

The Deltek logo is positioned on the left side of the slide, enclosed within a dark blue arrow-shaped graphic that points towards the right. The logo itself is the word "Deltek" in a white, sans-serif font, with a registered trademark symbol (®) at the end.

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

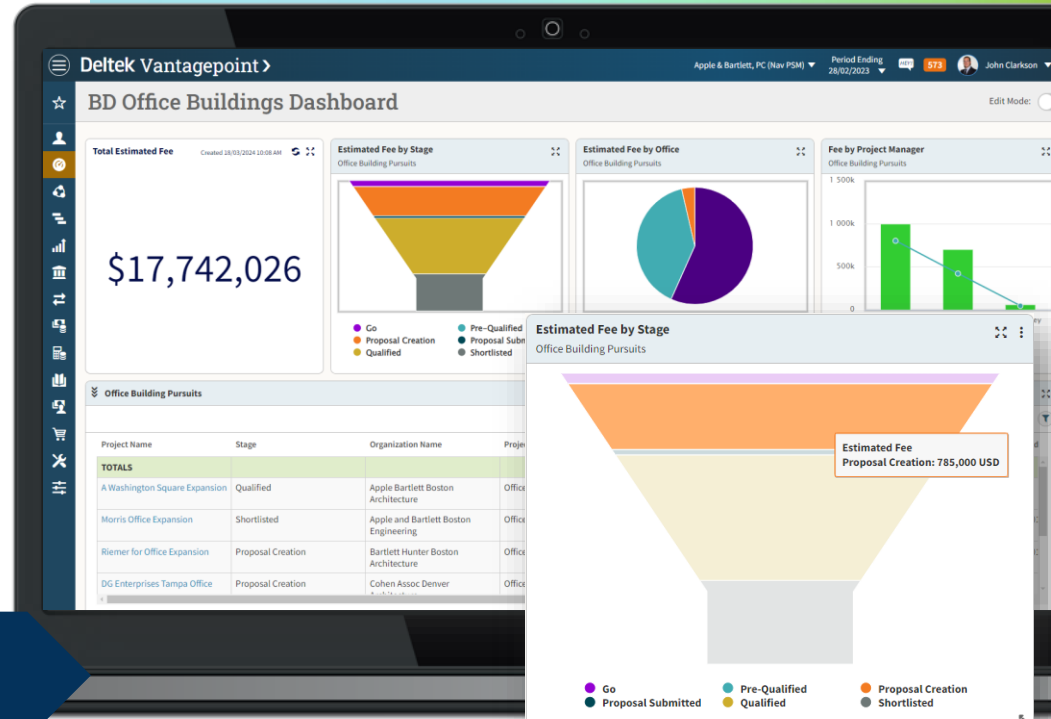
Deltek.

Dashboards and Business Intelligence



Funnel Charts

- » Provide clear, visual of pipeline by stage
- » Helps BD and marketing leaders see what's working, where more pipeline may be needed
- » Easily see more detail by hovering over a segment of the funnel chart
- » *Requested by customers and internal sales teams*



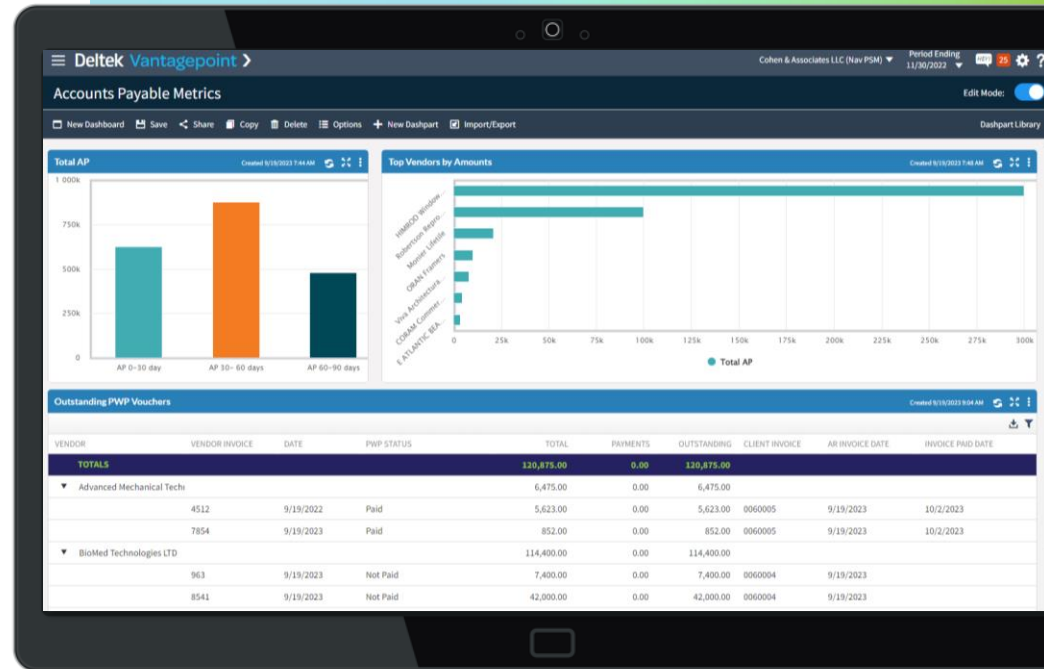
Visualize your pipeline by stage to quickly identify challenges and concerns

Gain Insight into AP Details

Vantagepoint 7.0



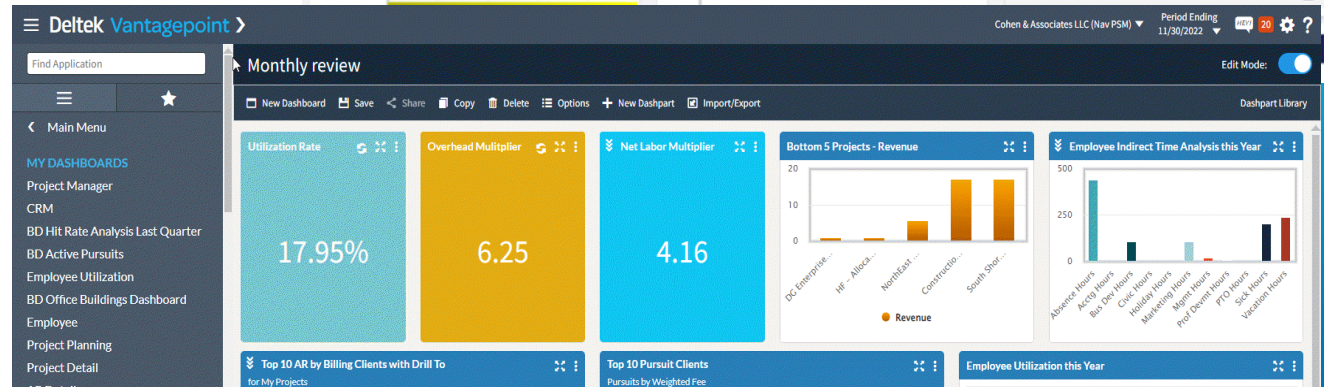
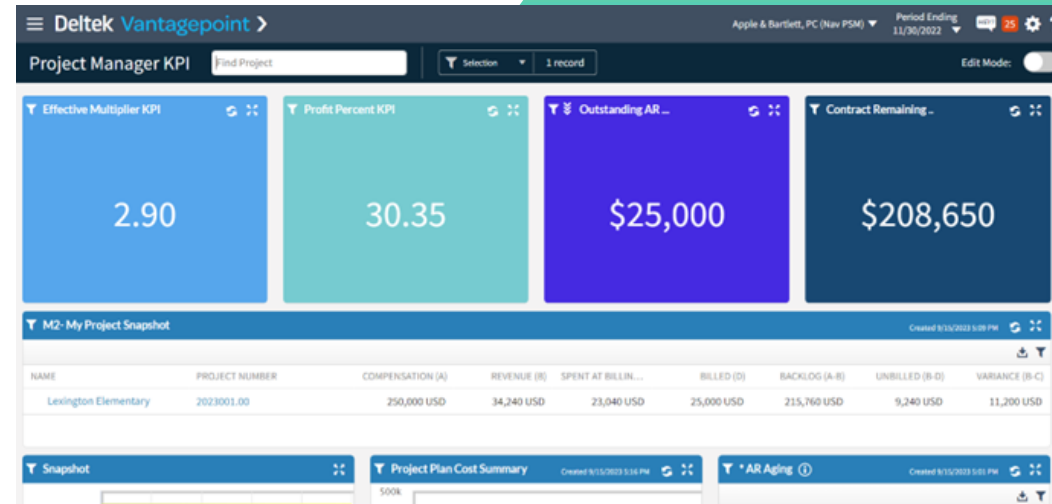
- » Deliver greater insight into accounts payable details on dashboards
- » Quickly identify cash flow requirements, exception reporting and company purchases in one place
- » Give finance leaders clear visibility into key AP metrics
- » View details for pay when paid (PWP) and outstanding AP balances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



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 dashboard

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

Top Screenshot: Shows the 'Dashpart Designer' window with the 'Calculated Field' tab selected. A 'Calculated Field Options' dialog box is open, listing available calculations. The 'Use Dashpart Calculation' option is highlighted with a red box.

Bottom Screenshot: Shows the 'Dashpart Designer' window with the 'Dashpart Calculation' dialog box open. The dialog box is used to define the calculation, including a description, field selection, and the calculation formula. The 'Dashpart Calculation' tab is highlighted with a red box.

Firm Base Dashparts

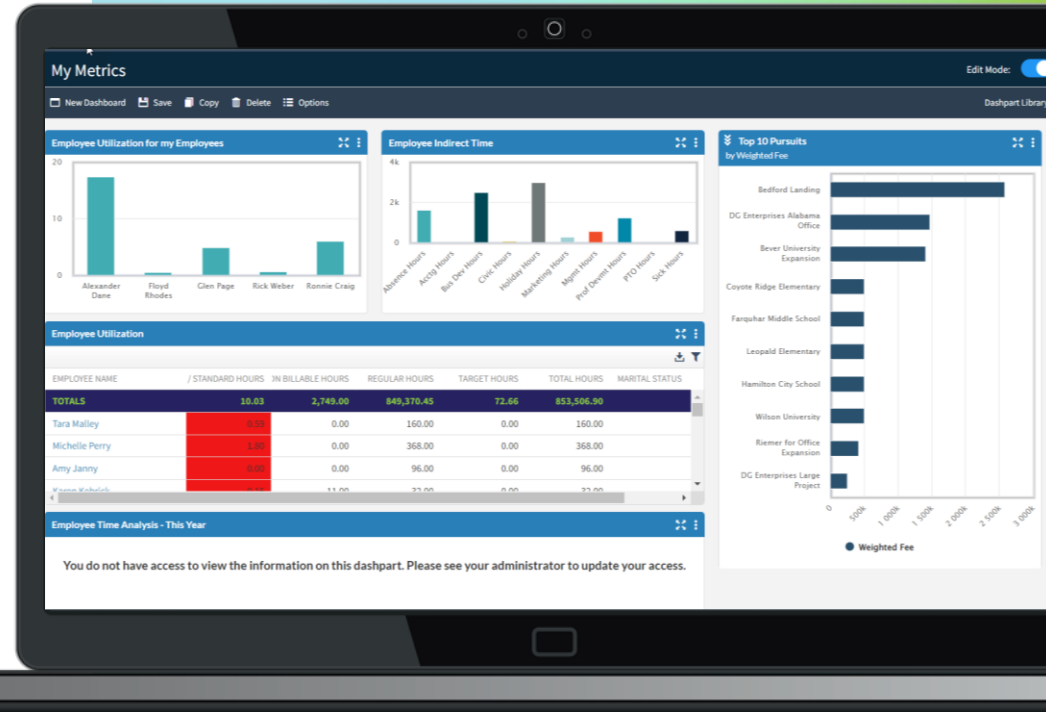
- » Firm base now available to build dashparts
- » Continuing to extend flexibility of dashboards
- » More details at their fingertips
- » Great option to share with BD leaders who may not have been able to build out what they need on dashboards previously

The image shows a laptop screen displaying a software interface. The interface has a blue header with the text 'LTK_Test' and 'Test in USD'. Below the header is a table with columns: FIRM NAME, FIRM NUMBER, IS CLIENT, IS VENDOR, AVAILABLE IN COMPANIES, and PRIMARY CITY. The table contains a list of firms with checkboxes for 'IS CLIENT' and 'IS VENDOR', and a text field for 'AVAILABLE IN COMPANIES'. A 'TOTALS' row is highlighted in green. The table data is as follows:

FIRM NAME	FIRM NUMBER	IS CLIENT	IS VENDOR	AVAILABLE IN COMPANIES	PRIMARY CITY
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
Atlanta Falcons		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Atlanta
Atlantic Records		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America : Bartlett Enterprises Europe	San Diego
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
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
Firm - Demo4	123	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile
Firm Demo1	1234	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile
Gibson Guitars		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	San Diego
Granger	0398	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile
Les Paul Guitars		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America : Bartlett Enterprises Europe	San Diego
Ludwig Drums		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	San Diego
MCA Records		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Los Angeles
New Firm - Demo2	MM-002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile

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 top screenshot displays 'Grace's PM dashboard' with a table of project data and a pie chart. The table includes columns for PROJECT NAME, BILLING CLIENT, JTD BILLED, JTD RECEIVED, and JTD AR AMOUNT. The pie chart is titled 'AR by Billing Client' and shows a distribution of accounts receivable across various clients.

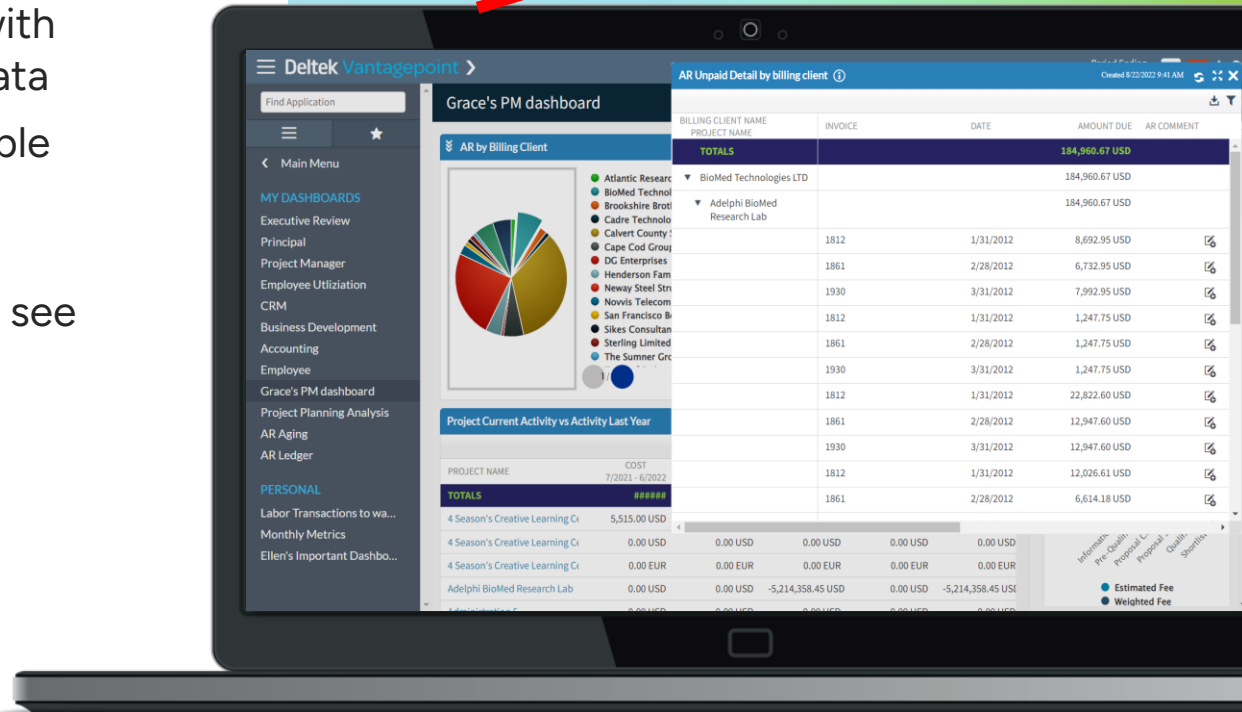
PROJECT NAME	BILLING CLIENT	JTD BILLED	JTD RECEIVED	JTD AR AMOUNT
TOTALS		#####	#####	#####
4 Season's Creative Learning Center	Calvert County Schools	3,700,299.18	2,951,740.98	848,558.20
Adephi BioMed Research Lab	BioMed Technologies LTD	1,797,717.55	1,612,756.88	184,960.67
All Children's Hospital	Atlantic Research Corporation	2,419,012.24	2,388,544.73	30,467.51
Armburst Learning	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
CAF Residence	The Summer Group	333,830.71	337,040.63	-3,209.92

The bottom screenshot displays 'Ellen's AR dashboard' with an 'AR Aging' table and a sidebar menu. The table includes columns for PROJECT INVOICE NUMBER, INVOICE, TOTAL AMOUNT, INVOICE DATE, and multiple columns for TOTAL AMOUNT by period.

PROJECT INVOICE NUMBER	INVOICE	TOTAL AMOUNT	INVOICE DATE	TOTAL AMOUNT 5/21/2022 - 6/21/2022	TOTAL AMOUNT 6/21/2022 - 7/20/2022	TOTAL AMOUNT 7/20/2022 - 8/19/2022	TOTAL AMOUNT 8/19/2022 - 9/18/2022
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
▼ 52531		212,366.00 USD		0.00 USD	0.00 USD	0.00 USD	0.00 USD
	52531	9,884.50 USD	8/24/2014	0.00 USD	0.00 USD	0.00 USD	0.00 USD
	52531	59,457.50 USD	8/24/2014	0.00 USD	0.00 USD	0.00 USD	0.00 USD
	52531	25,632.00 USD	8/24/2014	0.00 USD	0.00 USD	0.00 USD	0.00 USD

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

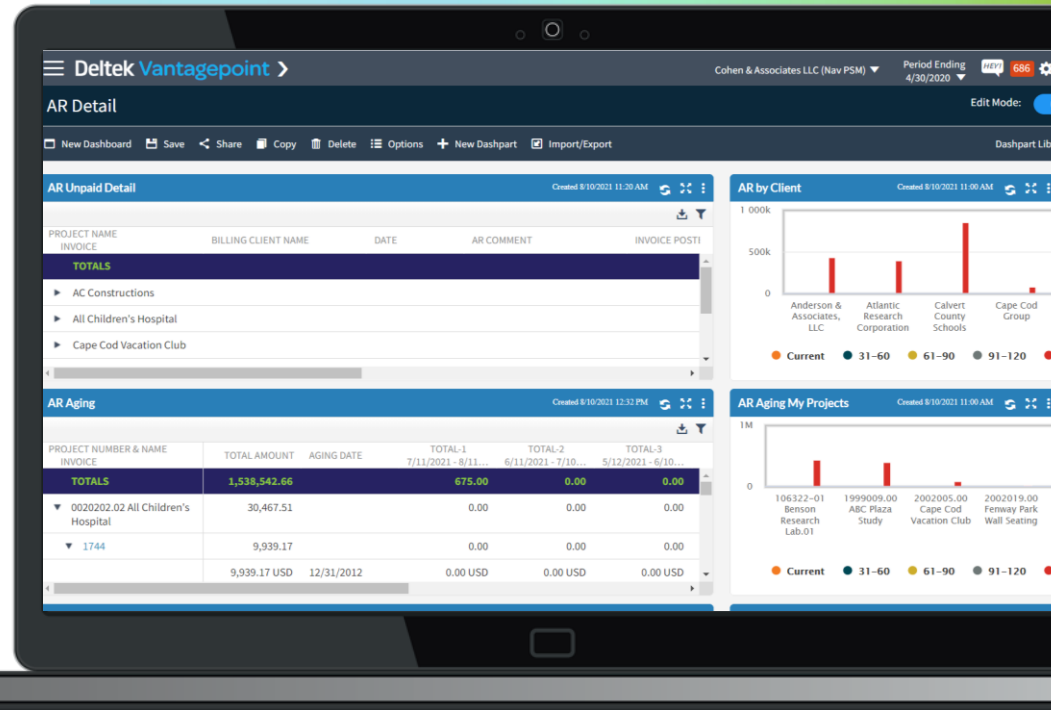
The screenshot displays the 'Project Manager JP' interface. At the top, there is a 'Project Base Dashpart JP' header. Below it is a table with the following columns: WBS LEVEL NUMBER, WBS LEVEL NAME, BUDGETED BILLING, BUDGETED AMOUNT COST, and WEIGHTED PERCENT COMPLETE BILL. The table contains a 'TOTALS' row and two project rows. A 'Cost Summary' modal is open, showing a table with columns: PROJECT, PROJECT NAME, PHASE, PHASE NAME, TASK, TASK NAME, and OVERALL % COMPLETE. The modal also includes a search bar and an 'OK' button.

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

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

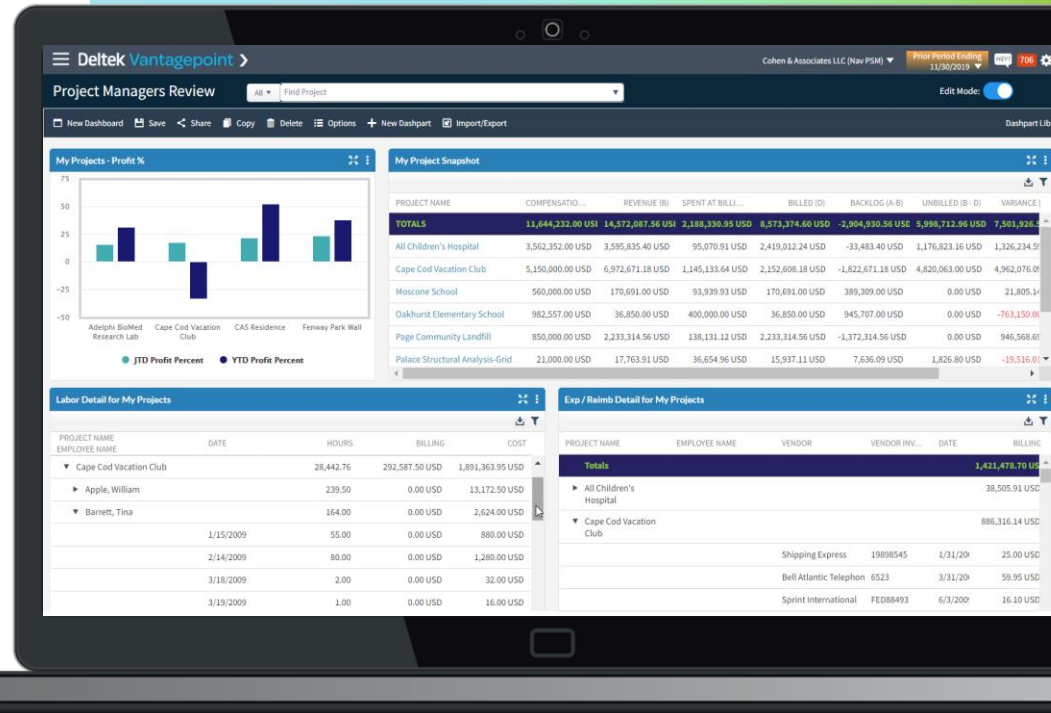
More Detail at Your Fingertips

- » 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



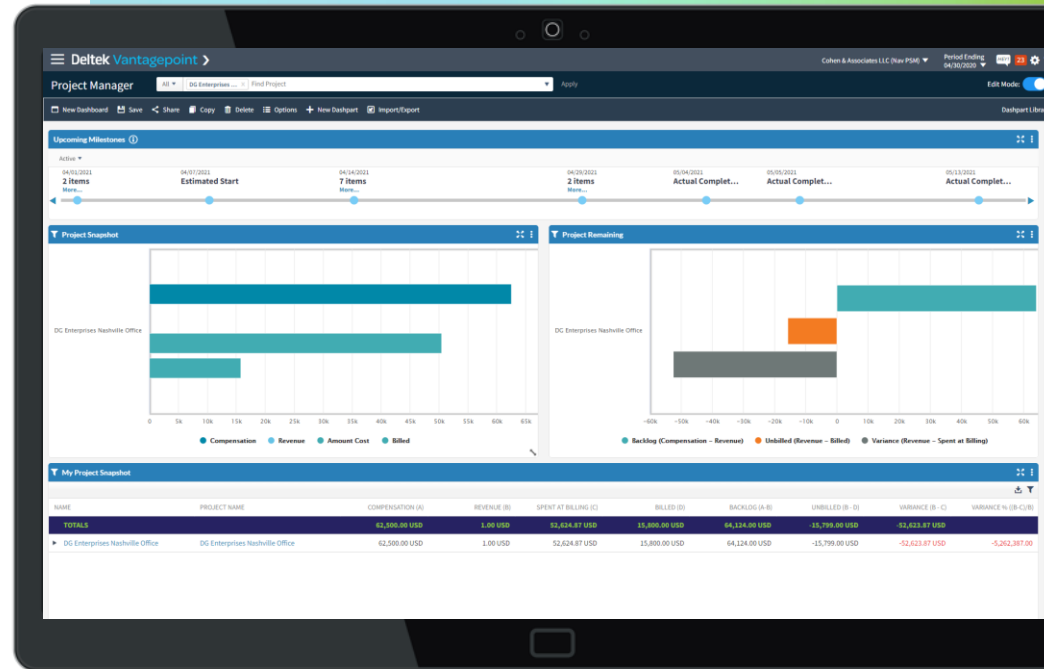
Improved Project Status Visibility

- » 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



Focus Attention with Dashboard Filters

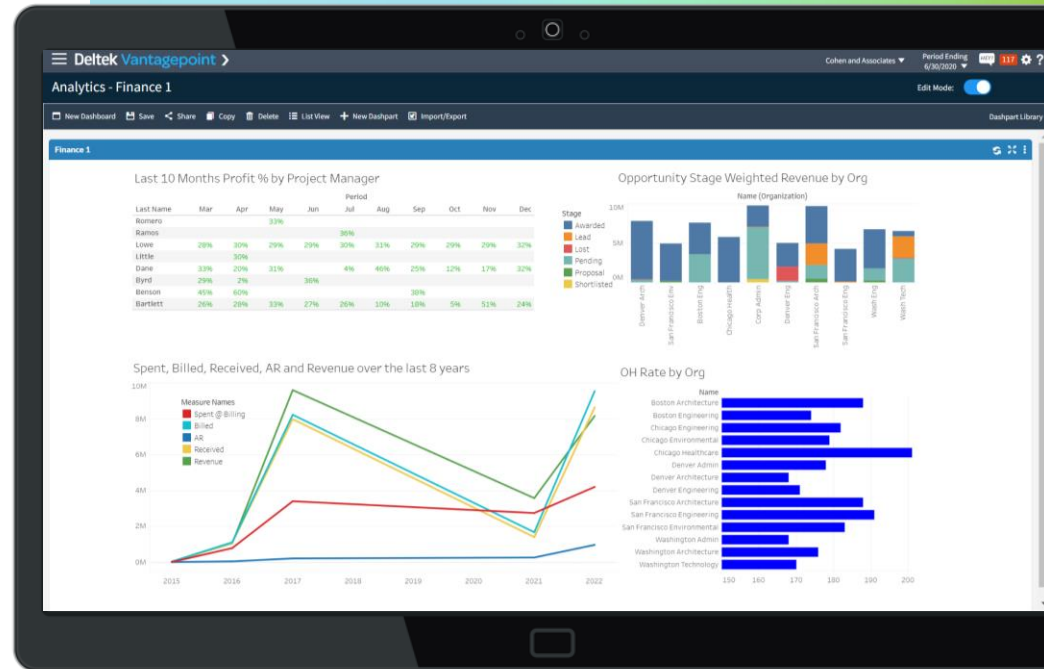
- » Dashboards typically have filter when created
- » Next level of filtering based on additional search criteria
- » Consistent search throughout system for improved usability
- » Focus on one project or subset to identify bright spots or challenges



Advanced Business Intelligence

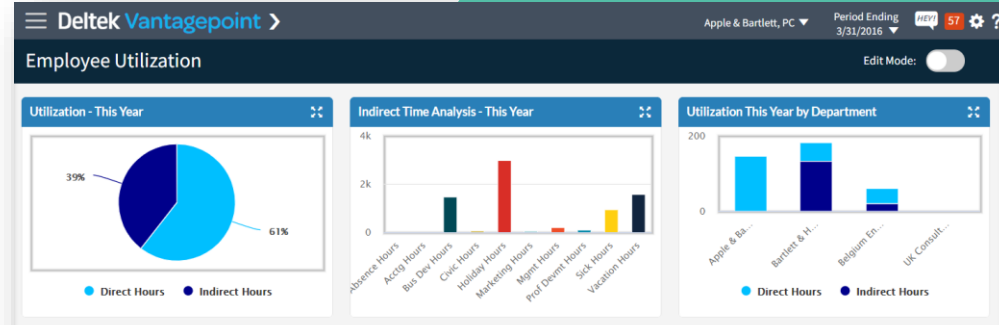
Vantagepoint 4.0

- » 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



Project Planning Analysis

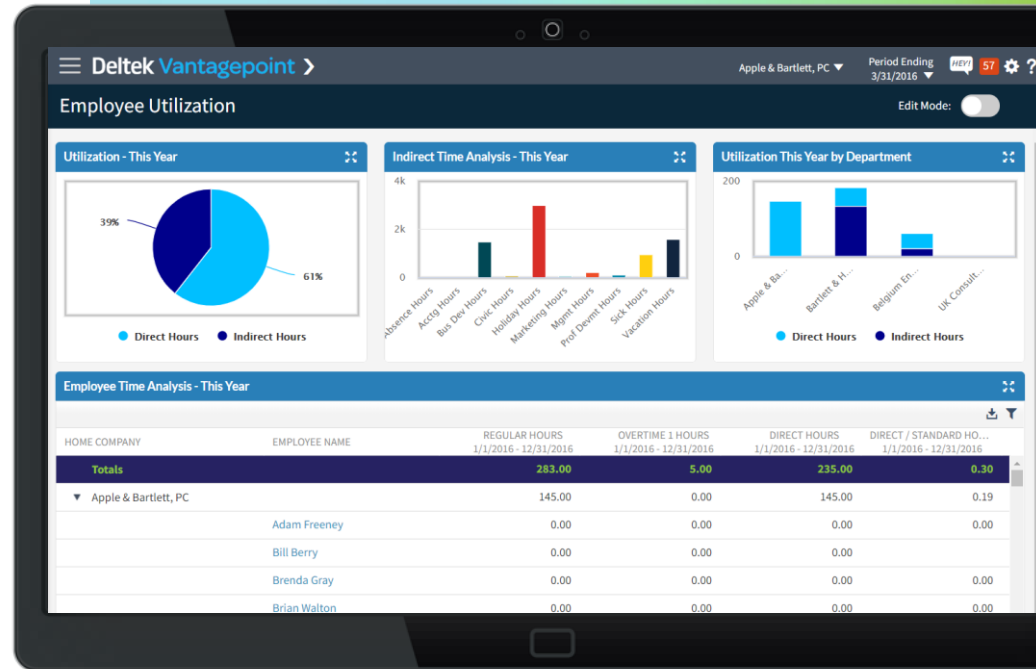
Apple & Bartlett, PC (Nav PSM) | Period Ending 5/31/2020

Planning Hours

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



Dashboard Enhancements

Vantagepoint 2.0

- » 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

Employee Capacity for Reassignment

- » Easily understand capacity and upcoming assignments for a resource
- » Determine if your potential reassignment can be managed within their current workload
- » Eliminate extra clicks going to another screen to view assignment details for a specific employee

The screenshot displays the 'Reassign' interface in Vantagepoint 7.1. At the top, it shows the resource 'Abby Hoppe' from 'DG Enterprises Boston Office / Schematic Design / Architecture'. The 'Period to Reassign' is set to 'Part of the assignment period' with dates from 04/08/2024 to 07/03/2025. The '% to Reassign' is 100.00, and 'Hours to Reassign' is 251, with a 'Maximum Hours' limit of 251. Below this, there is a 'Reassign To' field and a 'Find Resource' search bar. A list of resources is shown, including Aaron Weiss, who is highlighted. An 'Employee Card' for Aaron Weiss is overlaid, showing his profile, supervisor (Stacey Alana Anderson), and utilization target (90%). The card also features a table of assignment details.

Level	ETC Before	2024 04/01 - 04/30	2024 05/01 - 05/31	2024 06/01 - 06/30	2024 07/01 - 07/31
Totals	231	215%	93%	91%	
000002600 DG Enter	163	218			
000003300 HF - Key	17	40	43	36	
000003500 HF - Key	34	80	85	73	
000002800 HF - Key	17	40	43	36	

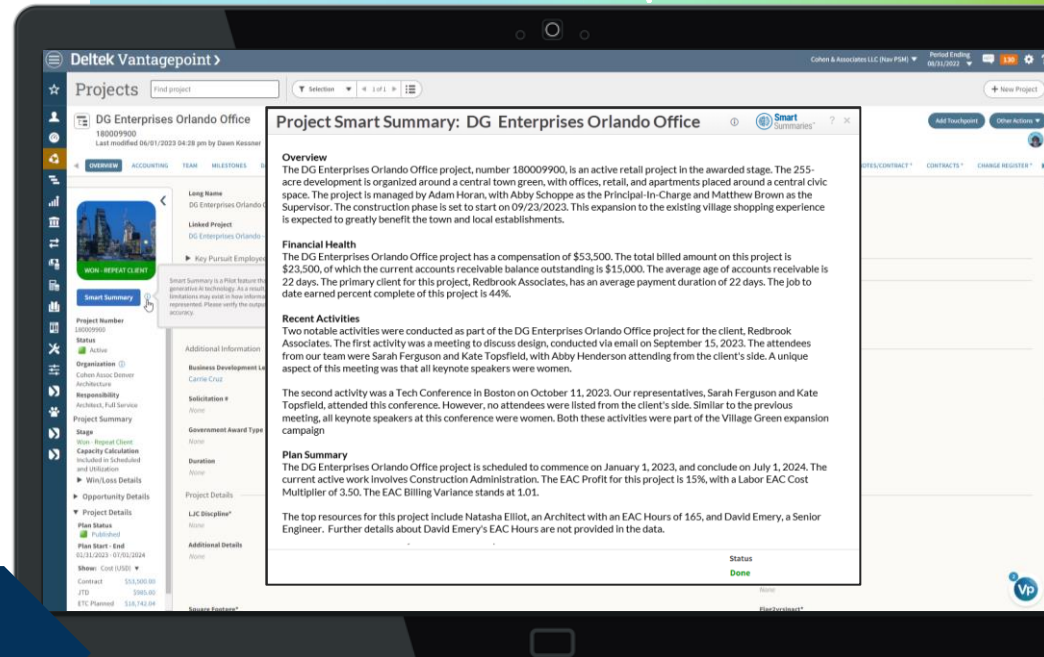
Make Better, More Informed Decisions if You Need to Reassign Resources

Project Smart Summaries™

Vantagepoint 7.0



- » 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

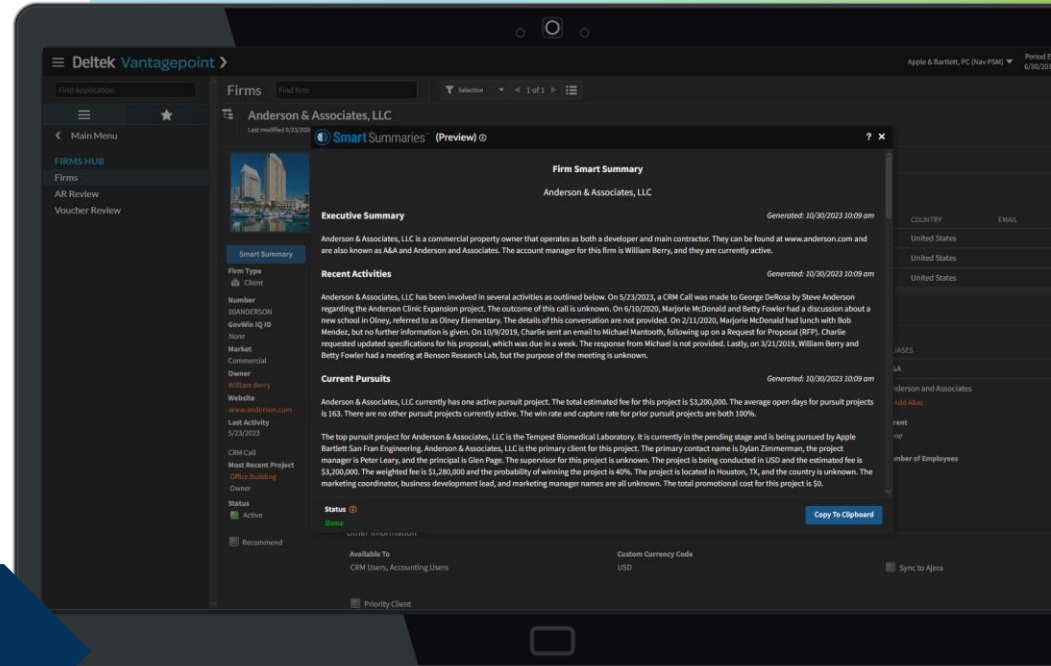


Transform Project Information to Project Intelligence with Generative AI

Client Smart Summaries™

Vantagepoint 6.5

- » Leverage Generative AI quickly turn client data into valuable intel
- » Get a quick snapshot of client history and status at your fingertips
- » Include key info like recent activities, active pursuits, past projects and more
- » Save hours of sifting through volumes of data with one click



Transform Client Information to Client 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

Vantagepoint 7.0



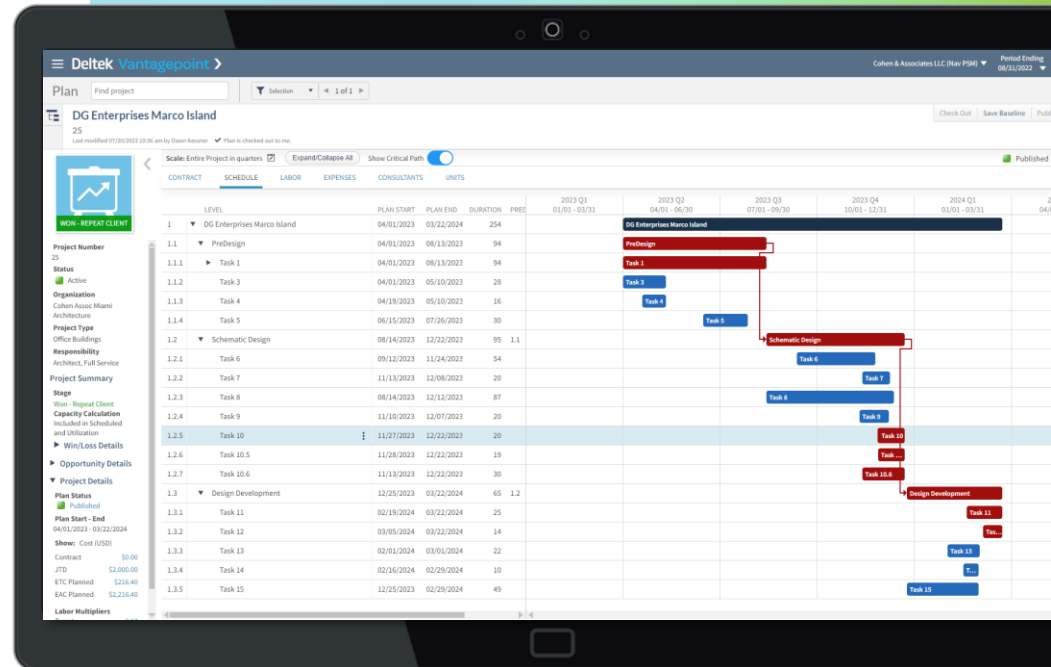
The screenshot displays the 'LABOR' tab in the Vantagepoint software. It shows a resource plan for 'PTO - Miami' with columns for 'PLAN START', 'PLAN END', 'ASSIGNMENT START', 'ASSIGNMENT END', 'ETC HOURS', and a grid of monthly hours for 2023. The plan is broken down into categories like Architecture, Engineering, and Interiors, with individual resource assignments and their planned hours.

LEVEL/RESOURCE	PLAN START	PLAN END	ASSIGNMENT START	ASSIGNMENT END	ETC HOURS	2023	2023	2023	2023	2023	2023	2023	2023	2023	2023	
PTO - Miami	01/01/2023	12/31/2023	03/01/2023	12/31/2023	300.00	Planned Hours	8.00	16.00	8.00	8.00	16.00	8.00	40.00	176.00	16.00	
Architecture	01/01/2023	12/31/2023	03/01/2023	12/31/2023	224.00	Planned Hours							56.00	8.00	40.00	112.00
Cindy Snow			01/02/2023	12/31/2023	80.00	Planned Hours									40.00	32.00
Dawn Kessner			01/03/2023	12/31/2023	64.00	Planned Hours									8.00	32.00
Karen Ketrick			01/01/2023	12/31/2023	48.00	Planned Hours	8.00								24.00	16.00
Steph Rusner			01/01/2023	12/31/2023	32.00	Planned Hours										32.00
Engineering	01/01/2023	12/31/2023	03/01/2023	12/31/2023	64.00	Planned Hours									8.00	56.00
Anty Miller			01/01/2023	12/31/2023	16.00	Planned Hours									8.00	8.00
Jane Hank			01/01/2023	12/31/2023	32.00	Planned Hours										32.00
Michelle Perry			01/01/2023	12/31/2023	16.00	Planned Hours										16.00
Interiors	01/01/2023	12/31/2023	03/01/2023	12/31/2023	72.00	Planned Hours									16.00	56.00
Anty Jenny			01/01/2023	12/31/2023	24.00	Planned Hours									8.00	16.00
Tara Malley			01/01/2023	12/31/2023	32.00	Planned Hours									16.00	8.00
Tiffany Hart			01/01/2023	12/31/2023	16.00	Planned Hours										16.00

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

The screenshot displays the Deltek Vantagepoint software interface for a project named 'Paris Rail Construction'. The interface includes a search bar, a project selection dropdown, and a scale for the project in months. The main table shows a detailed breakdown of expenses and consultants, organized by level and task, with columns for status, plan start/end, assignment start/end, planned cost, planned billing, ETC cost, and sub-row. The table also includes columns for planned cost and billing for the years 2023, broken down by quarter (7/1-7/31, 8/1-8/31, 9/1-9/30).

LEVEL/EXPENSE TYPE	STATUS	PLAN START	PLAN END	ASSIGNMENT START	ASSIGNMENT END	PLANNED COST	PLANNED BILLING	ETC COST	SUB-ROW	2023 7/1 - 7/31	2023 8/1 - 8/31	2023 9/1 - 9/30
Paris Rail Construction	Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	22,500.00	47,500.04	15,748.62	Planned Cost (USD)	2,516.70	2,844.39	3,573.82
									Planned Billing (USD)	4,880.93	5,433.81	7,891.54
Predesign	Green	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
									Planned Billing (USD)	1,125.97	1,321.22	4,136.58
Task 1	Green	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
									Planned Billing (USD)	1,125.97	1,321.22	4,136.58
2-Person Survey Crew	Green			6/2/2023	12/31/2023	500.00	500.00	424.11	Planned Cost (USD)	13.39	102.68	93.75
									Planned Billing (USD)	13.39	102.68	93.75
Fax Expense	Green			9/1/2023	12/31/2023	4,000.02	12,000.06	4,000.02	Planned Cost (USD)			976.75
									Planned Billing (USD)			2,930.25
Long Distance Telephone	Green			6/2/2023	12/31/2023	4,000.02	4,000.02	2,516.57	Planned Cost (USD)	556.30	609.27	556.30
									Planned Billing (USD)	556.30	609.27	556.30
Mileage	Green			6/2/2023	12/31/2023	3,999.96	3,999.96	2,516.53	Planned Cost (USD)	556.28	609.27	556.28
									Planned Billing (USD)	556.28	609.27	556.28
Schematic Design	Green	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
									Planned Billing (USD)	3,754.96	4,112.59	3,754.96
Design Development	Green	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

Plan Project Expenses & Labor with Unit Planning

Vantagepoint 6.0

- » 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 pursuit calendar periods

NOTE: Resource planning module required

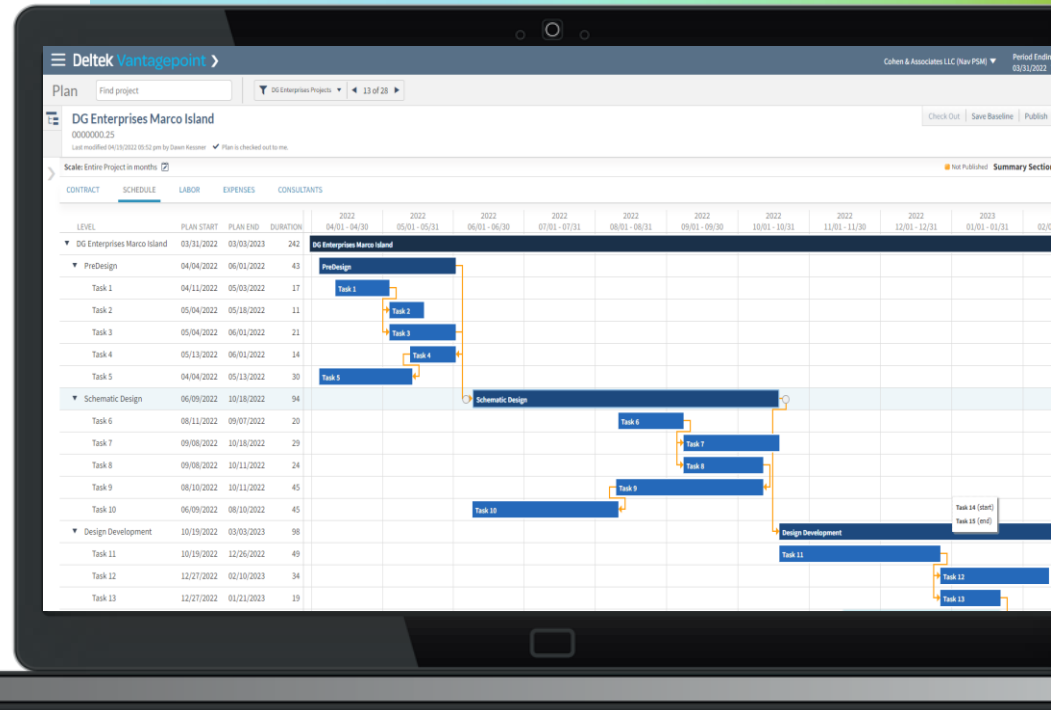
The screenshot displays the 'Plan' module interface for project 'HF - Turtle Island Resort'. The interface includes a search bar, navigation tabs (CONTRACT, SCHEDULE, LABOR, EXPENSES, CONSULTANTS, UNITS), and a detailed table of project units. A left sidebar provides project details such as 'Project Type', 'Responsibility', and 'Project Summary'. The table columns include 'LEVEL/UNIT NAME', 'ACCOUNT', 'ACCOUNT TYPE', 'ASSIGN... END', 'ASSIGN... START', 'BASELINE BILLING', 'BASELINE QUANTITY', and 'CALCULATED % COMPLETE BILLING'. The table shows a hierarchy of units from '2200067.00 HF - Turtle Island Resort' down to specific tasks like '2-Person Field Crew' and 'Concrete Sample Test'.

LEVEL/UNIT NAME	ACCOUNT	ACCOUNT TYPE	ASSIGN... END	ASSIGN... START	BASELINE BILLING	BASELINE QUANTITY	CALCULATED % COMPLETE BILLING	CC
2200067.00 HF - Turtle Island Resort			4/21/2023	11/15/2022	465.00	111.00	0.00	1
▼ 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

Vantagepoint 5.5

- » 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

The screenshot displays the Vantagepoint 5.0 interface for an employee. The top section, 'My Upcoming Assignments', features a table with columns for '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', and '2022 6/1 - 6/30'. The 'Totals' row shows utilization percentages of 9%, 9%, 57%, 9%, 6%, and 0% respectively. Below this is a 'Pipeline' section with a bar chart showing revenue by project type: Aviation, Commercial, Educational, Educational Facilities, Environmental, Medical, Office Buildings, and Transportation. The 'Project Managers Review' table lists various projects with columns for 'PROJECT NAME', 'COMMITTED', 'REVENUE', 'SPENT AT BUDG.', 'BILLED TO DATE', 'WORK IN PROGRESS', and 'UNBILLED TO DATE'. The 'My Projects - Profit %' chart shows profit percentages for projects like Adelphi Research Lab, Cape Cod Vacation Club, and others. The 'Labor Detail for My Projects' table shows employee hours, billing, and cost for specific projects.

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	

PROJECT NAME	COMMITTED	REVENUE	SPENT AT BUDG.	BILLED TO DATE	WORK IN PROGRESS	UNBILLED TO DATE
TOTALS	13,444,222.00 USD	14,372,087.00 USD	2,188,239.99 USD	6,377,374.40 USD	2,264,430.54 USD	4,998,771.96 USD
All Children's Hospital	3,562,352.00 USD	3,595,835.40 USD	95,076.91 USD	2,419,932.24 USD	-31,483.40 USD	1,676,823.36 USD
Cape Cod Vacation Club	5,150,000.00 USD	6,972,671.18 USD	1,145,133.64 USD	2,152,898.18 USD	-1,622,671.18 USD	4,820,063.00 USD
Waxscone School	560,000.00 USD	170,691.00 USD	93,939.89 USD	170,691.00 USD	381,309.00 USD	0.00 USD
Dalhousie Elementary School	982,557.00 USD	36,850.00 USD	400,000.00 USD	36,850.00 USD	945,707.00 USD	-763,153.00 USD
Page Community Landfill	350,000.00 USD	2,233,314.56 USD	138,131.12 USD	2,233,314.56 USD	-1,372,314.56 USD	946,588.00 USD
Palace Structural Analysis Grid	21,000.00 USD	17,763.91 USD	36,654.96 USD	15,937.11 USD	7,638.80 USD	-19,538.00 USD

PROJECT NAME	EMPLOYEE NAME	HOURS	BILLING	COST
Cape Cod Vacation Club		26,442.76	292,587.50 USD	1,991,383.95 USD
Adelphi, William		239.50	0.00 USD	13,172.50 USD
Barnett, Tina		184.00	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
	3/18/2009	2.00	0.00 USD	32.00 USD

Improve Team Management and Project Analysis

Vantagepoint 5.0

- » 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

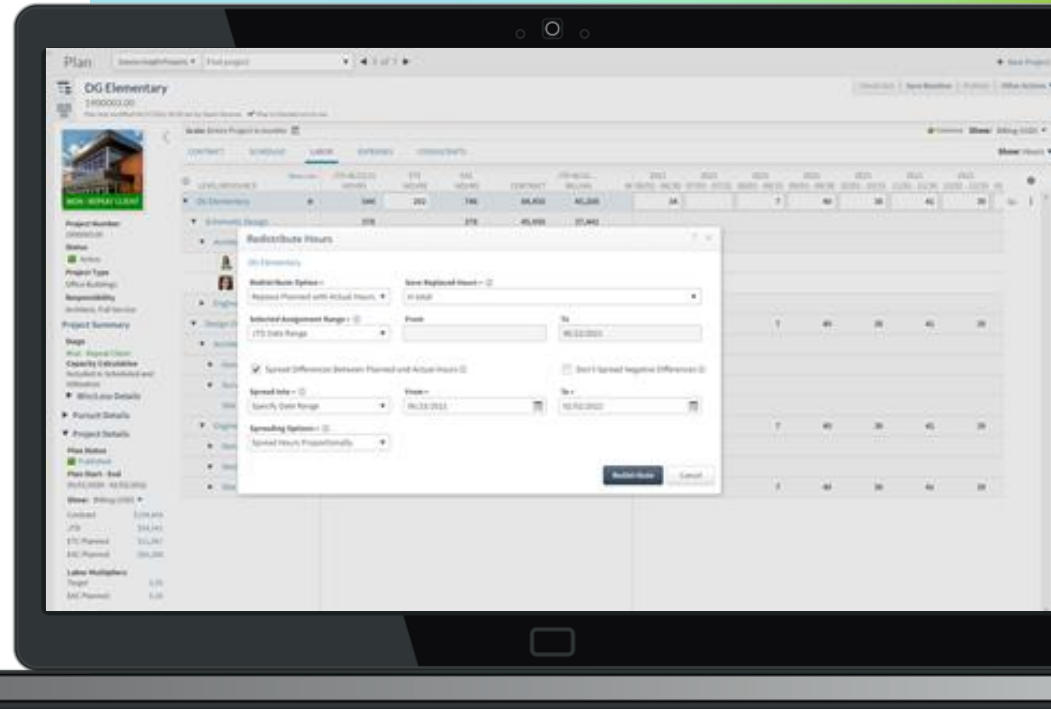
The screenshot displays the Vantagepoint 5.0 interface. At the top, the 'Plan' view is active for the 'Holbrook City Plan' (1825934.01). A table shows project data with columns for 'LEVEL/RESOURCE', 'PLANNED HOURS', 'PLANNED COST', 'PLAN STA', 'SUBROW', and monthly data from 4/1/20 to 8/1/20. A 'LEAD' button is visible below the project details.

The 'Resource View' is overlaid, showing a list of resources with columns for 'RESOURCE/LEVEL', 'ASSIGNMENT START', and 'ASSIGNMENT END'. Resources include Amy Miller, Cindy Snow, Dawn Kessner, Tara Malley, and various roles like Architect, Designer, and Project Manager.

A 'Filter Project' dialog box is open, allowing users to filter resources by 'Project Status', 'Charge Type', 'Organization Name', 'Project Manager', 'Stage Step', and 'Probability'. The 'Apply' and 'Cancel' buttons are visible at the bottom of the dialog.

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 Deltek Vantagepoint interface for a 'Revenue Forecast' report. The report is for 'DG Elementary' (ID: 1900003.00) and was last modified on 09/01/2020 at 10:11 am by Dawn Kessner. The report shows a table with columns for Level, Stage, Forecast Start, Forecast End, Compensation, and forecasted revenue by quarter for the years 2020 and 2021.

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	2021 01/01 - 01/31
▼ 1900003.00 DG Element	Won - R	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 Ta		09/14/2020	05/12/2021	15,000		925	1,564	1,494	1,636	
004 Engineering Ta		09/18/2020	02/23/2021	22,500		640	1,565	1,494	1,636	
▼ 004 Design Developm		07/06/2021	03/02/2022	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

The screenshot displays the 'Project Review' interface for 'DG Enterprises Sydney Office'. It features a summary table and a detailed labor drill-down.

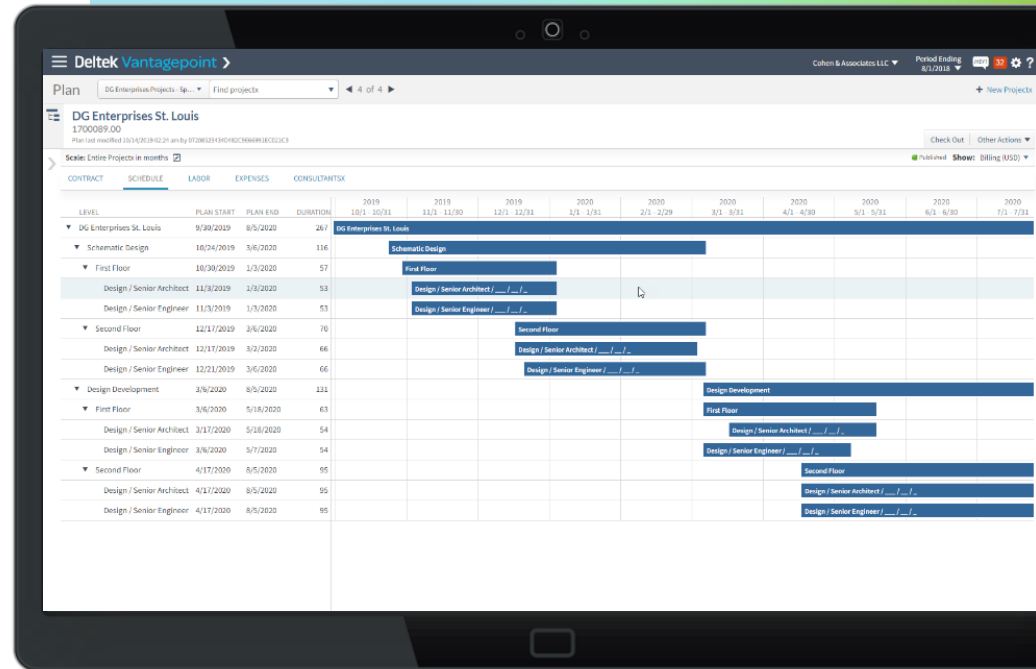
	CONTRACT/FEE	PLANNED BILLING	BUDGETED BILLING	PLANNED VARIANCE	BUDGETED VARIANCE	JTD BILLING	ETC PLANNED BILLING	ETC BUDGETED BILLING	EAC PLANNED BILLING
Directs									
Total Labor	30,000.00	30,000.00	30,000.00			3,880.40	26,000.00	26,000.00	29,880.40
Direct Labor Hours		300.00	300.00			60.00	240.00	240.00	300.00
Average Rate/Hour		100.00	100.00						99.60
Labor at Burden									
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
	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

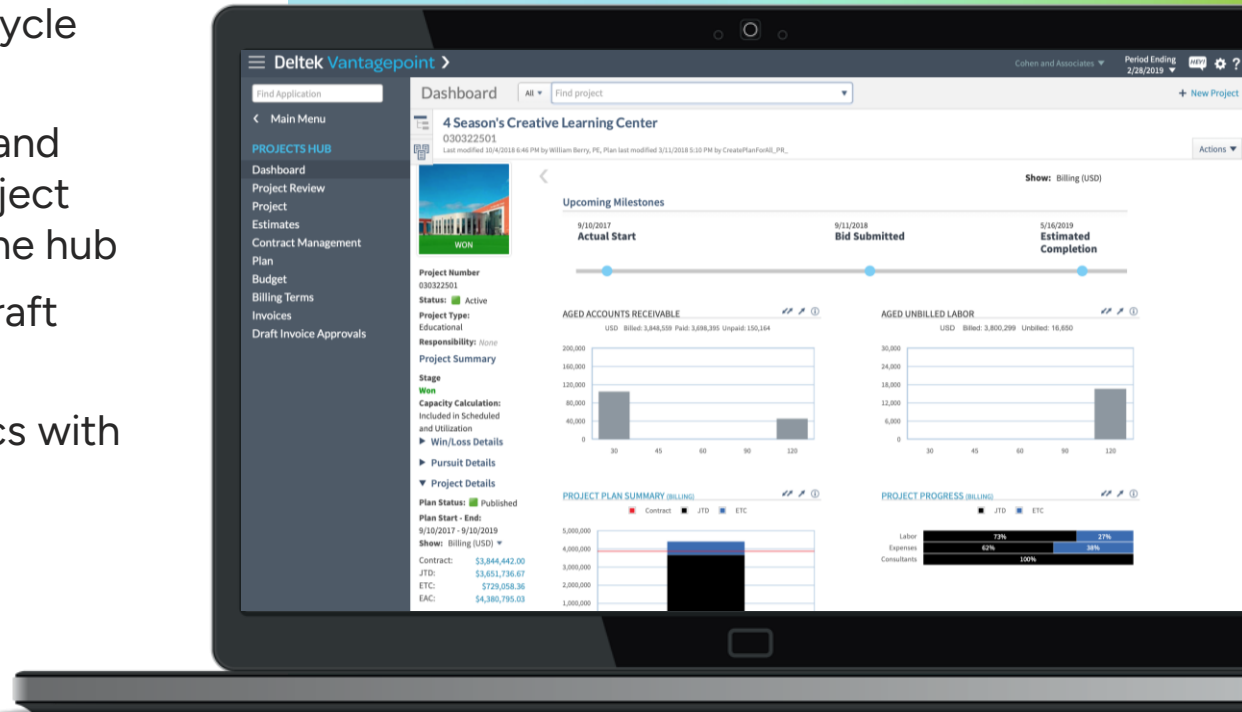
- » Easier to view gaps and overlap in project schedule
- » Quickly shift and update schedule as deadlines and projects change
- » Improve project schedule and resource assignment accuracy
- » Export Gantt Chart
- » Plan labor to the labor code level



One Project Command Center

Vantagepoint 2.0

- » 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

The screenshot displays the Deltek Vantagepoint web application. The main header shows 'Deltek Vantagepoint' and a search bar for 'Find Application'. The left sidebar contains a 'Main Menu' and a 'PROJECTS HUB' section with various navigation options like 'Dashboard', 'Project Review', 'Project', 'Estimates', 'Contract Management', 'Revenue Forecast', 'Plan', 'Budget', 'Billing Terms', 'Invoices', and 'Draft Invoice Approvals'. The main content area shows the details for a project named 'Natick Mall Renovation' (ID: 2018300.00) under '3DD Design Development'. A modal dialog box titled 'Assign New Project Number' is open, displaying the following text:

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 *

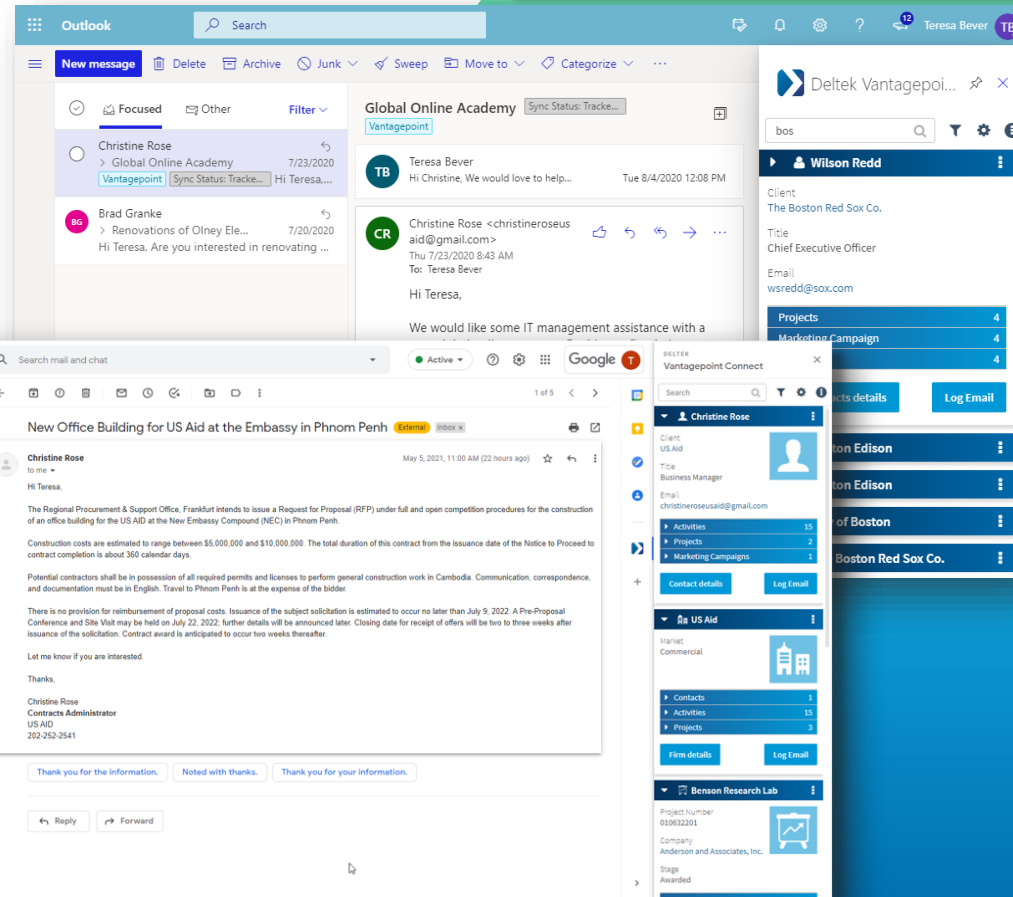
Buttons: Assign New Number, Keep Existing Number, Cancel

Project details visible in the background include:

- Phase Number: 3DD
- Status: Active
- Project Type: None
- Responsibility: None
- Project Summary
- Stage: Awarded - Repeat Client
- Capacity Calculation: Included in Scheduled and

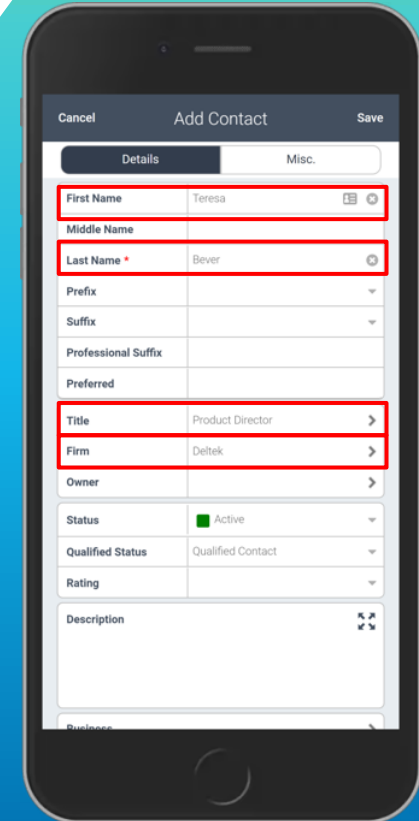
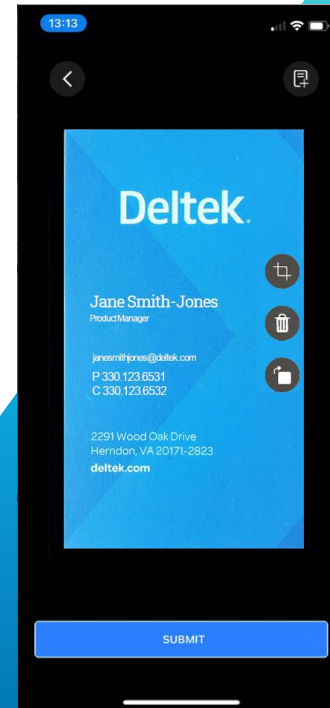
Vantagepoint Connect

- » 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*



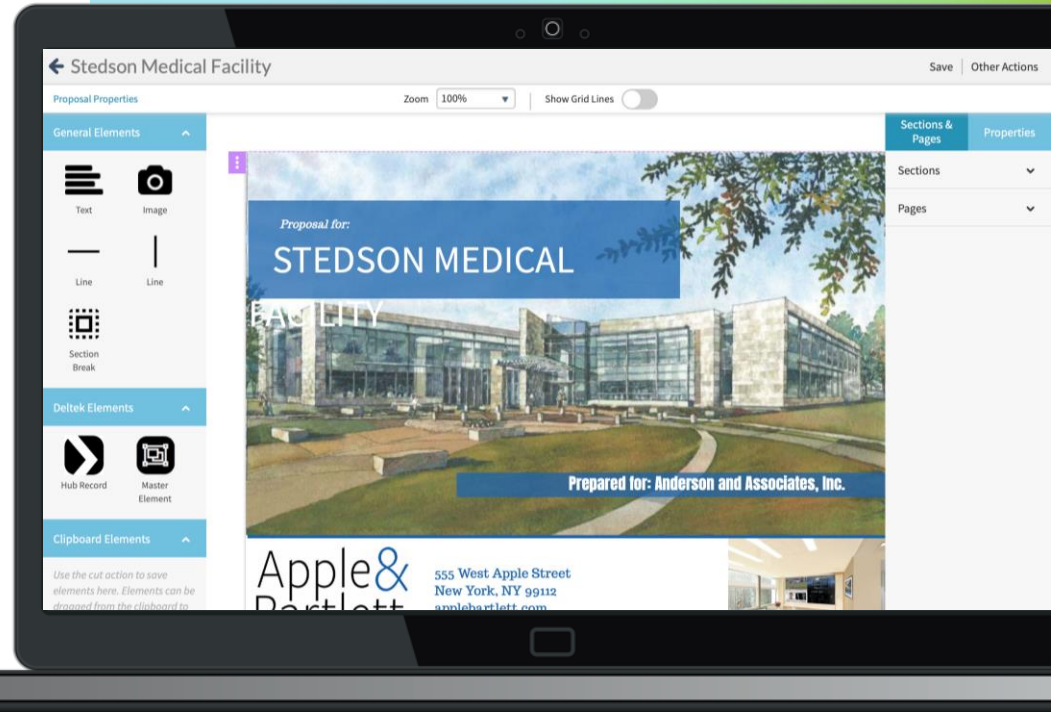
Capture Contact Info Faster

- » 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



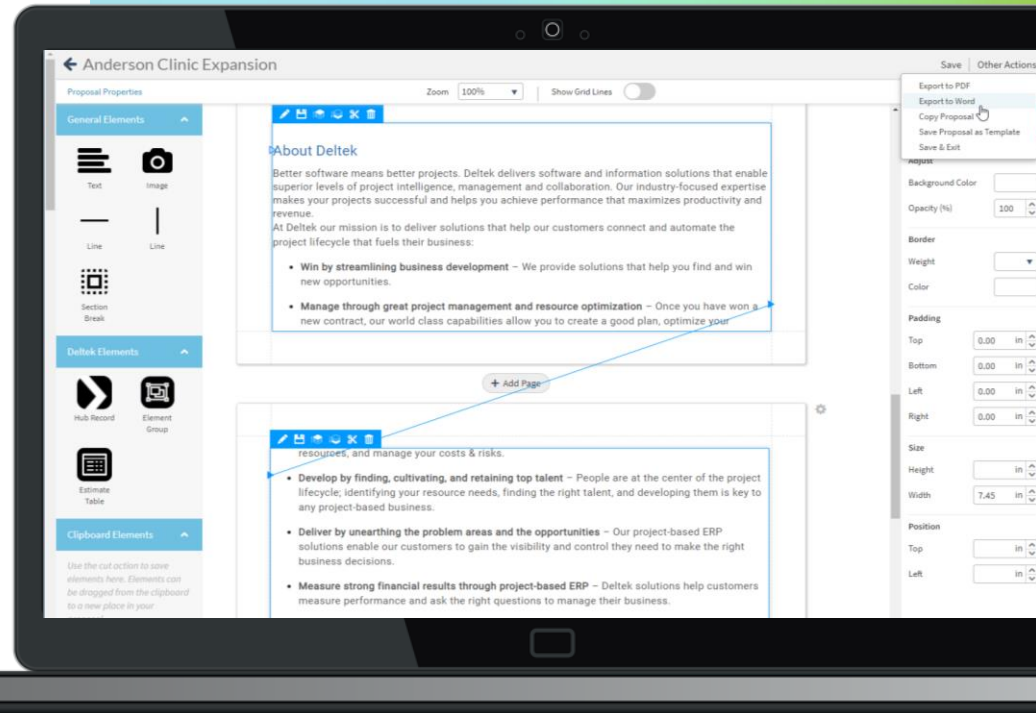
New Proposal Builder

- » 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

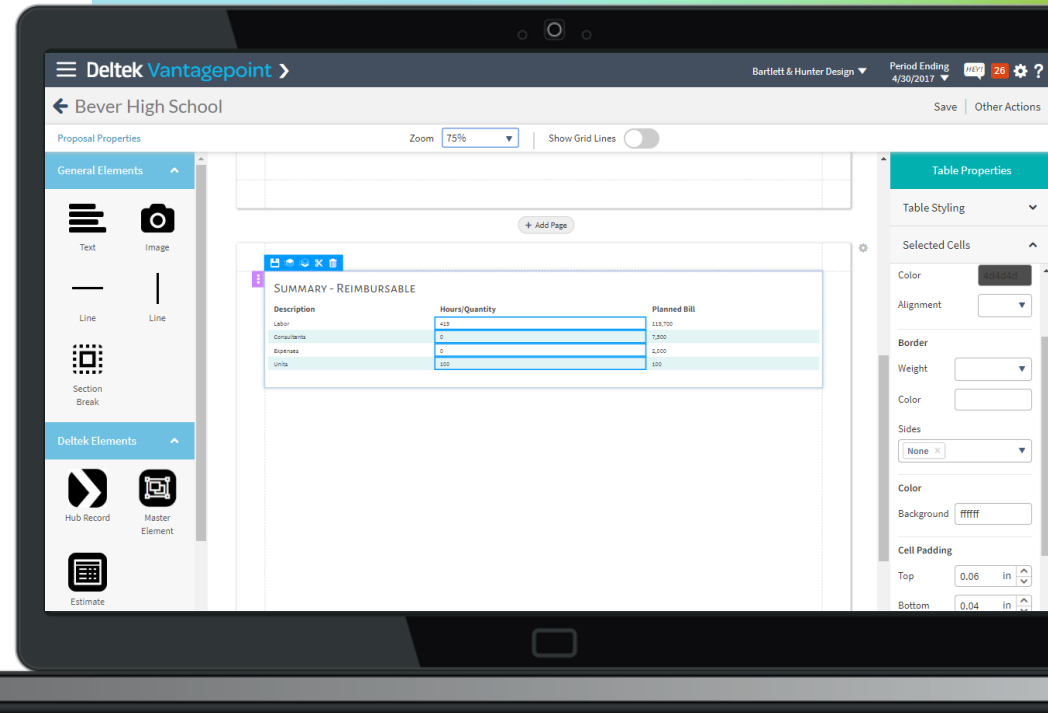
- » Leverage the power of the WYSIWYG Editor
- » Link Text Elements
- » Export Proposals to Word
- » Improve flexibility for content creation and collaboration with other team members and companies



CRM & Proposal Enhancements

Vantagepoint 3.5

- » 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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Project Accounting and Financial Management

Forecast AR Collections

- » New AR Collections dashpart now available, forecasting invoice payments by week or period
- » Predict when payments will be received to better plan for the future
- » Identify potential challenges earlier to quickly adjust to minimize the impact on the bottom line

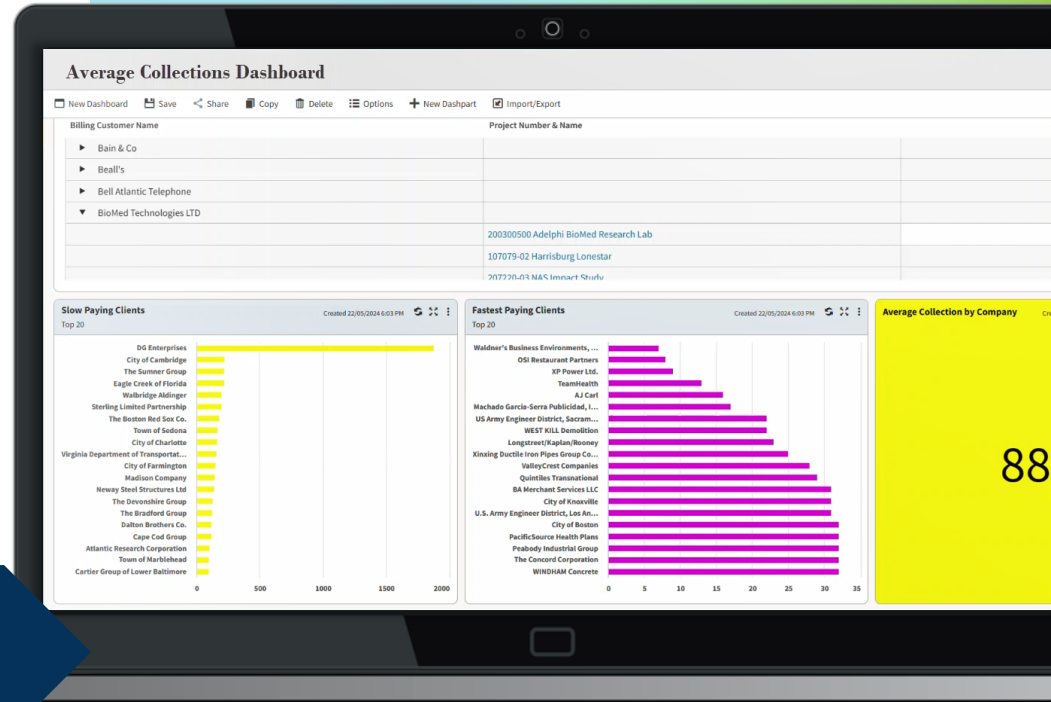
The screenshot displays the 'Collections Forecast' dashboard. It features a table with the following columns: Invoice Billing Client Name, Project Number & Name, Invoice, Forecast Days, Invoice Date, Total Amount, Forecast Current Month, Forecast Month 1 (9/1/2024 - 9/30/2024), Forecast Month 2 (10/1/2024 - 10/31/2024), Forecast Month 3 (11/1/2024 - 11/30/2024), Forecast Month 4 (12/1/2024 - 12/31/2024), Forecast Month 5 (1/1/2025 - 1/31/2025), Forecast Month 6 (2/1/2025 - 2/28/2025), and Forecast Month 7 (3/1/2025 - 3/31/2025). The table is filtered to show 'Active' invoices in 'Monthly Projection' mode, with the currency set to 'USD - US Dollar'.

Invoice Billing Client Name Project Number & Name Invoice	Forecast Days	Invoice Date	Total Amount	Forecast Current Month	Forecast Month 1 9/1/2024 - 9/30/2024	Forecast Month 2 10/1/2024 - 10/31/2024	Forecast Month 3 11/1/2024 - 11/30/2024	Forecast Month 4 12/1/2024 - 12/31/2024	Forecast Month 5 1/1/2025 - 1/31/2025	Forecast Month 6 2/1/2025 - 2/28/2025	Forecast Month 7 3/1/2025 - 3/31/2025
TOTALS			2,558,192.09 USD	2,264,196.17 USD	17,411.81 USD	64,350.00 USD	163,442.33 USD	48,791.78 USD	0.00 USD	0.00 USD	0.00 USD
▼ ALDI Inc.			86,900.00 USD	15,675.00 USD	0.00 USD	64,350.00 USD	6,875.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0038.00 ALDI Mobile Ord	39		86,900.00 USD	15,675.00 USD	0.00 USD	64,350.00 USD	6,875.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▼ Anderson Construction			587,538.96 USD	364,768.06 USD	17,411.81 USD	0.00 USD	156,567.33 USD	48,791.78 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0015.00 Sumpter Elemel	103		131,960.31 USD	83,168.53 USD	0.00 USD	0.00 USD	0.00 USD	48,791.78 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0019.00 Linfield U. Del Si	70		233,067.33 USD	76,500.00 USD	0.00 USD	0.00 USD	156,567.33 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0023.00 Vero Espresso B	62		61,018.13 USD	61,018.13 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0033.00 Basil and Board	0		21,722.50 USD	21,722.50 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0036.00 Kendall Yards Si	29		139,770.71 USD	122,358.90 USD	17,411.81 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▼ BMG Construction			211,079.36 USD	211,079.36 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0016.00 KeyBank Downt	122		80,079.36 USD	80,079.36 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0018.00 Cascade View B	57		131,000.00 USD	131,000.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▼ Dawson Developers			73,600.00 USD	73,600.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▶ 21.0028.00 Green Drop Gar	93		27,600.00 USD	27,600.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
▶ 22.0031.00 Data Tech Comr	0		46,000.00 USD	46,000.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD

Forecast invoice payments to better predict cash flow

Average Collection Period by Project

- » How long does it take on average to get paid by a client?
- » Average collection period by project
- » Can look at slowest paying or fastest paying
- » Can sort by PM, client, etc.
- » Better forecast cash flows with more insight into past trends



Better Manage Cash Flow and More Intel on Average Collection Periods by Project

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

Vantagepoint 7.0



The screenshot displays the 'Billing Terms' configuration page in Deltek Vantagepoint. The page is for a project named 'LexingtonTown Hall Expansion' with ID '0201718.00'. The 'FEES' tab is active, showing the 'Fee Method' as 'Percent Complete by Phase, as Percent of Fee' and the 'Fee Basis' as 'Lump sum'. A table titled 'Fees' shows a fee of 1,000,000.00 with a percent complete of 5.9200, resulting in a current fee of 43,200.00. Below this, the 'Fee Billing Phases' table lists various project phases with their respective billing details.

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

Improve Timesheet Efficiency with Timesheet Assist

Vantagepoint 7.2

- » Quickly update timesheets with project suggestions, including projects used on recent expense reports
- » Ensure timesheet accuracy with reminders of approved absences
- » Fewer steps to get timesheets updated and submitted

The screenshot displays the Deltek Vantagepoint software interface. The main dashboard shows a 'Project Profitability' chart with 'Average Hourly Rate' on the y-axis (0 to 3M) and time periods on the x-axis (12/2018, 1/2019, 2/2019, 3/2019, 4/2019). A legend indicates 'Revenue' (green) and 'Billed Amount' (blue). Below the chart is a 'Target Sectors' pie chart. A notification window titled 'Timesheet Updates For The Period Of 6/13/2024 - 6/19/2024' is open, displaying a greeting and a list of project suggestions. The suggestions table is as follows:

<input type="checkbox"/>	Project Number	Project Name	Phase Number	Phase Name	Task Number	Task Name
<input type="checkbox"/>	020020036	Adelphi Research Lab	4CD	Construction		
<input type="checkbox"/>	200200500	Cape Cod Vacation Cl	4CD	Construction		
<input type="checkbox"/>	200201900	Fenway Park Wall Sea				

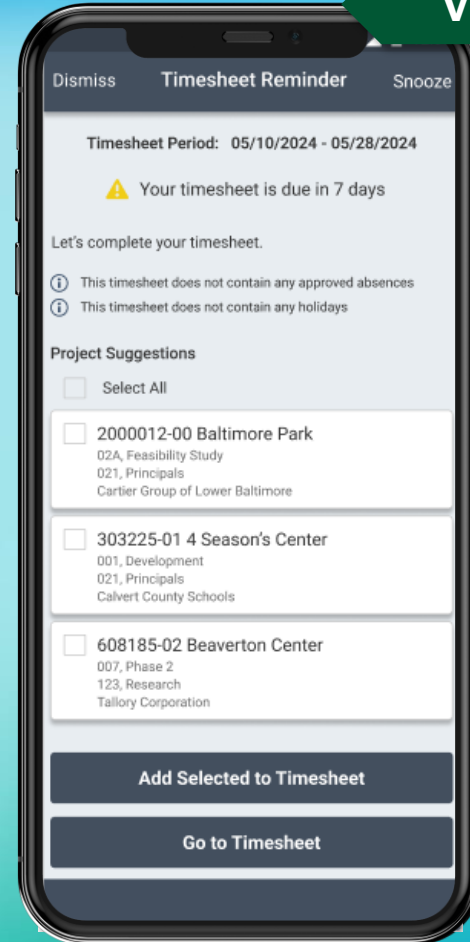
At the bottom of the notification window are buttons for 'Dismiss', 'Add to Timesheet', and ' Snooze'. The background interface shows a 'Billed Amount' and 'Revenue' table with values in USD.

Quickly update timesheets with project suggestions and reminders of absences

Timesheet Assist in Mobile T&E

- » Improve timesheet efficiency with Timesheet Assist, now available in Mobile T&E
- » Quickly update timesheets with project suggestions and reminders of absences.

Access Timesheet Assist through Mobile T&E





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

Deltek Vantagepoint

Timesheets | ALL IN PROGRESS | john

John Clarkson, PE | 9/1/2023 - 9/15/2023

Colten & Associates LLC (New PSM) | Today's date is not in the current timesheet period.

Period Status: Open | Period: 23 | Timesheet Status: In Progress

Project	Project Name	Client Name	Phase	Phase 2
VAC-CD	VAC-CD			
303225-01	4 Season's Creative Learning Center	Calvert County Schools	CH2	ch test
223456987	4 Season's Creative Learning Center		002	Phase 2

Timesheet Updates For The Period Of 9/1/2023 - 9/15/2023

Hi John,
Happy Monday! We noticed that your timesheet is incomplete. Here's some helpful resources to speed up your timesheet submission:

General

- Your timesheet is due today.
- Your 7 day PTD is approved. Your time will be automatically updated in your timesheet.
- Your holiday hours for National Chocolate Chip Day on 9/15 has been added to your timesheet.

Project Suggestions

The following projects are associated for you from either a prior timesheet, plan assignments or a recently submitted expense report. Please select one or more projects from the below and add to your timesheet.

PROJECT	PROJECT NAME	PHASE NAME	PHASE	TASK NAME
<input checked="" type="checkbox"/>	P00003.00	Medical Facilities	006	SF - Arch
<input checked="" type="checkbox"/>	P00004.00	Professional/Bus	005	SF - Arch
<input type="checkbox"/>	P00002.00	Child Duty	004	Busion - Arch
<input type="checkbox"/>	P00002.00	Child Medical School	003	SF - Arch
<input type="checkbox"/>	P00002.00	Marketing	002	SF - Arch
<input type="checkbox"/>	P00002.00	Medical Campaigns	001	Busion - Arch
<input type="checkbox"/>	P00011.00	RFP School Proposal	011	Busion - Arch

Calendar view for 9/1/2023 - 9/15/2023.

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 form includes sections for 'AP Invoices', 'Invoice Information', and 'Project Information'. The 'Invoice Information' section contains fields for Vendor (3e Technologies International, Inc.), Invoice (Accounts Payable), Invoice Date, Address (Oregon Address - 12345 Main Street Suite), Payment (Next), Payment Date, Purchase Order, Invoice Amount (100.00), Currency (USD), Route To, and Employee. The 'Project Information' section shows a table with columns for Description, Project Name, Phase Name, Task Name, and ACO. A preview window on the right shows the 'Preview AP Invoices' for 'Great Idea Services' with an invoice number of 01/05/2023. Below this, a 'Bill To' address is shown, followed by a table of invoice items:

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

The total invoice amount is 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

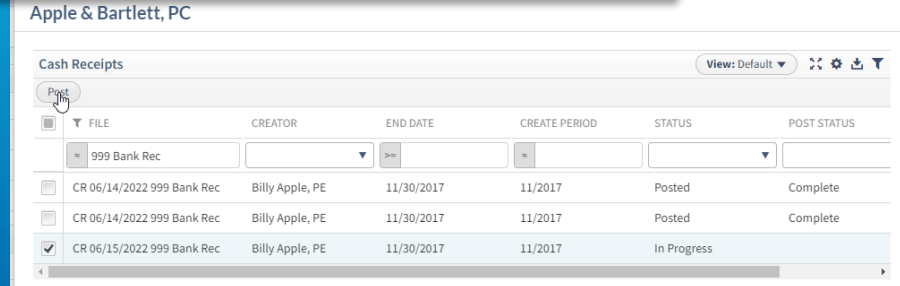
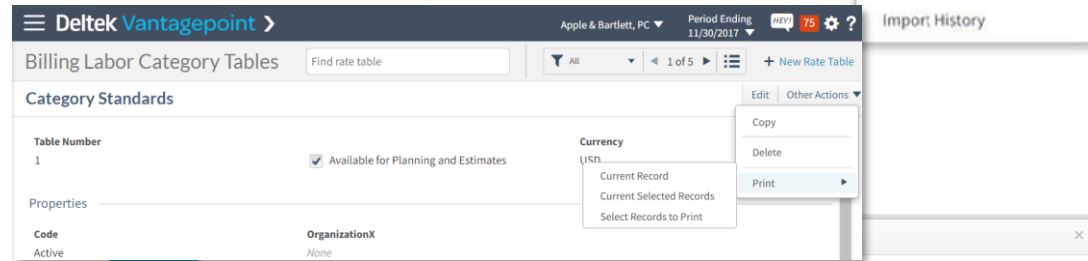
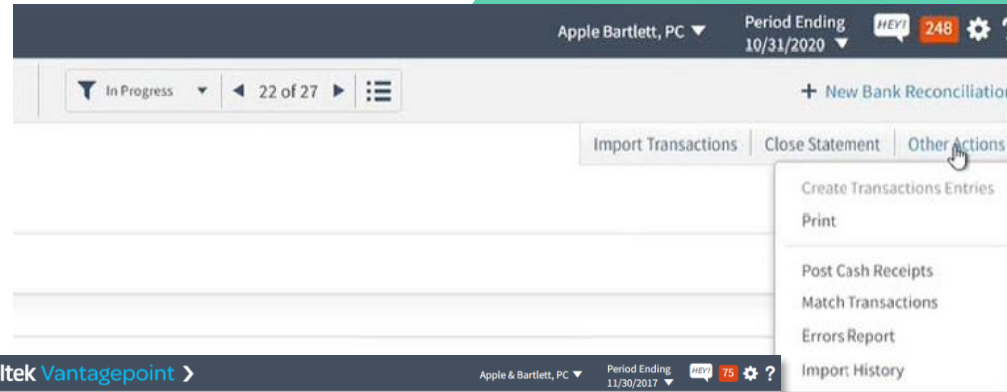
The screenshot displays the Deltek Vantagepoint software interface. On the left, the 'Interactive Billing' window shows the 'Invoice History' tab for project 'Everest Shopping Complex'. A table lists various invoices, with the row for invoice 0052555 dated 6/22/2021 and voided on 8/9/2023 highlighted with a red box. The 'VOID' column for this row contains the text 'VOID'. Above the table, a toolbar includes buttons for 'Print', 'Credit Memo', 'Void', and 'Cancel', with the 'Void' button also highlighted in red.

On the right, a detailed invoice document is displayed. The header identifies the client as 'APPLE AND BARTLETT STRUCTURAL ENGINEERS' and the project as 'Everest Shopping Complex'. The invoice number is 106322-01. The document includes a summary of 'Total Consultants' at \$100.00 and 'Professional Personnel' at \$2,800.00. It also shows 'Outstanding Invoices' with a total due of \$442,702.00. A large 'VOID' watermark is overlaid on the right side of the invoice document.

Accounting & Financial Management Enhancements

Vantagepoint 5.5

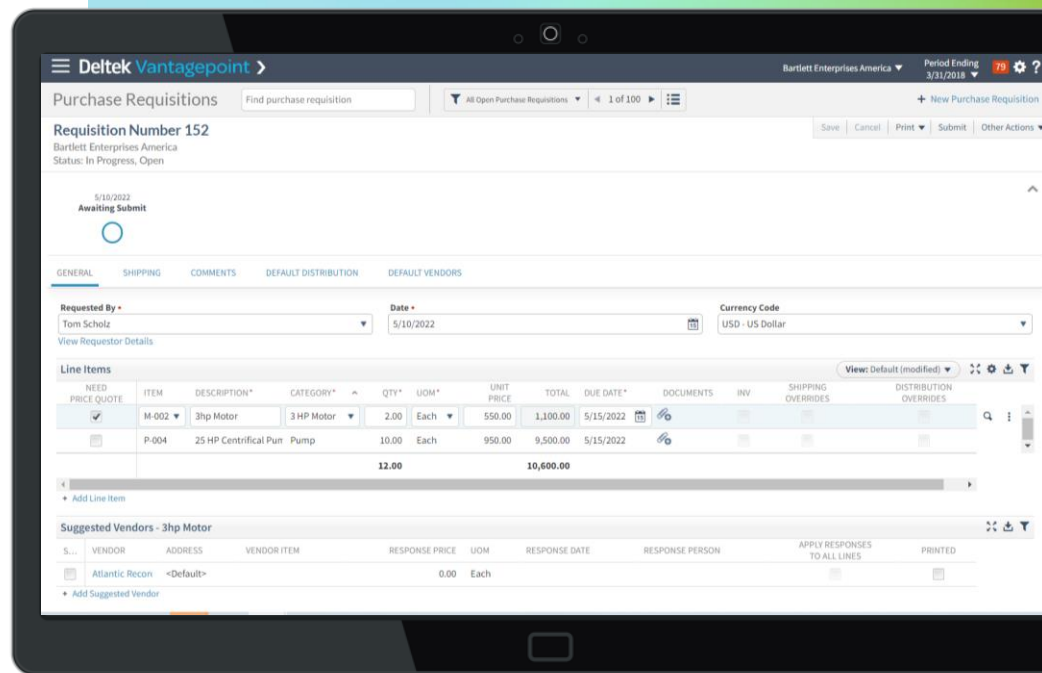
- » Streamline entry of deposits by posting cash receipt directly from bank
- » Expanded reporting to support key details within timesheets and billing
- » Print billing category rate table report
- » Overtime premium calculated using cost rates defined in the Billing Labor Override table



Streamline Purchasing

Vantagepoint 5.5

- » 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



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

Vantagepoint 5.0

- » 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

Bank Reconciliation

Baybank - Corporate - 7/30/2017

Fiscal Period - 11/2017

Apple & Bartlett, PC

SUMMARY RECEIPTS PAYMENTS MISCELLANEOUS IMPORT

Summary

TYPE	Number	Description	Date	Amount	BALANCE	CLEAR NUMBER
Receipts						
Payments						
Total						

Import Records

SEARCH	DATE	CLASS	PROJECT	PROJECT NUMBER	AMOUNT	BALANCE	CLEAR NUMBER
	7/20/2016	Cambridge	Washburn Street Renovations	200001.00	0.00	-1,000.00	CAMBRIDGE
	7/20/2016	City of Cambridge	Washburn Street Renovations	200001.00	0.00	-1,000.00	CAMBRIDGE
	8/15/2008	City of Cambridge	Kennedy School Addition	200001.00	145.66	145.66	CAMBRIDGE
	8/15/2008	City of Cambridge	Kennedy School Addition	200001.00	145.66	145.66	CAMBRIDGE
	8/15/2008	City of Cambridge	Kennedy School Addition	200001.00	329.12	329.12	CAMBRIDGE
	8/15/2008	City of Cambridge	Kennedy School Addition	200001.00	474.78	474.78	CAMBRIDGE
	11/30/2010	City of Cambridge	Washburn Library	200001.02	520.00	520.00	CAMBRIDGE

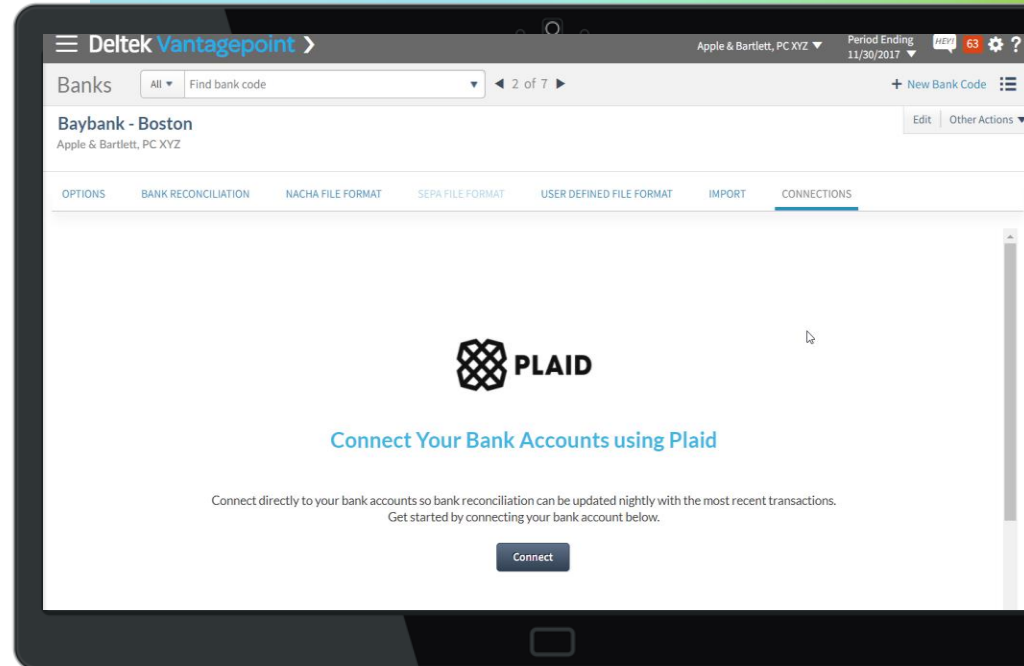
Payment SparkFun | 7/5/2011 | 0.00 | 89.40 |

Payment Librar 0731515 SE**ROD** | 7/27/2011 | 0.00 | 6.33 |

504.22 **4,769.06**

Automatic Bank Feed

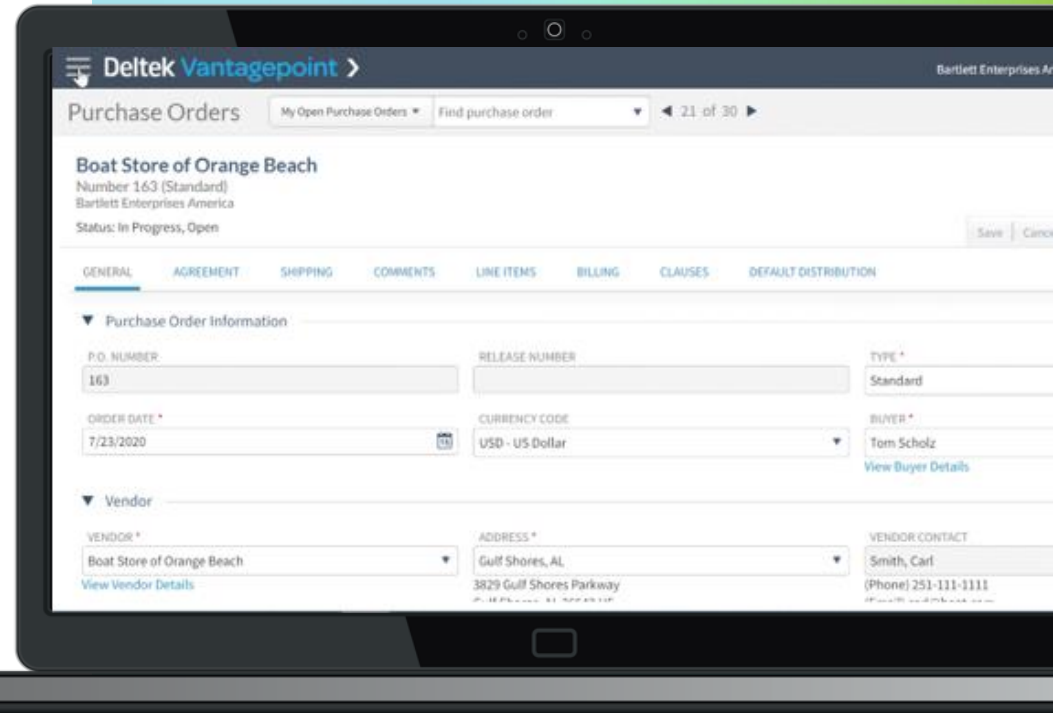
- » Automate manual bank imports
- » Simplify bank reconciliation with direct connection to bank accounts
- » Updated nightly with recent transactions
- » NOTE: Currently Cloud Only and supporting North American banks
- » Integration with PLAID



Manage Purchase Orders More Easily

Vantagepoint 4.5

- » 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

Vantagepoint 4.0

- » 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

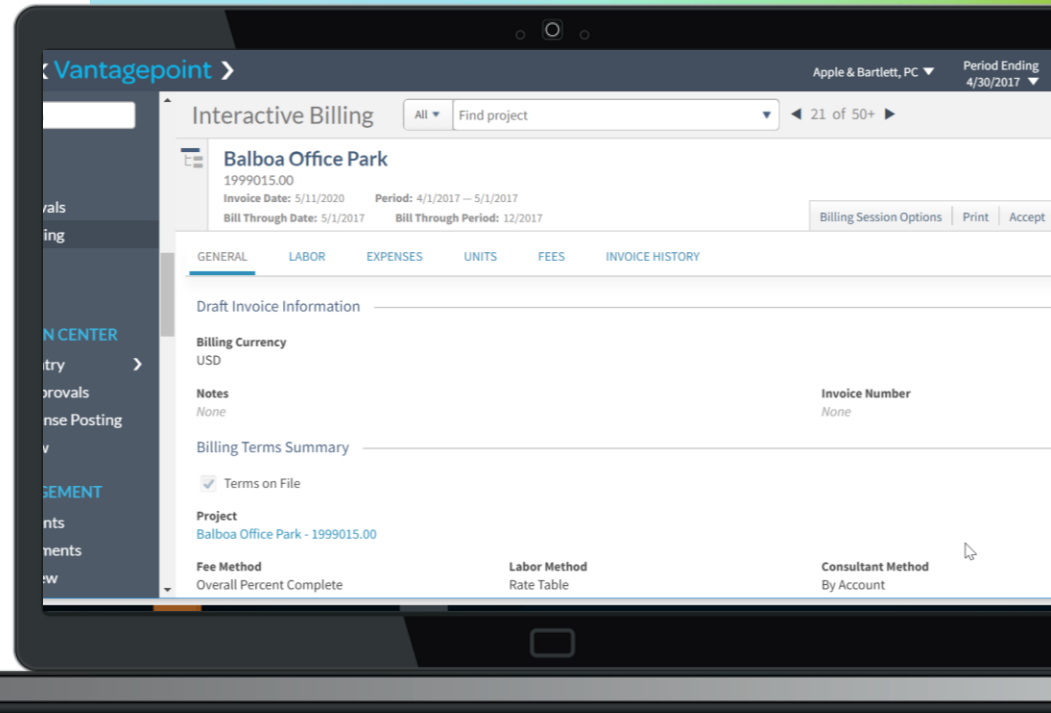
The screenshot displays the Deltek Vantagepoint software interface. The top navigation bar shows the user is logged in as 'Apple & Bartlett, PC (Nav PSM)' with a 'Prior Period Ending 12/31/2020' dropdown. The main header is 'Draft Invoice Approvals' with a search bar and a 'Find project' dropdown. The invoice is for 'Cape Cod Vacation Club' with an invoice date of 3/31/2021 and a bill through date of 12/2021. The interface is divided into several tabs: DRAFT PREVIEW, GENERAL, LABOR, EXPENSES, UNITS, FEES, and INVOICE HISTORY. The 'DRAFT PREVIEW' tab is active, showing a list of comments on the left and a detailed view of the invoice on the right. The invoice details include the company name 'APPLE AND BARTLETT STRUCTURAL ENGINEERS', address '1200 Central Avenue, Suite 409, Sandwich, MA 01520', and project information 'Cape Cod Vacation Club'. A table of billing phases and fees is visible, with a red circle highlighting the 'Percent Complete' column.

Billing Phase	Fee	Percent Complete	Earned	Previous Fee Billing	Current Fee Billing
Schematic Design	15,000.00	60.00	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 Total Fee 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

Draft Invoice Approvals | All | Find project | 28 of 50

Adelphi Research Lab
2003005.00
Invoice Date: 10/4/2019 | Period: 11/1/2018 – 11/30/2018

GENERAL | LABOR | EXPENSES | UNITS | FEES | INVOICE HISTORY | INVOICE PREVIEW

Labor

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"/>						Submitted	Bill	✓	11/30/2018	3DD		000	Architect	00987	Fitzgerald, Meg	16,890.00	0.0000
<input type="checkbox"/>						Submitted	Bill	✓	1/1/2020	LPD	PRO	000	Architect	00987	Fitzgerald, Meg	3.00	250.0000
<input type="checkbox"/>						Submitted	Bill	✓	1/2/2020	LPD	PRO	000	Architect	00987	Fitzgerald, Meg	4.00	250.0000
<input type="checkbox"/>						Submitted	Bill	✓	1/10/2020	LPD	PRO	000	Architect	00987	Fitzgerald, Meg	8.00	250.0000
<input type="checkbox"/>						Submitted	Bill	✓	1/14/2020	LPD	PRO	000	Architect	00987	Fitzgerald, Meg	8.00	250.0000
<input type="checkbox"/>						Submitted	Bill	✓	7/7/2020	2SD	DOC	000	Architect	00987	Fitzgerald, Meg	8.00	0.0000
<input type="checkbox"/>						New	Hold	✓	2/22/2012	5BD		190	Engineer	00019	Morgan, Dwayr	8.00	105.0000
<input type="checkbox"/>						New	Hold	✓	3/20/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.0000
<input type="checkbox"/>						New	Hold	✓	3/21/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.0000
<input type="checkbox"/>						New	Hold	✓	3/24/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.0000
<input type="checkbox"/>						New	Hold	✓	4/1/2012	LPD	SIT	030	Surveyor	00032	Replinger, Hani	8.00	87.5000
																17,898.00	

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

Payroll Payments ALL Find payment run 1 of 1

Run Number 184 - Select Payments
 Payment Date: 10/8/2019 - Payment Run Total: 135,298.71
 Cohen & Associates LLC (Nav PSM) - Created 10/8/2019 by John Clarkson, PE

Automatic Payment 10/8/2019

Employee Pay Details

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 Deltak Vantagepoint 2.0 web application interface. The main content area is titled "Draft Invoice Approvals" and shows details for a project named "Cape Cod Vacation Club" (ID: 2002005.00). The invoice date is 3/5/2019, and the period is 11/1/2018 to 11/30/2018. The interface includes a navigation menu on the left with options like "Main Menu", "PROJECTS HUB", "Dashboard", "Project Review", "Project", "Estimates", "Contract Management", "Plan", "Budget", "Billing Terms", "Invoices", and "Draft Invoice Approvals". The main content area has tabs for "GENERAL", "LABOR", "EXPENSES", "UNITS", "FEES", "INVOICE HISTORY", and "INVOICE PREVIEW". The "INVOICE PREVIEW" tab is active, showing a preview of the invoice document. The invoice header includes the company name "APPLE AND BARTLETT STRUCTURAL ENGINEERS" and their address: "1200 Central Avenue, Suite 409, Sandwich, MA 01520". The project details are: "Project: 2002005.00 Cape Cod Vacation Club", "March 5, 2019 Project No: 2002005.00", and "Invoice No: <Draft>". 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 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

Vantagepoint 2.0

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

Deltak Vantagepoint > Apple & Bartlett, PC (Nav PSM) Period Ending 11/30/2018

Find Application

Main Menu

TRANSACTION ENTRY

- All Transactions
- AP Disbursements
- AP Vouchers
- Cash Disbursements
- Cash Receipts
- Employee Expenses
- Employee Repayments
- Invoices
- Journal Entries
- Labor Adjustments
- Miscellaneous Expenses
- Prints and Reproductions
- Timesheets
- Units
- Units By Project

AP Vouchers

Apple & Bartlett, PC (Nav PSM)

AP Vouchers

VENDOR	INVOICE	AMOUNT	VOUCHER DATE	CREATE PE...	CREATOR	STATUS
Advanced Mechanical Technologies	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	5,678.00	4/20/2020	11/2018	ADMIN	Posted
Duplexx 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

Deltek.

User Experience and Overall Usability

Find Data Faster with Ask Dela Enhancements

Vantagepoint 7.2



- » Open hub records and any application in the navigation menu using *Ask Dela*, your AI business companion
- » Simplify navigation by using natural language to access Vantagepoint data, saving valuable time

The screenshot displays the Deltek Vantagepoint 7.2 interface. The main dashboard includes a 'Project Profitability' section with a bar chart showing 'Average Hourly Rate' (Revenue and Billed Amount) from 12/2018 to 6/2019. A 'Billed by Period' section shows a horizontal bar chart of billed amounts from 12/2018 to 6/2019. A 'Target Sectors' section features a pie chart and a legend for various sectors: Aviation, Commercial, Educational, Educational Facility, Environmental, Medical, Office Buildings, and Sports/Recreation. A 'Detailed Profitability' table is also visible, listing client names, average hourly rates, billed amounts, and revenues.

Client Name	Average Hourly Rate	Billed Amount	Revenue
TOTALS	146,595.64	4,700,328.06 USD	7,484,276.87 USD
Calvert County Schools	176.11	101,892.50 USD	101,892.50 USD
Peabody Industrial Group	93.00	186.00 USD	0.00 USD
Machado Garcia-Serra Publicidad, Inc.	61.38	2,326.01 USD	141,174.85 USD
BioMed Technologies LTD	153.82	78,934.27 USD	78,934.27 USD

The 'Ask Dela' chat window is open, showing a conversation where the user asks 'what is the AR on lexington project?' and 'what is the profit on the lexington project?'. The AI assistant responds with 'The Accounts Receivable (AR) on the Lexington project, specifically the Thornton Oil Lexington project, is \$5,526.75.' and 'The profit on the Thornton Oil Lexington project is \$5,526.75.' The user then types 'Open the lexington project'.

Access the right data faster with *Ask Dela*

General Usability

- » Prevent duplicate records with enhanced duplicate check
- » Export data directly to Excel with new Search and Download action for reports
- » Display project performance metrics across different organization levels from your dashboard
- » Streamline entry of billing fee from project compensation
- » And more!

Update Fees From Compensation

Category	Compensation Fee	Fee	Change	New Fee
<input checked="" type="checkbox"/> Labor	\$10,000.00	\$0.00	\$10,000.00	\$10,000.00
<input checked="" type="checkbox"/> Consultants	\$10,000.00	\$0.00	\$10,000.00	\$10,000.00
<input checked="" type="checkbox"/> Expenses	\$10,000.00	\$0.00	\$10,000.00	\$10,000.00

Update Cancel

PERSONAL INFORMATION

Are You Looking For ...

You may be creating a duplicate record. We found potential matches.

- Tam Adam (Madison County)
Madison Parks Superintendent
- Euna Adame, PE (Anderson & Associates)

Deltek Vantagepoint

Company and Office Dashboard

Company Profit Percent

Hit Rate by Department

Rev & Cost by Office

Project List by Office

Office Name	Stage	Project Number & Name	Company Name	Department Name	Client Name	Contact Name	Contact Email	Contact Phone
TOTALS								
Calgary	Won	00.0000.00 Integrated	Accuterra Environment	Environmental				
Chicago	Qualified	23.9023.00 Apple Store Michigan Avenue	Accuterra A/E	Architecture	Weston Group - HQ	Young, Jessica		(312) 563-4554
	Won	22.8020.00 Bank Of America Financial Center	Accuterra A/E	Architecture	Weston Group - HQ	Young, Jessica		(312) 563-4554
		PP 2320.00 BO - Apple Store Michigan Avenue	Accuterra A/E	Architecture	Weston Group - HQ	Young, Jessica		(312) 563-4554

Opt-In Features

- » Introduced in 7.2
 - » Purchase template editor in the browser
 - » Report administration in the browser
 - » 1099 initialization in the browser
- » Introduced in prior versions
 - » User Activity
 - » Form W-2 Processing
 - » Use OpenID Connect SSO provider for authentication
 - » * Create Request for Quote Only
 - » * Create Voucher From Purchase Order in the Browser
 - » * Explicit Save In List View
 - » * Row Level Validation for Transaction Center

* Will be enabled automatically in 2025.1 (2025 1Q)

Area	Title	Description	Enabled	Reversible	Help Topic	Release Automatically Enabled	Module Dependenc	Modified By User	Date
Transaction Center	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 interrupted by required field validations. These validations are now moved to the save step.	<input checked="" type="checkbox"/>	Yes		2025.1	Any Module	ADMIN	7/23/
Login & Navigation Menu	Use OpenID Connect SSO provider for authentication	This feature enables OpenID Connect SSO providers for authentication. Once enabled, enter the Openid Settings -> General -> Settings. If you already have Microsoft Entra ID SSO configured and you opt into this feature, please be aware that you will need to update your redirect URI in Azure for SSO to work successfully. Once enabled all Vantagepoint Navigation Menu items for the Desktop and Web Applications will be shown within the Web Application. The Desktop Application login dialog will no longer be used.	<input checked="" type="checkbox"/>	Yes		2025.2	Any Module	ADMIN	7/23/
Utilities	User Activity	The User Activity application is now available to be shown within the browser interface. Enabling this feature will display the User Activity application within the browser instead of the Desktop and has been reimaged to track all authentication and application activity in Vantagepoint. Logic has also been introduced to remove activity older than 30 days.	<input checked="" type="checkbox"/>	Yes		2025.2	Any Module	ADMIN	7/23/
Purchasing	Create Request for Quote Only	Create Request for Quote (RFQ) now available in Purchase Requisitions. This new functionality allows a user to define a Purchase Requisition as RFQ only.	<input type="checkbox"/>	No		2025.1	Purchasing		7/23/
Purchasing	Create Voucher From Purchase Order in the Browser	Create Voucher from Purchase Order functionality now available in AP Transaction entry. If you own the Purchasing module, enable this feature to move the "Create Voucher from Purchase Order"	<input type="checkbox"/>	Yes		2025.1	Purchasing		7/23/

Enhanced Search Capabilities

- » Simplify searches for multiple values without complex "OR" statements
- » Improve time-bound searches to now include YEAR in this, next and last search criteria

New Employee Search

Select Search Hide Search Options + Add a Field Clear Search

Employees - Status = Active

Employees - Supervisor Starts With ja; ri; he

You can use a semicolon space "; " delimited value when using Starts With, Contains, and Does Not Contain operators. For example:
 Name Contains Mary; John; Bill
 will find records where
 Name Contains Mary OR John OR Bill

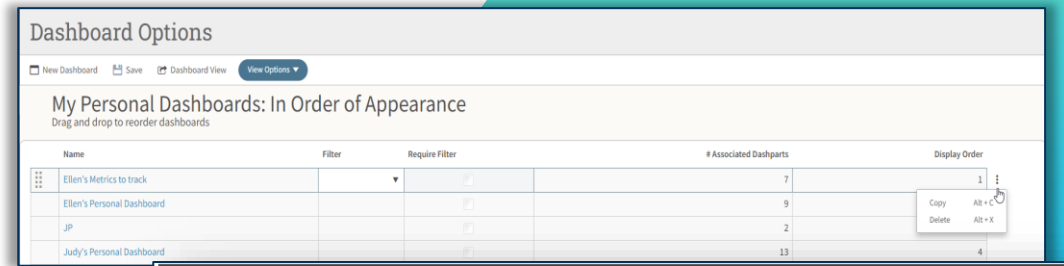
	Full Name	Employee Number	Title	Labor Category	Organization	Location	Status
<input type="checkbox"/>	Adrian Horan	UK987	Principal	Principals	Thaving Thomas Lor		Active
<input type="checkbox"/>	Albert Ruiz	00240	Senior Interior Desig	Designer	Cohen Assoc Denver	COR	Active
<input type="checkbox"/>	Alex Lucas	C0203	Information Technol	Surveyor	Cohen Assoc Corpor	COR	Active
<input type="checkbox"/>	Amy Ball	00299	Project Assistant		Cohen Assoc Denver	COR	Active
<input type="checkbox"/>	Betty White	00BH7	Administrative Assis	Administrative	Bartlett Hunter Bost	BOS	Active

Show # of Results: 37 results Apply All Cancel

Quickly create better search criteria to find the data you need

General Usability

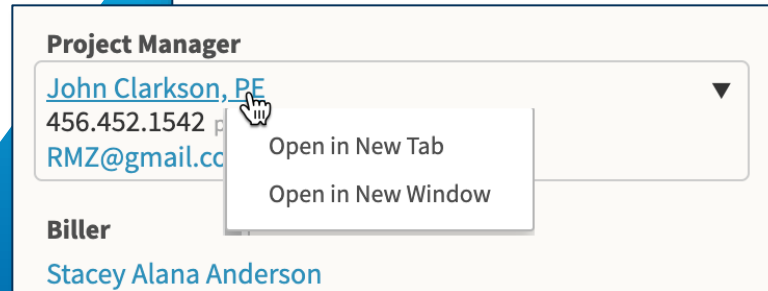
- » Administrators can access personal dashboards to copy/remove as needed
- » Copy dashboards to all users in one click vs. clicking each role
- » Add Biller Name on Project Earnings Report
- » Right-click contextual menus to open applications or records in new tabs



Project Earnings

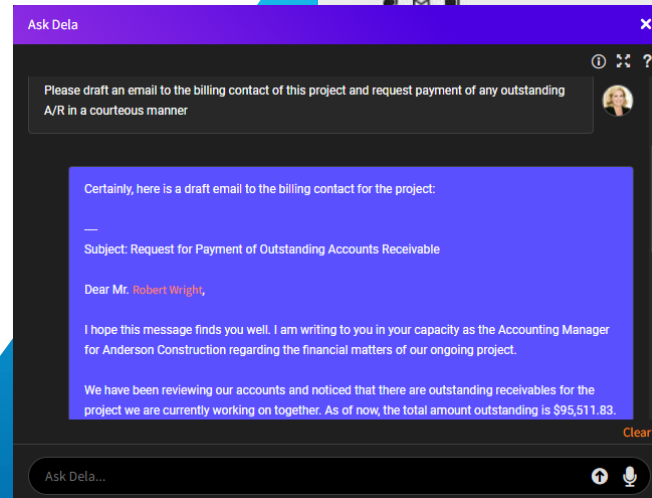
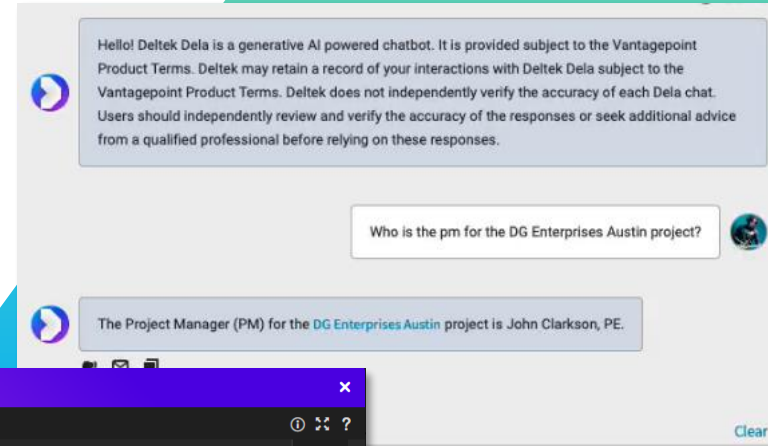
Accutera Architects & Engineers For the period 3/1/2023 - 3/31/2023

Estimate Overhead	Project Manager	Biller	Compensation	JTD Hours
20.0001.00 Stone Cabin Ranch - Bend	Davis, Laura	Hill, Pat	146,300.00	1,228.00
20.0002.00 East Gresham Elementary School	Sullivan, Brian	Banks, Roman	139,500.00	806.00
20.0003.00 Dave's Place - Assurant HQ	Robinson, Heather	Hill, Pat	101,250.00	810.00
20.0004.00 Joliet High Recreational Center	Healy, Thomas	Hill, Pat	141,850.00	838.00
20.0005.00 Bayside Beach House - Bandon	Davis, Laura	Hill, Pat	93,100.00	570.00
20.0006.00 Park East High School Extension	Robinson, Heather	Banks, Roman	101,250.00	810.00
20.0007.00 Shore Side Drive Lofts	Kingsley, Kevin	Hill, Pat	89,100.00	810.00
			119,000.00	730.00
			89,100.00	810.00
			140,500.00	877.00
			164,000.00	1,197.00
			160,000.00	1,187.00
			129,800.00	899.00
			147,800.00	997.00
			98,550.00	810.00



Interact with Your Data via Deltek Dela™

- » Engage with *Ask Dela*, your AI business companion, 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



Opt-In Features

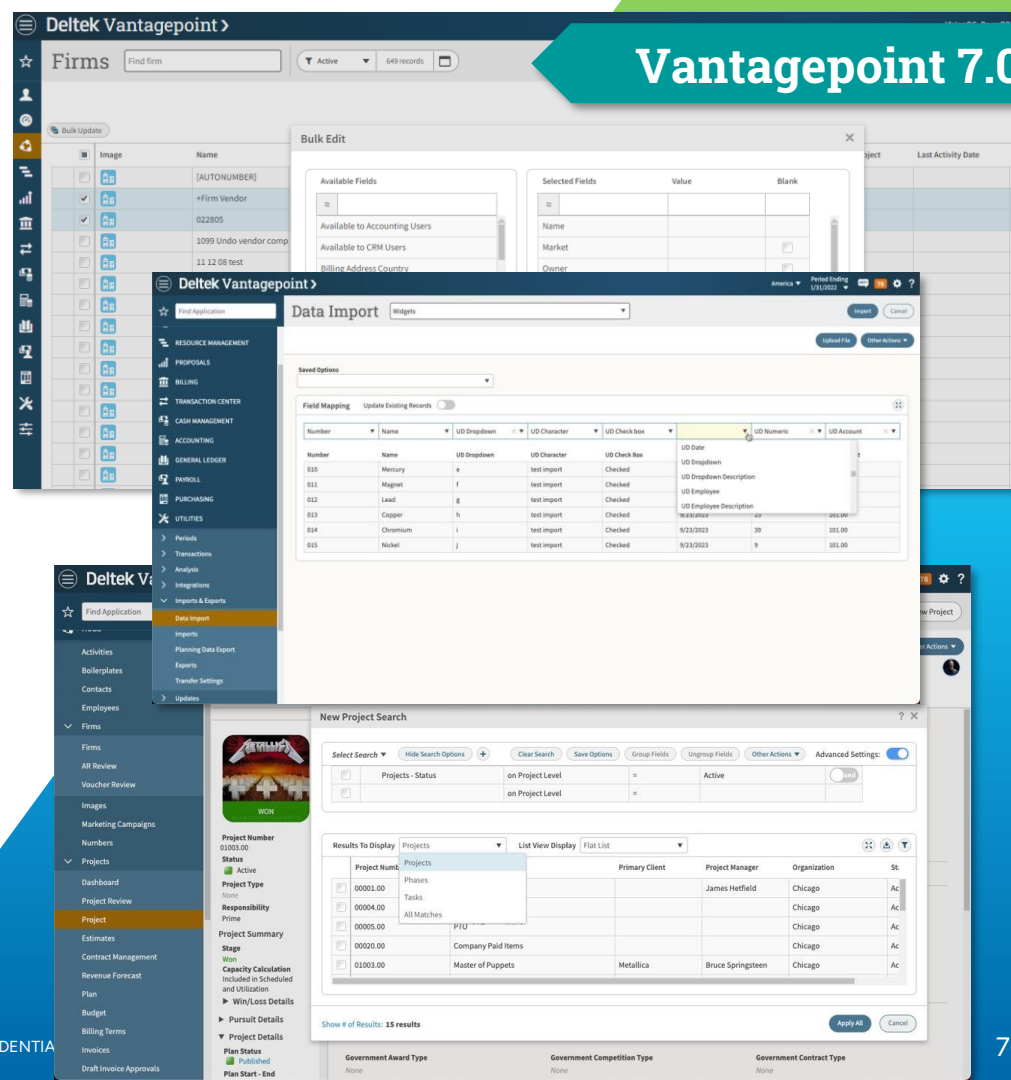
- » Allow administrators additional control to transition to enable subset of features for additional testing prior to production
- » Note that opt-in period is a finite amount of time and features will be automatically enabled for all users at a later date

The screenshot displays the 'Opt-In Features' configuration page in the Deltek Vantagepoint application. The page includes a search bar, a selection dropdown, and a table of features. The 'Explicit Save in List View' feature is currently enabled.

Area	Title	Description	Enabled	Reversible	Help Topic
Purchasing	Create RFQ Only	Create RFQ Only Description	<input type="checkbox"/>	No	
Purchasing	Create VO From PO	Create VO From PO Description	<input type="checkbox"/>	Yes	
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 interrupted by required field validations. These validations are now moved to the save step.	<input type="checkbox"/>	Yes	
Hubs	Explicit Save in List View	When the Explicit Save in List View feature is enabled the auto-save feature will be disabled in the Hub List Views. This allows you to update multiple records before choosing when to save those changes. When saving multiple records at a time with this feature enabled all records that pass validation will be saved. If any records have errors, those records will not be saved and the errors will be shown.	<input checked="" type="checkbox"/>	Yes	

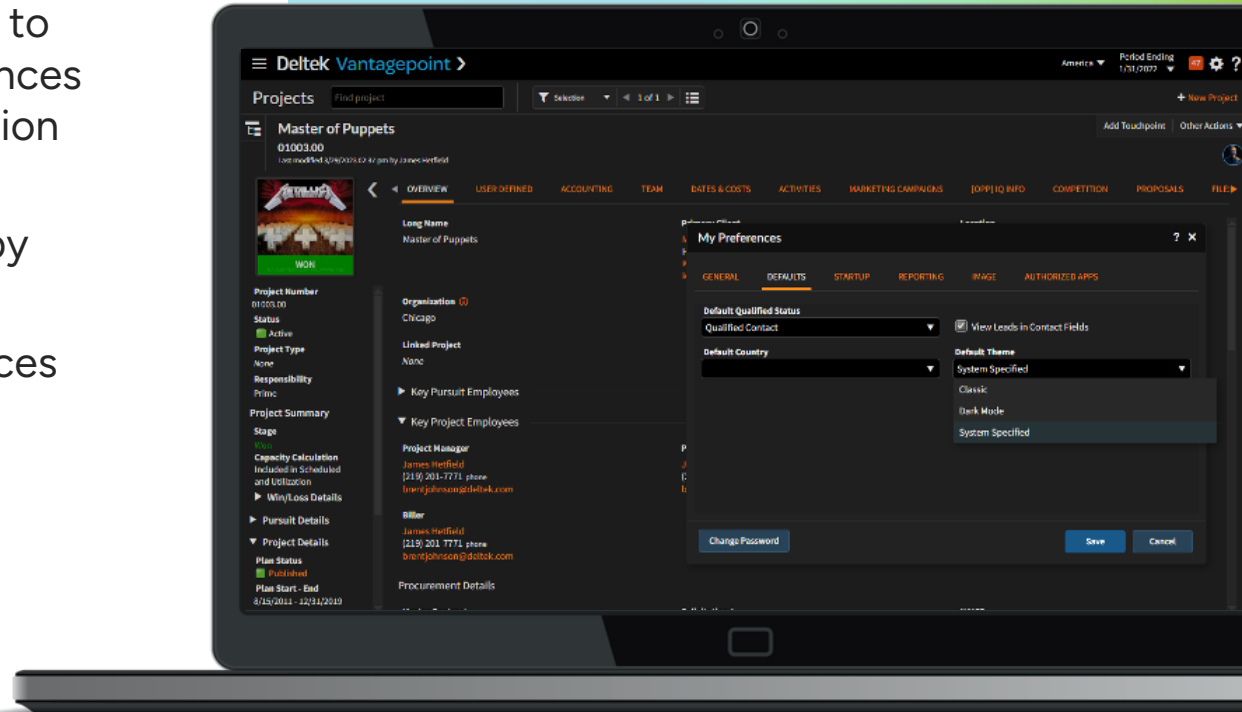
General Usability

- » 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



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

Vantagepoint 6.5

- » 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

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						

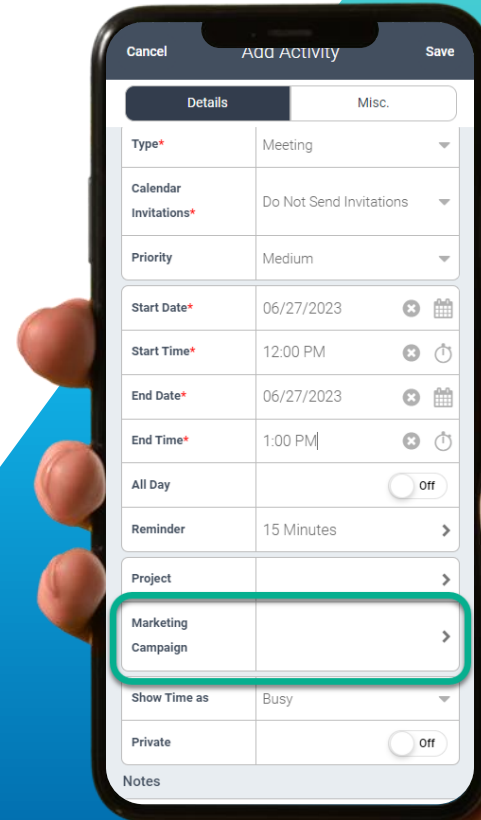
Timesheets MY TIMESHEETS Find timesheets 1 of 11

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

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

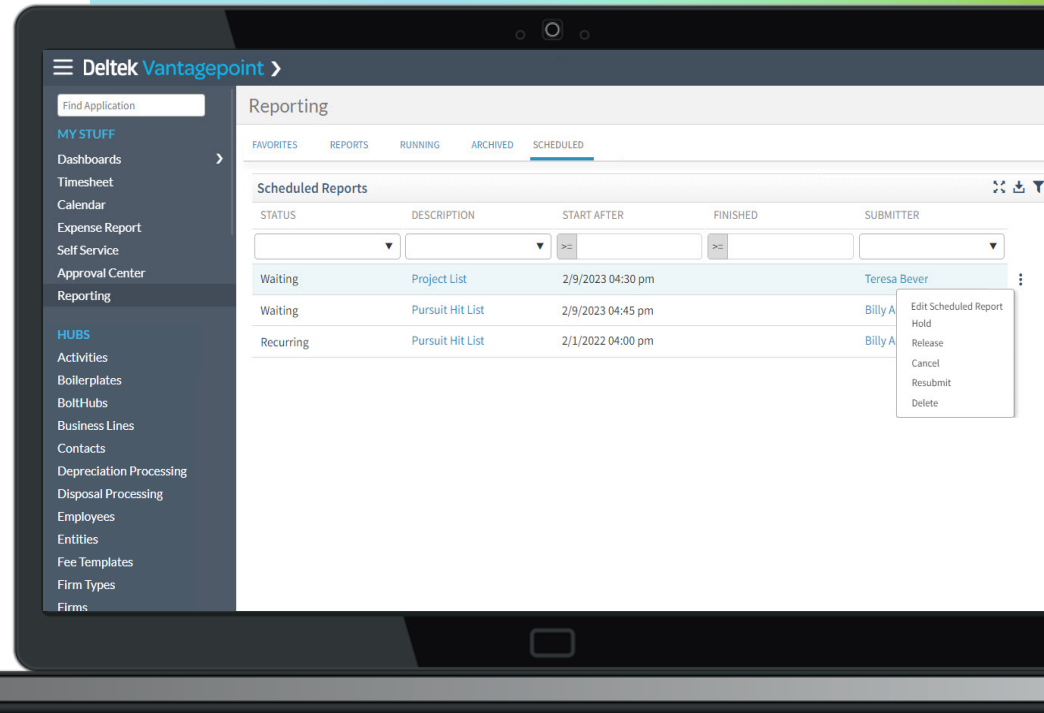


Usability: Editing Scheduled Reports

Vantagepoint 6.5

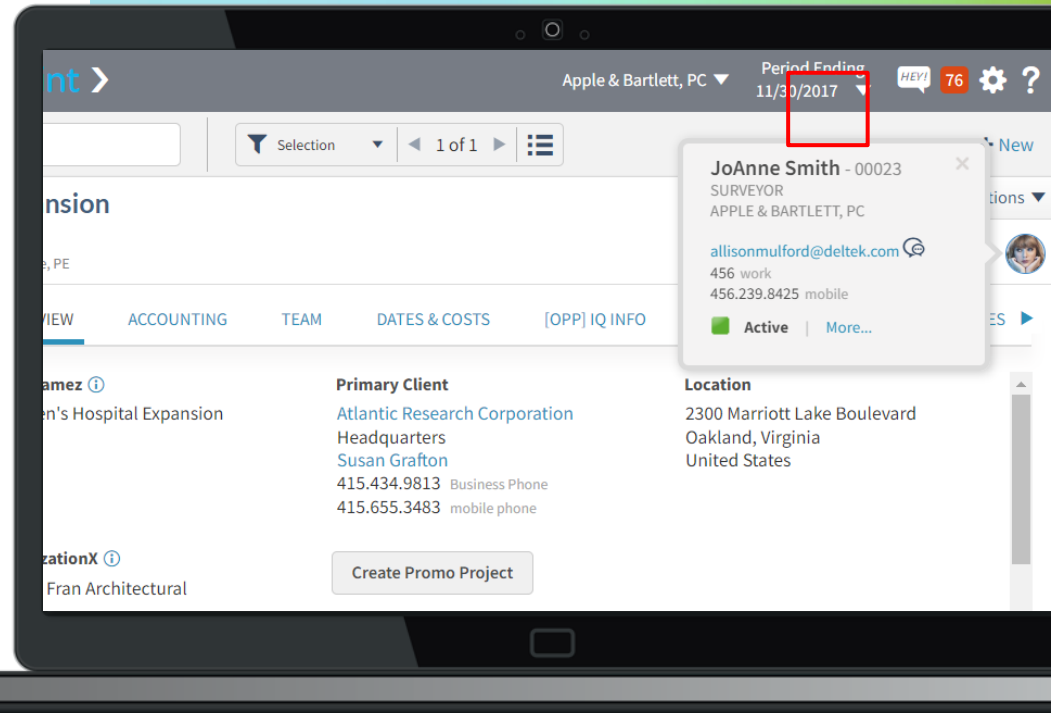
- » Edit scheduled reports as needed to adapt to changing needs of the firm
- » Make changes to recipients or body of the email
- » Update the report options or search criteria
- » Save time by simply editing rather than recreating scheduled reports

Another popular item from Idea Portal



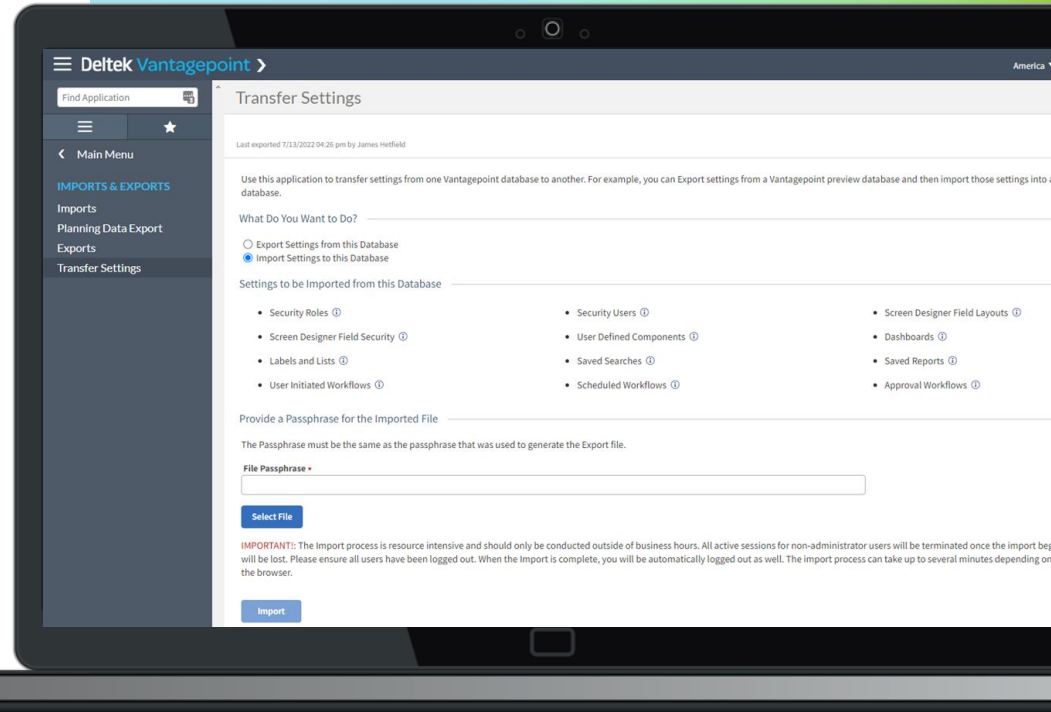
Improve Collaboration with Teams Integration

- » 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

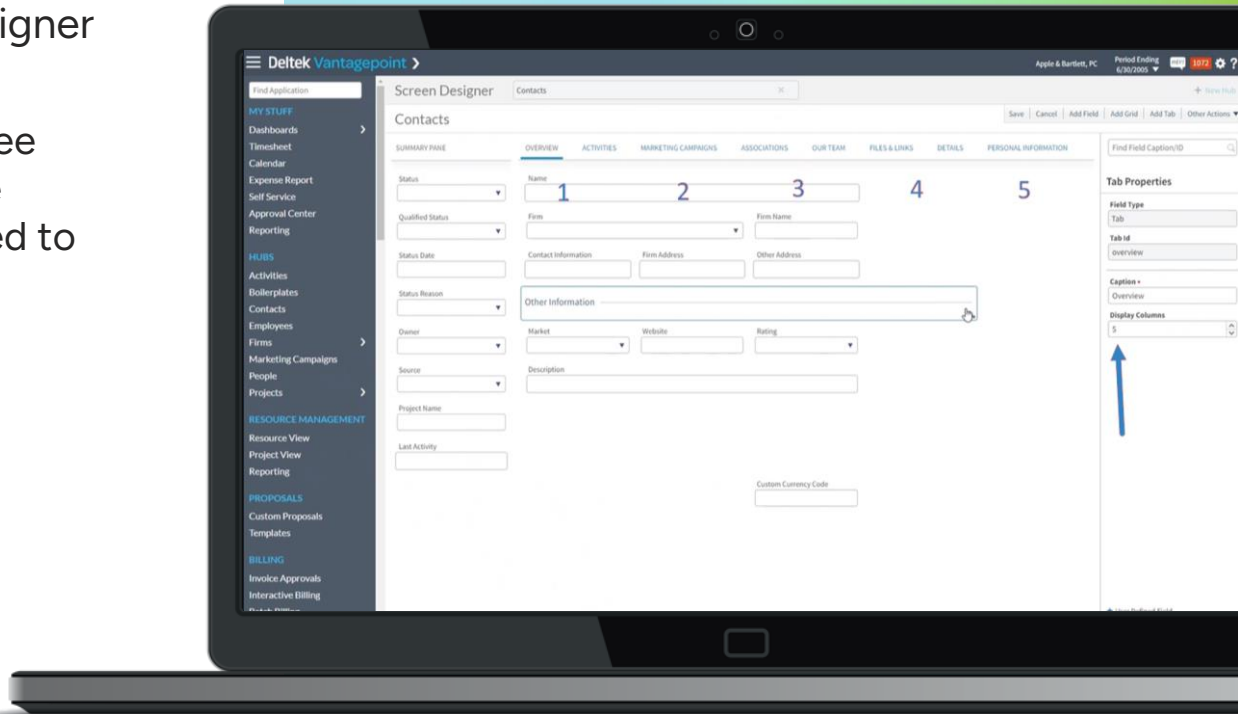
- » Key settings can be transferred from one database to another
- » Save valuable time and significantly reduce manual work
- » Critical for supporting Vision to Vantagepoint upgrades, but not just for upgrades
- » Example – preview to production



Empower Admins to Create a Better User Experience

Vantagepoint 6.0

- » 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



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!

Employee Card
Billy Apple, PE
 Principal
 All Corporate
 Last modified: 12/15/2022 09:15 am by Billy Apple, PE

PROFILE | SKILLS & CREDENTIALS | **ASSIGNMENTS** | PROJECTS | RATIOS | ABSENCE HOURS

Forecast Range: 20 weeks beginning 1/11/2023

LEVEL	2022	2022	2022	2022	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 Adelphi Research Lab					
0201900.05 Cambridge YMCA Renovations		51			
2002005.00 Cape Cod Vacation Club			1		
2020000.00 DS Central Perk			3		

Deltek Vantagepoint >

User ID
 JAMES

Password
 Enter password
 Caps Lock is on

Database
 DVPPMBrent (ASHV0659)

Language
 English (United States)

Log In

© 2023 Deltek, Inc.

Contacts

Alex Carl, PE
 President
 Last modified: 12/15/2022 12:48 pm by James Bartlett, PE

James Bartlett - 00002
 PRINCIPAL
 APPLE & BARTLETT, PC
 brentjohnson@deltek.com
 415 work
 415.654.7564 mobile
 Active

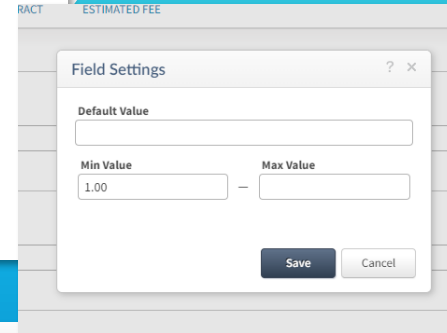
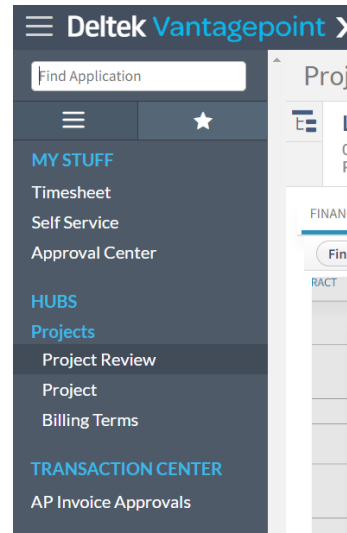
Benefit Hours

Sick Leave
 Starting Balance: 58.00
 Current Year Earned: 0.00
 Current Year Taken: 0.00
 Unposted Time: 15.00
 Current Balance: **43.00**

Vacation
 Starting Balance: 220.00
 Current Year Earned: 6.93
 Current Year Taken: 0.00
 Unposted Time: 68.00
 Current Balance: **158.93**

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!

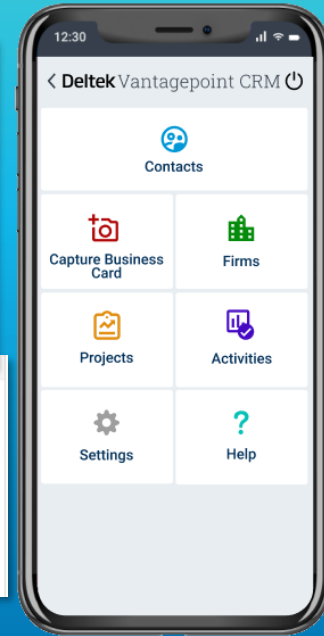


Floor Check

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

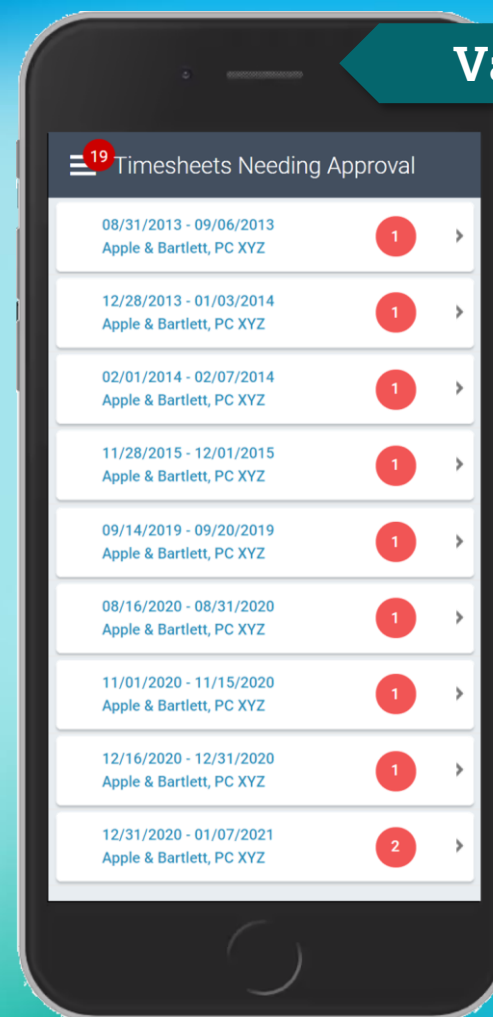
TIMESHEET STATUS	TIME GROUP	EMPLOYEE NAME	EXPECTED HOURS	HOURS ENTERED
Missing		Aaron Fernburg	40.00	0.00
Missing	Department 1	Aaron Weiss	40.00	0.00
Missing		Alan Lovend	40.00	0.00
Missing	Department 5	Alex Lucas	40.00	0.00
Missing	Department 5	Alexander Dane, AIA	40.00	0.00



Usability Enhancements: Mobile

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

Vantagepoint 4.5



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 shows the Deltek Vantagepoint interface. The main content area displays the 'Firms' page for 'Newway Steel Structures Ltd'. The page includes a search bar, a navigation menu, and a list of firm contacts. The 'Firm Contacts' table is as follows:

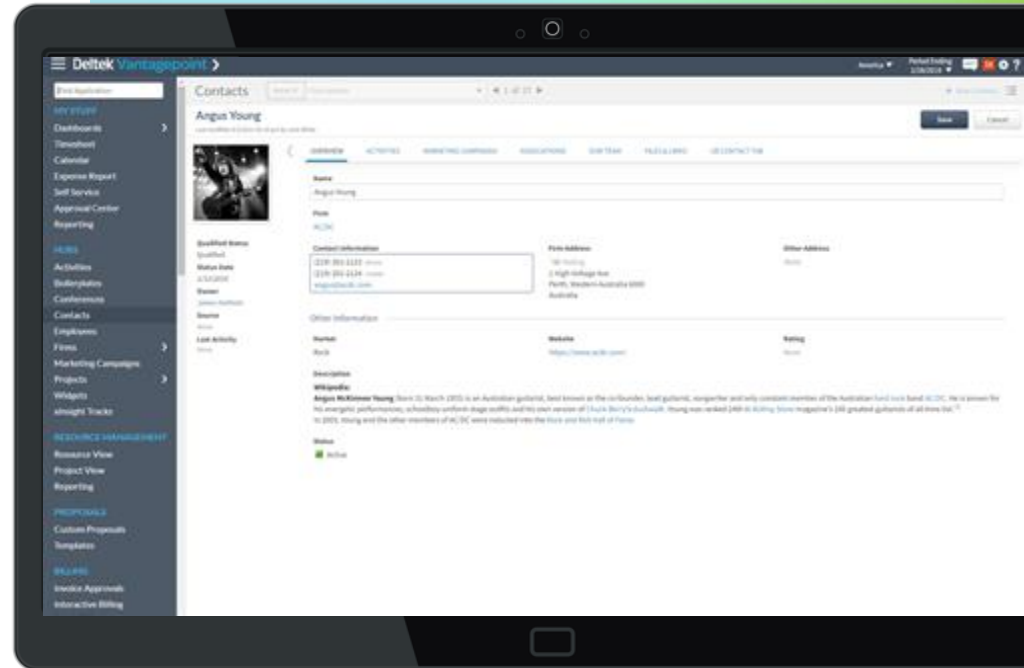
NAME	STATUS	TITLE	WORK PHONE	MOBILE PHONE	LOCATION	EMAIL
Mike Fensterer	Active	Contracts Administrat	321.234.2945	321.981.9301	Orlando Office	mfenster@anderson.co
Dylan Zimmerman, P	Active	Chief Executive Officer	713.920.7000	713.549.0537	Texas office	dzimmerman@anders
George DeRosa, AIA	Active	Director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

Below the firm contacts, there is a section for 'Contacts from Project Associations' with the following data:

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

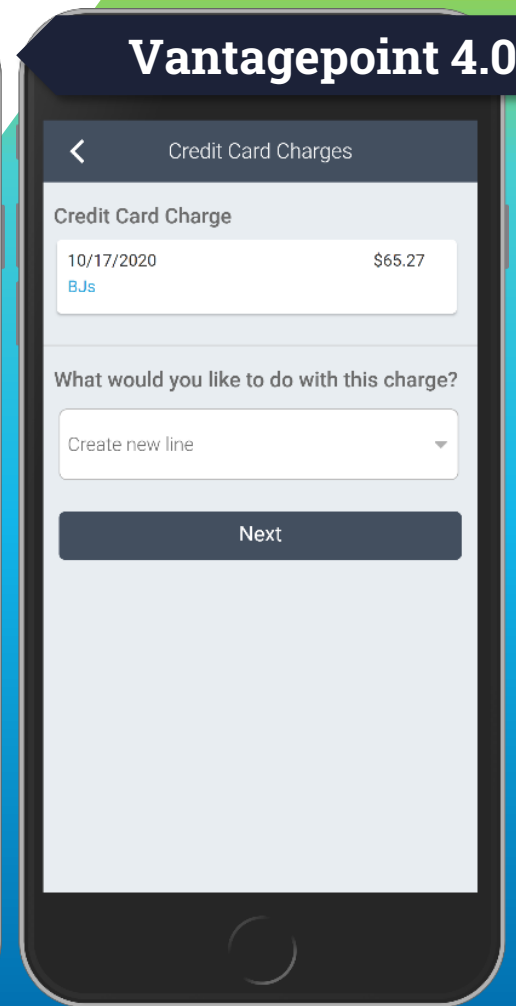
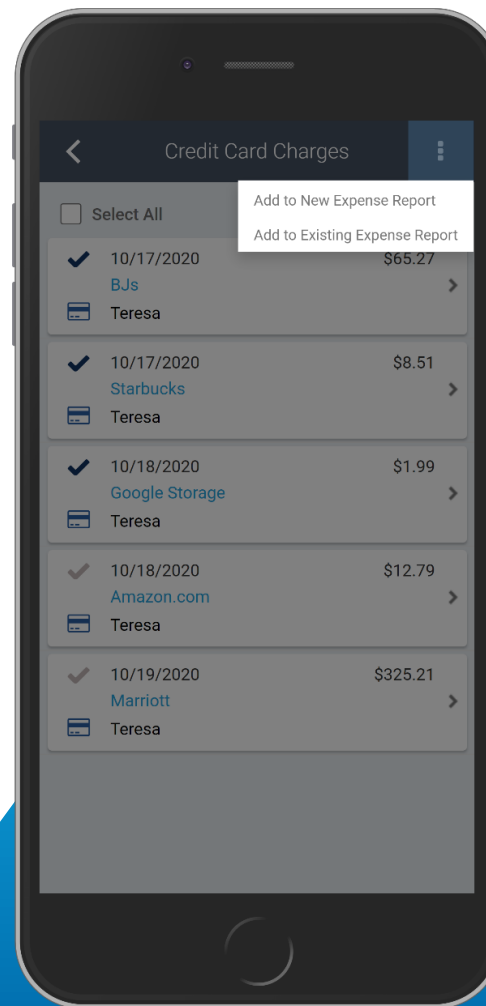
Usability Enhancements

- » 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

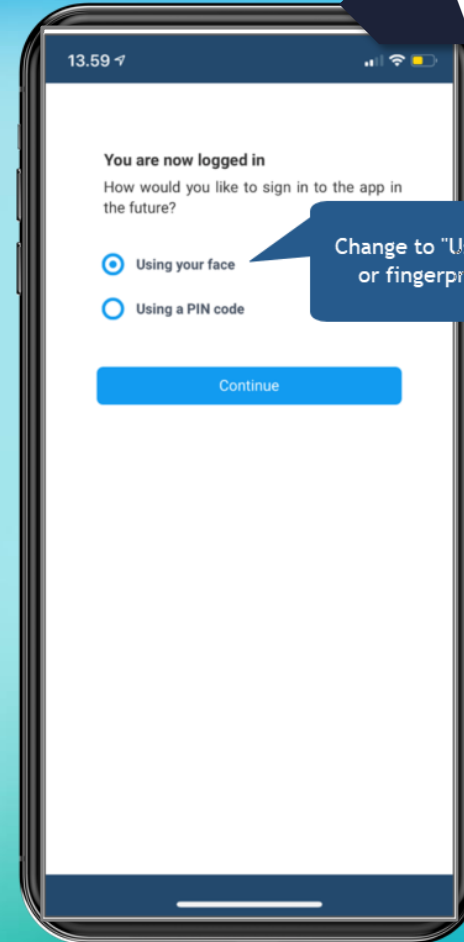
- » Automatically match credit card charges with expense items
- » Available desktop, tablet and mobile
- » Close matches result in recommendations for close dates, amounts, etc.
- » Improve credit cards for users
- » Add to existing report or create new



Increased Mobile Security

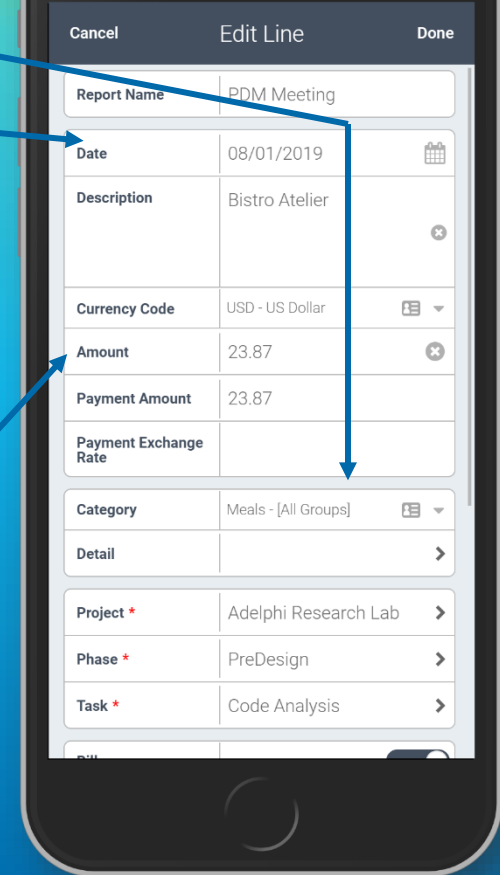
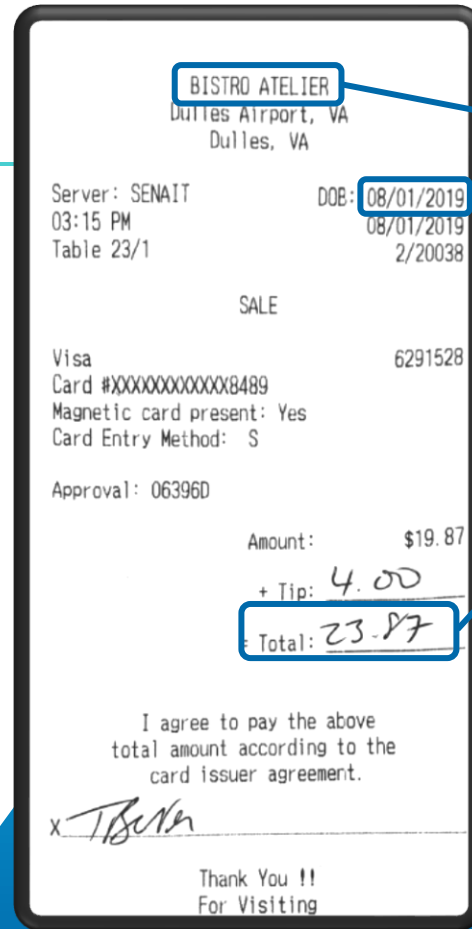
- » Leverage fingerprint ID or face ID
- » Increase security for Mobile Time & Expense and Mobile CRM
- » Must be enabled on mobile device

Vantagepoint 4.0



ICR for Expenses

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



Deltek.

Learn More

Learn More About Vantagepoint

- » To learn more about the latest releases, visit the Deltek Learning Hub and select 'Vantagepoint'
- » Manage your email subscriptions to ensure you never miss a critical product email on Deltek.com

The screenshot shows the Deltek Learning Hub interface for Vantagepoint. The header includes the Deltek Learning Hub logo, navigation links for Deltek.com, Register, and Login, and a search bar with a 'Filters' dropdown and a search icon. The main content area is titled 'Vantagepoint' and features a grid of nine content cards, each with a 'View All' button:

- What's New?**: New Features, What's New Videos, Release Notes
- Getting Started**: Basics, Concepts, User Guides, Activation
- Articles by Product Area**: Accounting, Asset Management, Billing, Cash Management
- Learn by Task**: Common Tasks, Project Tasks, Timesheet Tasks, Expense Tasks
- Learn by Role**: General User, Business Developer, Buyer, Contract Manager
- Browse eLearning Courses**: Absence Accrual Based on Hours Worked, Deltek Vantagepoint Accounting Series - General Ledger Budgets, Deltek Vantagepoint: QuickBooks Integration, Converting from Quickbooks to Deltek Vantagepoint
- Videos by Product Area**: Getting Started, Timesheets, Expense Reports, CRM
- Additional Resources & Certification**: Helpful Resources, Additional Training, Get Deltek Certified, Vision Customers: The Vantagepoint Upgrade Journey
- Cloud Resources**: Cloud Administrator's Help, Set Up User Accounts and Security, Set Up Exchange Rate Updates, Set Up Direct Database Access

Learn More About Vantagepoint

- » Check out the Vantagepoint blog for more in-depth posts about recent releases
<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
- » Join us for Deltek ProjectCon to learn, network and experience Vantagepoint
www.deltekprojectcon.com

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- » Upgrading from Vision to Vantagepoint? Be sure to visit the Deltek Vantagepoint Upgrade Resources page to ensure a smooth and successful upgrade <https://education.deltek.com/web/vpupgraderesources/>
- » If you have questions, contact Vantagepoint@Deltek.com