

Deltek

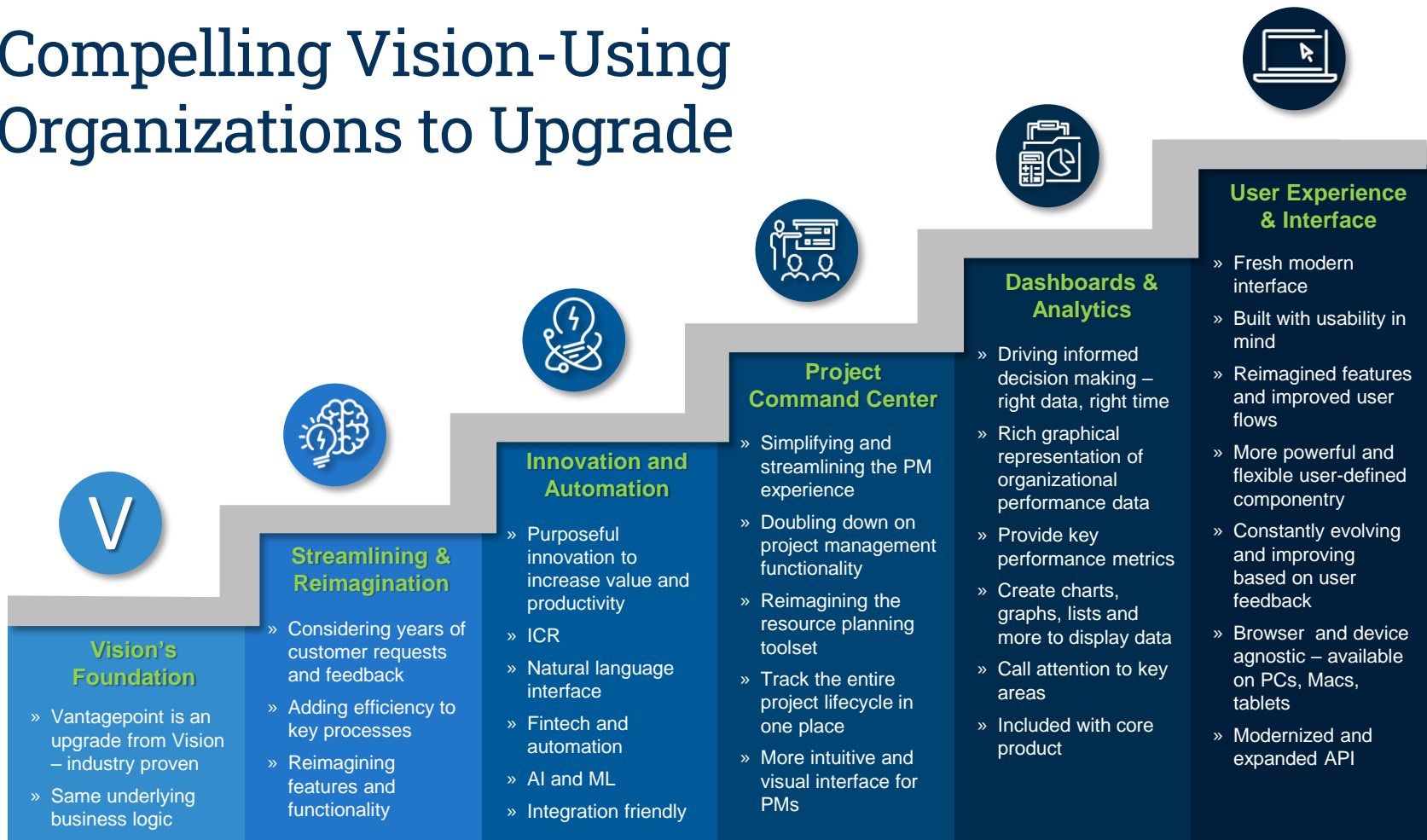
# Why Vantagepoint?

The Vantagepoint User Experience

Brent Johnson  
Product Director



# Compelling Vision-Using Organizations to Upgrade



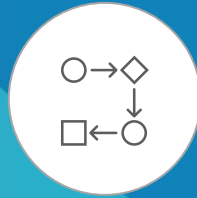
# Highlights Within the Vantagepoint User Experience



Fresh modern &  
intuitive interface



Browser and device  
agnostic



Reimagined features  
and improved user  
workflows



Easier access to the  
right data



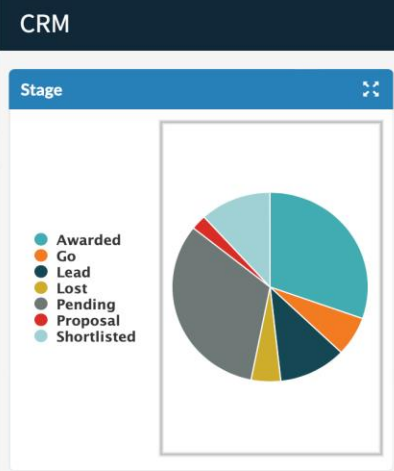
Improved shortcuts,  
help, & learning aids

Find Application

< Main Menu

MY DASHBOARDS

- CRM
- Project Manager
- Owner
- Seller/Doer
- Time & Expense
- Project Profitability
- Employee Utilization
- General Ledger

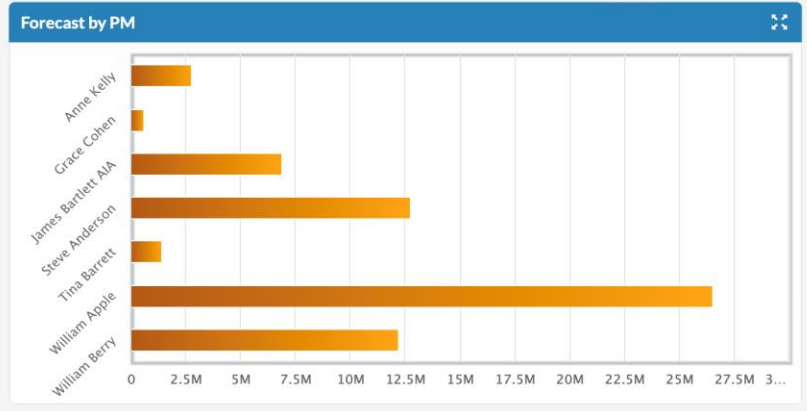


### My Activities + New Activity

Next 30 Days ▾  Show Completed

DATE	SUBJECT	NOTES
8/5/2022 01:30 pm	Company All Meeting	
8/5/2022 02:00 pm	One on One Meeting	Dinesh Sheth
8/8/2022 09:00 am	Review Proposal Pipeline Meeting	Al Newsom
8/8/2022 11:00 am	Client Dinner Proposal	George DeRosa, AIA Anderson Clinic Expansion

Browser agnostic – Chrome, Edge, Safari on a Mac, etc



### Client Revenue

CLIENT NAME	PROJECT NAME	REVENUE
<b>TOTALS</b>		<b>48,899,881 USD</b>
▶ A & E International Corp.		1,774,000 USD
▶ Anderson and Associates, Inc.		1,680,493 USD
▶ Atlantic Research Corporation		9,059,454 USD
▶ BioMed Technologies LTD		2,007,699 USD
▶ Brookshire Brothers		136,619 USD
▶ Calvert County Schools		3,698,500 USD
▶ Cape Cod Group		2,692,067 USD

### Upcoming Milestones ?

All ▾

Find Application



Main Menu

PROJECTS HUB

- Dashboard
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- Estimates
- Contract Management
- Revenue Forecast
- Plan
- Budget
- Billing Terms
- Invoices
- Draft Invoice Approvals

Navigation menu indicators alert you when action is required.

Invo



0



Prime

Project

Stage

Won

Capacit

bill

Expe



HUBS

Projects

Billing Terms

BILLING

- Interactive Billing
- Batch Billing
- Billing Groups

ACCOUNTING

Intercompany Billing

UTILITIES

Updates

- Refresh Billing Extensions
- Update Billing Status

SETTINGS

Billing

Rate Tables

- Billing Labor Rates
- Billing Labor Categories
- Billing Labor Code
- Billing Labor Overrides
- Billing Expense Accounts
- Billing Expense Categories
- Billing Expense by Vendor

The application finder helps you quickly filter to an application.

Find Application



MY STUFF

- Timesheet
- Expense Report
- Self Service

HUBS

Employees

Projects

- Project
- Contract Management

SETTINGS

Workflow

User Initiated Workflows

General

Screen Designer

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

Self S



EXPENS

Find Application

Projects Find project

Project Manager 4 of 39



Main Menu

PROJECTS HUB

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- Budget
- Billing Terms
- Invoices
- Draft Invoice Approvals

And Justice For All

01005.00 Last modified 2/24/2022 01:28 pm by James Hetfield



OVERVIEW USER DEFINED

Long Name

And Justice For All

Organization

Chicago

Linked Project

None

Key Pursuit Employees

Key Project Employees

Project Manager

James Hetfield (111) 111-1111 phone brentjohnson@deltek.com

Biller

None

Procurement Details

Master Contract

None

Government Award Type

None

Duration

None

Project Details

Project Currency

All

Saved Searches

Quick Find

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

My Searches

EDU or School

Shared Searches

Ofc Earns - America Co.

Active Searches

+ New Search

Find in list...

- 00001.00 General Overhead
- 01003.00 Master of Puppets
- 01004.00 Ride the Lightning
- 01005.00 And Justice For All
- 01011.00 Garage Inc
- 01018.00 St. Anger
- 01019.00 Black Album

Select Multiple Done

New Project Search

Select Search

- Quick Find
- Active
- All
- My Active
- Project Manager
- My Company
- My Organization
- My Draft Invoices
- My Searches
- EDU or School
- Shared Searches
- Ofc Earns - America Co.
- Active Searches
- + New Search

Show # of Results: 15 results

COMPETITION PROPOSALS FILES & LINKS [OPP] IQ INFO

Location

Fc

Principal

Jack White brentjohnson

Solicitation

None

Government

None

Period of

0

Billing Cycle

All

PROJECT NAME	PRIMARY CLIENT	PROJECT MANAGER	ORGANIZATION	STATUS
any Paid Items			Chicago	Active
Master of Puppets	Metallica	James Hetfield	Chicago	Active
And Justice For All	Metallica	James Hetfield	Chicago	Active
	Metallica	James Hetfield	Chicago	Active
01055.00 Rocky Mountain Wav	Ine Walsh	James Hetfield	Chicago	Active

Apply All Cancel

Find Application

Project Review

Selection 1 of 1

[+ New Project](#)

[Main Menu](#)

PROJECTS HUB

[Dashboard](#)

[Project Review](#)

[Project](#)

[Estimates](#)

[Contract Management](#)

[Revenue Forecast](#)

[Plan](#)

[Budget](#)

[Billing Terms](#)

[Invoices !](#)

[Draft Invoice Approvals !](#)

**Master of Puppets**

01003.00  
Principal: James Hetfield Project Manager: James Hetfield Supervisor: Janis Joplin

Update % Other Actions

FINANCIALS PURCHASING

Financial Options Published **Show:** Billing (USD)

	CONTRACT/FEE	BUDGETED BILLING	PLANNED BILLING	BUDGETED VARIANCE	PLANNED VARIANCE	JTD 8/10/2022 BILLING	ETC BUDGETED BILLING	ETC PLANNED BILLING
<b>Directs</b>								
Total Labor	52,503.00	2,560.00	1,877,636.00	49,943.00	-1,825,133.00	1,414,832.00		
<i>Direct Labor Hours</i>		8.00	6,446.00			5,622.00		
<i>Average Rate/Hour</i>		320.00	291.29			251.66		
Direct Expenses			204.00		-204.00			204.00
<b>Compensation</b>	<b>52,503.00</b>	<b>2,560.00</b>	<b>1,877,840.00</b>	<b>49,943.00</b>	<b>-1,825,337.00</b>	<b>1,414,832.00</b>		<b>204.00</b>
Direct Consultants	9,000.00		16.00	9,000.00	8,984.00	1,500.00		8.00
<b>Total Directs</b>	<b>61,503.00</b>	<b>2,560.00</b>	<b>1,877,856.00</b>	<b>58,943.00</b>	<b>-1,816,353.00</b>	<b>1,416,332.00</b>		<b>212.00</b>
<b>Reimbursables</b>								
Reimbursable Expenses	3,900.00		174,796.00	3,900.00	-170,896.00	151,102.63		149,695.00
Reimbursable Consultants			34,984.00		-34,984.00	31,007.25		27,116.00
<b>Total Reimbursables</b>	<b>3,900.00</b>		<b>209,780.00</b>	<b>3,900.00</b>	<b>-205,880.00</b>	<b>182,109.88</b>		<b>176,811.00</b>
<b>Total</b>	<b>65,403.00</b>	<b>2,560.00</b>	<b>2,087,636.00</b>	<b>62,843.00</b>	<b>-2,022,233.00</b>	<b>1,598,441.88</b>		<b>177,023.00</b>

**Key Performance Indicators**

Revenue	Variance	Ratios
JTD Earned Revenue: 1,708,396.21	JTD Earned Variance: 109,954.33 = 6.44%	Realization Ratio: 1.08
ETC Budgeted Revenue: 1,254,820.00 = 2,302.87%	ETC Budgeted Variance: 1,254,820.00 = 2,302.87%	Budgeted Ratio: 20.51



Find Application

# Principal

Edit Mode:

☰ ★

< Main Menu

MY DASHBOARDS

Principal

Project Details

## My Projects where I'm Principal

PROJECT MANAGER NAME	CLIENT NAME	PROJECT NUMBER & NAME	CONTACT NAME	CONTACT EMAIL	CONTACT PHONE	COMPLETION
▼ No Project Manager Name						
	Weezer	01058.00 Pacific Daydream	Bell, Brian			1,000,000
	Weezer	P1058.00 Promo for Daydream	Bell, Brian			0
▼ James Hetfield						
	Metallica	01003.00 Master of Puppets	Hammett, Kirk	kirkhammett@deltek.com		52,503
	Metallica	01034.00 Load	Hammett, Kirk	kirkhammett@deltek.com		100,000
	Spoon	01057.00 A Series of Sneaks	Pope, Rob			250,000

## Project Revenue

for the last 6 fiscal periods for My Projects

PROJECT NAME	CLIENT NAME	TOTAL REVENUE	REVENUE 1/2022 - 1/2022	REVENUE 12/2021 - 12/2021	REVENUE 11/2021 - 11/2021
<b>TOTALS</b>					
A Series of Sneaks	Spoon	868,727.21 GBP	0.00 GBP	0.00 GBP	0.00
And Justice For All	Metallica	1,107,372.09 AUD	0.00 AUD	0.00 AUD	0.00
Hotel California	Eagles	2,088,434.48 USD	0.00 USD	0.00 USD	0.00
Load	Metallica	1,723,168.98 AUD	0.00 AUD	0.00 AUD	0.00
Master of Puppets	Metallica	1,708,396.21 USD	0.00 USD	0.00 USD	0.00
Pacific Daydream	Weezer	6,247,398.64 USD	0.00 USD	0.00 USD	0.00
Rocky Mountain Way	Joe Walsh	4,445,436.71 USD	0.00 USD	0.00 USD	0.00

## Project Receivables by Client

for My Projects

CLIENT NAME	PROJECT NAME
<b>TOTALS</b>	
▼ Eagles	Hotel California
▼ Joe Walsh	Rocky Mountain Way
▼ Metallica	

## Top 10 Clients - Receivables

for My Projects



Find Application

Expense Report Find expense report

My In Progress No results

+ New Expense Report

- MY STUFF
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- PROPOSALS
- Custom Proposals
- Templates

**My April Expense 4/15/2022** ■ Submitted

James Hetfield — America

Last modified 4/15/2022 01:22 pm by James Hetfield



**Awaiting Approval**

Step: Report - Supervisor  
 Assigned: 4/15/2022  
 Due: 4/18/2022

**Assigned Approvers**

James Hetfield  
 Responsibility: Requester's Supervisor  
 Action Taken: None  
 Date: 4/15/2022

**Currency Override**      **Default Expense Location**

Currency: USD      None

Exchange Override: None

EXPENSE LO...	TOTAL TAX AMOUNT	NET AMOUNT	PROJECT	PROJECT NAME	PHASE	PHASE NAME	TAX
	0.00	4,300.00	01003.00	Master of Puppets	ZZ	Expenses	ZZ
	0.00	0.00					

View: Default

+ Add Line

Credit Card Charges (5)

Find Application

Plan Find project

Active Regular 1 of 9

+ New Project

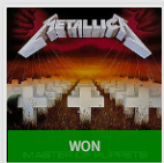
Main Menu

PROJECTS HUB

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- Plan
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- Billing Terms
- Invoices
- Draft Invoice Approvals

**Master of Puppets**  
 01003.00  
 Last modified 2/13/2019 07:38 am by VisionUpgrade

Check Out Other Actions



**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

▼ Pursuit Details

**IQ Record**  
None

**Estimated Fee**  
None

**Probability**  
None

**Weighted Fee**  
None

**Owner Value**  
\$0.00

**Source**  
None

Scale: Entire Project in months

Published Show: Cost (USD) 7/1/2017 to 12/31/2019

CONTRACT SCHEDULE LABOR EXPENSES CONSULTANTS

LEVEL/RESOURCE

▼ Master of Puppets

▼ Design

▼ Engineering

- Dave Grohl
- David Roth
- Jack White
- James Hetfield**
- Janis Joplin
- Joe Walsh
- Rivers Cuomo

- ▶ Architecture
- ▶ test pending
- ▶ Construction
- ▶ Expenses

**Employee Card**

**James Hetfield**  
 President  
 Chicago  
 Last modified 2/10/2023 02:35 pm by James Hetfield

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

Roles Find role

Selection ▾ ◀ 1 of 1 ▶ ☰

+ New Role

☰ ★

< Main Menu

SECURITY

Roles

Users

Password Policies

# LIMITED

Last modified 6/15/2022 12:12 pm by James Hetfield

Actions ▾



- OVERVIEW
- RECORD ACCESS
- ACCOUNTING
- PLANNING
- ACCESS RIGHTS

Full Access to All Menu Items

Enable All Disable All

- >  My Stuff
- <  Hubs ⓘ Detailed application tab access is controlled on the Access Rights tab.
- Activities
- Boilerplates
- Contacts
- Employees
- Equipment
- >  Firms
- Marketing Campaigns
- >  Projects
- Widgets
- >  Resource Management
- >  Reports

### Type of Role

- Setup
- Accounting

- Administrator
- CRM

### Save Rights

#### Reports, Searches, Options, and Grid Views

Save For All Roles

#### Dashboards and Dashparts

None

#### Email Templates

Save For All Roles

### Process Queues

#### Allow Priority

0

### Organization Record Access

#### Organization Record Access

All Organizations

### Additional Search Options

Allow Access to SQL Where Clause

Enable Searching Across Hubs in Desktop Applications

Find Application

Contacts Find contact

Active ▾ ◀ 1 of 20 ▶ ☰

+ New Contact

☰ ★

MY STUFF

- Dashboards >
- Timesheet
- Calendar
- Expense Report
- Self Service
- Approval Center
- Reporting

HUBS

- Activities
- Boilerplates
- Contacts
- Employees
- Firms >
- Marketing Campaigns
- Projects >
- Widgets

RESOURCE MANAGEMENT

- Resource View
- Project View
- Reporting

PROPOSALS

- Custom Proposals
- Templates

Contacts Angus Young

Add Touchpoint Other Actions ▾

Last modified 8/10/2022 01:32 pm by James Hetfield



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

**Status**  
■ Active

**Owner**  
 None

**Source**  
 None

**Last Activity**  
 None

**Name**  
 Angus Young

**Firm**  
 AC/DC

**Contact Information**  
 None

**Firm Address**  
 None

**Other Address**  
 None

**Other Information**

**Market**  
 None

**Website**  
 None

**Description**  
 None

Find Application

Projects Find project

Active Regular ▾ 9 records

+ New Project

☰ ★

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- Draft Invoice Approvals

Actions ▾

View: Default ▾ ⚙️ ⏴ ⏵

<input type="checkbox"/>	IMAGE	NUMBER	NAME	LONG NAME	ORGANIZATION	STAGE
<input type="checkbox"/>		▶ 01003.00	Master of Puppets	Master of Puppets	Chicago	Won
<input type="checkbox"/>		▶ 01005.00	And Justice For All	And Justice For All	Chicago	Won
<input type="checkbox"/>		▶ 01034.00	Load	Load	Chicago	Won
<input type="checkbox"/>		01055.00	Rocky Mountain Way	Rocky Mountain Way	Chicago	Won
<input type="checkbox"/>		01056.00	Hotel California	Hotel California	Chicago	Won
<input type="checkbox"/>		▶ 01057.00	A Series of Sneaks	A Series of Sneaks	Los Angeles	Won
<input type="checkbox"/>		01058.00	Pacific Daydream	Pacific Daydream	Los Angeles	Won
<input type="checkbox"/>		Z0000.05	Midtown Center	Midtown Center	Chicago	Pendin
<input type="checkbox"/>		Z0000.07	Benson Research Lab	Benson Research Lab	Chicago	Pendin

# 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

MY STUFF

- Dashboards
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- Reporting

HUBS

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- Applicants
- Boilerplates
- Contacts
- Employees
- Firms
- Marketing Campaigns
- Projects
- Time Off Request
- Vehicles

RESOURCE MANAGEMENT

- Resource View
- Project View
- Reporting

PROPOSALS

- Custom Proposals
- Templates

## Reporting

Find saved report 3

Projects

RESOURCE NAME

DG Enterprise

Steph Rusn

Michelle Pe

DG Enterprise

Steph Rusn

DG Enterprise

Steph Rusn

DG Enterprise

Design

Steph Rusn

DG Enterprise

Verification

Michelle Pe

Steph Rusn

DG Enterprise

Specifications

Michelle Pe

Steph Rusn

DG Enterprises

Forecast Range: 3 months beginning February 2023

NAME	ASSIGNMENT START	ASSIGNMENT END	JTD 1/13/2023 HOURS	TOTAL ETC HOURS	HOURS
PE				2,750	
	8/10/2022	8/10/2022	27		27
	5/4/2022	5/4/2023	50	36	86
	9/2/2022	9/4/2023	88		88
	12/2/2019	2/12/2024		2,707	2,707
	1/3/2022	9/14/2038	1,088	5	1,093
	5/1/2019	4/19/2022			
	7/28/2006	5/31/2023	275	2	277
tlett AIA				1,357	

Save Other Actions

Save As...  
Rename  
Delete

### Saving Favorites and Other Actions

Actions for saving reports and managing saved favorites are now located at the top-right of the screen. Use the **Save** button to save your report. Use **Other Actions** to access the **Save As**, **Rename**, and **Delete** actions.

Close

es: 3 months beginning February 2023

TOTAL ETC HOURS	EAC HOURS	TOTAL PLANNED HOURS
32	32	64
16	16	31
17	17	33
1	1	1
1	1	1
1	1	1
1	1	1
1	1	1
1	1	1
24	24	24
8	8	8
16	16	16
10	10	10
3	3	3
7	7	7
9	9	9
2	2	2



Find Application

☰ ☆

MY STUFF

Dashboards >

Timesheet

Calendar

Expense Report

Self Service

Approval Center

Reporting

HUBS

Activities

Boilerplates

Contacts

Employees

Firms >

Marketing Campaigns

Projects >

Widgets

RESOURCE MANAGEMENT

Resource View

Project View

Reporting

Getting Started with Deltek Vantagepoint



Look Around

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




Become part of the Deltek

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

## Menu Navigation Overview

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




3:50

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- Numbers
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- Widgets
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- Project View
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- PROPOSALS
- Custom Proposals
- Templates

Expense Report  My Expense Reports ▾ ◀ 19 of 75 ▶

 **expense report 11/1/2018** ■ Posted  
 James Hetfield — America  
Last modified 11/1/2018 12:20 pm by Jack White

**Currency Override** **Default Expense Location**  
 Currency: USD *None*  
 Exchange Override: None

LINE STATUS	LINE	DATE	CATEGORY	DESCRIPTION	DETAIL	COMP... PAID	CURRE... CODE	AMOUNT	PAYMENT EXCHANGE RATE
✓	1	11/1/2018	Expenses - America E	stuff		<input type="checkbox"/>	USD	15.00	0.0000000000
	2					<input type="checkbox"/>	USD	0.00	0.0000000000

	<b>Total Expenses</b>	15.00
	<b>Company Paid</b>	0.00
	<b>Amount Advanced</b>	<input type="text" value="0.00"/>
	<b>Total Due (USD)</b>	15.00

- 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 Reports 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
  - About

Charges (5)

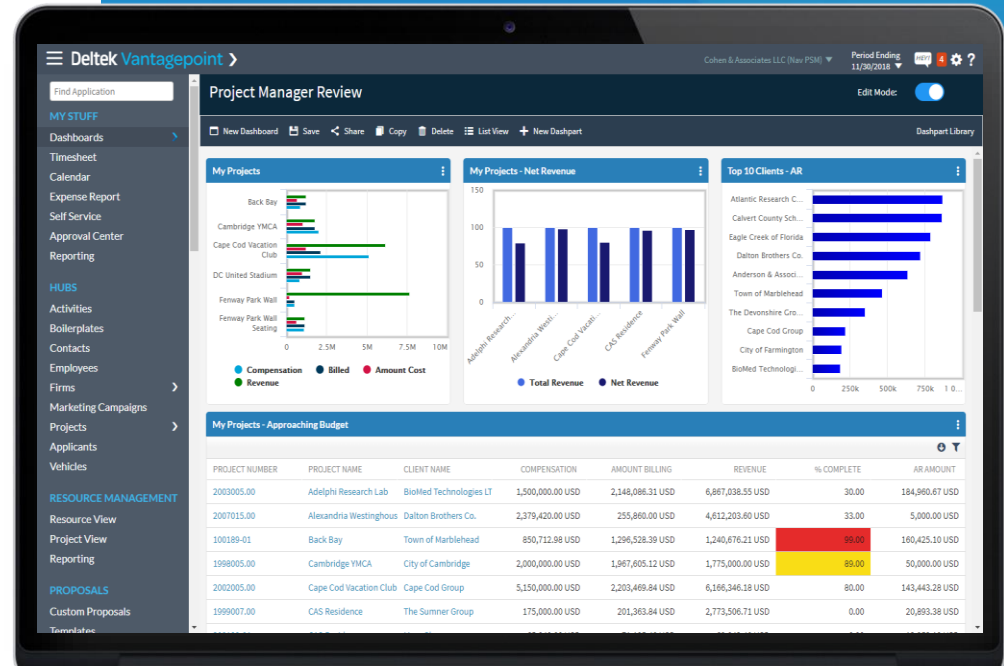
# Recap

- » 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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[vantagepoint@deltek.com](mailto:vantagepoint@deltek.com)

