

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 company, from project initiation to completion. Get actionable insights to make more informed decisions.



## More Efficient Way to Work

Enable teamwork and collaboration via a single tool, and empower users with a simple, intuitive experience.



## Single Project Command Center

Control all project information in one place – from pursuit and proposal through project planning and financial management



## Increased Profitability and Cash Flow

Manage project costs and company financials with greater precision and control to boost profitability and cash flow

Deltek.

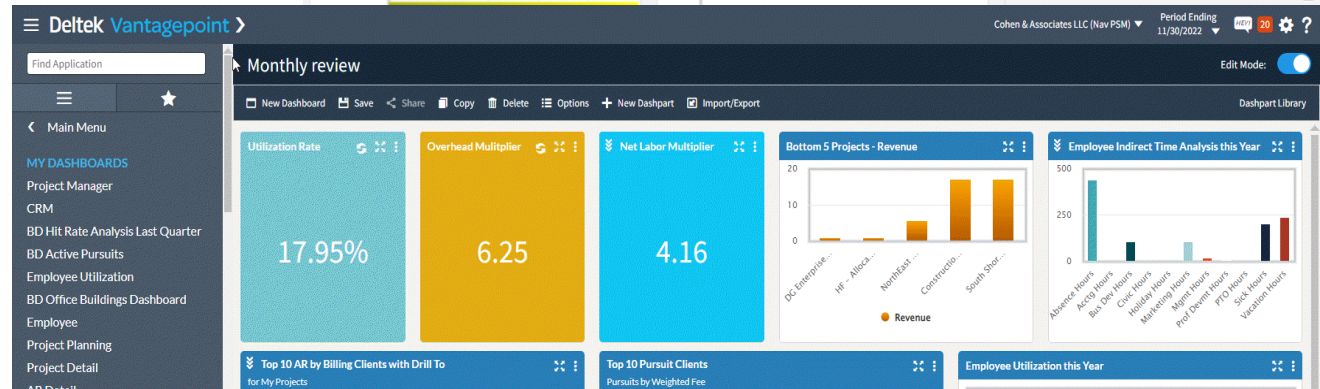
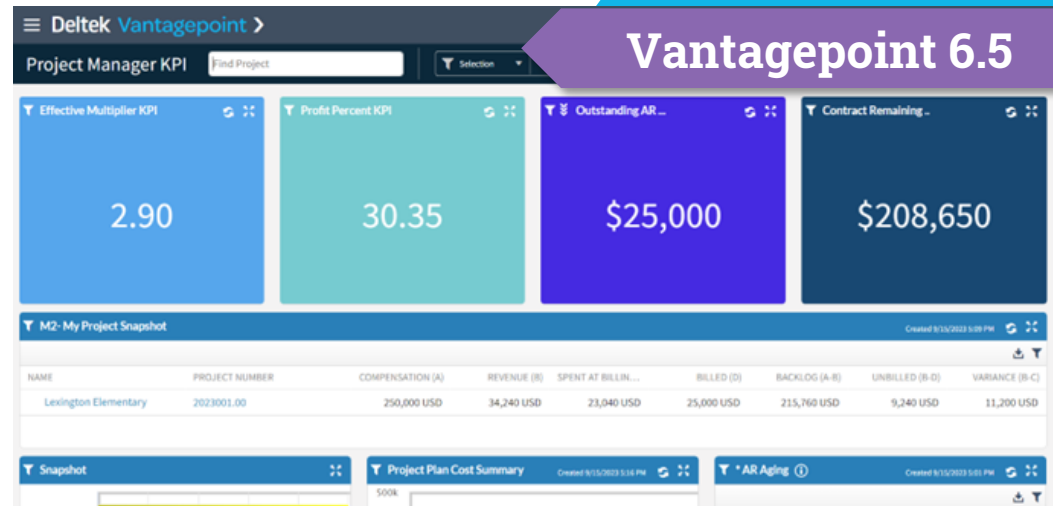
# Dashboards and Business Intelligence

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# KPIs on the Dashboard

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



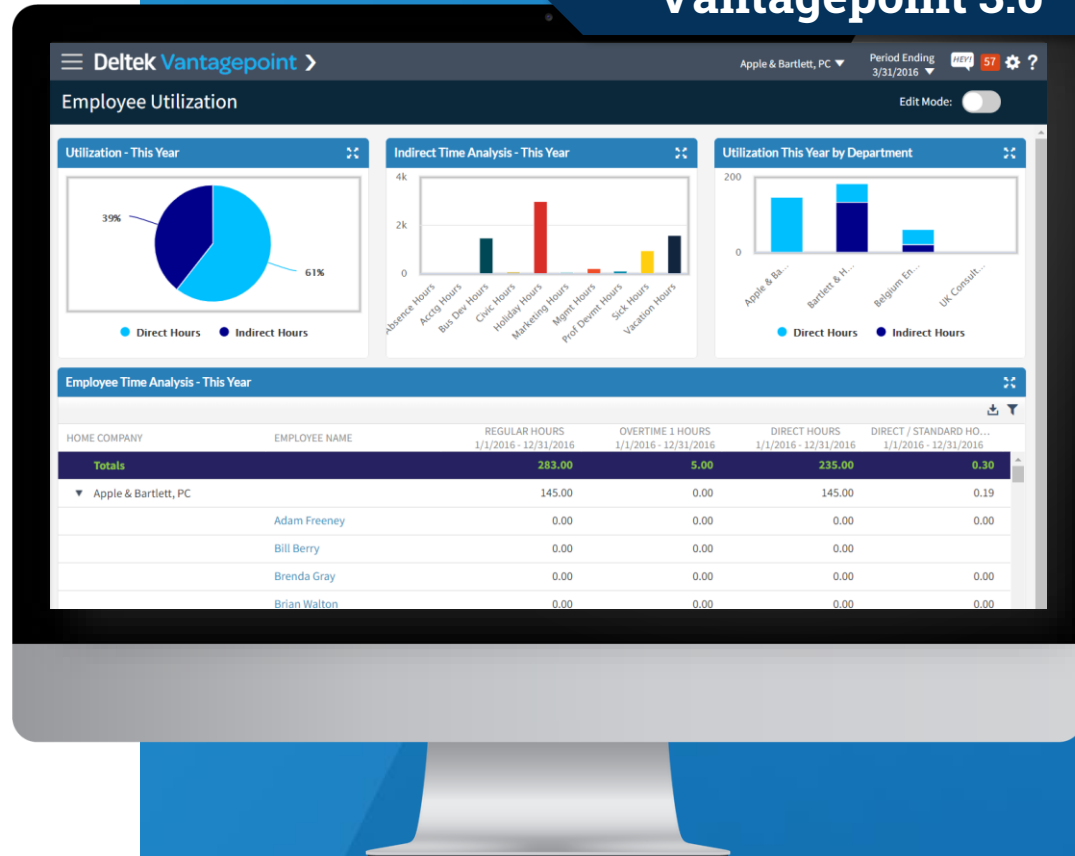
## Dashboard Enhancements

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



# 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



# More Detailed Dashboards

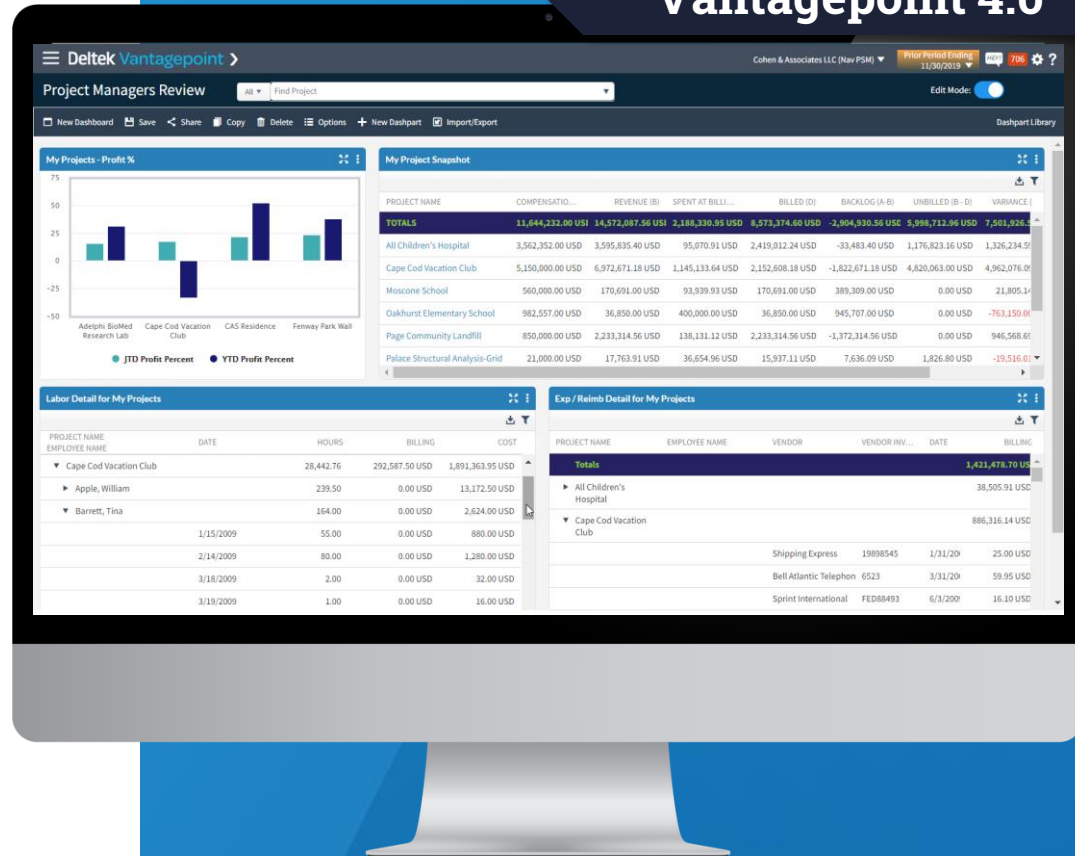
- » Drill to detail for hours, labor cost and labor billing on project dashparts
- » New options for planning data on dashparts
- » Enhanced pipeline dashpart includes total compensation

The screenshot displays the 'Project Planning Analysis' dashboard in Deltek Vantagepoint. The interface includes a header with the company name, user information, and a period ending date of 5/31/2020. The main content is a table titled 'Planning Hours' with columns for NAME, COMPENSATION, PLANNED HOURS, % PLANNED EXP HO..., HOURS, PLANNED COST, % PLANNED EXP COST, and COS. The table lists various projects and their associated costs and hours.

NAME	COMPENSATION	PLANNED HOURS	% PLANNED EXP HO...	HOURS	PLANNED COST	% PLANNED EXP COST	COS
<b>TOTALS</b>							
▶ 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

# Improved Project Status Visibility

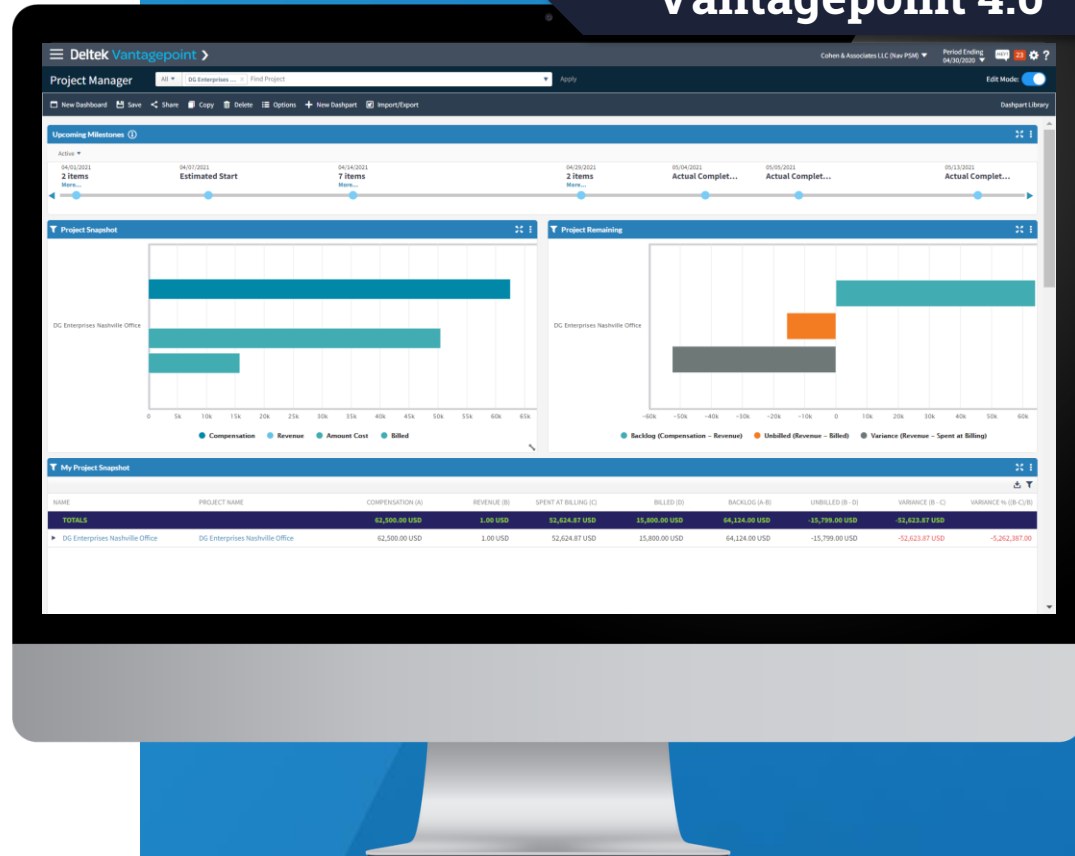
- » NEW project detail base for dashboards to create chart and table dashparts
- » Eliminates need for separate processes and spreadsheets
- » Delivers more detail to dashboard including labor, expense and reimbursable detail





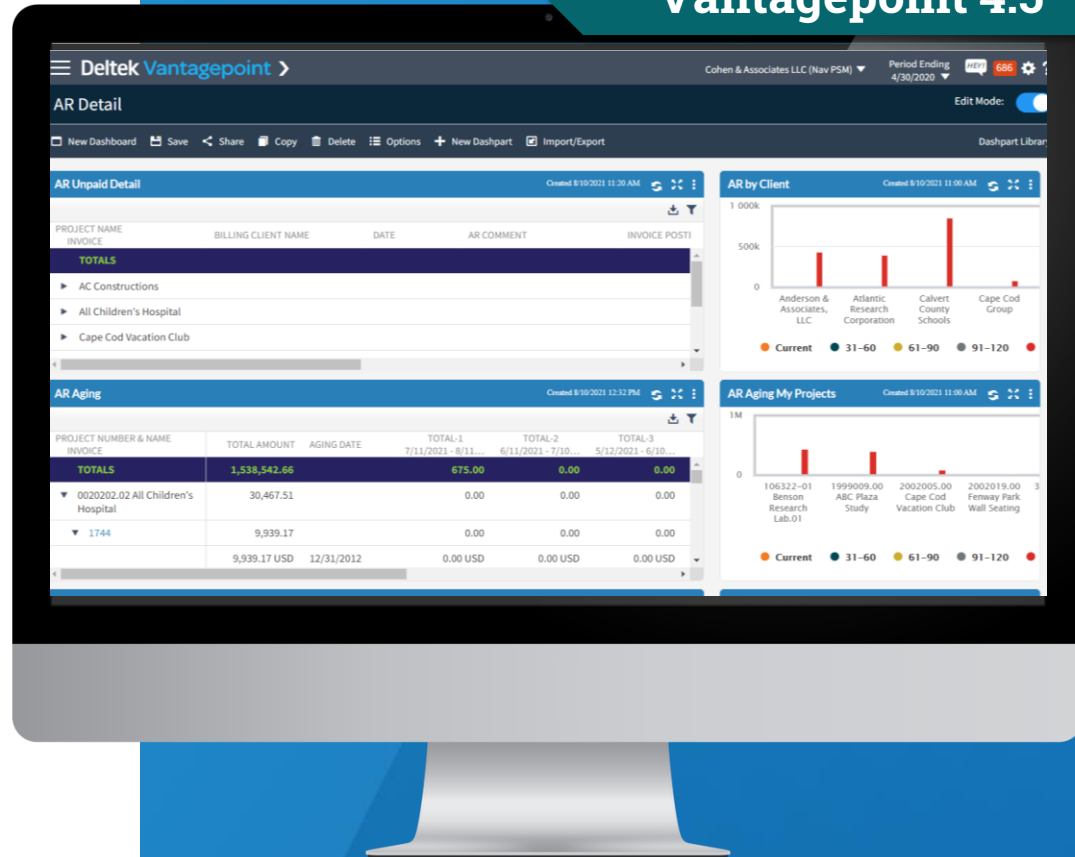
# Focus Attention with Dashboard Filters

- » 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



# 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



## Personal Dashboards

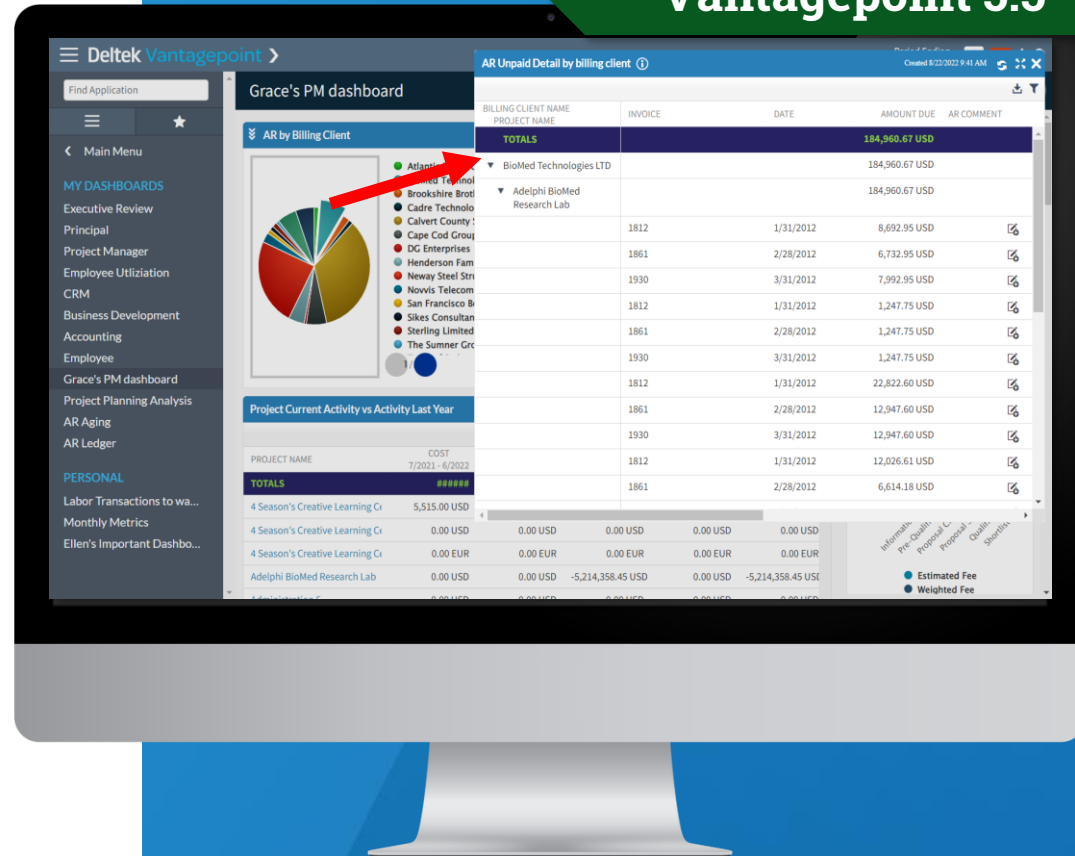
- » Expand dashboard adoption by allowing users to create personal dashboards
- » Eliminate need for administrative time spent on individual needs
- » Give users the power to manage their own data and see what they need with pre-configured dashparts

The screenshot displays the Deltek Vantagepoint 5.5 interface. At the top, the user is identified as 'Apple & Bartlett, PC (Nav PSM)' with a period ending of '6/30/2022'. The interface is divided into several sections:

- Left Navigation Panel:** Contains 'Find Application', 'Main Menu', 'MY DASHBOARDS' (Project Manager, Project Type Analysis, Grace's PM dashboard), and 'PERSONAL' (Ellen's AR dashboard, In Pursuit Projects).
- Ellen's AR dashboard:** Shows an 'AR Aging' table with columns for PROJECT, INVOICE NUMBER, INVOICE, TOTAL AMOUNT, INVOICE DATE, and multiple columns for TOTAL AMOUNT by date range (5/21/2022-6/21, 4/21/2022-5/20, 3/22/2022-4/20, 2/20/2022-3/21). The table includes rows for 'TOTALS', '106322-01 Everest Shopping Complex', 'No Invoice Number', and '52531'.
- Grace's PM dashboard:** Features a 'My Project AR' table with columns for PROJECT NAME, BILLING CLIENT, JTD BILLED, JTD RECEIVED, and JTD AR AMOUNT. It lists various projects like 'Barton's Creative Learning Center', 'BioMed Research', etc. To the right is an 'AR by Billing Client' pie chart with a legend listing clients such as 'DC Enterprises', 'The Summer Group', 'Sikes Consultants', etc.

## 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' dashboard. At the top, there is a 'Project Base Dashpart JP' section with a table of project data. Below this, a 'Cost Summary' modal window is open, showing a detailed view of a project's cost and completion status.

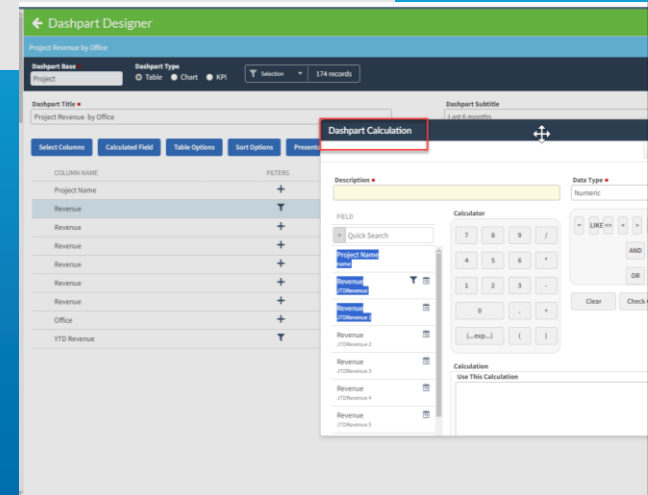
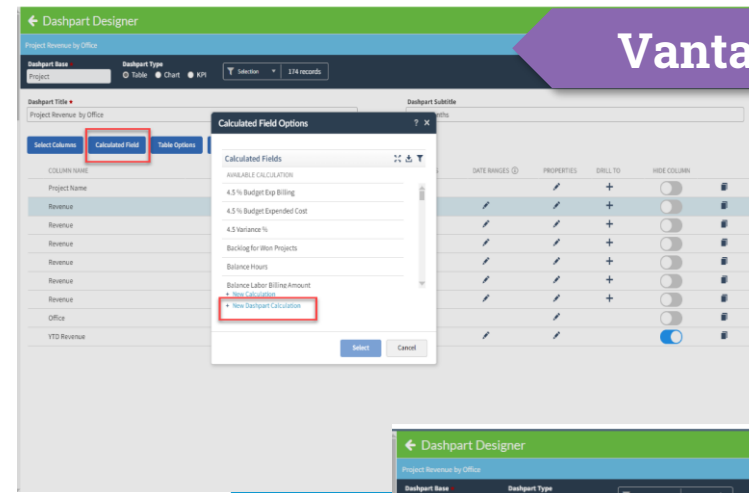
WBS LEVEL NUMBER	WBS LEVEL NAME	BUDGETED BILLING	BUDGETED AMOUNT COST	WEIGHTED PERCENT COMPLETE BILL
<b>TOTALS</b>		<b>642,875.00 USD</b>	<b>1,172,538.00 USD</b>	
200300500	Adelphi BioMed Research Lab	642,875.00 USD	672,538.00 USD	14.45
200701500	Alexandria Westinghouse Office	0.00 USD	500,000.00 USD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

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

# Improved Dashboard Calculations

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



# Firm Base Dashparts

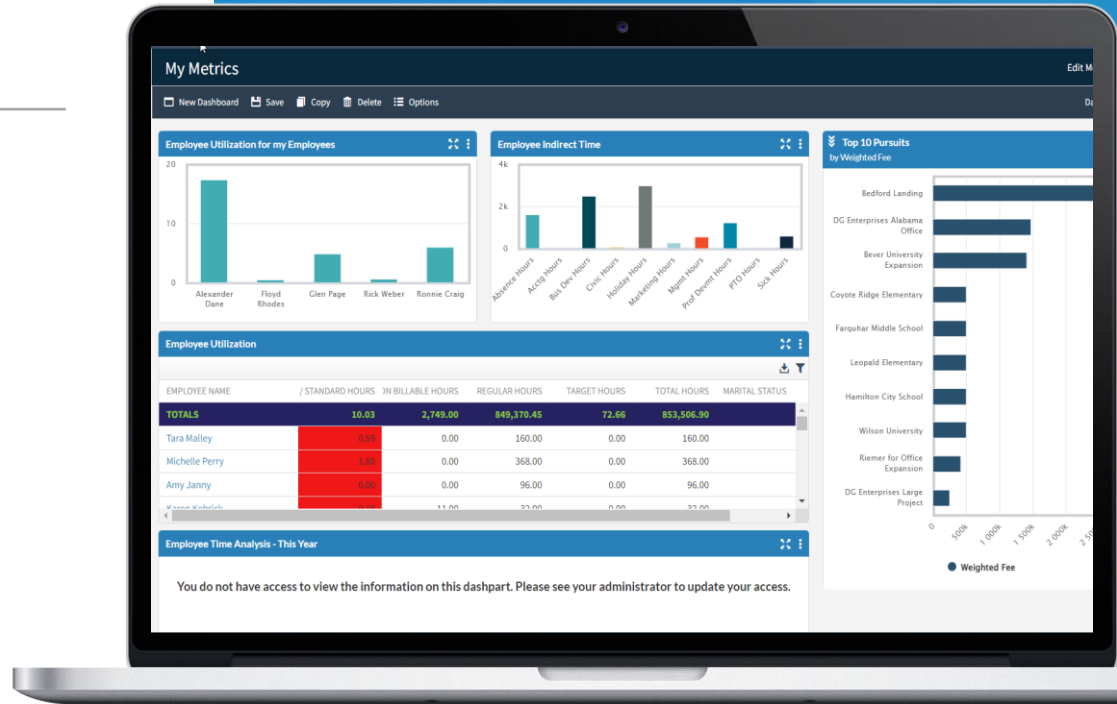
- » Firm base now available to build dashparts
- » Continuing to extend flexibility of dashboards
- » More details at their fingertips
- » Great option to share with BD leaders who may not have been able to build out what they need on dashboards previously

LTK\_Test  
Test In USD Created 6/12/2023 3:37 PM

FIRM NAME	FIRM NUMBER	IS CLIENT	IS VENDOR	AVAILABLE IN COMPANIES	PRIMARY CITY	PRIMARY STATE
<b>TOTALS</b>						
Add Firm From Items Master	T-001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America		
American Express		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	San Diego	CA
Atlanta Falcons		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Atlanta	GA
Atlantic Records		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America : Bartlett Enterprises Europe	San Diego	CA
Billy Bob's Used Autos		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America		
Boat Store of Orange Beach	MM-0001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Gulf Shores	AL
Butsko Utility Design, Inc		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America		
CATHY Vendor 2		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America		
DownEast Mechanical Consultant		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Bar Harbor	ME
Firm - Demo4	123	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile	AL
Firm Demo1	1234	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile	AL
Gibson Guitars		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	San Diego	CA
Granger	0398	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile	AL
Les Paul Guitars		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America : Bartlett Enterprises Europe	San Diego	CA
Ludwig Drums		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	San Diego	CA
MCA Records		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Los Angeles	CA
New Firm - Demo2	MM-0002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bartlett Enterprises America	Mobile	AL

# Improve Employee Info for Dashboards

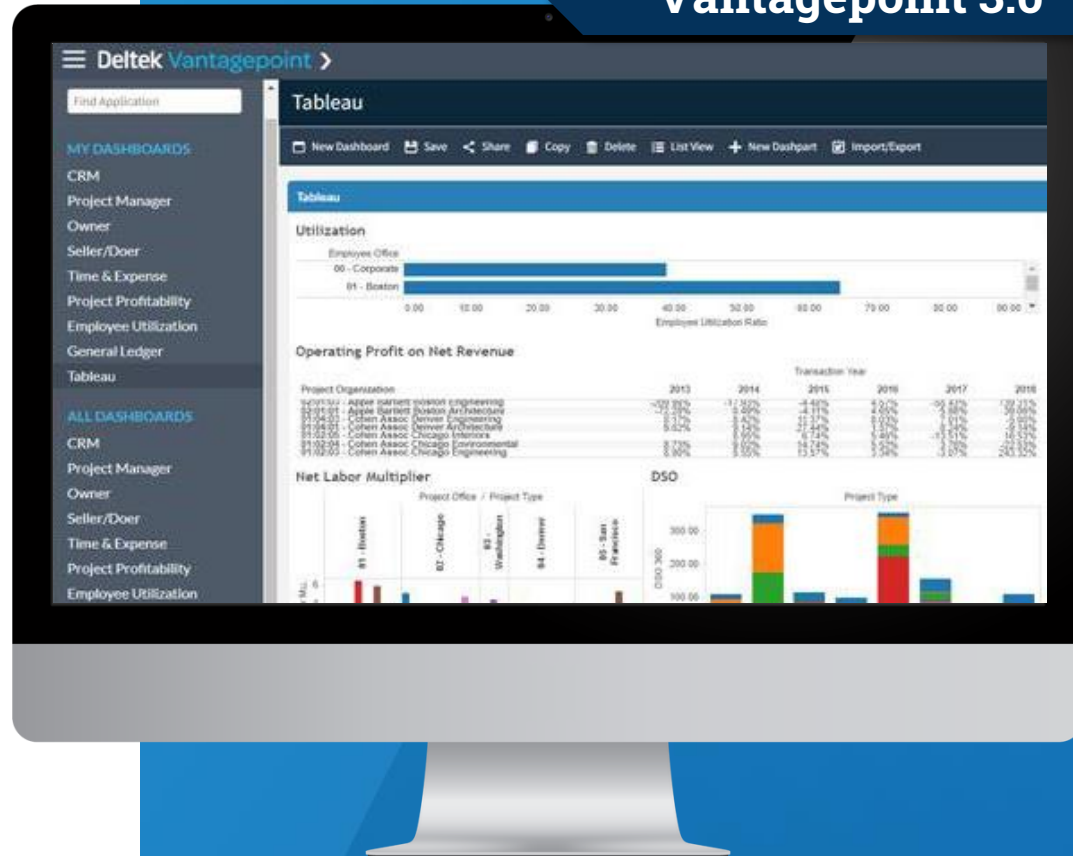
- » Increased visibility with more employee data on dashboards
- » New columns now available for dashboard from employee hub
- » Employee User defined fields available
- » New field level security





# Vantagepoint Intelligence

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



# Advanced Business Intelligence

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

## Vantagepoint 4.0



Deltek.

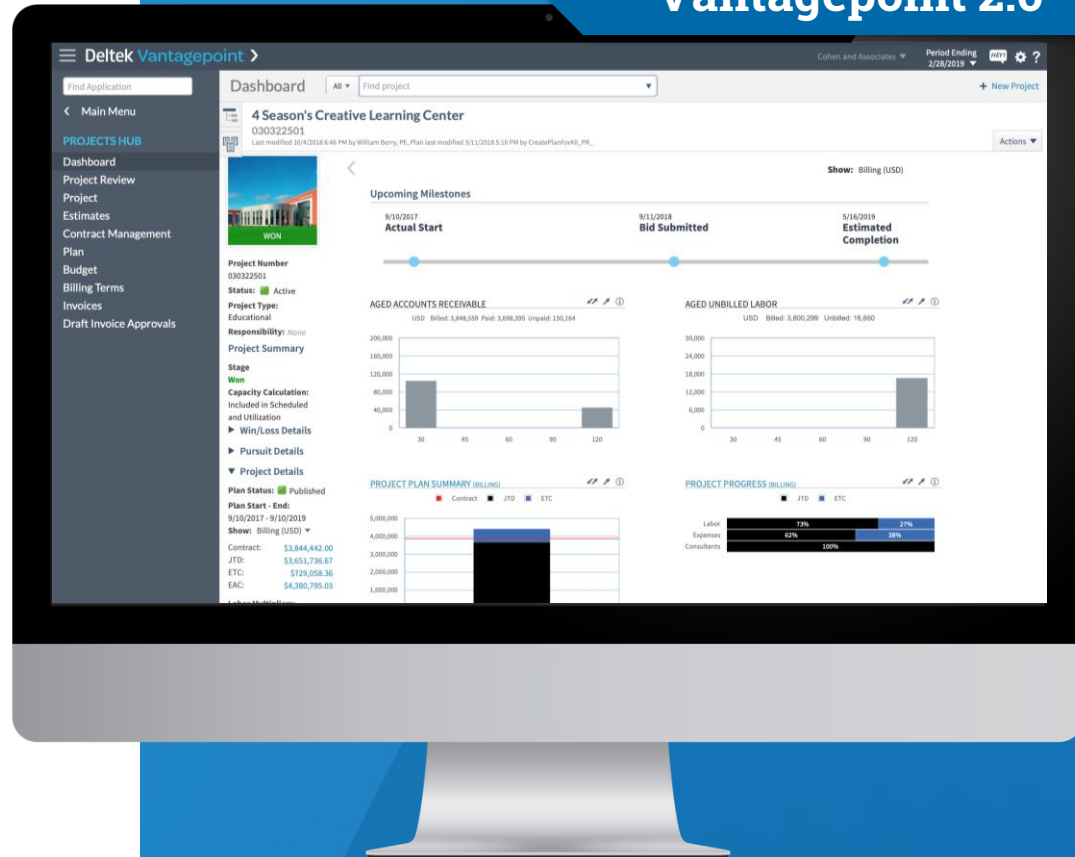
# Project Management & Resource Management

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# One Project Command Center

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



# Revenue Forecasting in Projects

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

The screenshot displays the 'Revenue Forecast' page in Deltek Vantagepoint. The page title is 'DG Elementary' with ID '1900003.00'. Below the title is a table with the following columns: LEVEL, STAGE, FORECAST START, FORECAST END, COMPENSATION, J EA, and five quarterly revenue columns for 2020 (09/14-09/30, 10/01-10/31, 11/01-11/30, 12/01-12/31, 01/01-01/31). The table contains several rows of data, including a summary row for the entire project and detailed rows for sub-projects like '003 Schematic Design' and '004 Engineering Tasks'.

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

## Project Review Drill Down

- » Empower PMs to better monitor project details
- » Direct, indirect and reimbursable expenses
- » Direct and reimbursable consultants
- » Similar to labor drilling in a single place with expand/collapse functionality

The screenshot displays the 'Project Review' interface for 'DG Enterprises Sydney Office' (1900001.00). The interface includes a search bar, navigation controls, and a main data table. A modal window titled 'Labor at Burden' is open, showing a list of labor entries with columns for Name, Date, Hours, Amount, Posted, and Comment.

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

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

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

# Easily Monitor Upcoming Tasks & Access Key Data

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

**Vantagepoint 5.0**

**Employee**

New Dashboard Save Share Copy Delete Options + New Dashp...

**My Upcoming Assignments**

Forecast Range: 6 months beginning January 2022 Show Capacity: Utilization %

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

**Deltek Vantagepoint**

Cohen and Associates Period En 6/30/201

**Executive**

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

**Pipeline**

Edit Search By Project Type Next 6 Months (Projected) SUSD - US Dollar

Aviation  
Commercial  
Educational  
Educational Facilities  
Environmental  
Medical  
Office Buildings  
Transportation

**Deltek Vantagepoint**

Cohen & Associates LLC (Non PMA) 11/30/2015

**Project Managers Review**

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

**My Projects - Profit %**

My Project Snapshot

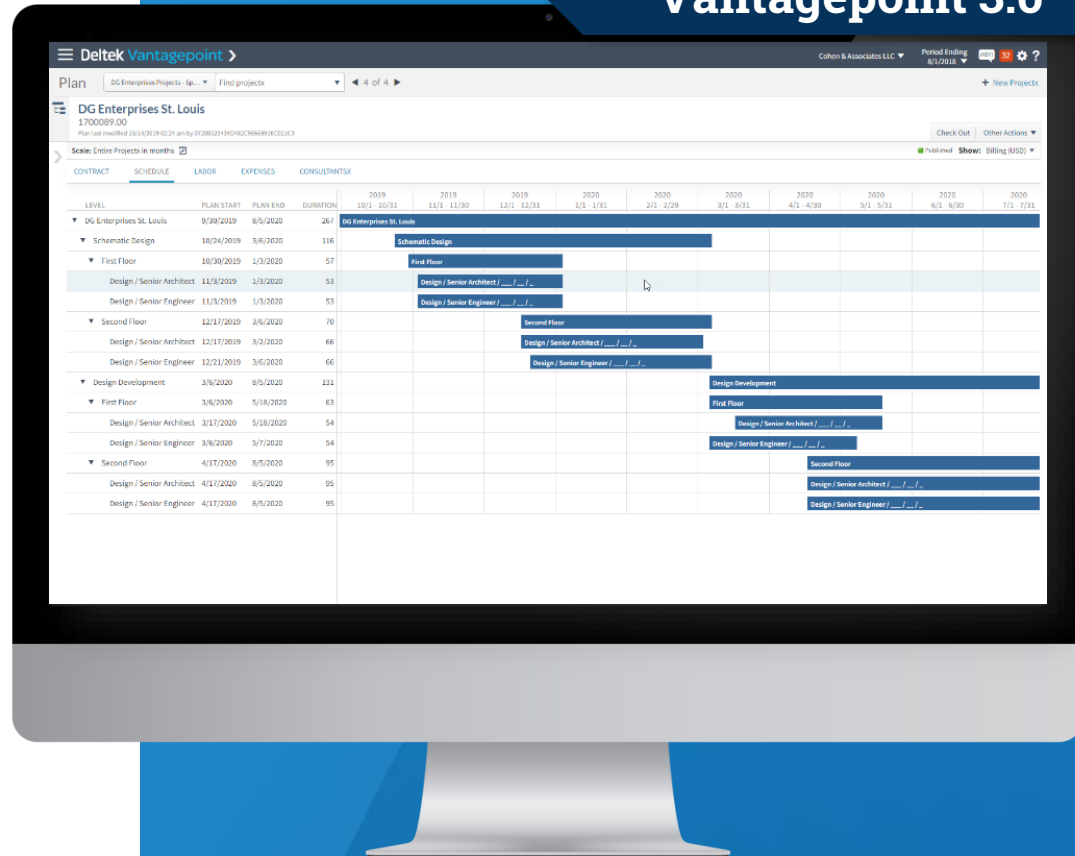
PROJECT NAME	COMMENTS	REVENUE (M USD)	SPENT (M USD)	BILL TO (M USD)	SALES (M USD)	UNBILLED (M USD)	WORKING	
TOTALS		13,444,222.00	14,372,087.00	2,188,209.00	6,377,174.00	-1,264,430.50	4,396,711.00	7,281,211.00
All Children's Hospital		3,562,352.00	3,995,935.40	95,076.90	2,419,922.24	-31,483.40	1,176,623.36	1,326,234.9
Cape Cod Vacation Club		5,150,000.00	6,972,671.18	11,451,133.64	2,152,898.18	-1,622,671.18	4,820,263.00	4,362,076.0
Waxsone School		560,000.00	170,691.00	93,939.00	170,691.00	381,309.00	0.00	21,861.1
Dakhurst Elementary School		982,557.00	36,850.00	400,000.00	36,850.00	945,707.00	0.00	-763,150.0
Page Community Landfill		350,000.00	2,233,314.56	138,131.12	2,233,314.56	-1,372,314.56	0.00	946,588.0
Palace Structural Analysis Grid		21,000.00	17,763.51	36,654.96	15,937.11	7,618.00	1,826.80	-19,531.0

**Labor Detail for My Projects**

PROJECT NAME	EMPLOYEE NAME	VEHICLE	VEHICLE INV...	DATE	BILLING
<b>Totals</b>					
1,431,476.76 USD					
All Children's Hospital					
38,500.50 USD					
Cape Cod Vacation Club					
886,136.14 USD					
Shipping Express					
1880645 1/31/20 25.00 USD					
Bell Atlantic Telephone					
023 3/31/20 58.95 USD					

# Visual Project Scheduling

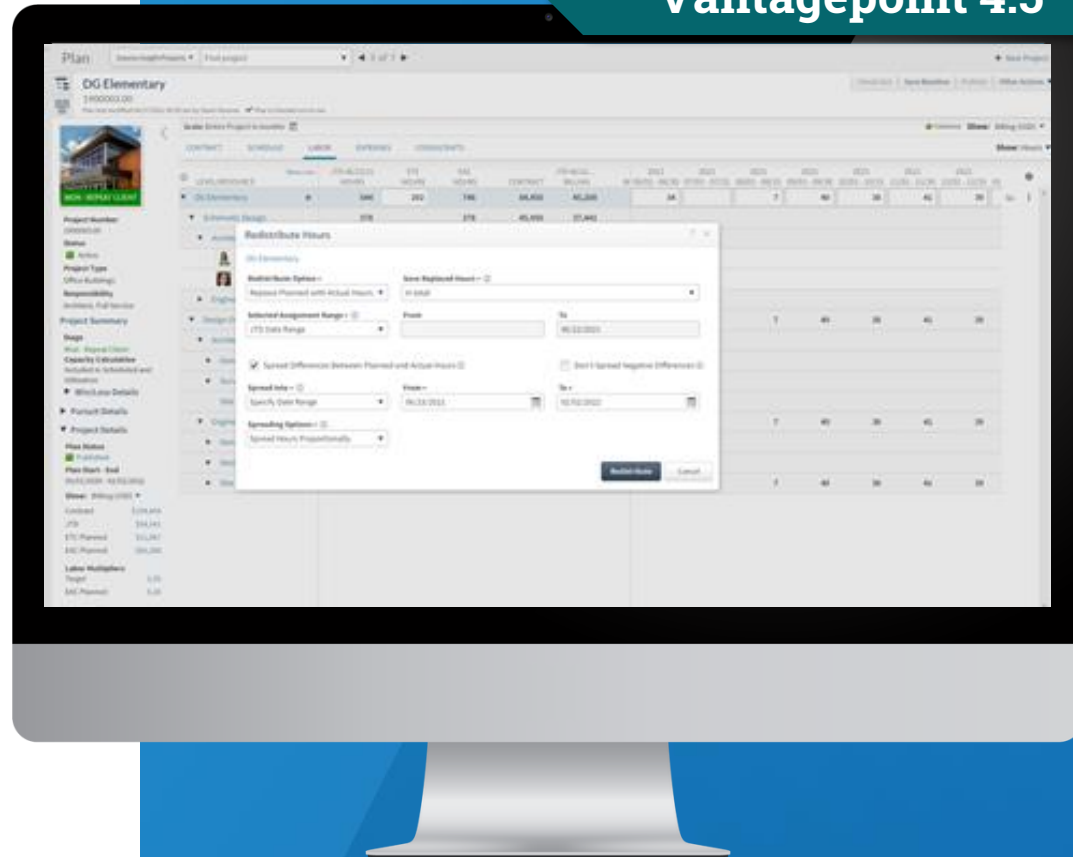
- » Easier to view gaps and overlap in project schedule
- » Quickly shift and update schedule as deadlines and projects change
- » Improve project schedule and resource assignment accuracy
- » Export Gantt Chart
- » Plan labor to the labor code level





# 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



# 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

# Improve Team Management and Project Analysis

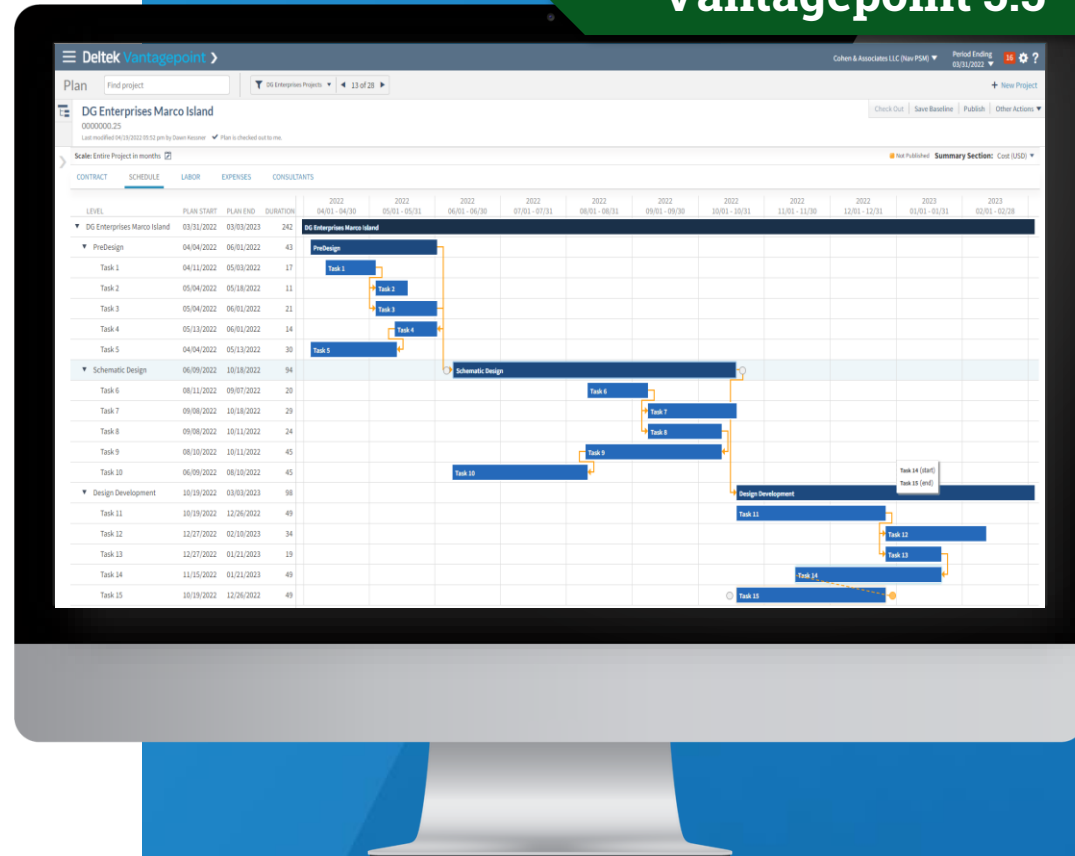
- » Better evaluate and adjust team assignments with enhanced search and project filters
- » More specific searches to ensure the right people are available for your projects
- » In-depth project analysis: planned, actual and baseline in one view
- » More proactive project management and insight into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

The screenshot displays the Vantagepoint 5.0 interface. At the top, there's a 'Plan' section for 'Holbrook City Plan' (1825934.01) with a 'LEAD' role. Below this is a table with columns for 'LEVEL/RESOURCE', 'PLANNED HOURS', 'PLANNED COST', 'PLAN STA', 'SUBROW', and a grid of dates from 4/1/20 to 8/1/20. A 'Resource View' window is overlaid, showing a list of resources like Amy Miller, Cindy Snow, Dawn Kessner, and Tara Malley, along with their assignments to various projects. A 'Filter Project' dialog box is also visible, allowing users to filter projects by status, charge type, organization name, project manager, stage step, and probability.

*Deliver More Power to Project Managers*

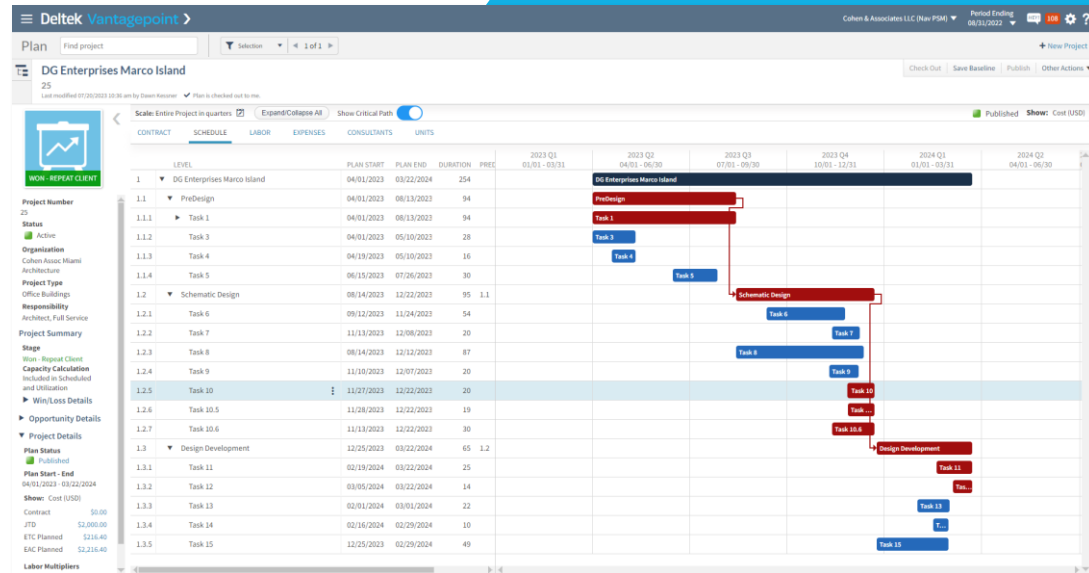
# Schedule Dependencies

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



# Easily Identify Critical Path

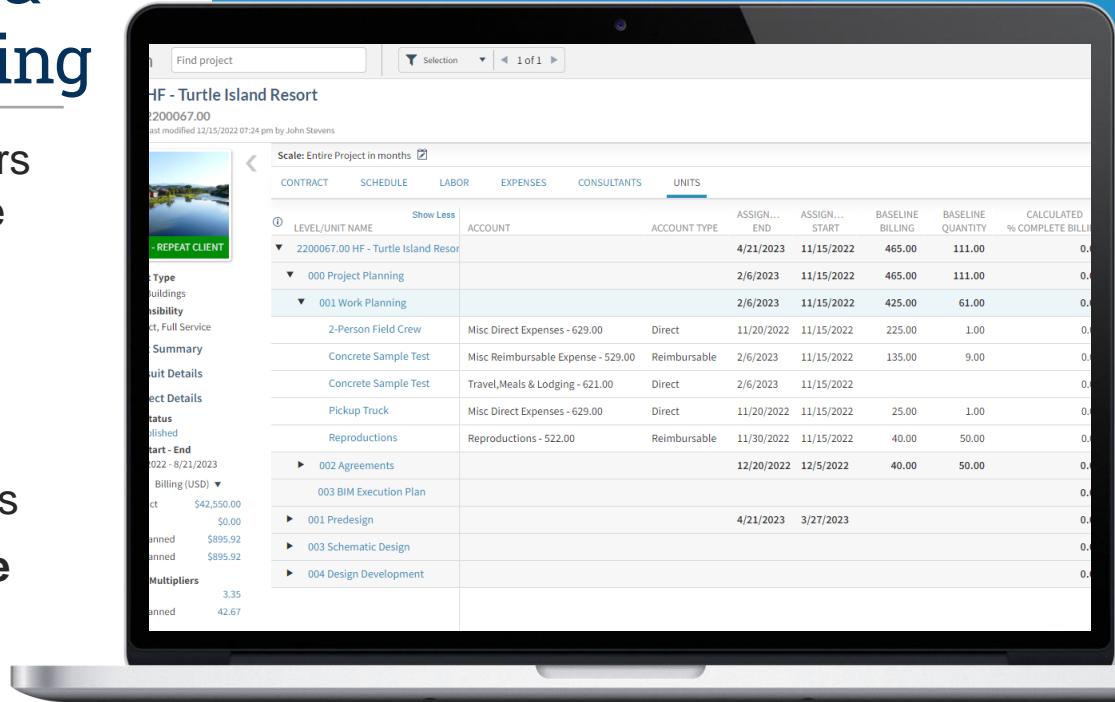
- » Show Critical Path option (toggle) in plan
  - » “Critical path” is all work items that would impact project end if moved forward 1 day
- » Expand/Collapse All option within the Gantt chart



## Plan Project Expenses & Labor with Unit Planning

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

**NOTE: Resource planning module required**



# 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**

CONTRACT	SCHEDULE	LABOR	EXPENSES	CONSULTANTS	UNITS	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	2023 10/1 - 10/31	2023 11/1 - 11/30
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	3,743.99	3,743.98
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	12,500.00	20,500.04	9,457.23	Planned Billing (USD)	4,880.93	5,433.81	7,891.54	8,267.34	8,267.32
						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	2,183.00	2,287.04	2,287.03
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	12,500.00	20,500.04	9,457.23	Planned Billing (USD)	1,125.97	1,321.22	2,183.00	2,287.04	2,287.03
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	500.00	500.00	424.11	Planned Cost (USD)	13.39	102.68	93.75	98.22	98.21
						Green	6/2/2023	12/31/2023	9/1/2023	12/31/2023	4,000.02	12,000.06	4,000.02	Planned Cost (USD)	13.39	102.68	93.75	98.22	98.21
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	4,000.02	4,000.02	2,516.57	Planned Cost (USD)	976.75	1,023.26	1,023.26		
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	4,000.02	4,000.02	2,516.57	Planned Billing (USD)	2,930.25	3,069.78	3,069.78		
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	3,999.96	3,999.96	2,516.53	Planned Cost (USD)	556.30	609.27	556.30	582.78	582.79
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	3,999.96	3,999.96	2,516.53	Planned Billing (USD)	556.30	609.27	556.30	582.78	582.77
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	9,000.00	27,000.00	5,042.25	Planned Cost (USD)	1,251.45	1,370.96	1,251.46	1,311.26	1,311.25
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	9,000.00	27,000.00	5,042.25	Planned Billing (USD)	3,754.96	4,132.59	3,754.96	3,933.78	3,933.77
						Green	6/2/2023	12/31/2023	6/2/2023	12/31/2023	1,000.00		628.14	Planned Cost (USD)	139.08	152.31	139.08	145.69	145.70

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# CRM and Pipeline Management

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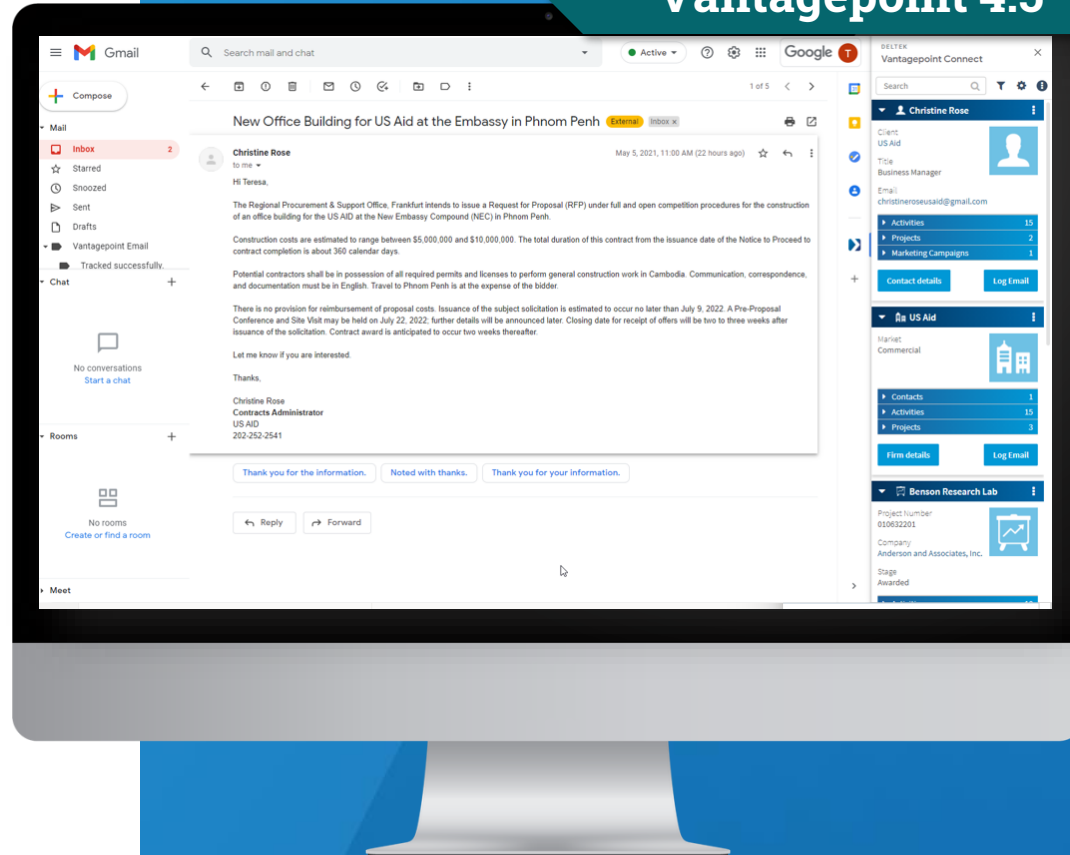




# Vantagepoint Connect

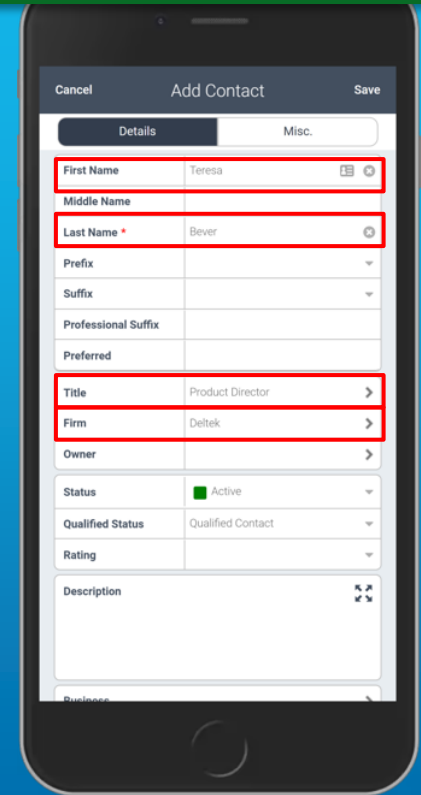
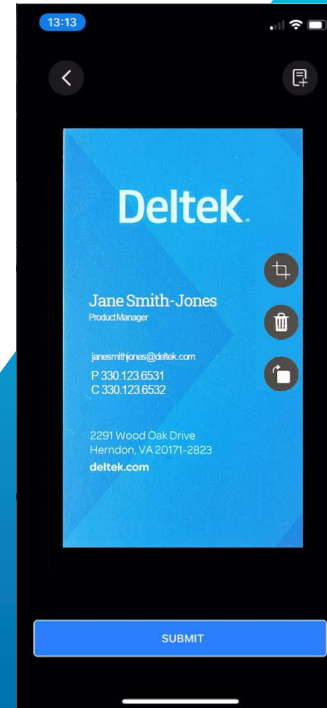
- » Capture key data where BD and PMs live – in Outlook or Gmail
- » Contextual email pane in Outlook or Gmail
- » Eliminate duplicate entry of contacts and activities
- » Easily update from anywhere
- » *NOTE: Included with Vantagepoint CRM*

## Vantagepoint 4.5



# Capture Contact Info Faster

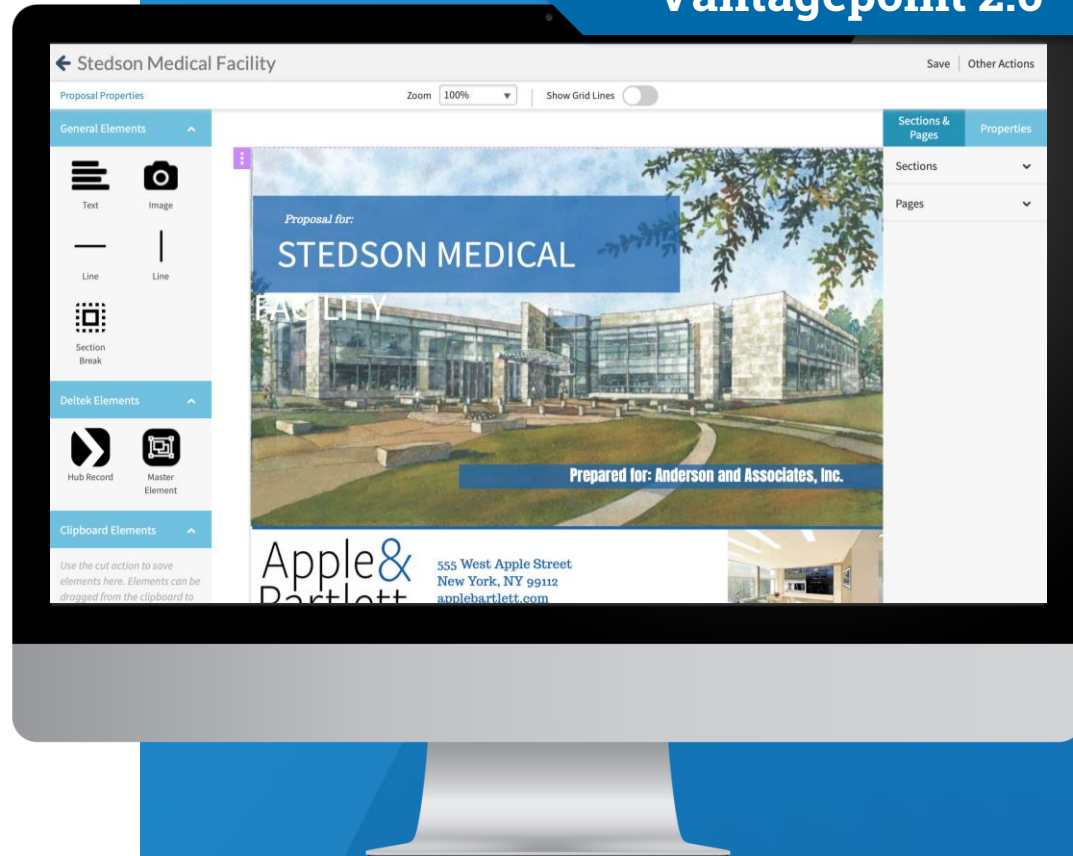
- » No more typing in stacks of business cards after in-person events
- » Quickly scan a business card
- » Capture key contact details and automatically create a new contact in Vantagepoint CRM
- » Leverages ICR to read text from images to populate the form



*Easily capture contacts with a simple scan*

# New Proposal Builder

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



# CRM & Proposal Enhancements

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

Deltek Vantagepoint > Bartlett & Hunter Design Period Ending 4/30/2017

Bever High School Save Other Actions

Proposal Properties Zoom 75% Show Grid Lines

General Elements

- Text
- Image
- Line
- Line
- Section Break

Deltek Elements

- Hub Record
- Master Element
- Estimate Table

Table Properties

Table Styling

Selected Cells

Color

Alignment

Border

Weight

Color

Sides

Color

Background

Cell Padding

Top 0.06 in

Bottom 0.04 in

Left 0.10 in

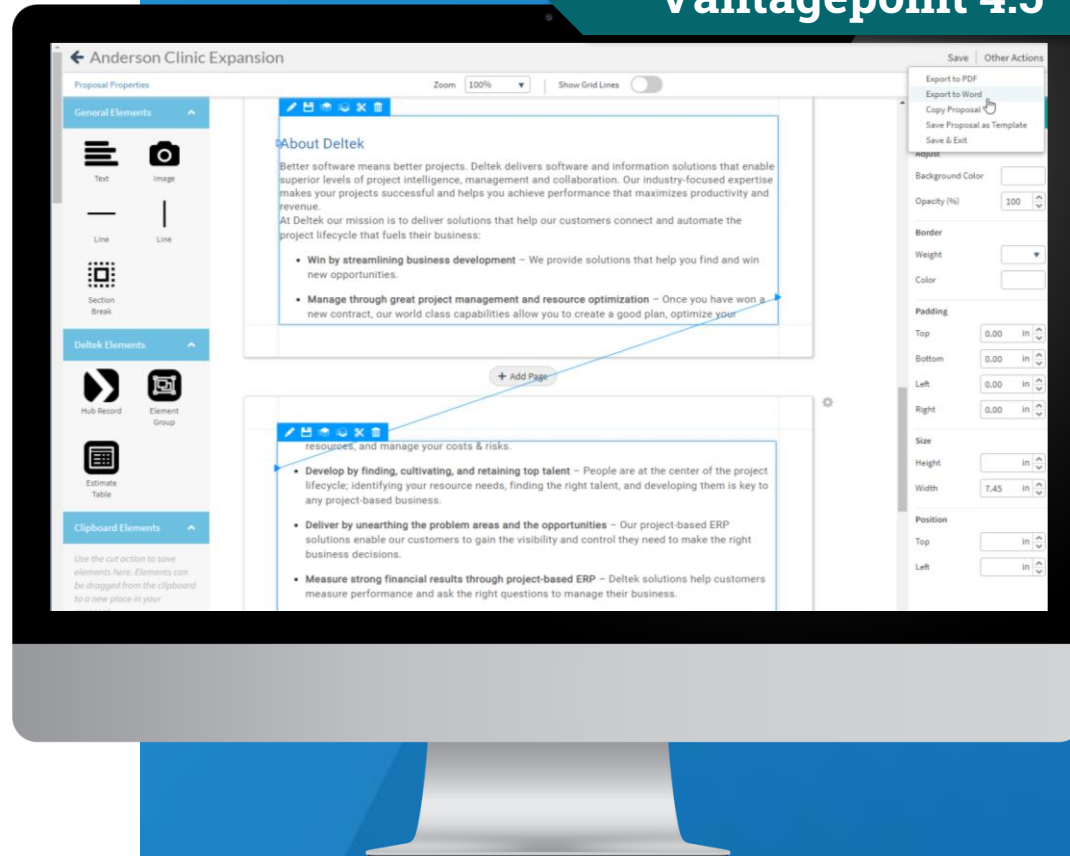
Right 0.10 in

Summary - REIMBURSABLE

Description	Hours/Quantity	Planned Bill
Labor	420	118,700
Consultants	2	7,000
Expenses	2	2,000
Units	100	800

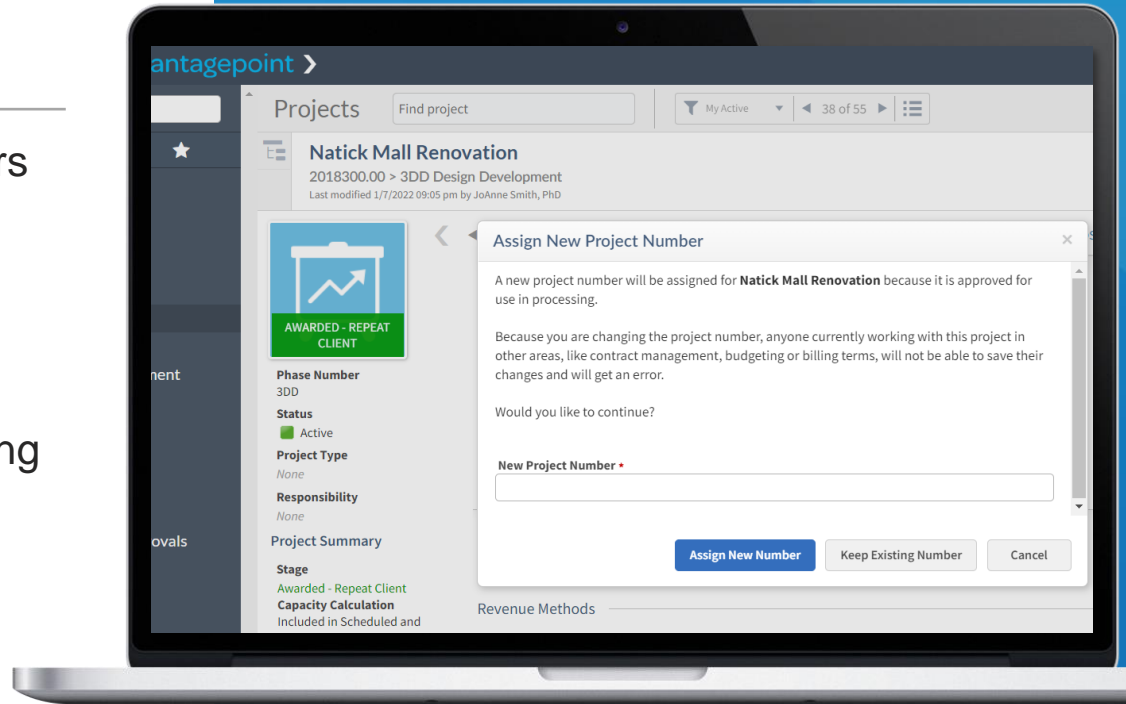
# Improve Proposal Flexibility

- » 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



# 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



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# Project Accounting and Financial Management

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# 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 'Draft Invoice Approvals' interface in Deltek Vantagepoint 2.0. The main content area shows details for a project named 'Cape Cod Vacation Club' with an invoice date of 3/5/2019 and a period from 11/1/2018 to 11/30/2018. The interface includes a sidebar with navigation options and a main content area with tabs for GENERAL, LABOR, EXPENSES, UNITS, FEES, INVOICE HISTORY, and INVOICE PREVIEW. The INVOICE PREVIEW tab shows a preview of an invoice from Apple and Bartlett Structural Engineers, including project details and a table of billing phases.

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



# Digital Markup of Draft Invoice

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

The screenshot displays the Deltek Vantagepoint software interface for draft invoice approvals. The main content area shows a draft invoice for Cape Cod Vacation Club, dated 2002005.00, with an invoice date of 3/31/2021 and a bill through date of 11/30/2021. The interface includes a navigation bar with tabs for DRAFT PREVIEW, GENERAL, LABOR, EXPENSES, UNITS, FEES, and INVOICE HISTORY. A sidebar on the left shows a list of comments from JoAnne Smith, dated March 18, 2021, at 5:23pm and 5:24pm. The main content area displays the invoice details, including the company name (APPLE AND BARTLETT STRUCTURAL ENGINEERS), address, and project information. A table of billing phases is shown, with a red circle highlighting the 'Percent Complete' column for 'Schematic Design'.

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

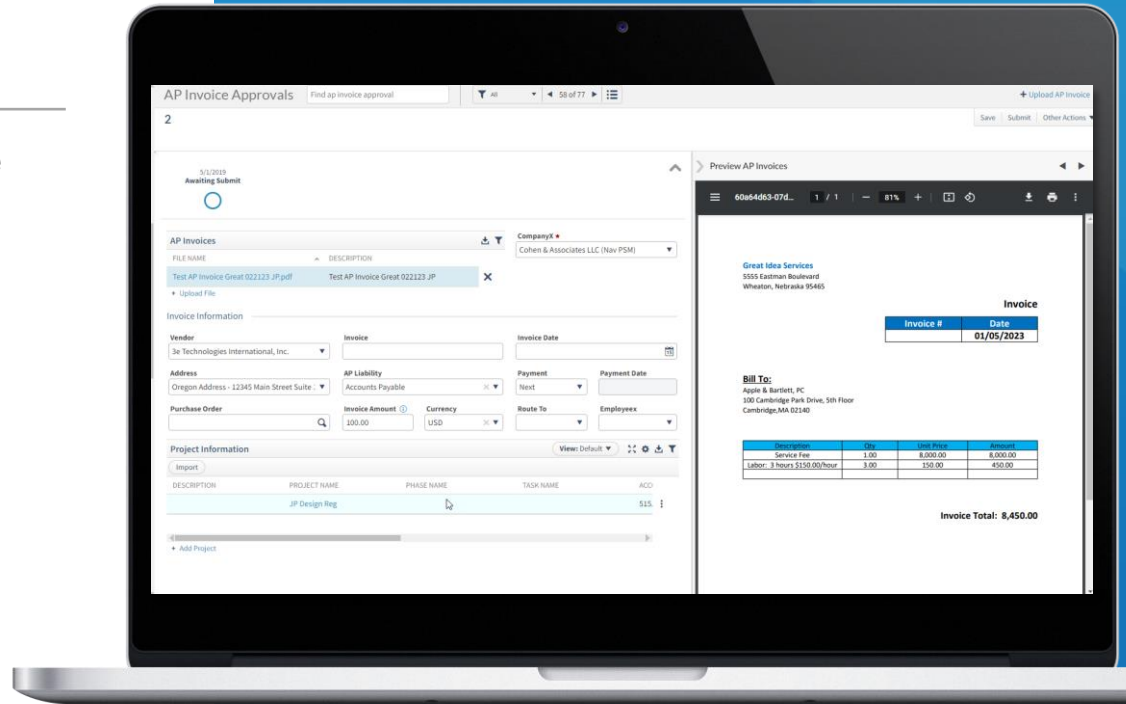
# Streamline Vendor Payments

- » 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*



# 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



# Retain Voided Invoices

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

The screenshot displays the Vantagepoint 6.5 software interface. On the left, the 'INVOICE HISTORY' table is visible, with a red box highlighting a row for invoice 22/2021 dated 8/9/2023. On the right, a detailed invoice is shown for 'APPLE AND BARTLETT STRUCTURAL ENGINEERS'. The invoice includes project details, a table of charges, and a summary of the total invoice amount of \$2,454.00.

INVOICE DATE	VOID DATE	CREDIT MEMO NUMBER	FILE TYPE	PRE-INVOICE	DRAFT INVOICE
22/2021	8/9/2023				
09/29/2010					
1/28/2010					
2/19/2010					
7/20/2011					
7/20/2011					
1/7/2011					
1/6/2011					
1/6/2011					
1/7/2011					
2/3/2011					
7/24/2011					
1/15/2011					
1/21/2011					

**APPLE AND BARTLETT  
STRUCTURAL ENGINEERS**

100 Stealing Heights Avenue  
Suite 510  
New York, NY 25410

June 22, 2021  
Project No: 100322-01  
Invoice No: 22554

Project: 100322-01 Event: Shipping Complex  
Professional Services through June 30, 2021

Advanced Mechanical Technologies, Inc.  
48179793 Advanced Mechanical Technologies, Inc.  
Total Consultants Invoice 140.00 140.00

**Total this WS22 \$100.00**

**Professional Personnel Total this WS22 \$2,886.00**

**Professional Personnel Total this WS22 6.00**

**Retainage**  
Current Retainage 576.00 (21.03 % of 2,892.00)  
Retainage To-Close 676.00  
**Total this Invoice \$2,454.00**

**Outstanding Invoices**

Number	Date	Balance	Retainage	New Due
52011	8/12/2014	-180.00	0.00	-180.00
8242014	8/24/2014	212,368.00	0.00	212,368.00
72032	9/10/2014	24,332.00	0.00	24,332.00
52033	7/20/2014	51,482.00	0.00	51,482.00
52034	12/13/2014	41,160.00	0.00	41,160.00
52035	12/13/2014	87,528.00	0.00	87,528.00
52036	11/12/2014	33,800.00	0.00	33,800.00
<b>Total</b>		<b>450,298.00</b>	<b>0.00</b>	<b>450,298.00</b>
			<b>Total New Due</b>	<b>442,762.00</b>

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

# Improved Accounting

- » 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

The screenshot displays the Deltak Vantagepoint 2.0 interface. The top navigation bar shows the company name 'Deltak Vantagepoint', the user 'Apple & Bartlett, PC (Nav PSM)', and the period ending '11/20/2018'. The sidebar menu on the left lists various transaction types under 'TRANSACTION ENTRY', including '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', and 'Units By Project'. The main content area is titled 'AP Vouchers' and shows a table of vouchers for 'Apple & Bartlett, PC (Nav PSM)'. The table has columns for 'VENDOR', 'INVOICE', 'AMOUNT', 'VOUCHER DATE', 'CREATE PE...', 'CREATOR', and 'STATUS'. The table contains 12 rows of data, including vendors like 'Advanced Mechanical Technology', 'Bell Atlantic Telephone', 'Diversified Electrical Technologies', 'Duplex Printers', 'Fitzsimmons Engineering Inc.', 'Five Star Travel', 'General Office Supply', 'Global Travel Consultants', 'Haley Hart Consulting', 'KED Engineering Services', and 'Philips Surveying and Design'. The status of each voucher is either 'In Progress' or 'Posted'.

VENDOR	INVOICE	AMOUNT	VOUCHER DATE	CREATE PE...	CREATOR	STATUS
Advanced Mechanical Technology	14521	9,245.00	11/20/2018	11/2018	ADMIN	In Progress
Bell Atlantic Telephone	932533-00-1	356.00	4/20/2020	11/2018	ADMIN	Posted
Bell Atlantic Telephone	85452-99	652.00	11/13/2018	Recurring	SMITH	In Progress
Diversified Electrical Technologies	3882-2828	5,878.00	4/20/2020	11/2018	ADMIN	Posted
Duplex Printers	9288-22	980.00	4/20/2020	11/2018	ADMIN	Posted
Fitzsimmons Engineering Inc.	89	765.00	4/20/2020	11/2018	ADMIN	In Progress
Five Star Travel	988221	3,512.00	11/8/2018	11/2018	ADMIN	In Progress
General Office Supply	82222-21488	293.00	4/20/2020	11/2018	ADMIN	Posted
Global Travel Consultants	9856423	982.00	11/7/2018	11/2018	SMITH	Posted
Global Travel Consultants	0002321	100.00	11/6/2018	11/2018	SMITH	In Progress
Haley Hart Consulting	848398-22	8,900.00	4/20/2020	11/2018	ADMIN	Posted
Haley Hart Consulting	8292-00	23,000.00	4/20/2020	11/2018	ADMIN	In Progress
KED Engineering Services	0000451	86,000.00	11/7/2018	11/2018	SMITH	In Progress
Philips Surveying and Design	0005124	5,600.00	11/8/2018	11/2018	SMITH	In Progress

# 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

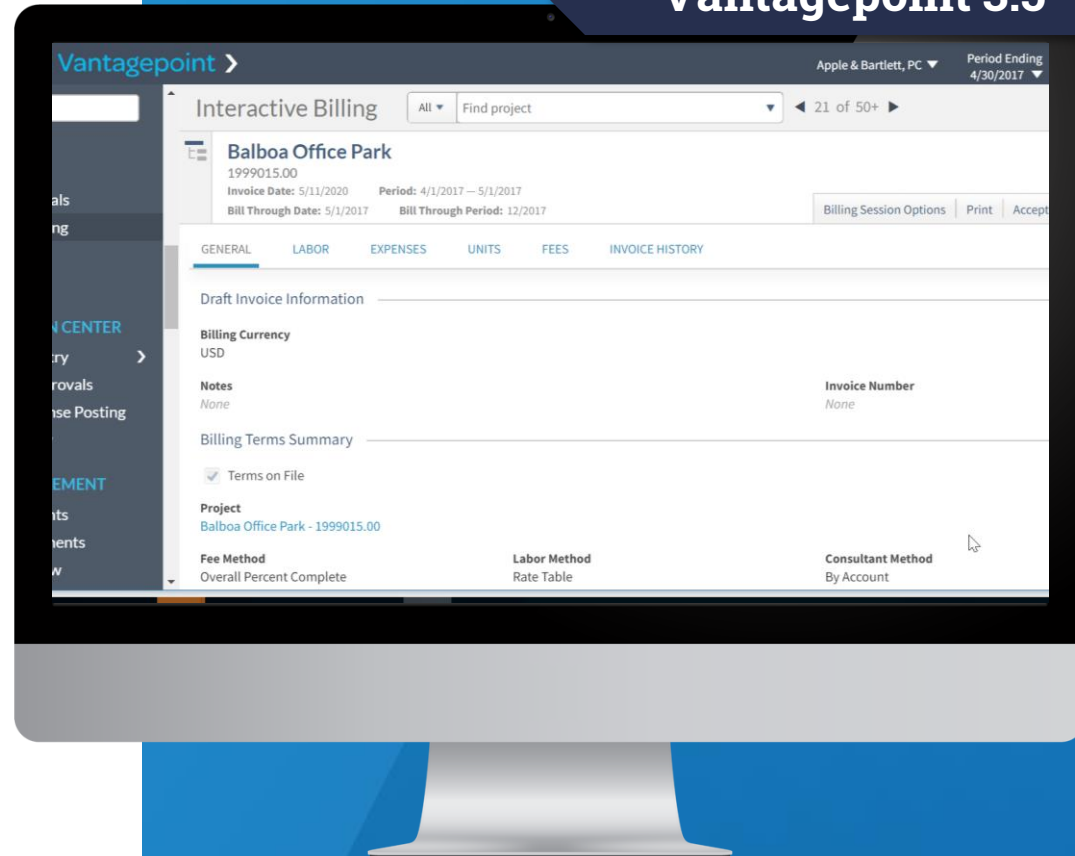
GENERAL | LABOR | EXPENSES | UNITS | FEES | INVOICE HISTORY | INVOICE PREVIEW

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

# 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



# Accounting & Financial Management Enhancements

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

Vantagepoint 5.5

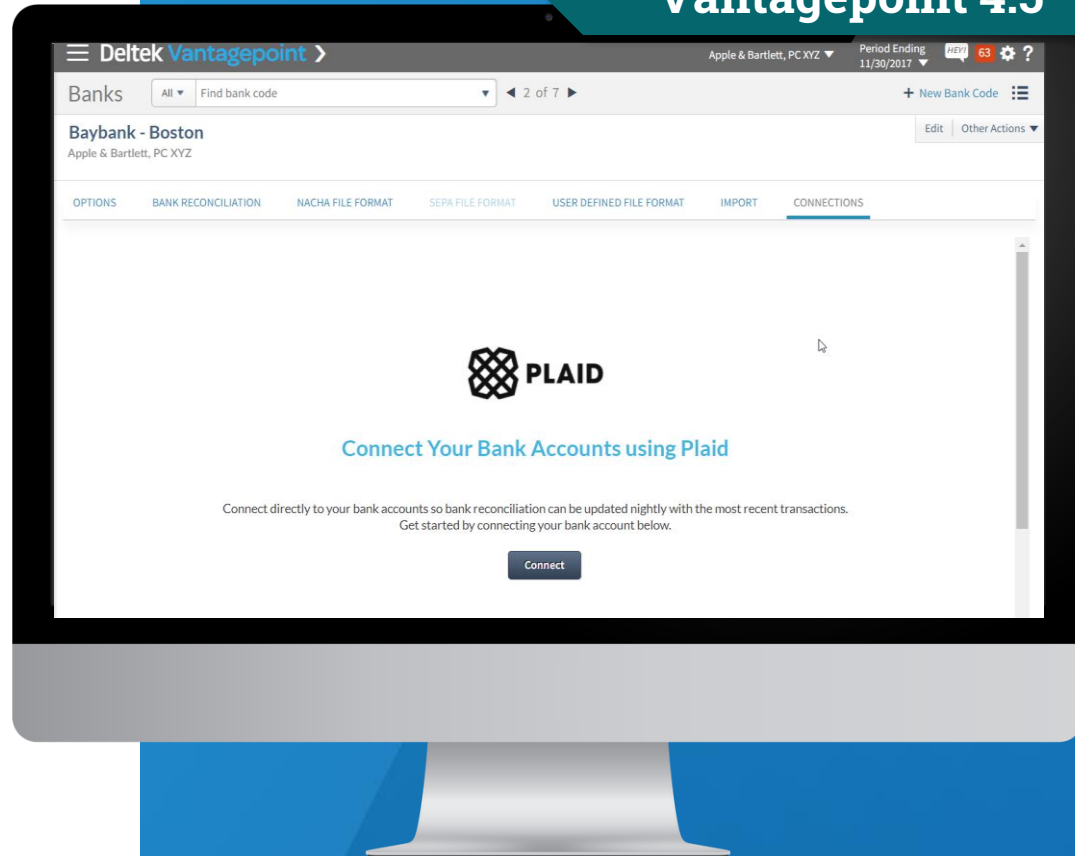
The screenshot displays the Deltek Vantagepoint 5.5 user interface. At the top, the header shows the user 'Apple Bartlett, PC' and the 'Period Ending' date '10/31/2020'. A navigation bar includes 'In Progress' and '22 of 27' items. A dropdown menu is open, showing options like 'Import Transactions', 'Close Statement', and 'Other Actions'. Below this, a 'Cash Receipts' window is visible, showing a table of transactions for 'Apple & Bartlett, PC'. The table has columns for FILE, CREATOR, END DATE, CREATE PERIOD, STATUS, and POST STATUS. One transaction is highlighted in blue, indicating it is 'In Progress'. Another window in the background shows 'Billing Labor Category Tables' with a 'Category Standards' section and a 'Currency' dropdown menu.

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



# Automatic Bank Feed

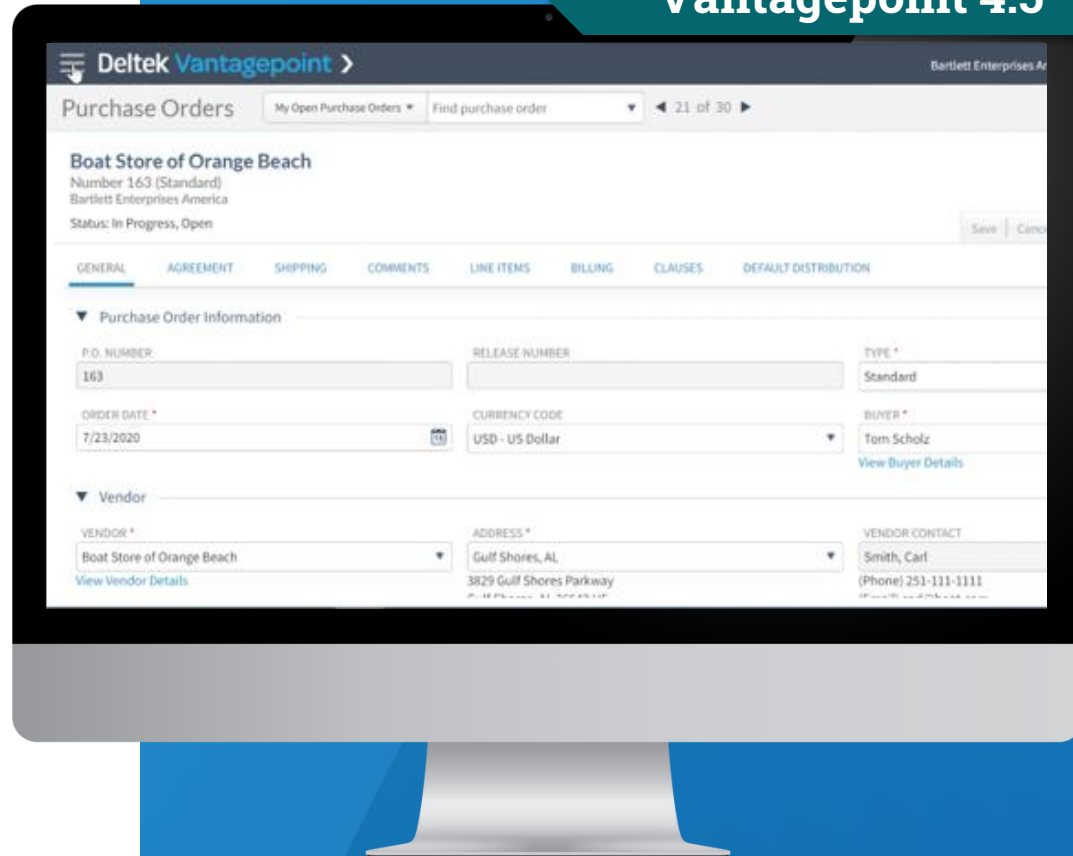
- » Automate manual bank imports
- » Simplify bank reconciliation with direct connection to bank accounts
- » Updated nightly with recent transactions
- » NOTE: Currently Cloud Only and supporting North American banks
- » Integration with PLAID





# Manage Purchase Orders More Easily

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



# Streamline Purchasing

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

The screenshot displays the Deltek Vantagepoint 5.5 web interface for a purchase requisition. The header shows the company name 'Deltek Vantagepoint', the user 'Bartlett Enterprises America', and the period ending '3/31/2018'. The main title is 'Purchase Requisitions' with a search bar and filters. The specific requisition is 'Requisition Number 152' for 'Bartlett Enterprises America' with a status of 'In Progress, Open'. A 'Awaiting Submit' indicator is visible for the date '5/10/2022'. The interface includes tabs for 'GENERAL', 'SHIPPING', 'COMMENTS', 'DEFAULT DISTRIBUTION', and 'DEFAULT VENDORS'. The 'Requested By' is 'Tom Scholz' and the 'Date' is '5/10/2022'. The 'Currency Code' is 'USD - US Dollar'. The 'Line Items' table shows a single item: 'M-002 3hp Motor' with a quantity of 2.00, unit price of 550.00, and a total of 1,100.00. Below the table, there is a 'Suggested Vendors - 3hp Motor' section with one vendor listed: 'Atlantic Recon' with a response price of 0.00 and unit of 'Each'.

# Streamlined Payroll

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

The screenshot displays the 'Payroll Payments' interface for 'Run Number 184 - Select Payments'. The interface includes a search bar, a 'Print Data' button, and a table of employee pay details. The table columns are: INCLUDE IN RUN, EMPLOYEE, EMPLOYEE NAME, TOTAL TIME HOURS, TOTAL PAY HOURS, BANK CODE, TOTAL GROSS PAYMENT, and NET PAYMENT. The data shows 11 employees with various payment details, all using 'BayBank Payroll' as the bank code.

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

Deltek.

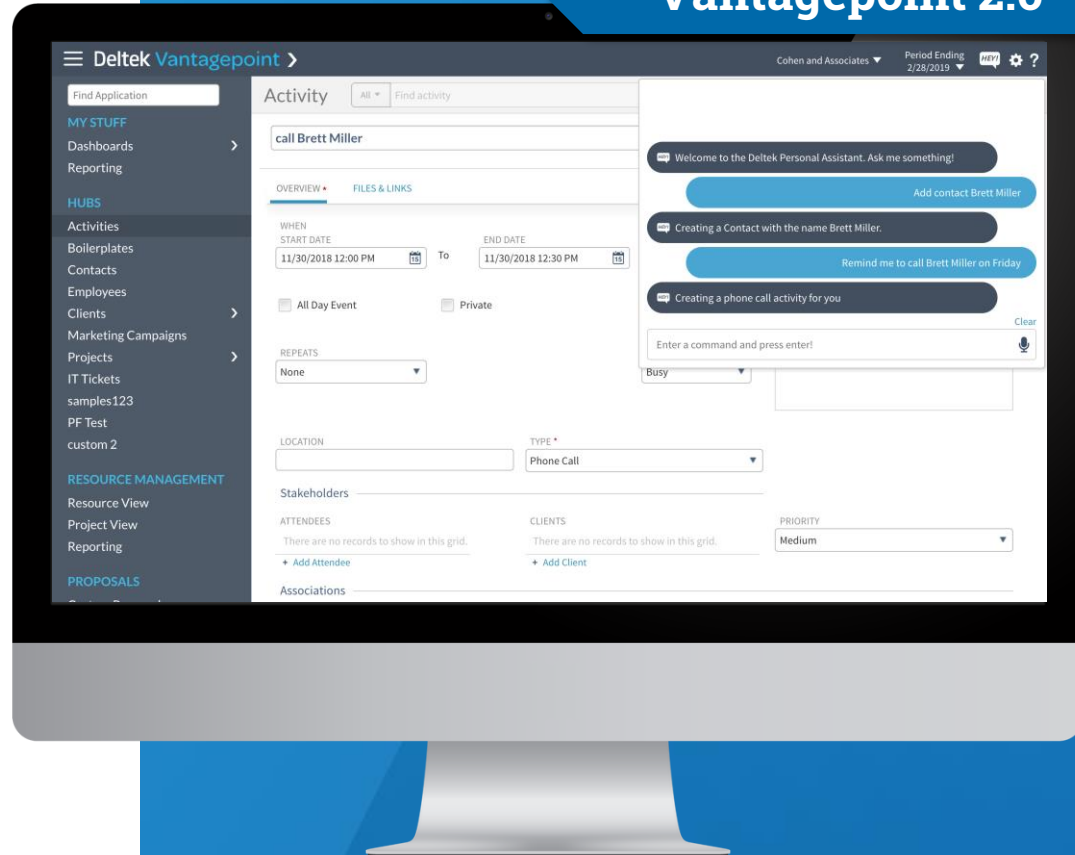
# Usability Enhancements

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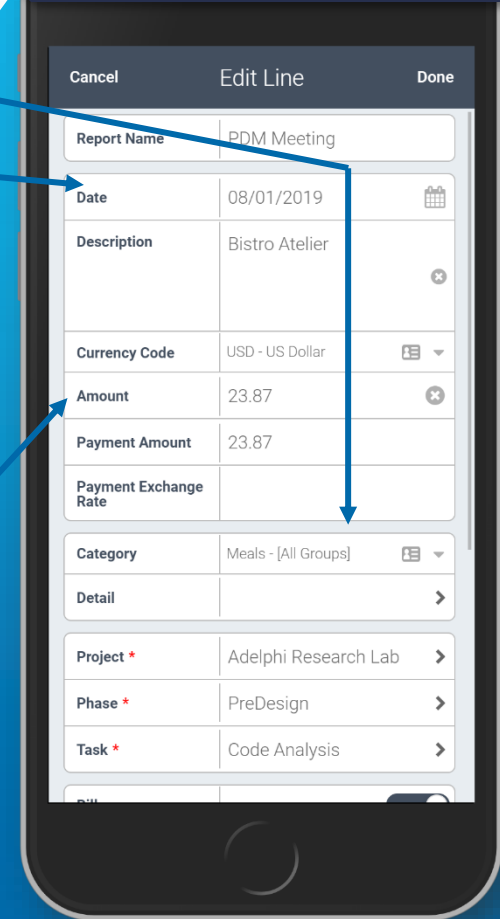
# Hey, Deltek!

- » Meet “Hey, Deltek,” your personal virtual assistant
- » Easily find records by just asking
- » Create reminders and new activities
- » Save time for every user and make everyday tasks simpler
- » Add contacts and projects quickly



## ICR for Expenses

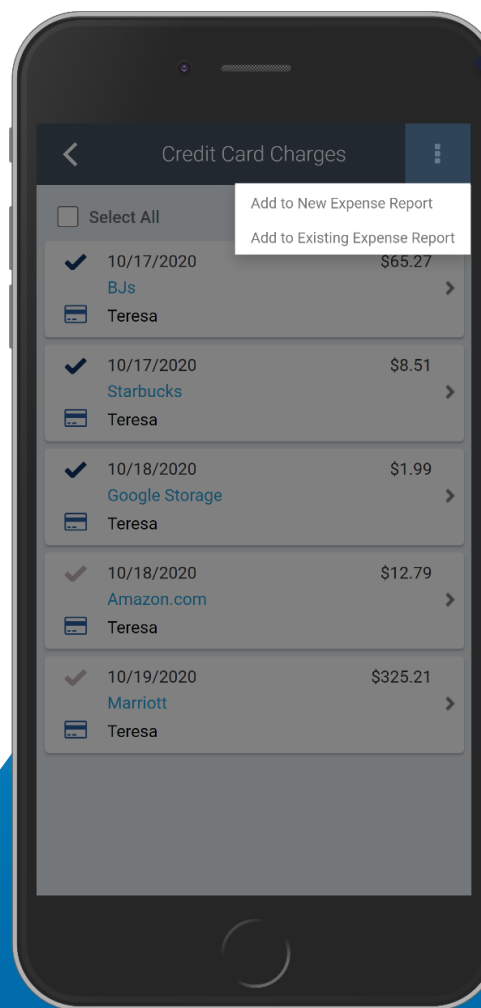
- » Simplify expenses and improve accuracy
- » Intelligent Character Recognition
- » Reads text from receipt and populates mobile expense
- » Reads handwriting
- » Leverages machine learning



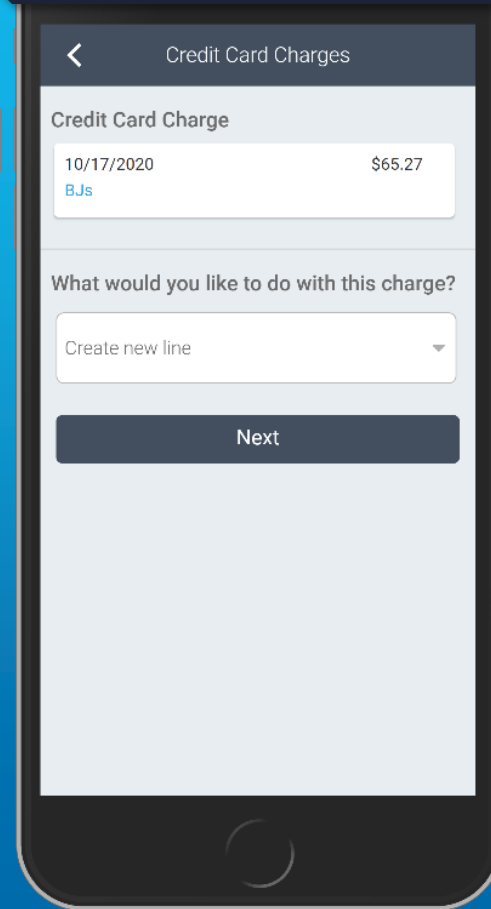


# Easily Match Credit Card Expenses

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

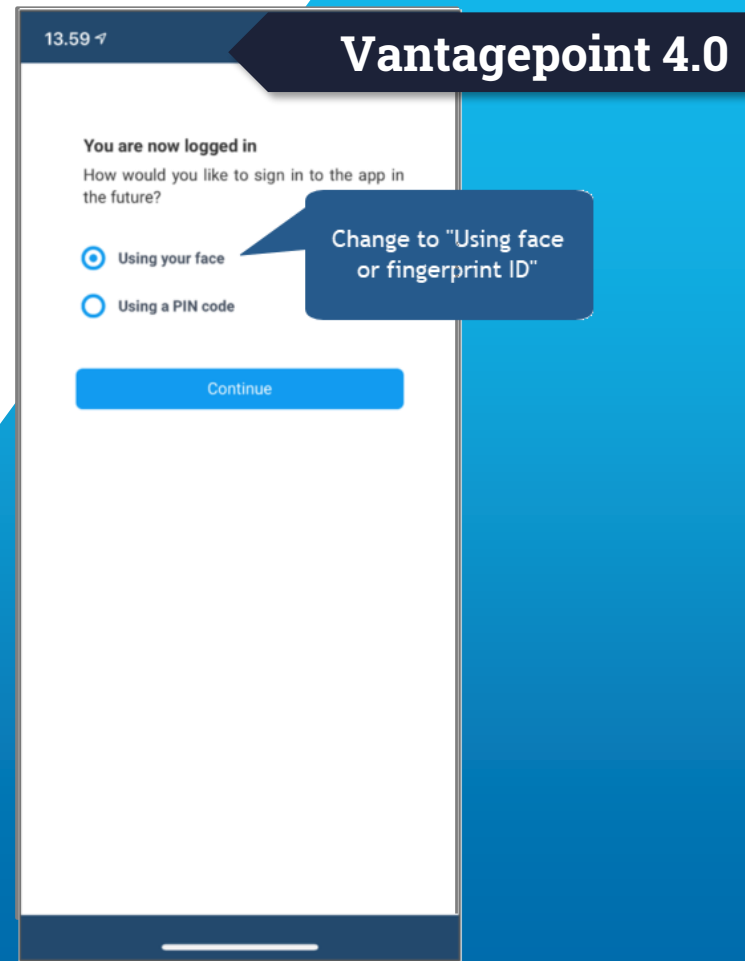


## Vantagepoint 4.0



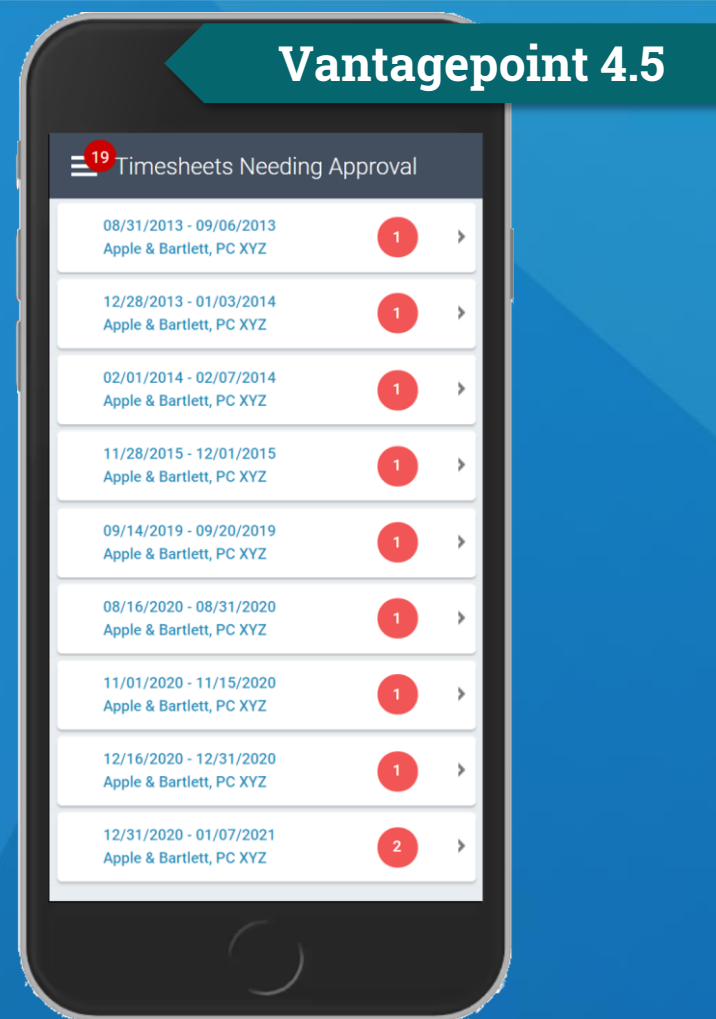
# Increased Mobile Security

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



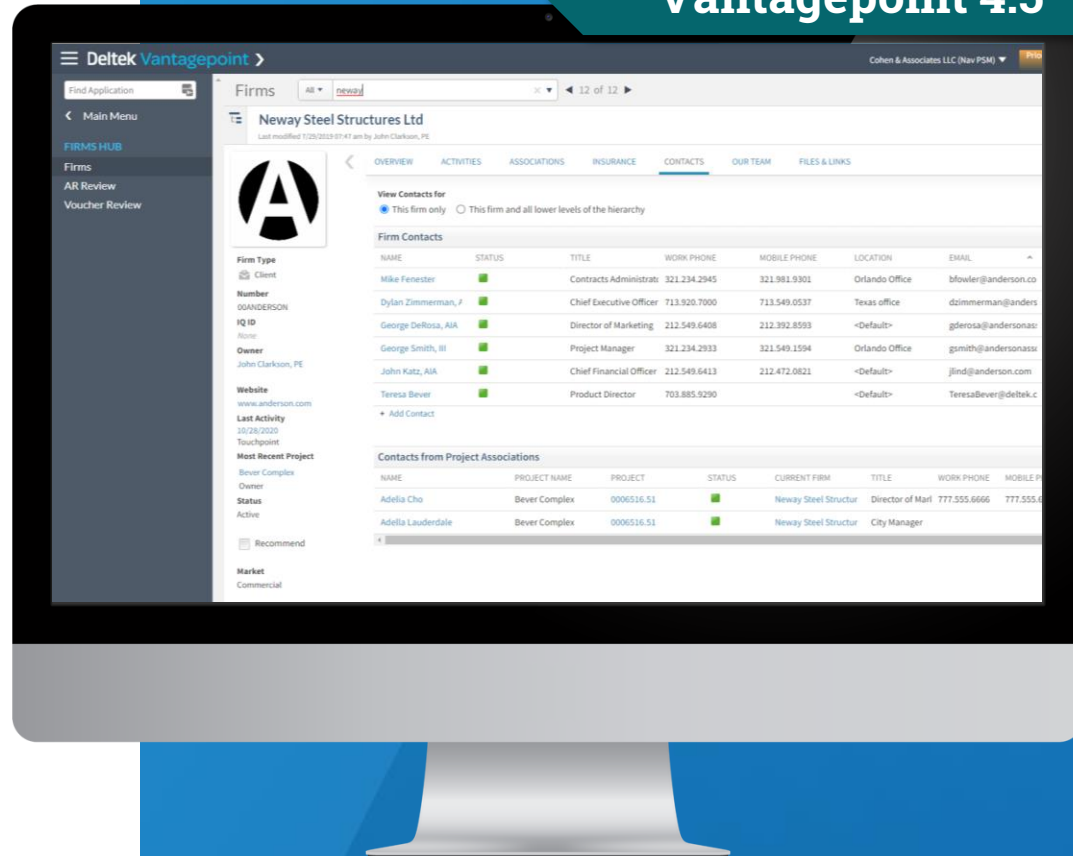
# Usability Enhancements: Mobile

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



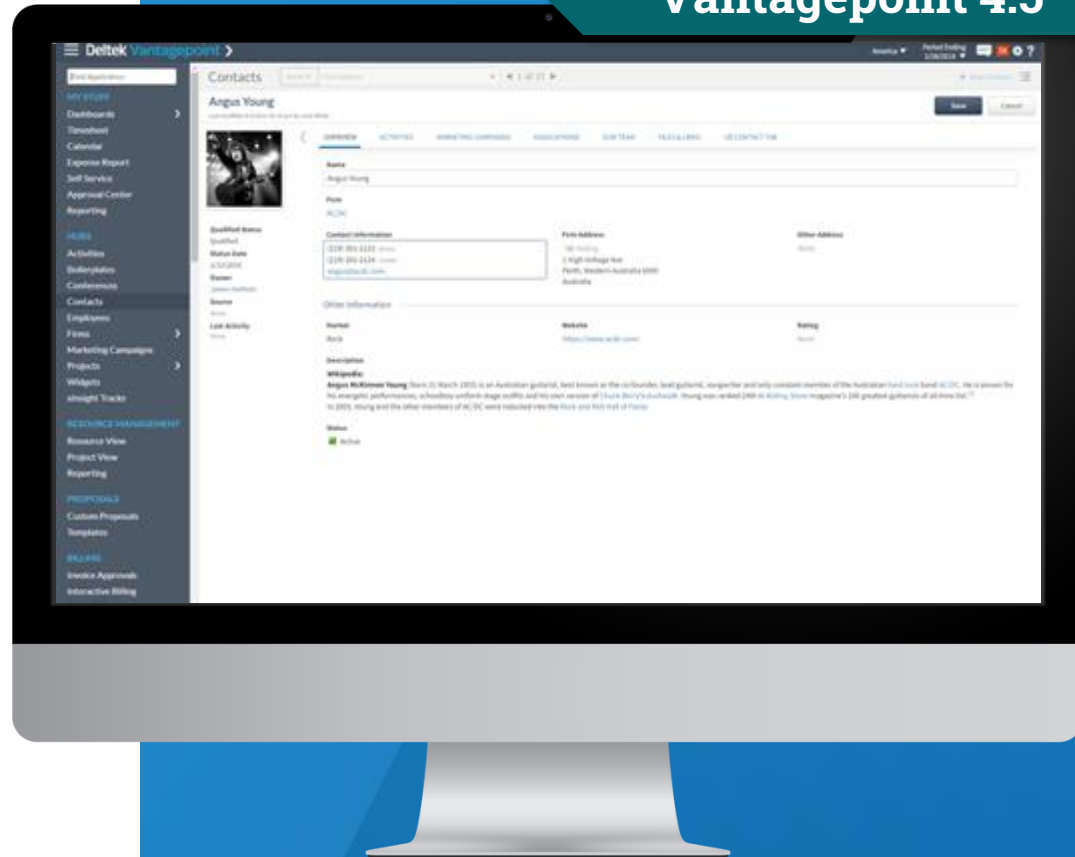
# Usability Enhancements

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



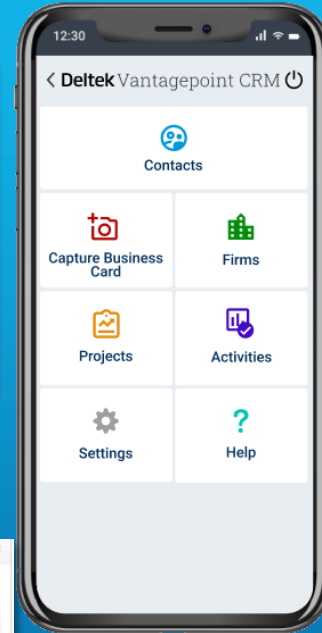
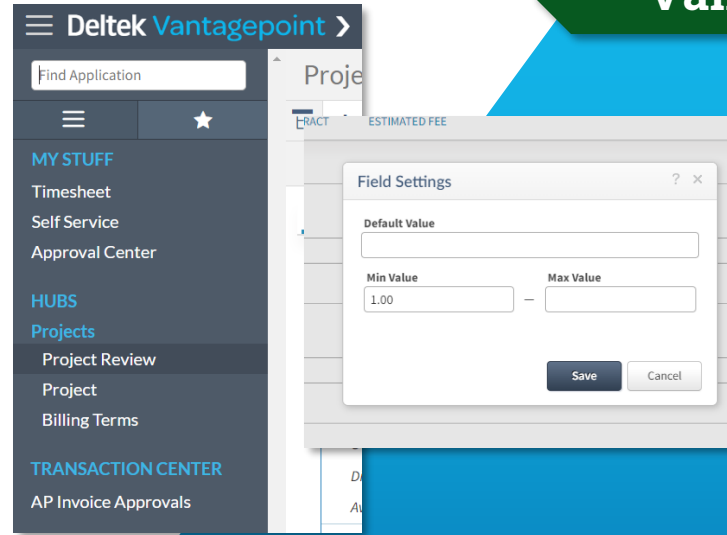
# Usability Enhancements

- » 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



## Usability Improvements

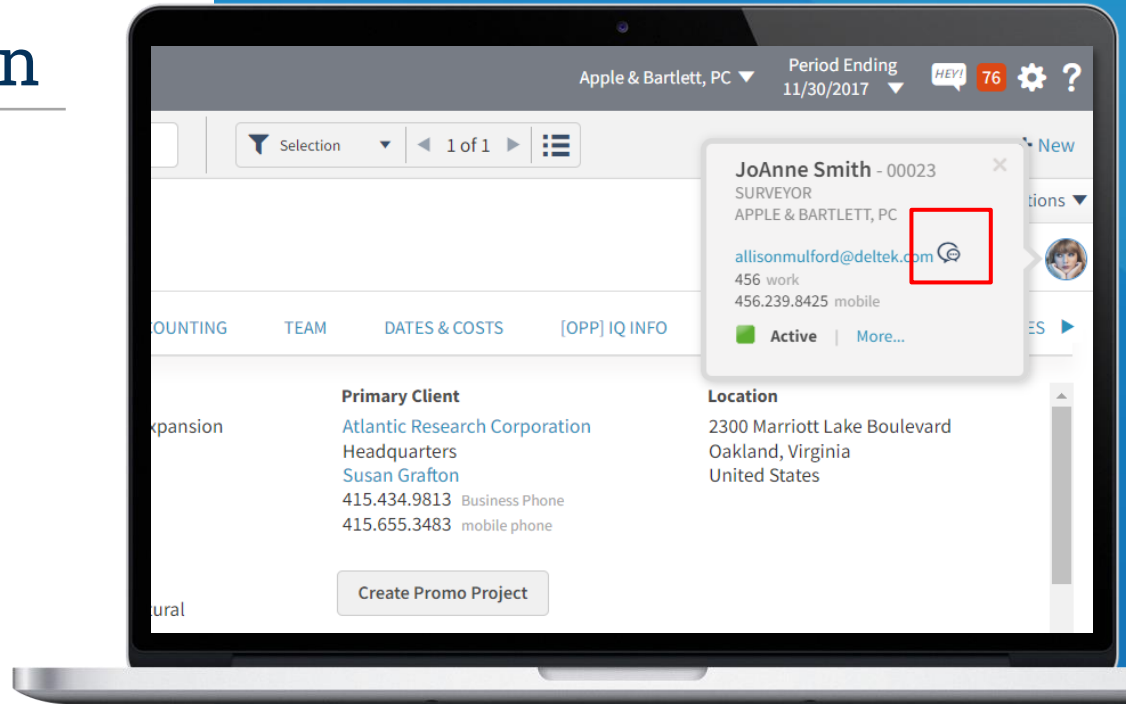
- » New menu for Mobile T&E and CRM & navigation improvements for T&E
- » Set navigation menu favorites
- » Print reports from Timesheet floor check
- » Email templates for payment remittance
- » Allow Min/Max & Default Values to be Configured for Standard Numeric Fields via Screen Designer
- » Support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



Send Notification	Send Email	Open Timesheet	Print Detailed Timesheet	Print Summarized Timesheet	Other Than Expected Hours
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TIMESHEET STATUS	TIME GROUP	EMPLOYEE NAME	EXPECTED HOURS	HOURS ENTERED	
<input checked="" type="checkbox"/>	Missing	Aaron Fernburg	40.00	0.00	
<input checked="" type="checkbox"/>	Missing	Department 1	Aaron Weiss	40.00	0.00
<input type="checkbox"/>	Missing	Alan Lovend	40.00	0.00	
<input type="checkbox"/>	Missing	Department 5	Alex Lucas	40.00	0.00
<input type="checkbox"/>	Missing	Department 5	Alexander Dane, AIA	40.00	0.00

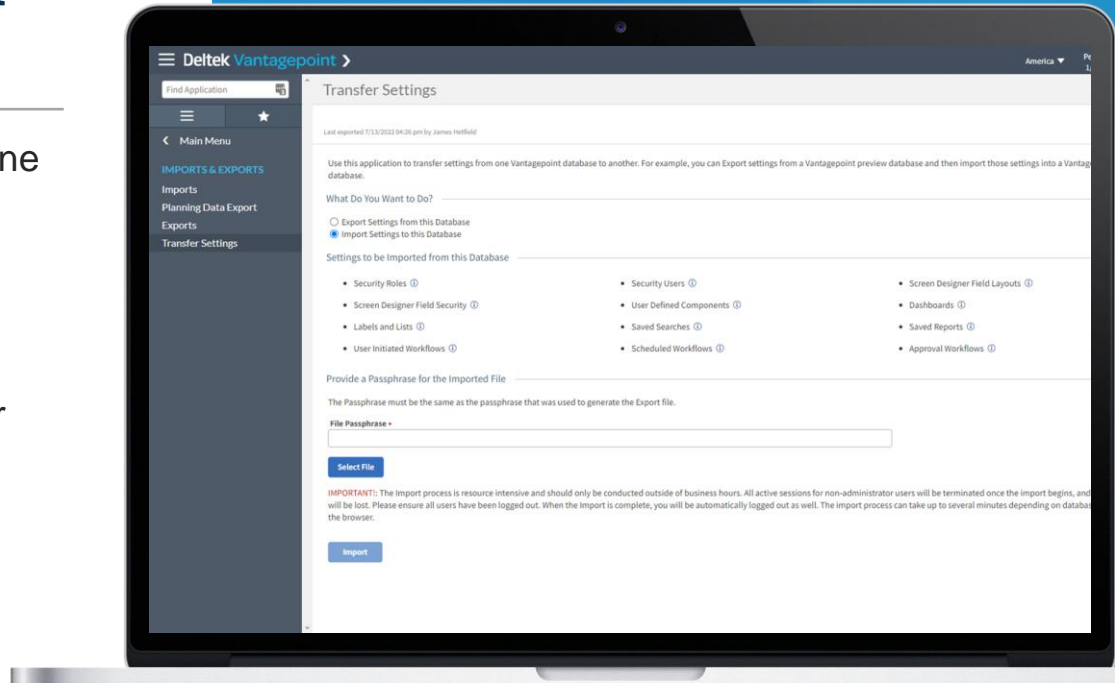
# Improve Collaboration with Teams Integration

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



# Transfer Settings from Preview to Production

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

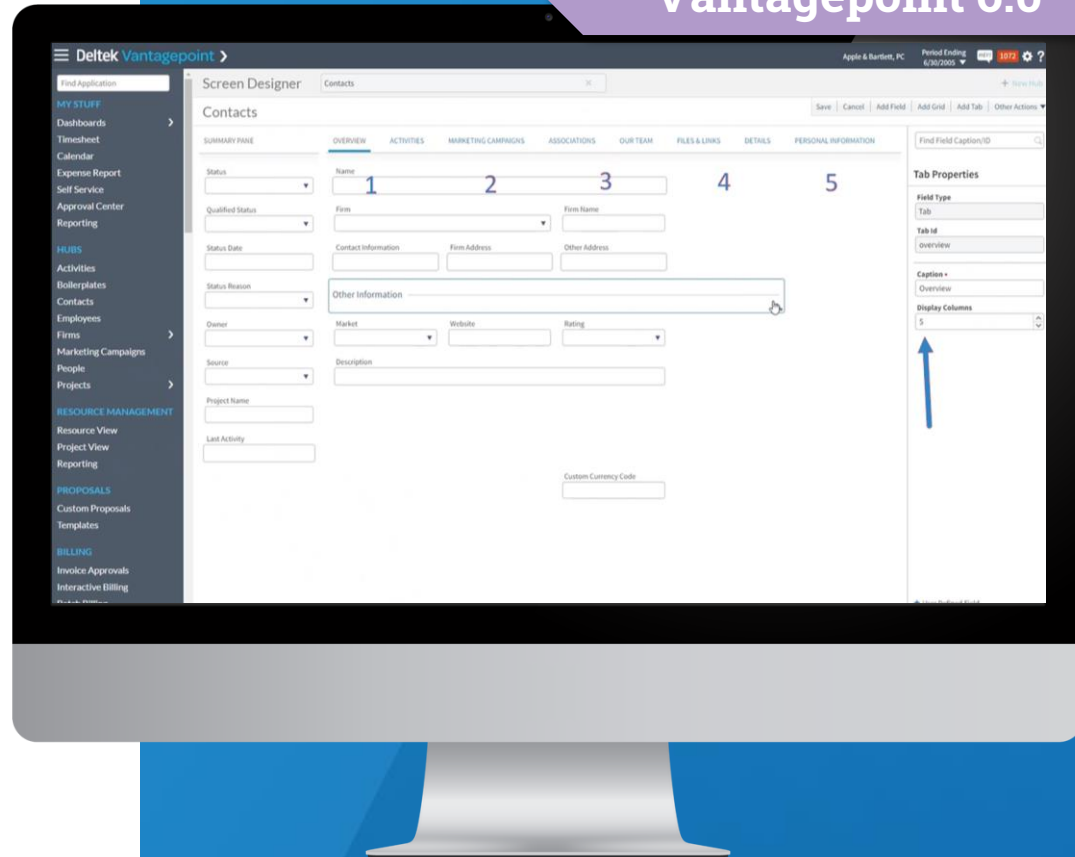




# Empower Admins to Create a Better User Experience

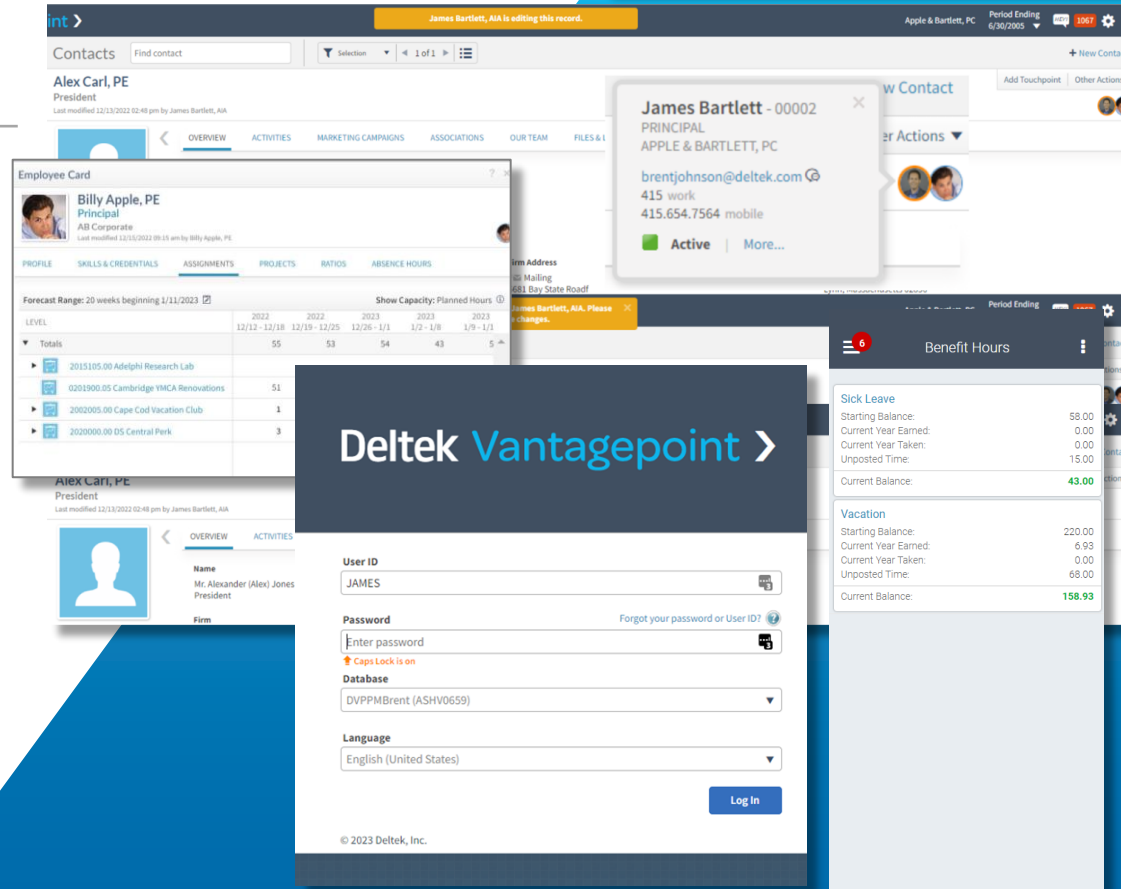
- » More flexibility in screen designer to display up to 5 columns
- » Enhanced security for employee dashparts enables admin more control on data available related to potential sensitive employee information

Vantagepoint 6.0



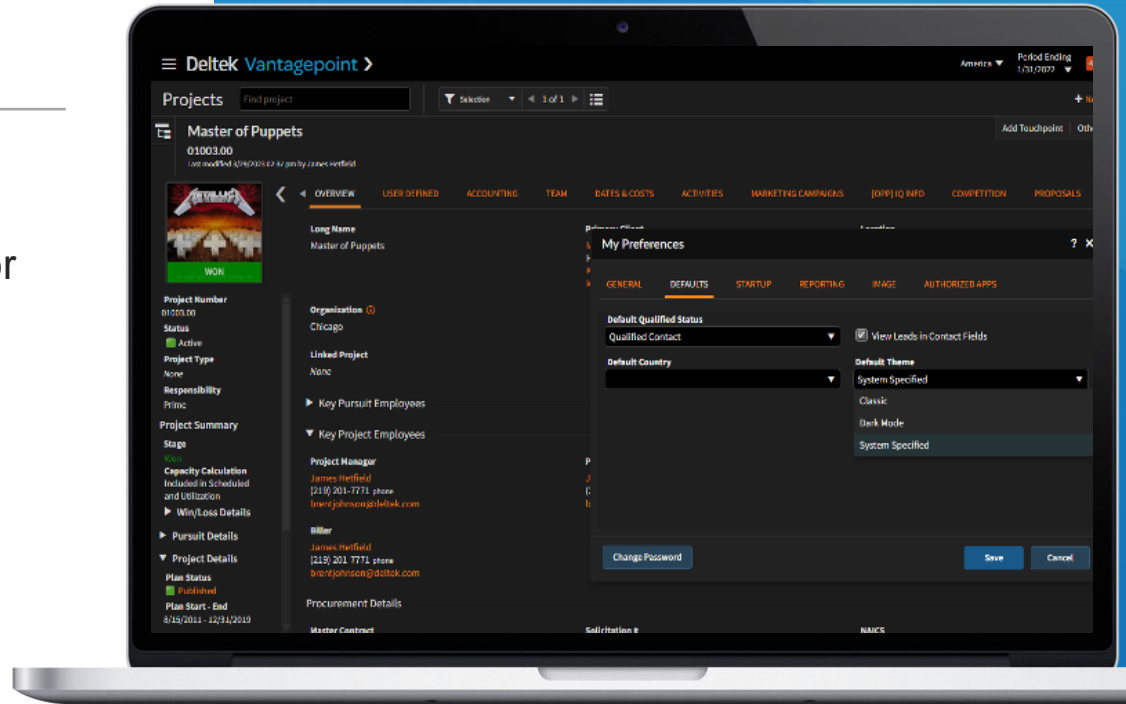
# Make Everyday Use Even Easier

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



# Usability: Dark Mode

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



# Usability: Simplify Timesheet Entry

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

NOTE: These are also supported in mobile app

## Vantagepoint 6.5

Timesheets MY TIMESHEETS Find timesheets

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

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

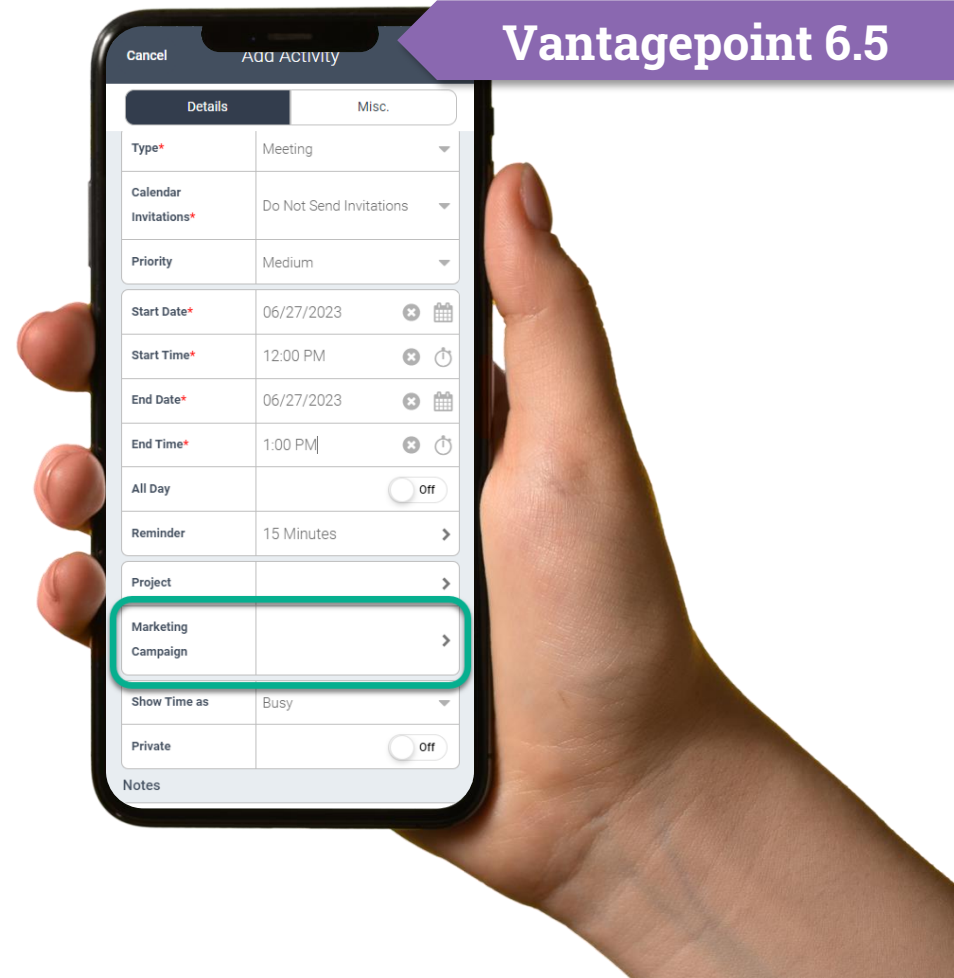
Timesheets MY TIMESHEETS Find timesheets 1 of 11

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

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

# Usability: Marketing Campaigns

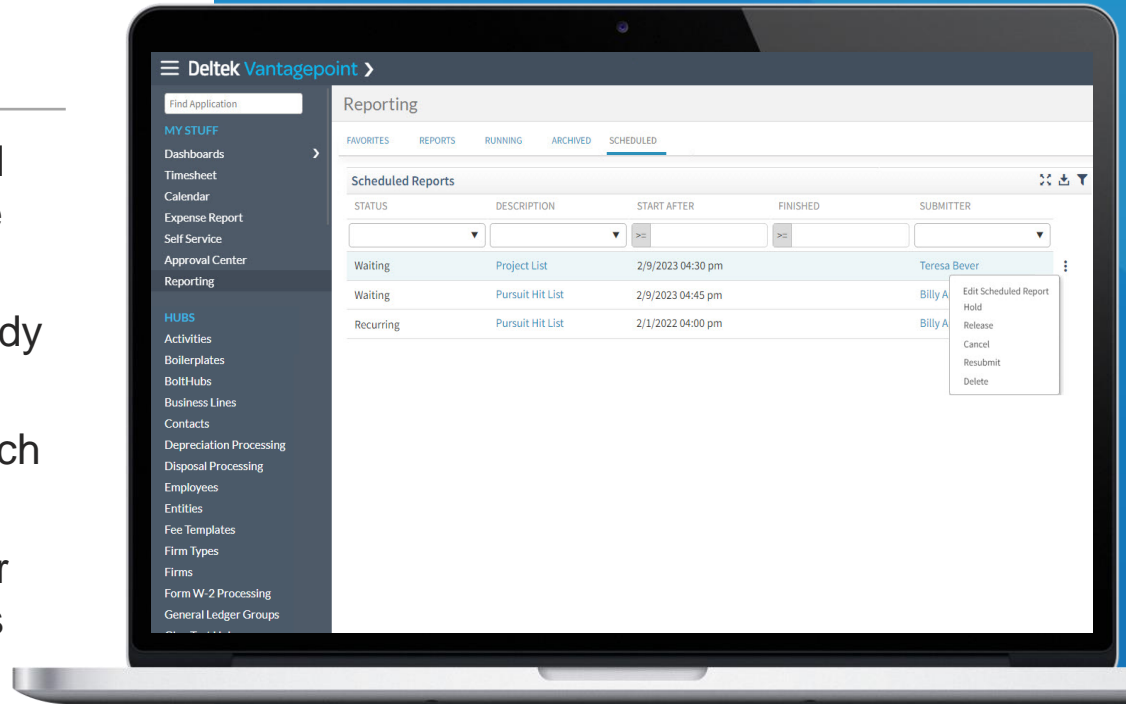
- » Marketing campaigns are now available in activities on the Vantagepoint CRM mobile app
- » Make it easier to connect specific activities to the campaign they are supporting from the mobile app



# Usability: Editing Scheduled Reports

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



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

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- » 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](mailto:Vantagepoint@Deltek.com)

## Deltek Vantagepoint > Upgrade Resources

Welcome to the Vantagepoint Upgrade Resources

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



### Why Vantagepoint and Why Now?

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

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