

Deltek

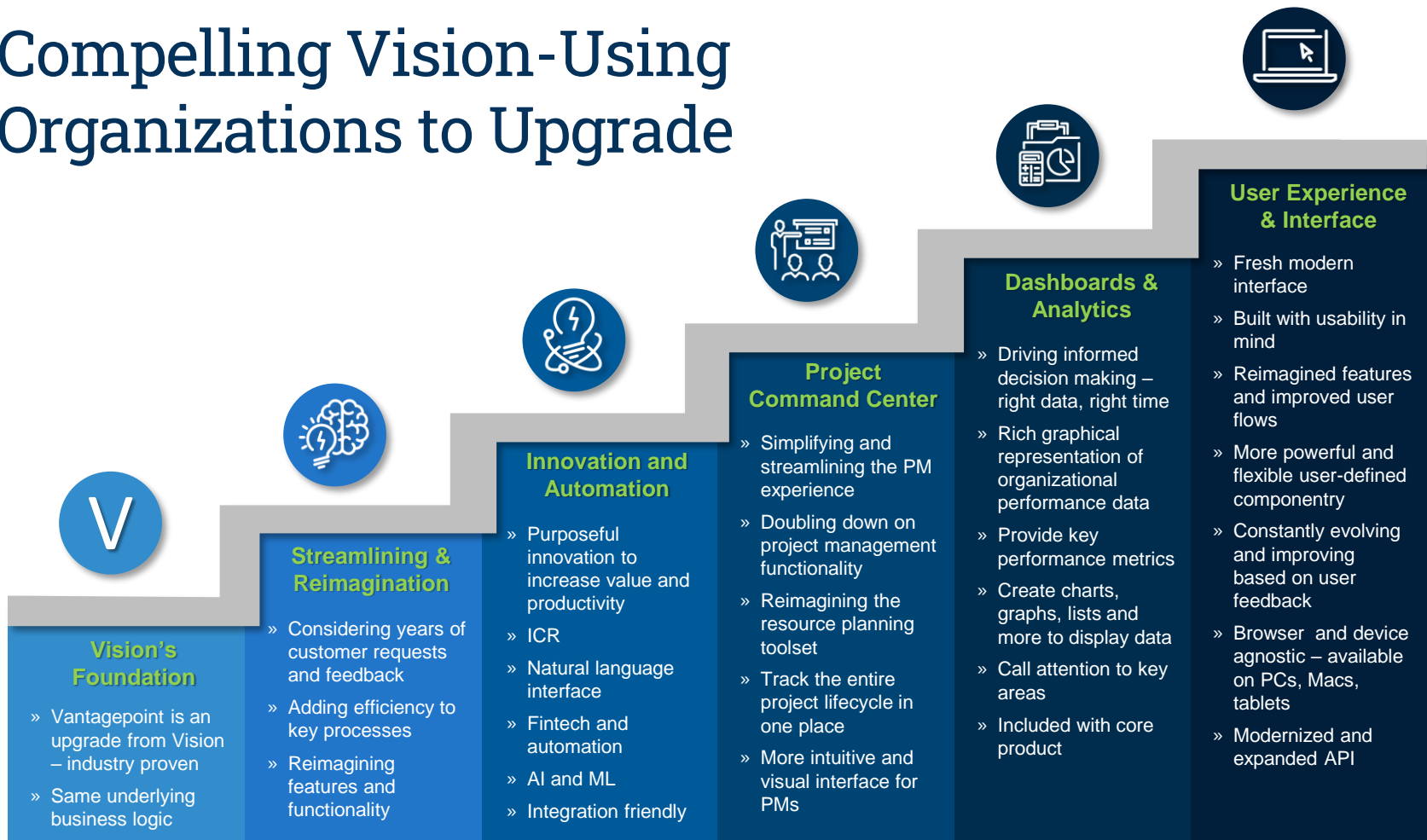
Why Vantagepoint?

The Vantagepoint User Experience

Brent Johnson
Senior Product Director



Compelling Vision-Using Organizations to Upgrade



Compelling Vision-Using Organizations to Upgrade



Vision's Foundation

- » Vantagepoint is an upgrade from Vision – industry proven
- » Same underlying business logic

Streamlining & Reimagination

- » Considering years of customer requests and feedback
- » Adding efficiency to key processes
- » Reimagining features and functionality

Innovation and Automation

- » Purposeful innovation to increase value and productivity
- » ICR
- » Natural language interface
- » Fintech and automation
- » AI and ML
- » Integration friendly

Project Command Center

- » Simplifying and streamlining the PM experience
- » Doubling down on project management functionality
- » Reimagining the resource planning toolset
- » Track the entire project lifecycle in one place
- » More intuitive and visual interface for PMs

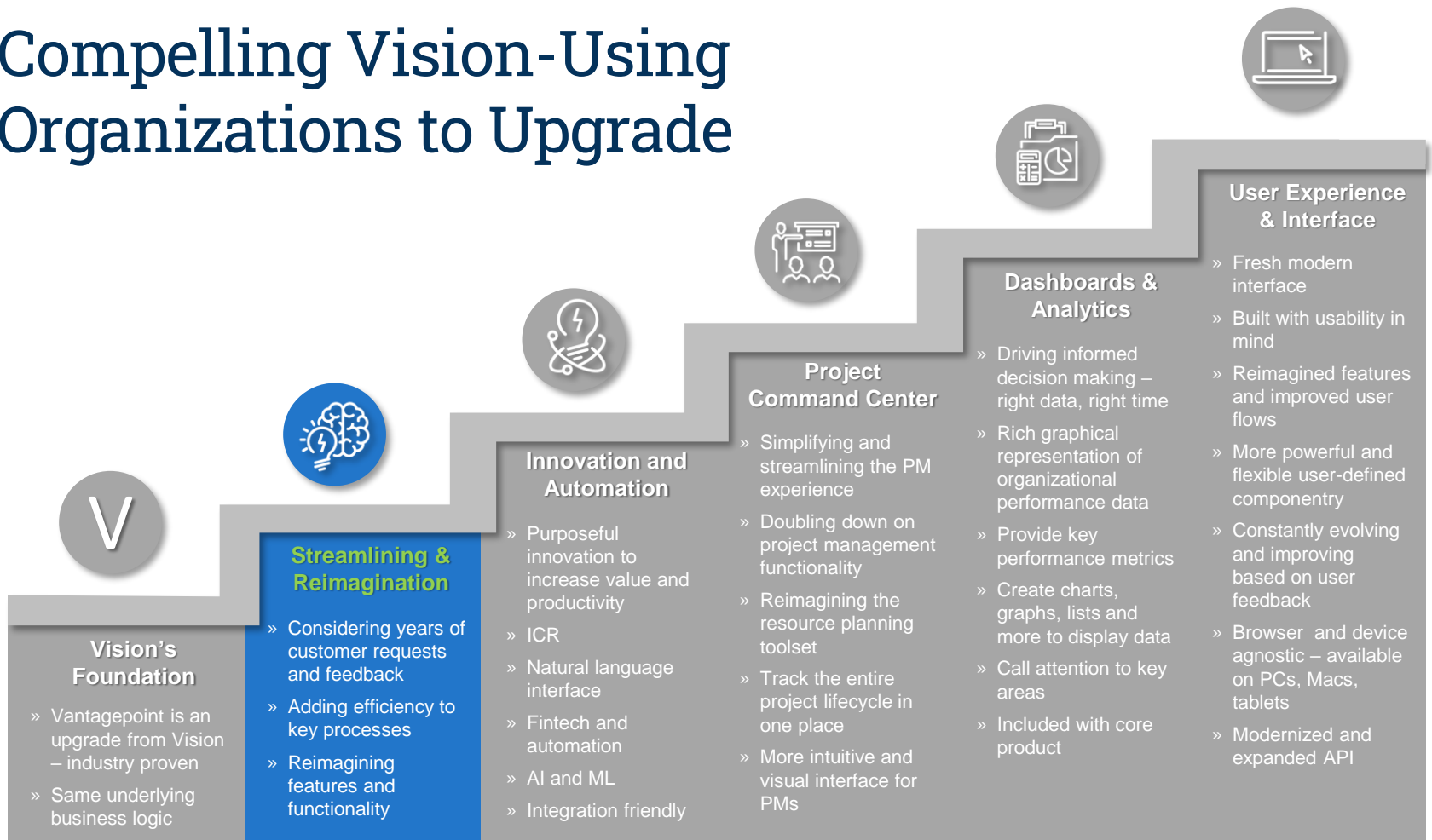
Dashboards & Analytics

- » Driving informed decision making – right data, right time
- » Rich graphical representation of organizational performance data
- » Provide key performance metrics
- » Create charts, graphs, lists and more to display data
- » Call attention to key areas
- » Included with core product

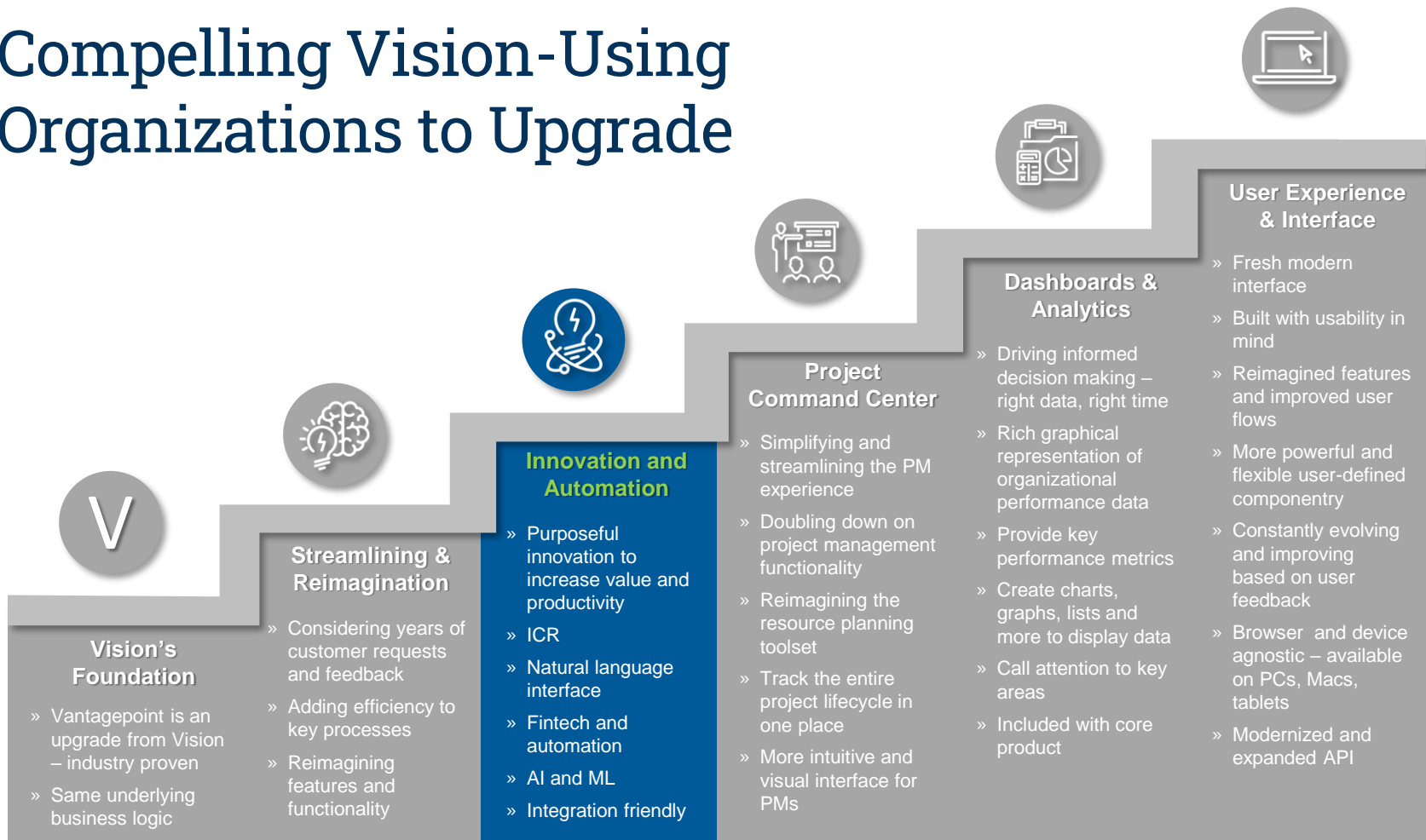
User Experience & Interface

- » Fresh modern interface
- » Built with usability in mind
- » Reimagined features and improved user flows
- » More powerful and flexible user-defined componentry
- » Constantly evolving and improving based on user feedback
- » Browser and device agnostic – available on PCs, Macs, tablets
- » Modernized and expanded API

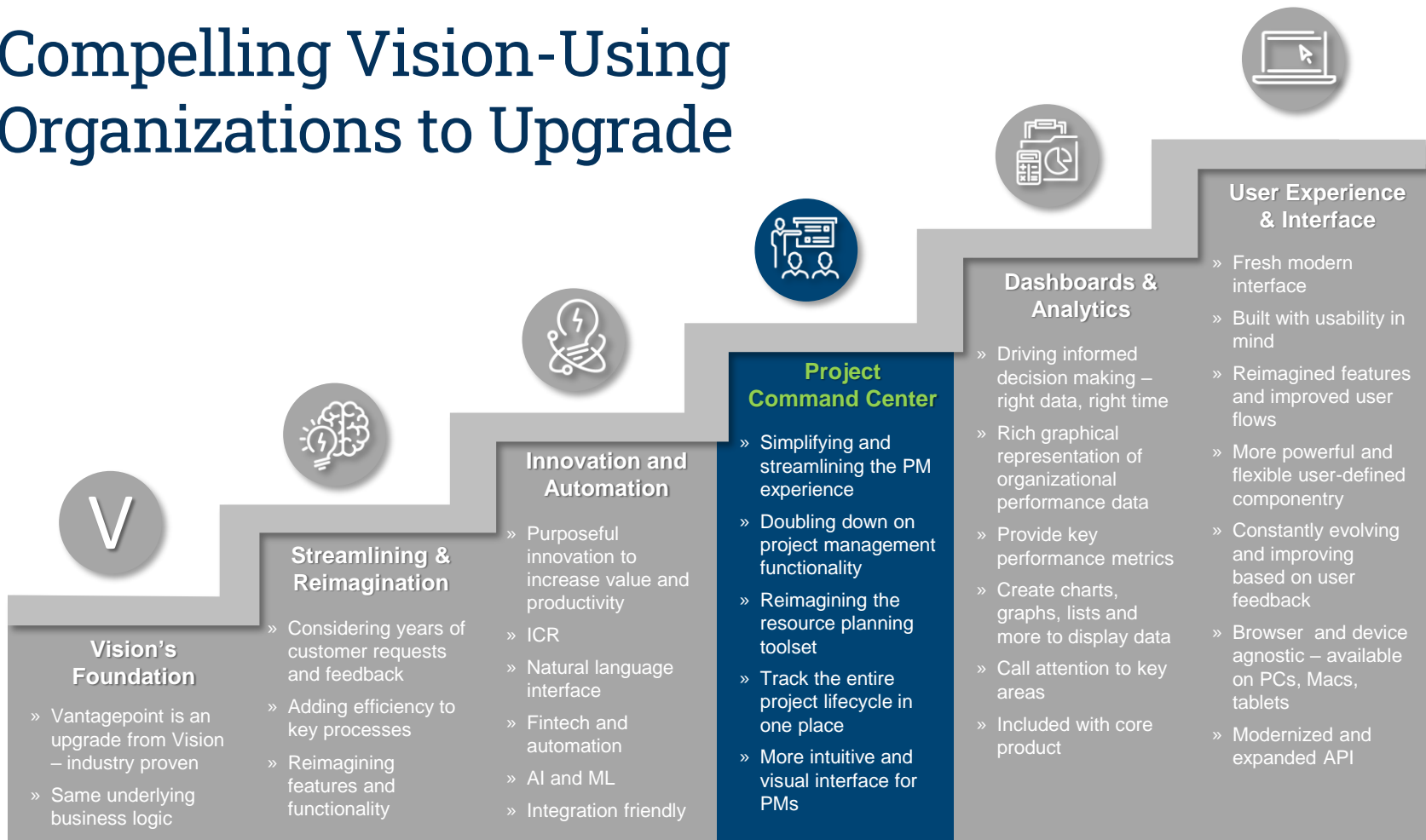
Compelling Vision-Using Organizations to Upgrade



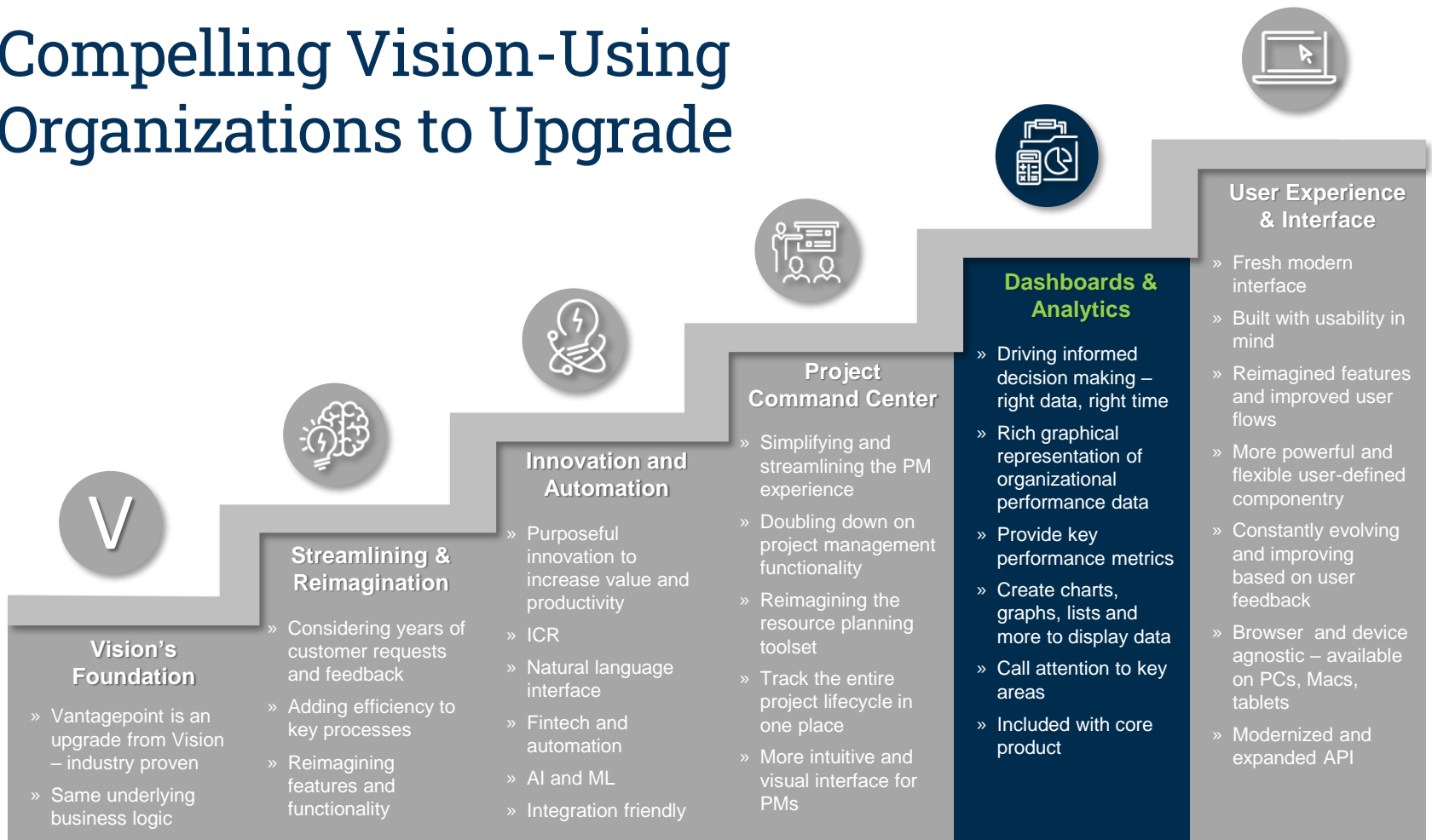
Compelling Vision-Using Organizations to Upgrade



Compelling Vision-Using Organizations to Upgrade



Compelling Vision-Using Organizations to Upgrade



Compelling Vision-Using Organizations to Upgrade



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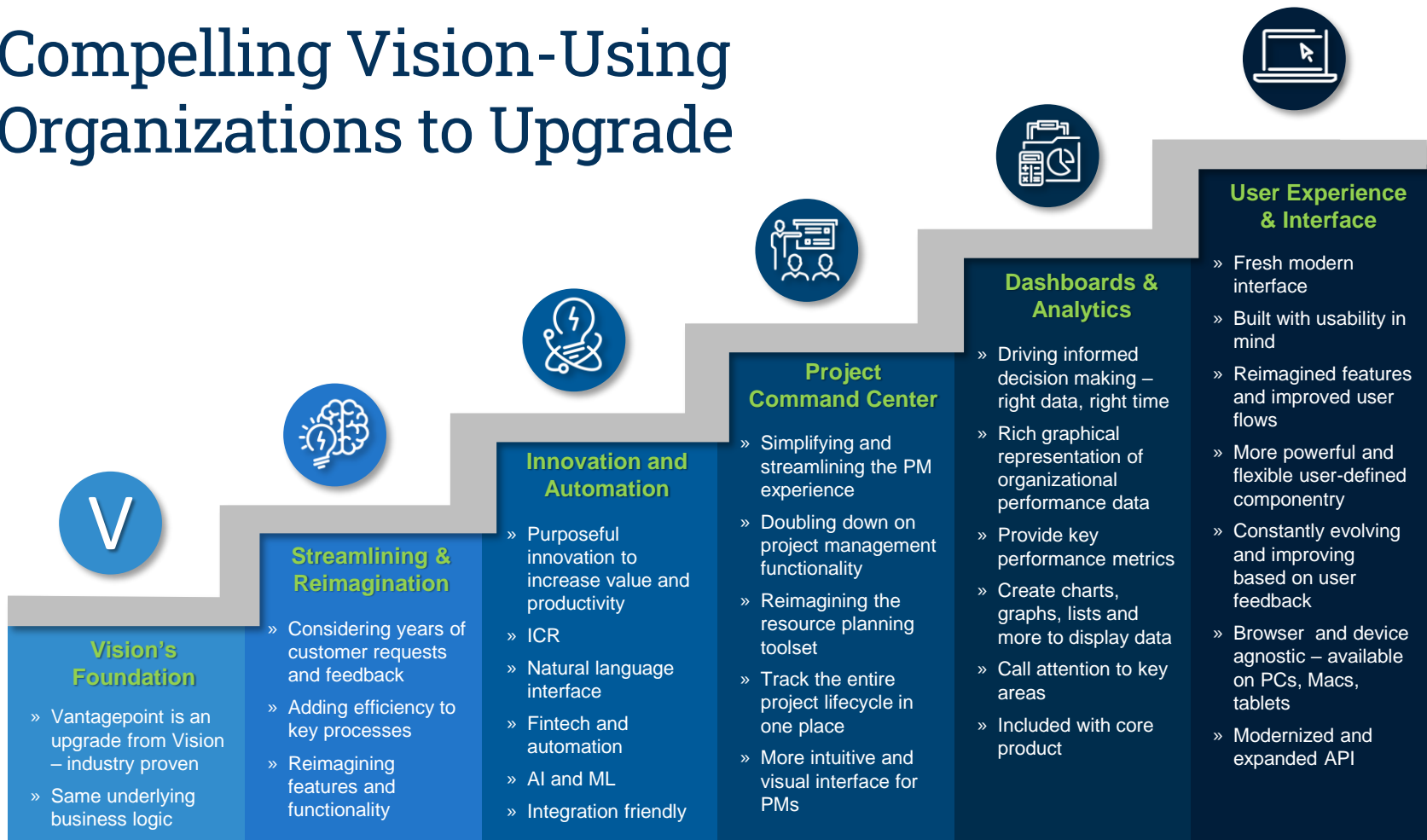
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Compelling Vision-Using Organizations to Upgrade



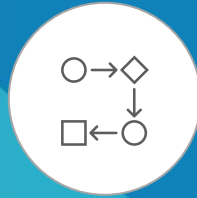
Highlights Within the Vantagepoint User Experience



Fresh modern &
intuitive interface



Browser and device
agnostic



Reimagined features
and improved user
workflows



Easier access to the
right data



Improved shortcuts,
help, & learning aids

Find Application

Project Manager with A/R

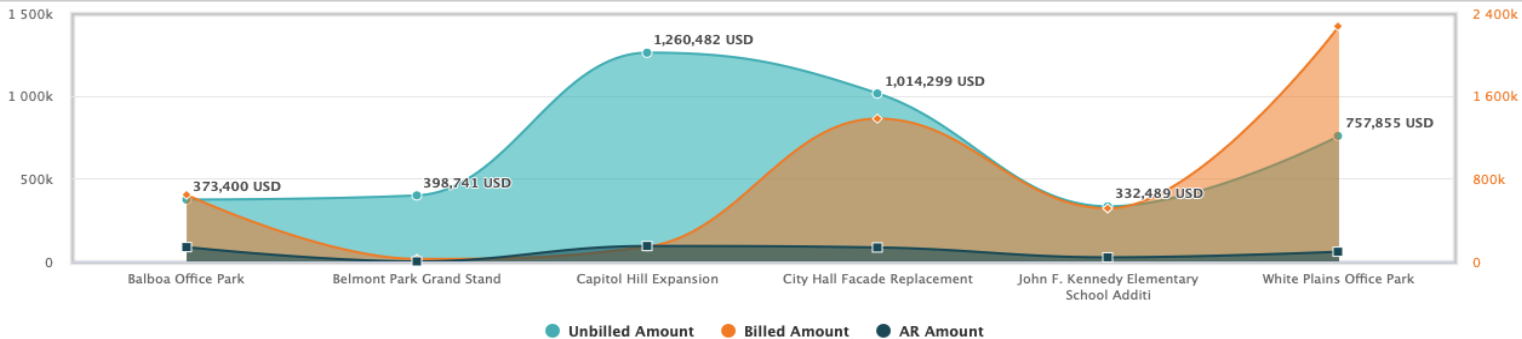
Find Project

All

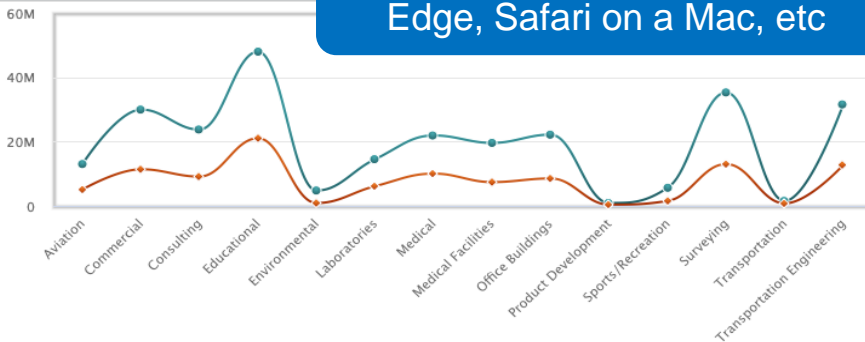
1150 records

Edit Mode:

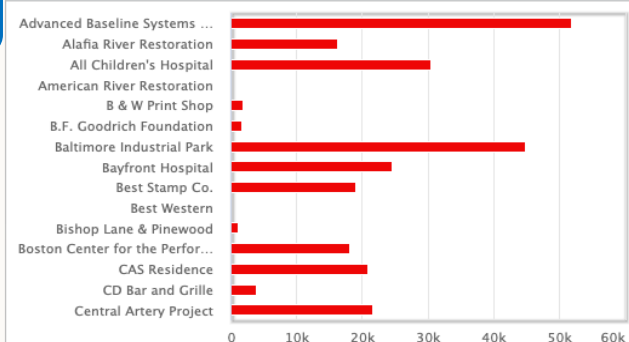
Billed, A/R & Unbilled by Project



Industry Pipeline Weighted vs. Estimated



A/R By Project



Deltek Vantagepoint >

Find Application

Employees

Firms

Images

Marketing Campaigns

Numbers

Projects

Dashboard

Project Review

Project

Estimates

Contract Management

Revenue Forecast

Plan

Budget

Billing Terms

Invoices

Draft Invoice Approvals

Widgets

RESOURCE MANAGEMENT

PROPOSALS

BILLING

Invoice

Pacific 01058.00

INVOICES

weezer pacific dynamics

Navigation menu indicators alert you when action is required.

Deltek Vantagepoint >

inv

HUBS

Projects

Invoices

Draft Invoice Approvals

BILLING

Invoice Approvals

TRANSACTION CENTER

Transaction Entry

Invoices

AP Invoice Approvals

UTILITIES

History Loading

Invoice and Receipt

SETTINGS

Billing

Invoice Accounts

Invoice Template Editor

Invoice Format

Invoice

weezer pacific dynamics

WON

Project Number 01058.00

Status Active

Project Type None

Responsibility Prime

Project Summary:

Stage Won

Capacity Calculator Included in Schedule and Utilization

Win/Loss Detail

Pursuit Detail

Project Detail

The application finder helps you quickly filter to an application.

Deltek Vantagepoint >

Find Application

FAVORITES

MY STUFF

Timesheet

Expense Report

HUBS

Projects > Project

BILLING

Interactive Billing

TRANSACTION CENTER

Transaction Entry > Prints and Reproduction

Project

Pacific 01058.00 Last modified

OVERVIEW

weezer pacific dynamics

Navigation menu favorites allow you to build a menu of your most frequently used applications.

Win/Loss Detail

Pursuit Detail

Record

None

Projects

Active Regular ▾ ◀ 1 of 10 ▶ ☰

+ New Project

Master of Puppets

01003.00
Last modified 1/25/2024 02:11 pm by James Hetfield

OVERVIEW USER DEFINED ACCOUNTING TEAM DATES & COSTS



Long Name
Master of Puppets

Organization ⓘ
Chicago

Linked Project
None

▶ Key Pursuit Employees

▼ Key Project Employees

Project Manager
Bruce Springsteen
bruce@deltek.com

Biller
James Hetfield
(219) 201-7771 phone
brentjohnson@deltek.com

Procurement Details

Master Contract
None

Government Award Type
None

Saved Searches

- Active
- All
- My Active
- Project Manager
- My Company
- My Organization
- My Draft Invoices

My Searches

- EDU or School
- How Long Am I allowed to make this search name so I can see the full name later?

Shared Searches

- Active Regular
- Active Regular SQL
- + New Search

- 01003.00
Master of Puppets ⚠️
- 01005.00
And Justice For All ⚠️
- 01034.00
Load ⚠️
- 01055.00
Rocky Mountain Way ⚠️
- 01056.00
Hotel California ⚠️
- 01057.00
A Series of Sneaks ⚠️

Edit Project Search: Active Regular

Active Regular ▾

Hide Search Options + Add a Field

Clear Search

Save Options

Other Actions ▾

Advanced Settings:

- Active
- All
- My Active
- Project Manager
- My Company
- My Organization
- My Draft Invoices

My Searches

- EDU or School
- ▶ Active Searches
- + New Search

on Project Level	=	Active	<input type="radio"/>	and
e Type	on Project Level	=	Regular	<input type="radio"/>
▼	on Project Level	▼	=	Add Value

Name	Primary Client Name	Project Manager Name	Organiza
Master of Puppets	Metallica	Bruce Springsteen	Chicago
And Justice For All	Metallica	Dave Grohl	Chicago
Load	Metallica	James Hetfield	Chicago
Rocky Mountain Way	Joe Walsh	Bruce Springsteen	Chicago
Hotel California	Eagles	Joe Walsh	Chicago

Show # of Results: 10 results

Apply All 13

☆ Find Application

Project Review Find project

▾ Selection ▾ ◀ 1 of 1 ▶

+ New Project

Activities

Boilerplates

> Clients

Contacts

Employees

Marketing Efforts

▼ Projects

Dashboard

Project Review

Project

Estimates

Contract Management

Revenue Forecast

Plan

Budget

Billing Terms

Invoices

Draft Invoice Approvals

RESOURCE MANAGEMENT

PROPOSALS

BILLING

TRANSACTION CENTER

4 Season's Creative Learning Center

Update % ▾ Other Actions ▾

030322501

Principal-In-Charge: [Alexander Dane, AIA](#) Project Manager: [Alexander Dane, AIA](#) Supervisor: [Alexander Dane, AIA](#)

FINANCIALS PURCHASING

Financial Options

Published **Show:** Cost (USD) ▾

	Contract/Fee	Planned Cost	Planned Profit	JTD 1/30/2024 Cost	ETC Planned Cost	EAC Planned Cost
Directs						
Total Labor	2,154,538.25	906,106.29	1,248,431.96	1,490,619.92		1,490,619.92
<i>Direct Labor</i>		323,609.39		1,036,022.38		1,036,022.38
<i>Overhead</i>		582,496.90		454,597.54		454,597.54
<i>Direct Labor Hours</i>		5,770.00		21,668.75		21,668.75
<i>Average Rate/Hour</i>		56.08		47.81		47.81
Direct Expenses		6,630.00	-6,630.00	2,070.57	4,847.46	6,918.03
Compensation	2,154,538.25	912,736.29	1,241,801.96	1,492,690.49	4,847.46	1,497,537.95
Direct Consultants	1,414,569.75		1,414,569.75			
Total Directs	3,569,108.00	912,736.29	2,656,371.71	1,492,690.49	4,847.46	1,497,537.95
Reimbursables						
Reimbursable Expenses	275,334.00	1,326.00	274,008.00	6,835.00	663.00	7,498.00
Reimbursable Consultants				1,630,909.24		1,630,909.24
Total Reimbursables	275,334.00	1,326.00	274,008.00	1,637,744.24	663.00	1,638,407.24
Total	3,844,442.00	914,062.29	2,930,379.71	3,130,434.73	5,510.46	3,135,945.19

Key Performance Indicators

☆ Find Application

Project Review

Selection ▼ ◀ 1 of 1 ▶

+ New Project

MY STUFF

DASHBOARDS

HUBS

RESOURCE MANAGEMENT

PROPOSALS

BILLING

TRANSACTION CENTER

CASH MANAGEMENT

ACCOUNTING

GENERAL LEDGER

PAYROLL

PURCHASING

UTILITIES

SETTINGS

Master of Puppets

01003.00
Principal: Bruce Springsteen Project Manager: Bruce Springsteen Supervisor: Jack White

Update % ▼

Other Actions ▼

FINANCIALS

PURCHASING

Financial Options

Published **Show:** Cost (USD) ▼ ⚙️

	Contract/Fee	Budgeted Cost	Planned Cost	Baseline Cost	Budgeted Profit	Planned Profit	JTD 1/30/2024 Cost
Directs							
Total Labor	52,503.00	2,200.00	558,200.00		50,303.00	-505,697.00	1,309,366.30
<i>Direct Labor</i>		800.00	558,200.00				477,603.20
<i>Overhead</i>		1,400.00					831,763.10
<i>Direct Labor Hours</i>		8.00	6,446.00				5,644.00
<i>Average Rate/Hour</i>		100.00	86.60				84.62
Direct Expenses			204.00			-204.00	
Compensation	52,503.00	2,200.00	558,404.00		50,303.00	-505,901.00	1,309,366.30
Direct Consultants	12,000.00		16.00		12,000.00	11,984.00	1,500.00
Total Directs	64,503.00	2,200.00	558,420.00		62,303.00	-493,917.00	1,310,866.30
Reimbursables							
Reimbursable Expenses	6,901.00	1,000.00	174,796.00		5,901.00	-167,895.00	153,726.98
Reimbursable Consultants		150,000.00	34,984.00		-150,000.00	-34,984.00	25,570.60
Total Reimbursables	6,901.00	151,000.00	209,780.00		-144,099.00	-202,879.00	179,297.58
Total	71,404.00	153,200.00	768,200.00		-81,796.00	-696,796.00	1,490,163.88

Key Performance Indicators

☆ Find Application


Expense Report

Selection ▾ ◀ 120 of 122 ▶

+ New Expense Report

- MY STUFF
- Timesheet
- Calendar
- Expense Report**
- Self Service
- Approval Center
- Reporting

- DASHBOARDS
- HUBS !
- RESOURCE MANAGEMENT
- PROPOSALS
- BILLING
- TRANSACTION CENTER
- CASH MANAGEMENT
- ACCOUNTING
- GENERAL LEDGER
- PAYROLL
- PURCHASING
- UTILITIES

 **Work Treats 6/29/2023** ■ Submitted
 James Hetfield — America
 Last modified 6/29/2023 01:06 pm by James Hetfield

Save Reassign ▾ Other Actions ▾ 



Awaiting Approval ✕


Step: Report - Supervisor
Assigned: 6/29/2023
Due: 6/30/2023

Assigned Approvers

Bruce Springsteen
Responsibility: Specific Employee
Action Taken: None
Date: 6/29/2023

Currency Override
 Currency: USD
 Exchange Override: None

Default Expense Location
 None

Line Status	Line	Date	Category	Description	Detail	Company Paid	Currency Code	Amount	Payment Exchange Rate	Pay Am
	1	6/29/2023	Expenses - America E	Case of Bourbon		<input type="checkbox"/>	USD	9,999.00	0.0000000000	9,99
	2					<input type="checkbox"/>	USD	0.00	0.0000000000	

Credit Card Charges (5)

Plan

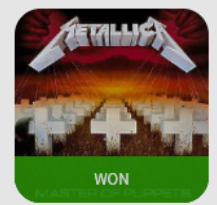
Selection ▾ ◀ 1 of 1 ▶

+ New Project

Master of Puppets
01003.00
Last modified 6/29/2023 02:25 pm by James Hetfield

Check Out Other Actions ▾

CONTRACT SCHEDULE **LABOR** EXPENSES CONSULTANTS UNITS



Project Number
01003.00

Status
Active

Project Type
None

Responsibility
Prime

Project Summary

Stage
Won

Capacity Calculation
Included in Scheduled and Utilization

► Win/Loss Details

Scale: Entire Project in months

Level/Resource Show Less

▼ Master of Puppets
▼ Design
▼ Engineering
Dave Grohl
David Roth
Jack White
James Hetfield
Janis Joplin
Joe Walsh
Rivers Cuomo
► Architecture
► test pending

Employee Card



James Hetfield
Principal-in-Charge

Chicago
Remote
Last modified 1/12/2024 10:49 am by James Hetfield

Actions ▾

PROFILE SKILLS & CREDENTIALS ASSIGNMENTS PROJECTS

Skills
Acoustical Engineer
Administrative
Project Manager

Credentials
American Institute of Architects, Active
AK, US

Professional Engineer, Active
Number: 6767676 AK, US

Close

☆ Find Application

ACCOUNTING

GENERAL LEDGER

PAYROLL

PURCHASING

UTILITIES

SETTINGS

Security

Roles

Users

Password Policies

Workflow

Time

Expense

Cash Management

Accounting

General Ledger

Currency

Billing

Rate Tables

Resource Planning

Project

Roles

Selection ▾ ◀ 1 of 1 ▶

+ New Role

LIMITED

Last modified 10/5/2023 10:44 am by James Hetfield

Actions ▾

OVERVIEW RECORD ACCESS ACCOUNTING PLANNING ACCESS RIGHTS

Full Access to All Menu Items

Enable All Disable All

- > My Stuff
- > Dashboards
- < Hubs

Detailed application tab access is controlled on the Access Rights tab.
- Activities
- Boilerplates
- Contacts
- Employees
- Equipment
- > Firms
- Images
- Marketing Campaigns
- Numbers
- > Projects

Type of Role

- Setup
- Accounting
- Administrator
- CRM

Rights

Dashboards, Searches, Options, and Grid Views
Save For All Roles

Email Templates
Save For All Roles

Process Queues

Allow Priority
0

Organization Record Access

Organization Record Access
All Organizations

Dashboards and Dashparts
None

- Allow Access to Vantagepoint Intelligence Dashparts
- Allow Access to Analysis Cubes Full Refresh

☆ Find Application

Contacts Find contact

▼ Active ▾ ◀ 1 of 23 ▶ ☰

+ New Contact

- HUBS
- Activities
- Boilerplates
- Contacts**
- Employees
- > Firms
- Images
- Marketing Campaigns
- Numbers
- > Projects !
- Widgets

Angus Young

Add Touchpoint Other Actions ▾ 

Last modified 1/30/2024 02:18 pm by James Hetfield

- OVERVIEW**
- ACTIVITIES
- MARKETING CAMPAIGNS
- ASSOCIATIONS
- OUR TEAM
- FILES & LINKS
- UD CONTACT TAB



Name

Angus Young

Firm

[AC/DC](#)

Contact Information

(219) 201-5555 fax

Firm Address

✉ Mailing
666 Rockin Way
Perth, Western Australia 6000
Australia

Other Address

None

Status

Active

Qualified Status

Qualified

Status Date

2/13/2019

Owner

None

Source

None

Last Activity

None

Other Information

Market

None

Website

None

Rating

Hot

Description

Angus McKinnon Young (born 31 March 1955) is an Australian musician, best known as the co-founder, lead guitarist, songwriter, and only remaining original member of the [hard rock](#) band [AC/DC](#). He is known for his energetic performances, schoolboy-uniform stage outfits and his own version of [Chuck Berrv's duckwalk](#). Young was ranked 24th in [Rollina Stone's](#) 100 greatest guitarists of all-time list.^[1] In 2003, Young and the other members of AC/DC were

- RESOURCE MANAGEMENT
- PROPOSALS
- BILLING
- TRANSACTION CENTER
- CASH MANAGEMENT
- ACCOUNTING
- GENERAL LEDGER
- PAYROLL
- PURCHASING

☆ Find Application

Projects Find project

Active Regular ▾ 10 records

+ New Project

HUBS

- Activities
- Boilerplates
- Contacts
- Employees
- > Firms
- Images
- Marketing Campaigns
- Numbers
- ✓ Projects
- Dashboard
- Project Review
- Project
- Estimates
- Contract Management
- Revenue Forecast
- Plan
- Budget
- Billing Terms
- Invoices
- Draft Invoice Approvals
- Widgets

Actions ▾

Bulk Update

View: Default (modified) ▾

<input type="checkbox"/>	Image	Number	Name	Long Name	Organization	Stage	Charge Type	Primary Clie
<input checked="" type="checkbox"/>		▶ 01003.00	Master of Puppets	Master of Puppets	Chicago	Won	Regular	Metallica
<input type="checkbox"/>		▶ 01005.00	And Justice For All	And Justice For All	Chicago	Won	Regular	Metallica
<input type="checkbox"/>		▶ 01034.00	Load	Load	Chicago	Won	Regular	Metallica
<input type="checkbox"/>		01055.00	Rocky Mountain Way	Rocky Mountain Way	Chicago	Won	Regular	Joe Walsh
<input type="checkbox"/>		01056.00	Hotel California	Hotel California	Chicago	Won	Regular	Eagles
<input type="checkbox"/>		▶ 01057.00	A Series of Sneaks	A Series of Sneaksss	Los Angeles	Won	Regular	Spoon
<input type="checkbox"/>		01058.00	Pacific Daydream	Pacific Daydream	Los Angeles	Won	Regular	Weezer
<input type="checkbox"/>		▶ 06000.01	Master of Puppets	Master of Puppets	Chicago	Won	Regular	Metallica
<input type="checkbox"/>		Z0000.05	Midtown Center	Midtown Center	Chicago	Pending	Regular	Led Zeppeli
<input type="checkbox"/>		Z0000.07	Benson Research Lab	Benson Research Lab	Chicago	Pending	Regular	Anderson &

Deltek Vantagepoint >

User ID

Vantagepoint 5.0 is now live!

Take a look at the newest features and updates 5.0 has to offer.

Click the **side arrow button** to learn more.

Find Application

Sales Find Project

All 1150 records

Edit Mode:

- My Dashboards
- Sales
- Pipeline Review
- Seller/Doer
- Win/Loss Analysis
- Project Manager with A/R
- Project Manager Snapshot
- My Utilization
- Employee Utilization
- Billing Review
- Owner
- General Ledger
- Resource Manager
- My Project Plans
- Project Plan Summary
- Project Financials
- VI- Project Details
- VI- Executive
- VI -CRM
- VI-Profit Details
- Accounts Receivable
- My Upcoming Assignments
- Employee

New Dashboard Save Share Copy Delete Options + New Dashpart Import/Export

Date	Subject	Contact (Project)	Notes	Completed
1/30/2022	Meeting			
1/31/2022	Appointment			
1/31/2022	Meeting			
2/1/2022				

Create Dashpart Calculations

Deltek Vantagepoint
Apply & Monitor, Inc Period Ending 6/30/2022

Final Application

Dashboard Calculation

Save Cancel

DESCRIPTION % Revenue Last Period

FIELD % Revenue Last Period

Quick Search

Project Number

Client Name

Total Revenue

Revenue This Period

Revenue Last Period

Revenue 2 Periods Ago

Revenue 3 Periods Ago

Revenue 4 Periods Ago

Add Field

Data Type Percentage

Calculator

7 8 9 /

4 5 6 *

1 2 3 -

0 . +

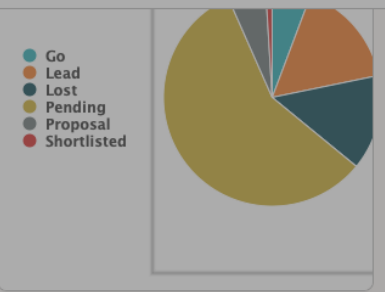
Clear Check Calculation

HERE COL

Calculation

Resultator

Multiplier 100



You can now create dashpart calculations in table, chart, and KPI dashparts. Dashpart calculations are calculated fields based on columns that you selected in your dashpart. Filter and date range settings of the dashpart columns are also applied to the dashpart calculation.

☆ Find Application

MY STUFF

DASHBOARDS

HUBS

RESOURCE MANAGEMENT

PROPOSALS

BILLING

TRANSACTION CENTER

CASH MANAGEMENT

ACCOUNTING

GENERAL LEDGER

PAYROLL

PURCHASING

UTILITIES

SETTINGS

Getting Started with Deltek Vantagepoint



Look Around

- [Menu Navigation Overview](#)
- Update your preferences
- Explore help topics



Become part of the Deltek Co

- Join a user group
- Register for Deltek ProjectCon
- Sign up for a class
- Subscribe to a blog

3:50

Menu Navigation Overview

- Find menu items
- Create screen real estate
- Navigate the toolbar
- Access online help and learning aids

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⏪ ⏩

☆ Find Application

- MY STUFF
- Timesheet
- Calendar
- Expense Report**
- Self Service
- Approval Center
- Reporting

- DASHBOARDS
- HUBS
- RESOURCE MANAGEMENT
- PROPOSALS
- BILLING
- TRANSACTION CENTER
- CASH MANAGEMENT
- ACCOUNTING
- GENERAL LEDGER
- PAYROLL
- PURCHASING
- UTILITIES

Expense Report

Find expense report

Selection ▾ ◀ 120 of 122 ▶

Work Treats 6/29/2023 ■ Submitted

James Hetfield — America

Last modified 6/29/2023 01:06 pm by James Hetfield



Currency Override **Default Expense Location**

Currency: USD *None*

Exchange Override: None

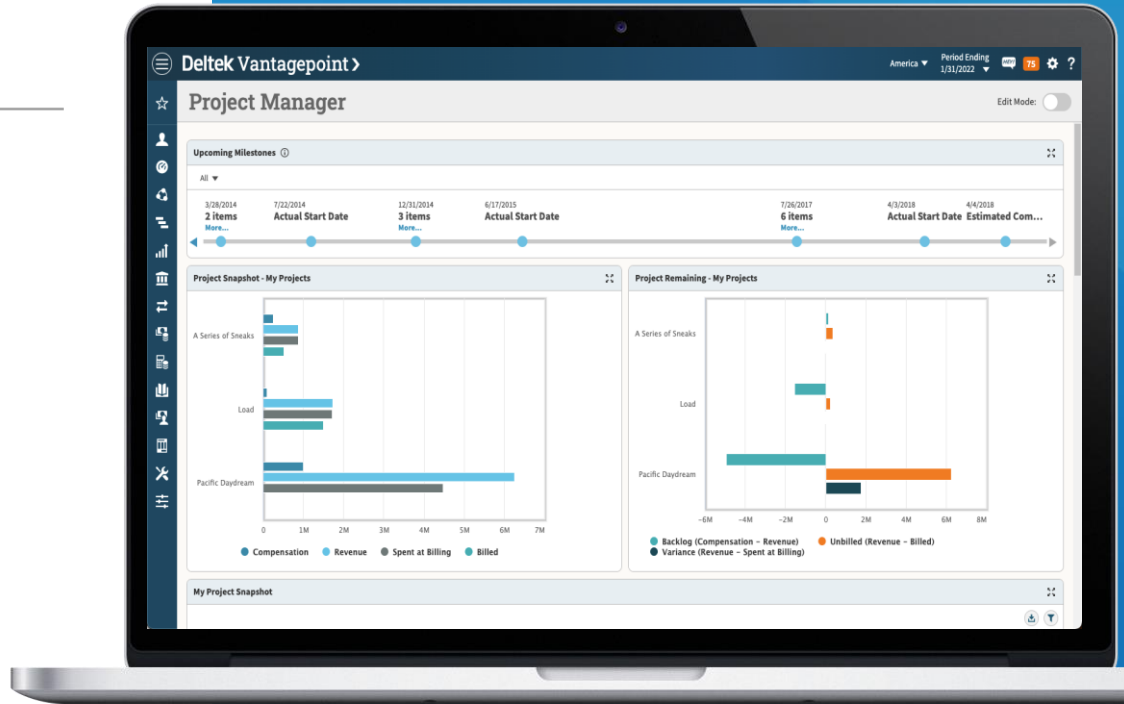
Line Status	Line	Date	Category	Description	Detail	Company Paid	Currency Code		
	1	6/29/2023	Expenses - America E	Case of Bourbon		<input type="checkbox"/>	USD	9	
	2					<input type="checkbox"/>	USD	0.00	0.0000000000

- Online Help
- Expense Reports Form
 - Display the Expense Reports Form
 - Header Fields for the Expense Report Form
 - Actions Bar for the Expense Report Form
 - Contents of the Expense Report Form
- Learning Aids
- Enter and Submit Expense Reports video**
 - Intelligent Character Recognition for Mobile Expenses video
 - Mobile Credit Card Expenses video
- Vantagepoint Information Center
- Technical Administrator Online Help
 - PDF Guides
 - What's New
 - Release Notes
 - Video Library
 - Developer Resources (API)
 - Data Dictionary
- Email Help Desk
- Deltek Support Center
 - Keyboard Shortcuts
 - About

arges (5)

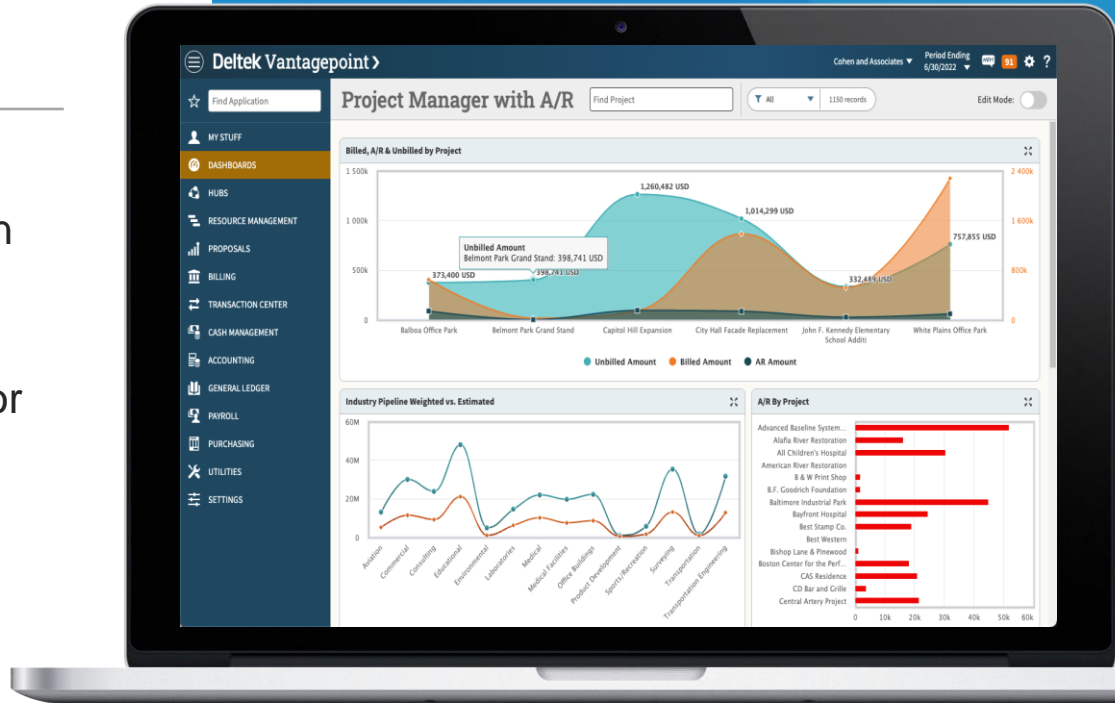
Recap

- » Easy to access
- » Easy to find the right data
- » Easy to use



Vantagepoint Commitment

- » Strong roadmap; solid strategy
- » Vantagepoint will be unmatched in the market
- » In totality, there is not a better product out there, purpose-built for your industry
- » We are committed to you, your businesses and your industry
- » All organizations will benefit from the value Vantagepoint brings
- » Vantagepoint is an evolution that will help future-proof your business



Deltek.

Thank You!

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