Central Consulting Group

Deltek
Platinum Partner

DELTEK VISION® ADVANCED TAILORING AND CUSTOMIZATION OPTIONS | **A TRUSTED PARTNER**

To get more out of your investment in Deltek Vision, consider tailoring your system with these simple adjustments that eliminate duplicate data entry, allow you to track more information and boost productivity.

If your IT staff isn't able to make these adjustments, we'd be happy to provide tailoring services. To learn more, contact Senior Consultant David Springer at 817-292-3399 or david.springer@centralconsultinggroup.com.

OPTION	FEATURE	BENEFIT
Opportunity		
Company and Contact	Delete old company or contact from clients and contacts grid.	Changes to company or contact do NOT delete the old values in the grids. This procedure and workflow will remove them.
Scope Grid	Grid to store both proposed phases of a project, plus description, hours and fee. Can use project template to populate the grid or use plan to populate the grid with not only phases, but hours and fee.	▪ Click a button and populate the grid ▪ Add fee to build a phase based estimate ▪ Output directly to fee proposal letters via merge templates ▪ Create regular projects from phases
Create Regular Project Phases from Project Template	Project Template drop down field with stored procedure to read the project template structure.	Allow the opportunity to drive the creation of not only the regular project via the built-in functions, but also the work break down structure as defined within the project templates.
Use Text Libraries for Proposal Scope	Add a column to the Scope grid above and let it be populated from the text libraries where scope or qualifications can be stored.	Prewritten scope can be stored in text libraries, added to the opportunity scope grid and customized for that opportunity. This scope is now available for fee proposal letters.
Revenue from Proj-ect	Update opportunity revenue from project fees when they change.	Supports opportunity revenue forecasting on a timeline of projected billings.
Contacts		
Firm History	Grid to store date and company name of last place of business.	As the contacts change companies, don't create new contacts, change their associated company and the workflow will capture the old company and record it in the grid.
Contact Manager	User-defined field that assigns the employee responsible for the contact. Automatically populate the employee associations grid.	Fields, not grid records, can be made mandatory, so that new contacts must be assigned to employees. Keeps your contacts from becoming isolated and unmanaged.

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Project		
Billing Terms	Project level data from user-defined fields like Billing Type determine type of billing terms.	▪ Maintain consistency in setting up billing terms for different Billing Types. ▪ Ensure that the basics are always right. ▪ Change Billing Type and automatically have billing terms change.
Billing Term Phases	Write project phases to billing terms Fee tab in the phase grid.	For lump sum projects, the phases are already known and the fee phase grid can be populated automatically.
Consultant Contracts	Grid to store subconsultant contract amounts, plus nightly updates from AP showing differences and percentages of: ▪ AP Invoices ▪ AP Invoices Paid ▪ AP Invoices Billed to client	Easy reference for original contract amount, plus transactional calculations at the time invoicing is being prepared for your client.
Latitude and Longitude	Based on opportunity or project address, populate latitude and longitude.	Query for projects within certain square distance of those points, to find projects with related data to the new project.
Company and Contact	Delete old company or contact from clients and contacts grid.	Changes to company or contact do NOT delete the old values in the grids. This procedure and workflow will remove them.
Push Down Approved for Use in Processing Flag	Push the Approved for Use in Processing checkbox down through the structure of a regular project where it has been approved at the project level.	Saves accounting lots of labor approving and saving at all levels of the project work breakdown structure.
Auto Approve Promo Projects	Check the Approved for Use in Processing checkbox when the project is promotional.	Eliminates the hassle of accounting having to approve promotional projects that have no billing terms or invoicing.
Inactivate Promo Projects	When a regular project is created for the root number associated with a promotional project number, set the promotional project to Inactive or Dormant.	Saves time for accounting and helps ensure that timesheet users don't see two projects of the same name and enter billable hours on the promotional project.
Fee Rollup	For firms that have enabled entry of fees at any level of the project, totals the current level and rolls up the fees to the parent levels.	Allows the built-in functionality of "Input Fees at the lowest level" with the freedom to pick which level the fees are managed at.
SF330 Grid Percents	Grid of the SF330 code and a numeric percent to establish SF330 fee value. As the fee of the project changes, the fee distributes over the SF330 codes automatically.	Eliminates the need for marketing to be adjusting the SF330 fees when the project fees change.
Fleet Management	Use the vehicle identification number (VIN) as a phase in Vision to translate vehicle accounting data — such as maintenance, mileage and full charges — into an automated maintenance schedule.	Reduces administrative time and helps keep vehicles running smoothly.

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Planning		
Copy Plan No and Name to Labor Tab	Copy the number and name from the General tab to the Labor tab populating the first line as the project name and the project column as plan no.	Reduces both project management labor and potential errors in setting up the project name and number in the plan.
Copy Plan % Complete to Project % Complete	Copy the reported % complete in the plan to the project reported % complete.	This allows project managers to manage from the plan and not have to be in both planning and project.
Global Planning Rate Refresh	Recalculates rates across all plans either via scheduled workflow or on demand. Labor Override Tables may also be used to set rates for specific plans at the project, phase or task level.	Reduces project management labor and potential errors in not refreshing rates on plans associated to rate tables that have been modified.
Project Construction Administration		
Change Orders	Grids to store: ▪ Construction costs by discipline ▪ Change order numbers and dates ▪ Change order items by discipline and amount Update construction costs and construction amounts to date.	Input change order items and have them sum up to the change order and update the construction costs by discipline, showing how many change orders per discipline and change order cost per discipline. Output data directly to AIA Change Order form. Have numerical data at your fingertips for marketing.
Shop Drawings	Grid to store everything that is now stored in a spreadsheet.	Use workflows to notify when shop drawings are about to be overdue or are overdue. Output data for via merge templates for job site meetings.
Employees		
Email Addresses	Generate employee email addresses from employee name.	Notify IT of new employees and present email address, department, etc.
PTO Accrual	Accrue PTO at non-standard rates.	Automation versus keeping the data outside of Vision.
Salary History	Grid of pay rate and title changes.	Auto populate the grid whenever the pay rate or title changes.
Client Info Center		
Client Billing History Grid	Add grid in which each record represents one year and the amount invoiced for that year. Optionally, include profitability for that year.	Provides volume, frequency and profitability information for each client across all time, which can be used to evaluate new opportunities and develop strategies for each client.

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