.392.8593	<Default>	gderosa@andersonass
George Smith, III	■	Project Manager	321.234.2933	321.549.1594	Orlando Office	gsmith@andersonass
John Katz, AIA	■	Chief Financial Officer	212.549.6413	212.472.0821	<Default>	jjind@anderson.com
Teresa Bever	■	Product Director	703.885.9290		<Default>	TeresaBever@deltek.c

NAME	PROJECT NAME	PROJECT	STATUS	CURRENT FIRM	TITLE	WORK PHONE	MOBILE P
Adella Cho	Bever Complex	0006516.51	■	Neway Steel Structur	Director of Marl	777.555.6666	777.555.6
Adella Lauderdale	Bever Complex	0006516.51	■	Neway Steel Structur	City Manager		

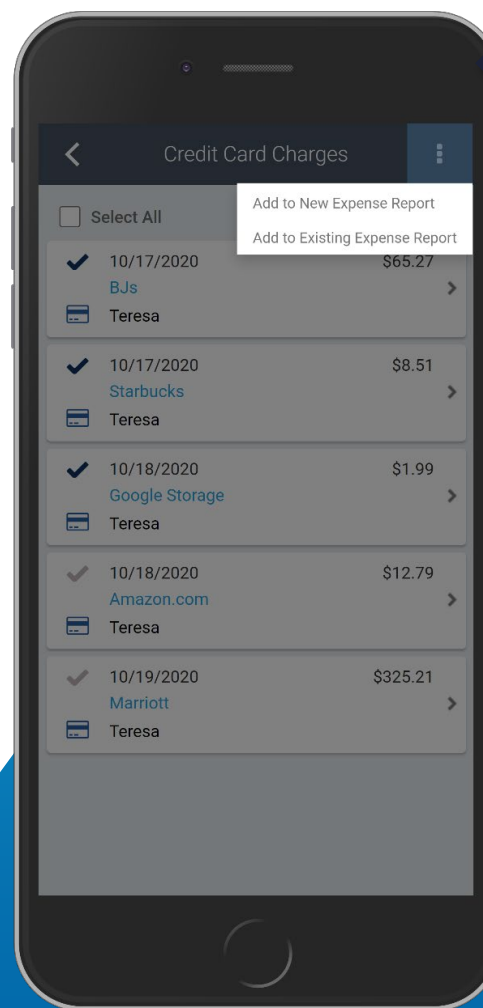
Usability Enhancements

- » 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

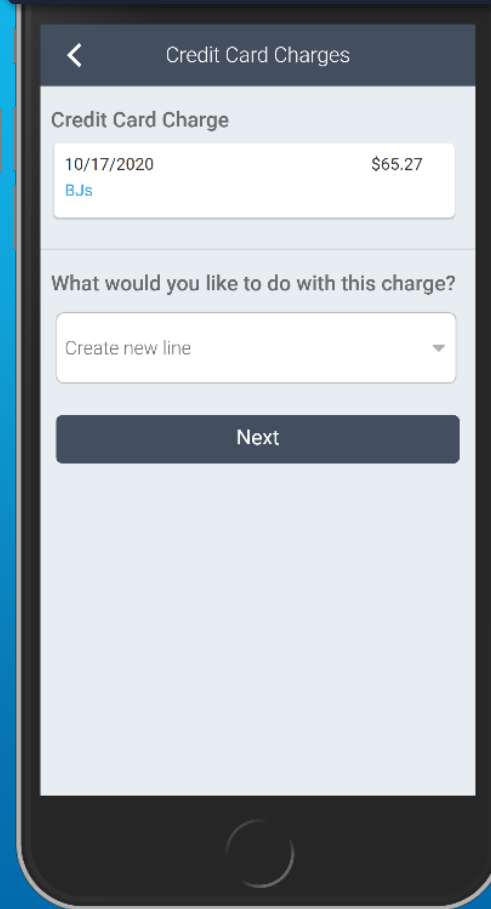


Easily Match Credit Card Expenses

- » 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

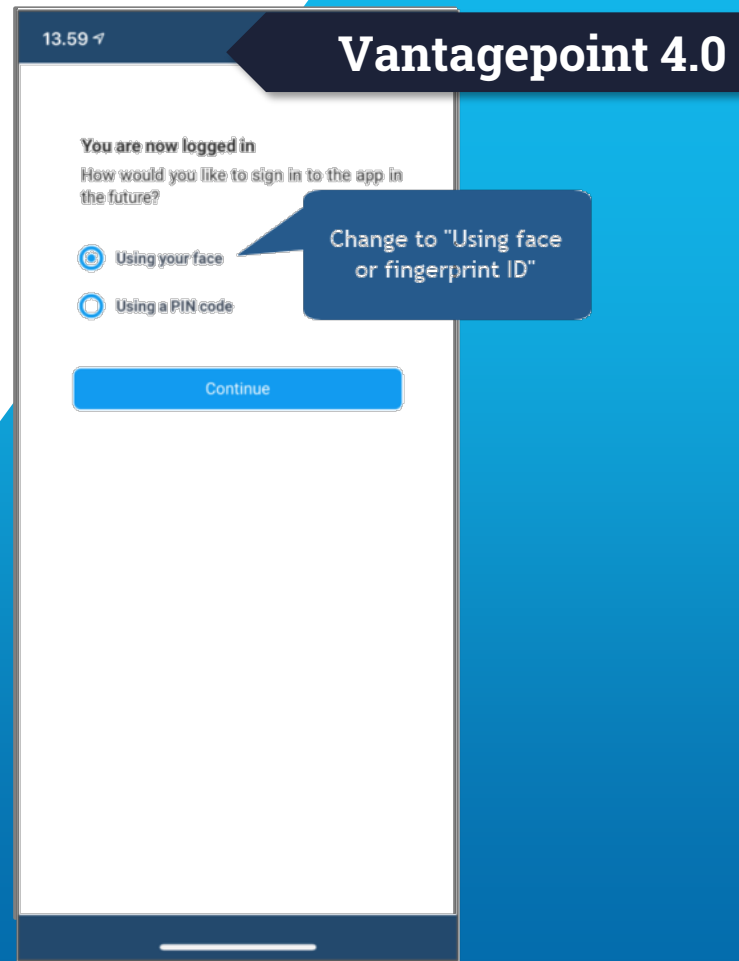


Vantagepoint 4.0



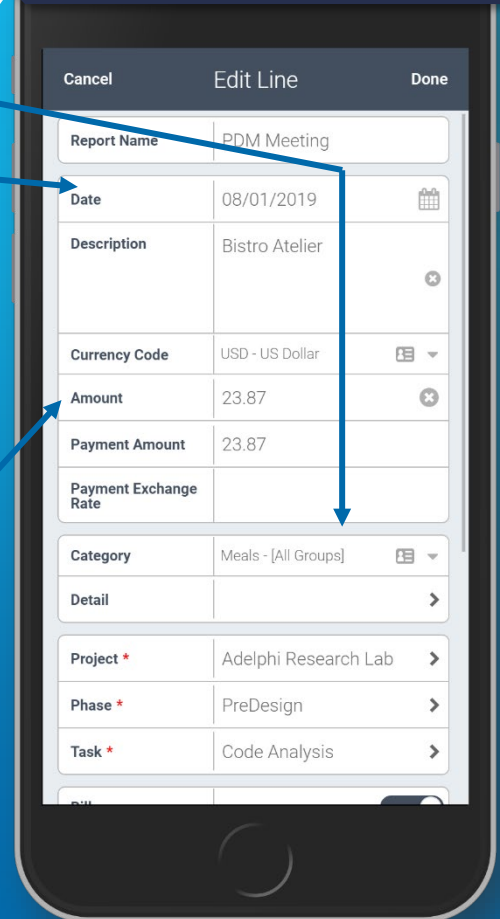
Increased Mobile Security

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



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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Learn More About Vantagepoint

- » To learn more about the latest releases, log into the Deltek Support Center and download the release notes
- » Manage your email subscriptions to ensure you never miss a critical product email on Deltek.com

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Login to your Deltek Support Account

Username

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Login

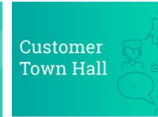
Login Help?



Deltek Insight is now Deltek ProjectCon! Learn more and be the first to know when registration opens.

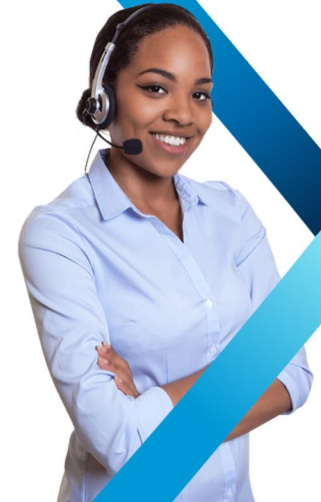


Join us May 17-18 for a 2-day learning event for Ajera, Vantagepoint and Vision users and earn CPE credits.



Register for an upcoming Customer Town Hall for product updates, roadmaps and more.

Awards & Recognition



Deltek Support Center

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<https://www.deltek.com/en/blog/vantagepoint>
- » Register for upcoming town halls and join us for in-person events
www.deltek.com/en/about/events
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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. Learn about resources available to help you on your journey to Vantagepoint including training resources, upgrade dates, what's new in Vantagepoint and much more in one place to make it easy 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.

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