

# Future Enhancements Vision 7.2

Presented by: Nicole Temple



# Agenda

1. Resources
2. WebEx Instructions
3. Presentation: What's New in Vision 7.1 & 7.2
4. Questions / Answers

Keep your business  
on *course*.

Full Sail Partners



# Other resources from Full Sail Partners:

## Webinar

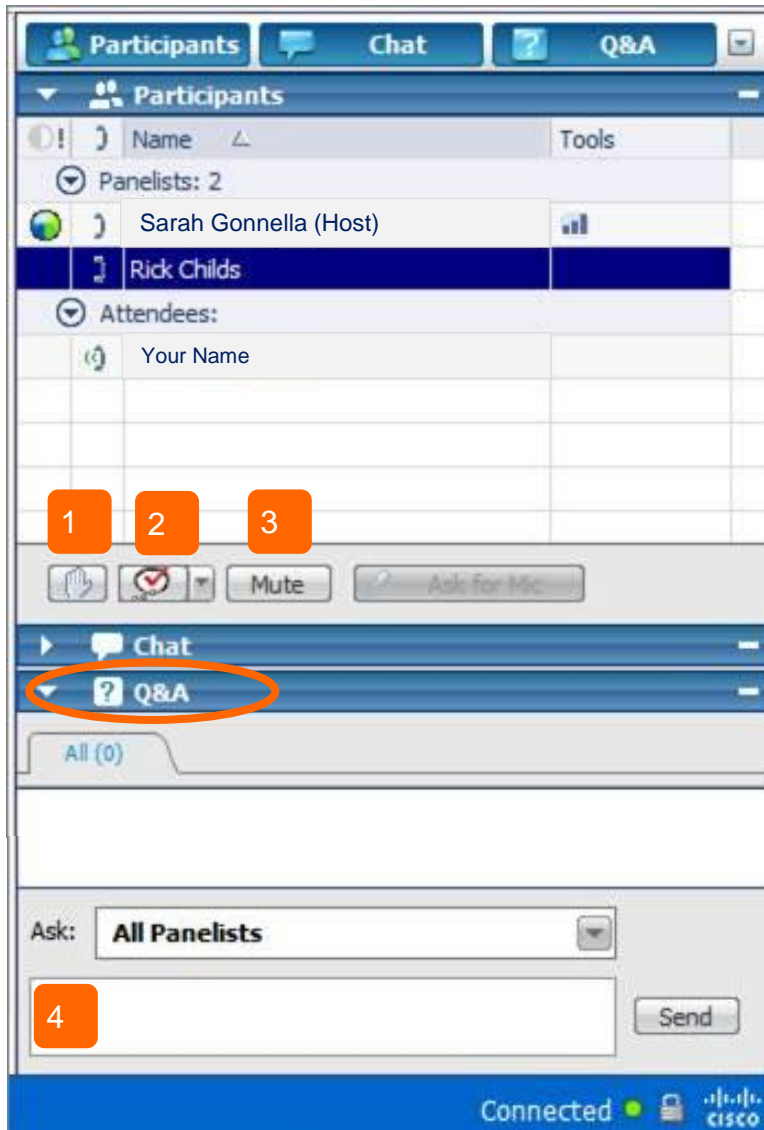
- Archived: Crafting a Marketing Plan: <http://bit.ly/17PIDrP>
- Archived: Growing Smarter! Core Growth Strategies for PS Firms: <http://bit.ly/16JePLY>

## Articles

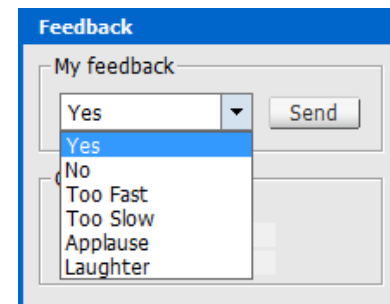
- Difference Between Project Backlog & Forecasting: <http://bit.ly/1atDWze>
- Why Cash Flow Planning is Essential for Growth: <http://bit.ly/1hmbfhe>
- Professional Services Marketing – A Changing Landscape: <http://bit.ly/1hPCe2G>

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1. **Raise Hand** (be sure to click again to remove raised hand or feedback information)
2. **Feedback Tool** (use for yes/no questions or to provide the speaker feedback.)



3. **Mute** (mute yourself when you need to talk to someone in your office or put the line on hold)
4. **Q&A** (Type in the Q&A dialogue box [Not Chat] to ask a question. Be sure to choose All Panelist)



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# Trends and Drivers



- Customer feedback
- Industry trends
- Enhancement requests
- Business value versus clicks and picks
- Evolution of technology
- Desire to grow



# Today, Tomorrow, and Future Enhancements

## TODAY

Internationalization  
 Transactional Document Management (TDM)  
 Custom Proposals  
 Refining Security  
 Vision Performance Management  
 Invoice Approvals

## TOMORROW

Internationalization  
 Timesheet Auditing  
 CMO Platform Upgrade  
 General Usability  
 Display Settings Refinement  
 Translation for All Languages

## FUTURE

Internationalization  
 CM Enhancements  
 Approvals  
 Security Refinements  
 Core Planning Enhancements  
 Fixed Assets  
 Refined Kona Integrations  
 Multi-Company Enhancements  
 Billing Enhancements  
 TDM Expansion  
 Extensibility  
 Archiving

TIME

T O U C H

CRM

APPROVALS

EXPENSES

N A V I G A T O R

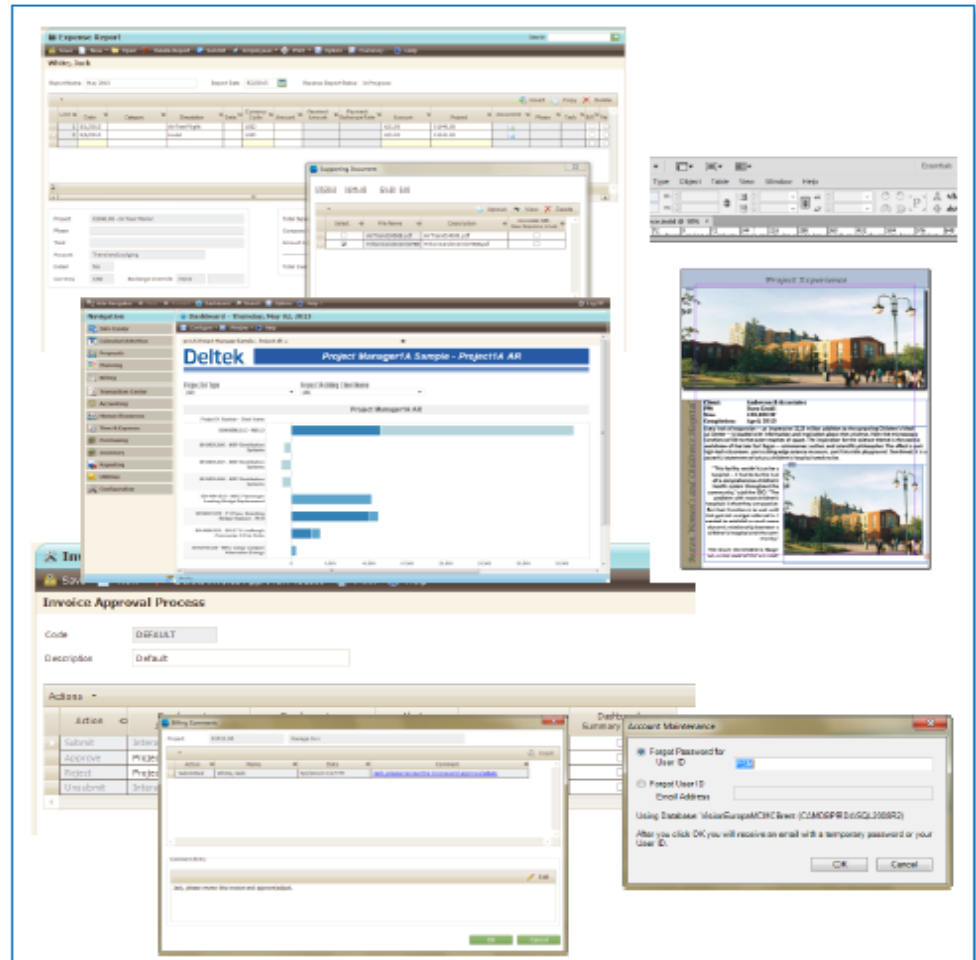
PLANNING TIMESHEET EXPANSION PLANS w/o PROJECTS PROJECT INITIATION INVOICE APPROVALS



# Today – Core Product, 7.1

## VISION 7.1

- ▶ Transactional Document Management
- ▶ InDesign for Custom Proposals
- ▶ Security Refinements
- ▶ Vision Performance Management
- ▶ Invoice Approvals
- ▶ Expanded Lookup Functionality
- ▶ Internationalization / Localization (Belgium)
- ▶ Interface Refinements
- ▶ Kona / Info Center Integration





# Today – Core Product, 7.1

## TRANSACTIONAL DOCUMENT MANAGEMENT

- ▶ Expanding file attachment capability to transactions
- ▶ AP Vouchers / Expense Reports
- ▶ Invoices
- ▶ Expense receipts
- ▶ Inclusion on invoices and billing backup
- ▶ Relies on SQL Server FILESTREAM

The screenshot displays the 'Expense Report' application window. The title bar reads 'Expense Report' and the menu bar includes 'File', 'Edit', 'View', 'Print', 'Options', 'Currency', and 'Help'. The main window shows a report for 'White, Jack' with the following details:

- Report Name: May 2013
- Report Date: 5/20/13
- Expense Report Status: In Progress

The main data table has columns: Line No, Date, Category, Description, Date, Currency Code, Amount, Payment Amount, Payment Exchange Rate, Account, Project, Amount, Phase, Task, and Flag. The table contains two rows of data:

Line No	Date	Category	Description	Date	Currency Code	Amount	Payment Amount	Payment Exchange Rate	Account	Project	Amount	Phase	Task	Flag
1	5/1/2013		Airfare Flight		USD				621.00	02048.00	6.6			<input type="checkbox"/>
2	5/1/2013		Hotel		USD				621.00	02048.00	6.6			<input type="checkbox"/>

Below the table, there are fields for Project (02048.00 - In Performance), Phase, Task, Account (Travel and Lodging), Detail (No), and Currency (USD). A 'Supporting Document' dialog box is open, showing a table of attachments:

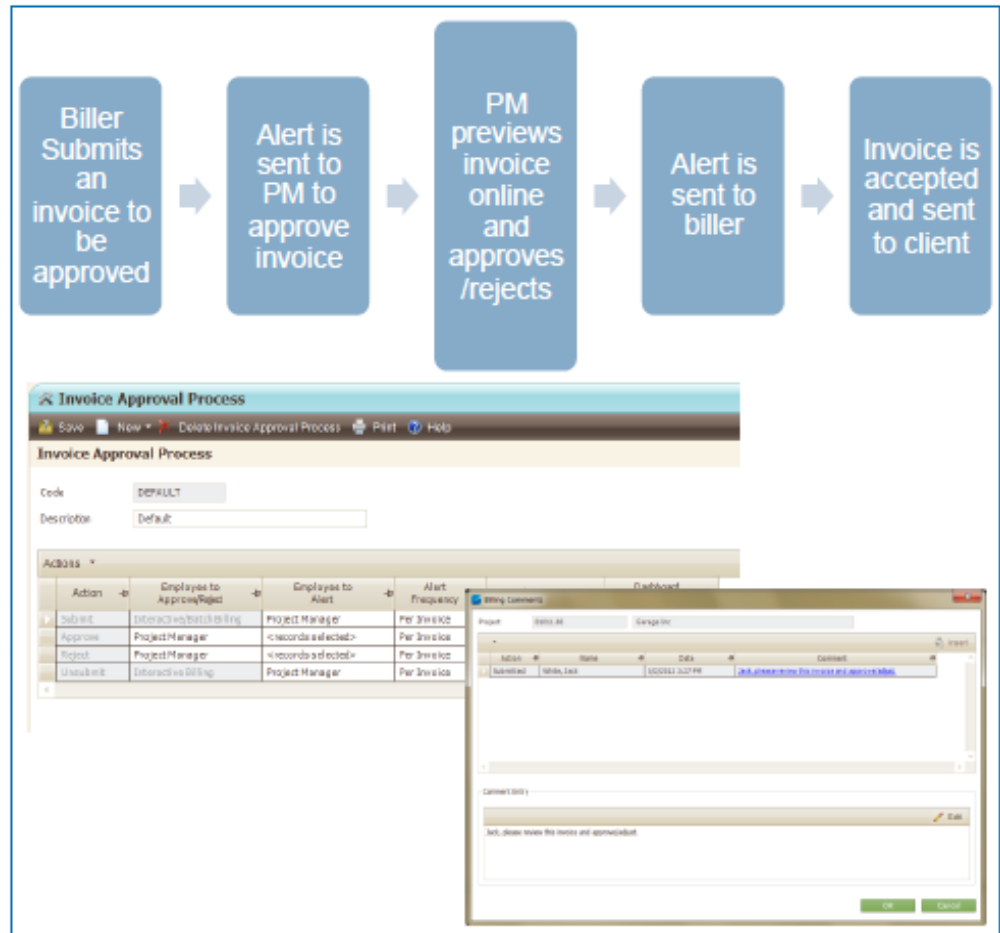
Select	File Name	Description	Has inline table	New Expense Lines
<input type="checkbox"/>	5/1/2013-05488.pdf	Air Travel 05488 Exp all	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Hotel Card on 5/1/2013	Hotel Card on 5/1/2013	<input type="checkbox"/>	<input type="checkbox"/>



# Today – Core Product, 7.1

## INVOICE APPROVALS

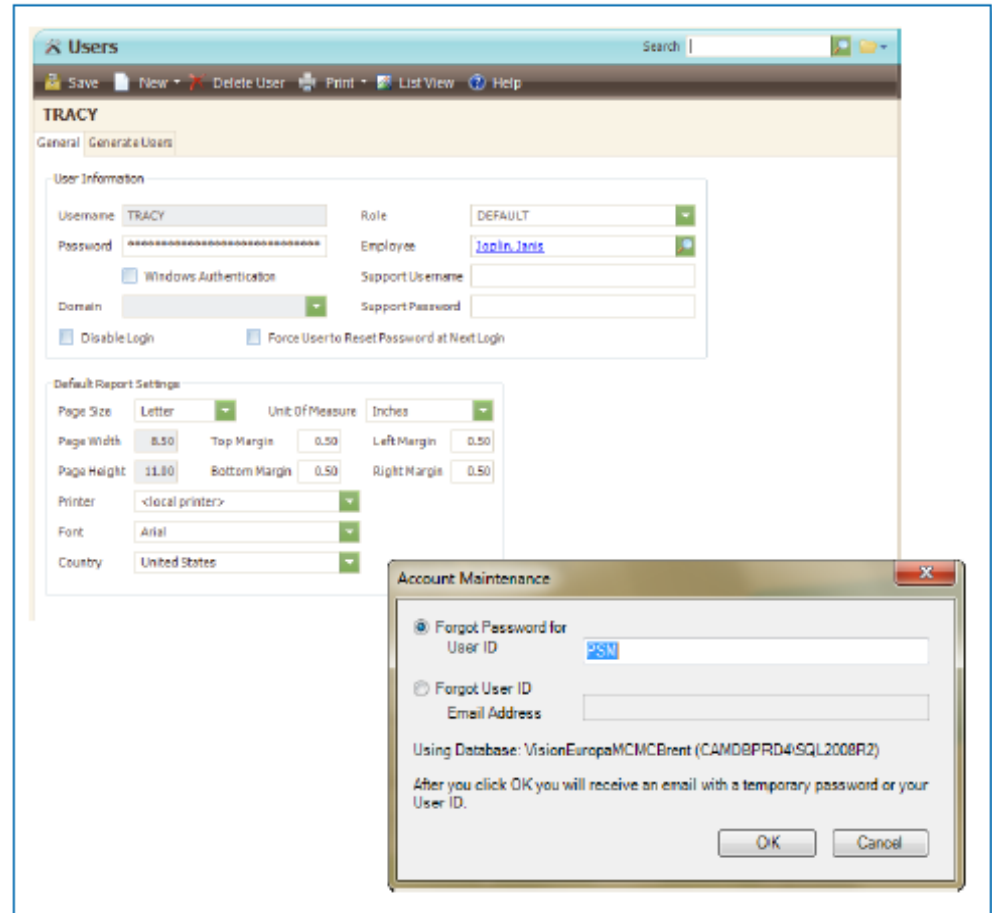
- ▶ Speed up the invoicing process
- ▶ Provide electronic communication and commenting for the invoice approval process
- ▶ Allows delegation of the approval process when primary approver is absent
- ▶ Reports the status of invoices in process



# Today – Core Product, 7.1

## SECURITY REFINEMENTS

- ▶ Improved flexibility in managing role security
- ▶ New info center style approach to users and passwords
- ▶ Distribution of authority
- ▶ Account maintenance
  - ▶ Forgot password
  - ▶ Forgot user ID
  - ▶ Force password reset



# Today – Core Product, 7.1

## INTERNATIONALIZATION / LOCALIZATION

- ▶ Sequential transaction numbering
- ▶ Tax Analysis report enhancements
- ▶ Payment formats

The screenshot displays the 'Accounting System Settings' window. The 'Transaction Auto Numbering' tab is active, showing a table for 'Bank Transaction Auto Numbering' with columns for Company, Bank Code, Receipts, Next Receipt Reference Number, Payments, and Next Payment Reference Number. A row for 'Europa America' is visible with values 'America Bank - USD', a checked 'Receipts' box, '1380007', a checked 'Payments' box, and '1380019'. Below the table, a text field shows 'Last System Generated Voucher Reference Number for Companies Not Listed Below' with the value '0000167'.

The 'Transaction Entry Auto Numbering' tab is also visible, showing a table with columns for Company and Transaction Type. A row for 'Europa America' is visible with the value 'A/P Voucher'.

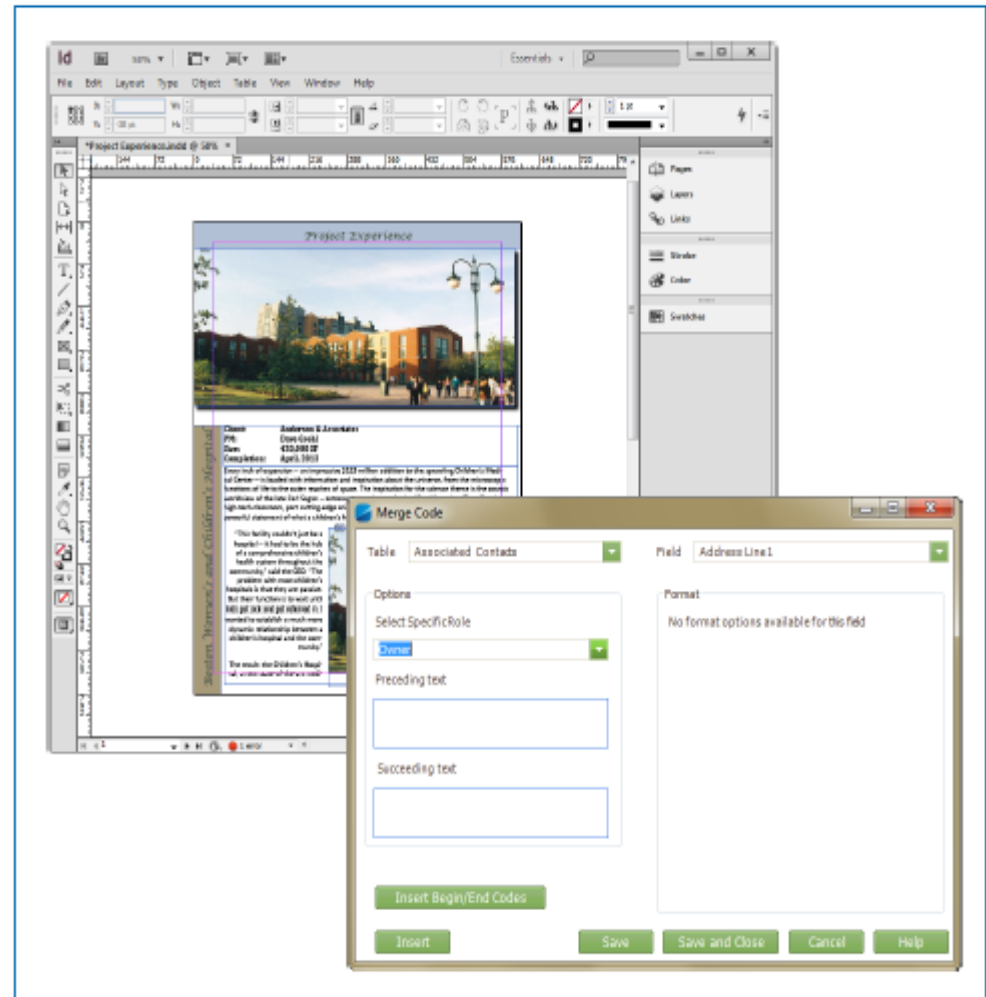
The 'Tax Analysis Report' dialog box is open, showing the 'General' tab. It has sections for 'Include Optional Columns' with checkboxes for 'Recoverable & Non-Recoverable Tax', 'Vendor/Client Tax ID', 'Gross Amount', and 'Address'. The 'Include in Report' section has checked boxes for 'Vendor', 'Employee', and 'Project', each with a search field. At the bottom, there are buttons for 'Options', 'Organize', 'Default', 'Apply', 'Cancel', and 'Help'.



# Today – Core Product, 7.1

## CUSTOM PROPOSALS AND INDESIGN

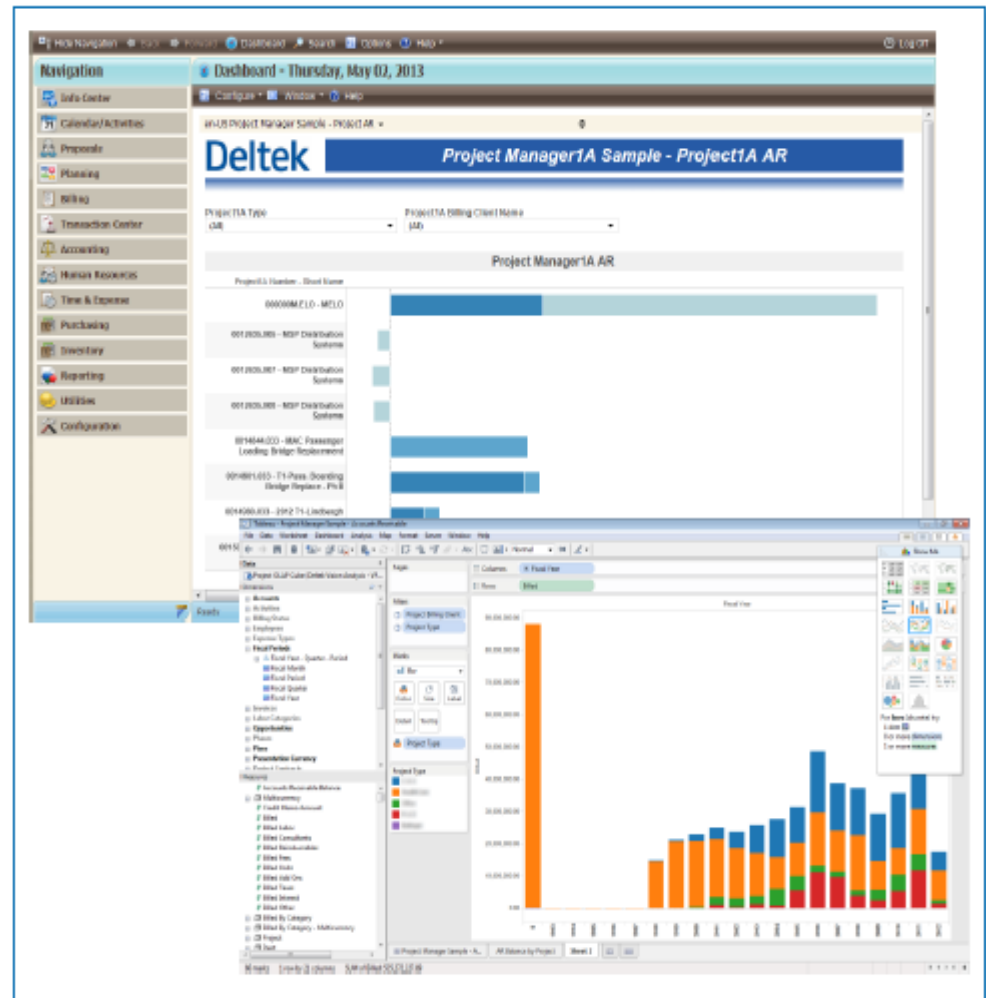
- ▶ InDesign integration
- ▶ Merge custom proposals directly into InDesign
- ▶ InDesign templates as merge templates



# Today – Core Product, 7.1

## VISION PERFORMANCE MANAGEMENT

- ▶ New presentation layer
- ▶ Improved dashboard interactivity
- ▶ More accessible authoring



# Tomorrow – Core Product. 7.2

## VISION 7.2

- ▶ Internationalization/Localization
- ▶ Timesheet Auditing
- ▶ CMO Platform Upgrade
- ▶ General Usability
- ▶ Translation for All Languages
- ▶ Generally Available in December

The screenshot displays the Deltek Vison 7.1 software interface. The main window shows a 'Timesheet' for 'Apple, William' with a 'Period Ending' of 1/15/2012 and 'Period Status' of 'Open'. Below this, there is a 'Decision Audit' section with a table of changes:

Date	Project	Issue	Task	Labor Code	Units
1/15/12	6673309-00	Tab	BOC	1414	12
1/15/12	09412-1100	TTB	BOC	1414	9

Below the table, there is a 'Description' field with the text: 'Revised hours due to incorrect original entry, correct to...'

Overlaid on the bottom right is a 'Report Server: HQ1APTST63VS' window. It shows a 'Load Reports' dialog with a table of reports:

Report Path	Lookup Type	Group Type	Version
Assoc/Client/Client Responsibility	Client		1.0
Assoc/Employee/Active Employees by Date			1.0
Assoc/Employee/CRM Responsibility	Employee		1.0
Assoc/Employee/CRM Resp_Act			1.0
Assoc/Employee/CRM Resp_Clients			1.0
Assoc/Employee/CRM Resp_Opps			1.0
/Custom/Cohen Assoc/Employee/Employee Labor Detail	Employee		1.0
/Custom/Cohen Assoc/Employee/Employee Productivity	Employee		1.0
/Custom/Cohen Assoc/Opportunity/Opport_Maint_Act			1.0
/Custom/Cohen Assoc/Opportunity/Opportunity Long Report Name			1.0

Overlaid on the bottom left of the report server window is a graphic with currency symbols: \$, €, £, ¥, and ₪.



# Tomorrow – Core Product, 7.2

## INTERNATIONALIZATION / LOCALIZATION

- ▶ Netherlands, Belgium, Columbia, Brazil
- ▶ Multiple tax codes
- ▶ Payment processing
- ▶ Bank reconciliation
- ▶ EFT refinements
- ▶ Improved Tax Analysis report
- ▶ Translations for all languages

The screenshot shows a software window titled "Bank Statement Reconciliation" with a menu bar (Save, New, Open, Print, Help) and a sub-header "America Bank - USD(USD)". Below the header are tabs for "Main", "Deposits", "Checks", "Miscellaneous", and "Summary". The main area contains a form with the following fields:

Bank	001	America Bank - USD
Fiscal Period	5/2013	
Statement Date	5/31/2013	
Statement Number		
Opening Balance	201,980.31	
Closing Balance	422,857.47	

The screenshot shows a software window titled "Bank Codes" with a menu bar (Save, New, Delete, Print, Help) and tabs for "Bank Codes", "NACHA File Format", "User Defined File Format", and "SEPA File Format". The main area contains a form with the following fields:

Code	ABOSTON	Currency	USD
Description	Baybank - Boston		
AccountX	10100	Checking Account	
Organization	US/Conversion/Boston/Architectural		
Export to Text Format	SEPA		
Wire Transfer Fee Deb	Check		
AccountX	SEPA		
AccountX	User Defined File		
Project			
Phase			
PC/Service			





# Tomorrow – Core Product, 7.2

## TIMESHEET AUDITING

- ▶ Revision comments with timesheet changes
- ▶ Labor transfer approvals
- ▶ Audit trail for timesheets
- ▶ Floor check
- ▶ Billing backup enhancements

The screenshot displays the Deltek Vision 7.1 software interface. The main window is titled "Timesheet" and shows a "Revision Audit" dialog box. The dialog box contains a table of charges and a text area for an explanation.

Date	Project	Phase	Task	Labor Code	Labor Category	Revision Description
1/13/13	8675309-00	PSB	TSK	0101	12	Hours from 8.0 to 2.5
1/15/13	01812-5150	TTD	DOC	1212	5	Task from TPD to DOC

Below the table is a text area for "Explanation" with the text: "Revised hours due to incorrect original entry, incorrect task or OUB12-5150 project".

The "Floor Check" dialog box is also visible, showing a table of employee timesheet data. The table has columns for Employee, Employee Name, Group, Status, Hours Per Day, Hours Entered, and Last Saved.

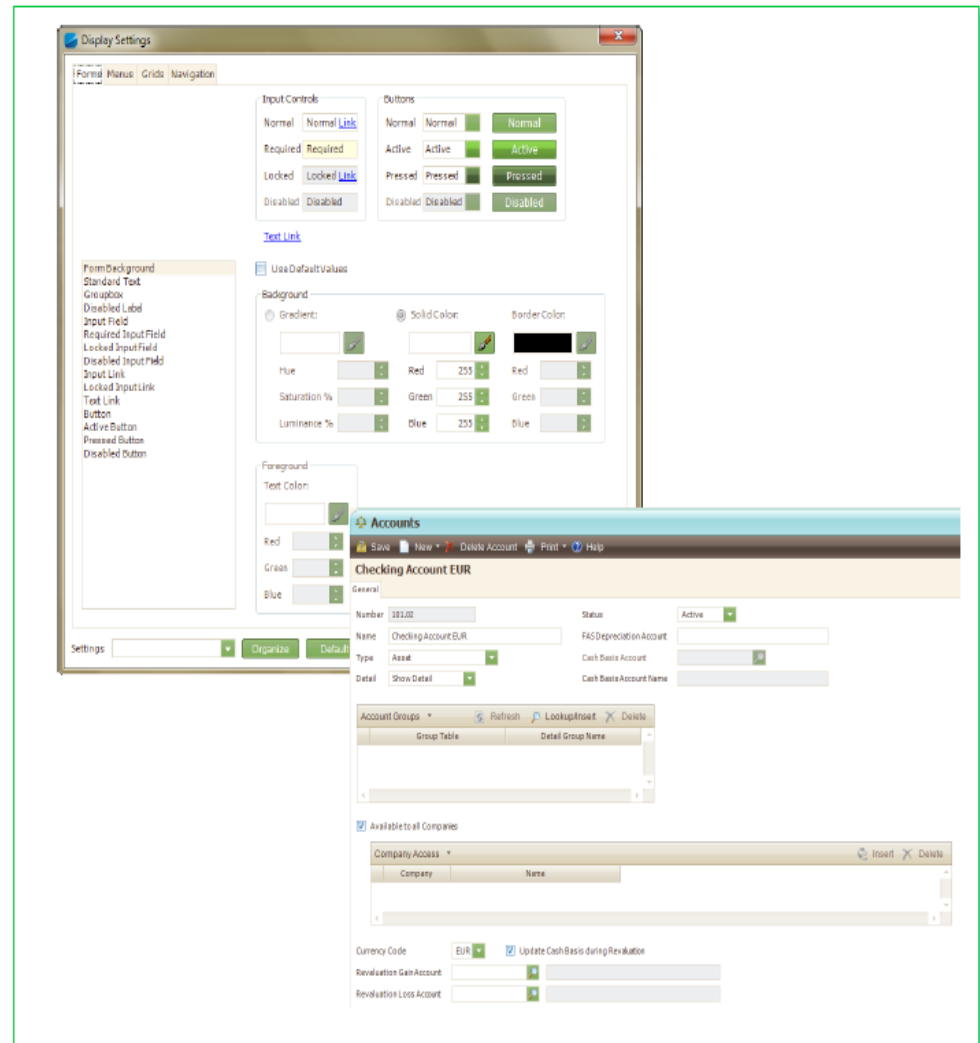
Employee	Employee Name	Group	Status	Hours Per Day	Hours Entered	Last Saved
00001	Anderson, Steve	Administration	In Progress	8	6	1/23/2013 3:15 PM
00002	Douise, Emily	Administration	In Progress	8	8	1/24/2013 1:00 PM
00002	Fitz, Alexander	Administration	In Progress	8	8	1/24/2013 2:15 PM
00029	Freese, Adam	Architectural	Missing	4	0	1/22/2013 12:15 PM
00031	Jefferson, Jamie	Architectural	In Progress	8	8	1/24/2013 9:15 PM
00032	Replinger, Hannah	Architectural	In Progress	4	4	1/24/2013 4:15 PM
00033	Sinenci, Julie	Civil	In Progress	8	6	1/23/2013 3:15 PM
00034	Boagh, Steve	Civil	In Progress	8	3	1/22/2013 6:20 PM
00035	Apple, William	Electrical	In Progress	8	0	1/23/2013 9:00 PM
00013	Cohen, Grace	Electrical	Submitted	8	8	1/24/2013 2:00 PM



# Tomorrow – Core Product, 7.2

## GENERAL USABILITY

- ▶ Spell Checker
- ▶ List View in Accounts IC
- ▶ Account List report enhancements
- ▶ Display Settings refinement



# Today/Tomorrow – Navigator

## NAVIGATOR

- ▶ Continuous User Interface (UI) Improvements
- ▶ Q1
  - ▶ Timesheets
- ▶ Q2
  - ▶ Timesheet refinements
  - ▶ Consultants Planning
- ▶ Q3
  - ▶ Expenses Planning
- ▶ Q4
  - ▶ Language translations
  - ▶ Plans without projects

The top screenshot displays the 'ABC Plaza Study' project overview. It includes a table with columns: Level/Account, Start Date, End Date, Contract, Baseline, Planned, JTD, Planned Less JTD, and Contract Balance. The table lists various project levels such as 'ABC Plaza Study', 'Phase 01a Study', 'Site Survey', 'Design Proposal', and 'Construction'. A detailed view of 'Construction' shows a sub-table with columns: Consultant Type, Type, Account, Consultant Name, Baseline, Planned, JTD, and Plan - JTD. Consultants listed include 'AJ Call Engineers', 'PDS Business Engineering Inc.', and 'Haley Hall Consulting'.

The bottom screenshot shows a 'Timesheet' view for 'William Apple'. It features a grid for Project, Phase, Task, Labor Code, and Labor Category. A summary table at the bottom shows: Regular (50), Overtime (50), Overtime 2 (50), and Total (50). A dropdown menu is open, showing a list of project numbers and phases.



# Today/Tomorrow – Touch

## TIME

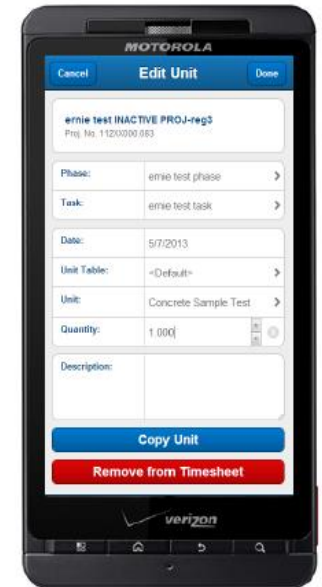
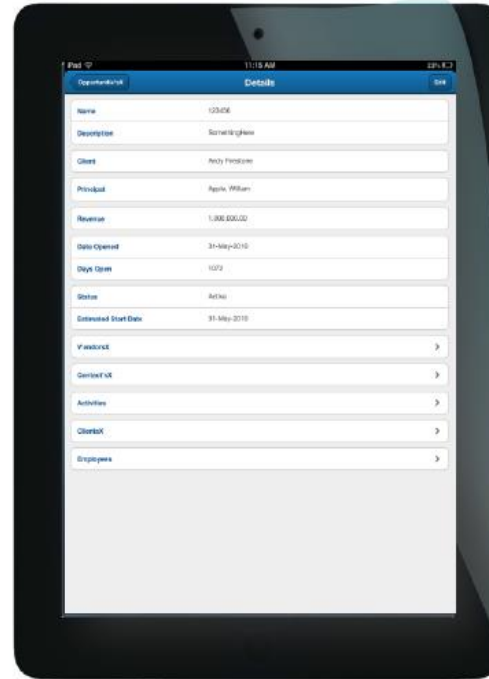
- ▶ Q1 – basic editing and submittal
- ▶ Q2 – units, new save mechanism
- ▶ Q4 – translations, start/stop times, being work on approvals

## CRM

- ▶ Q1 – contacts and clients
- ▶ Q2 – opportunities
- ▶ Q4 – activities, tablet optimization, translations

## EXPENSES

- ▶ Q4 – begin work on expenses



# Future – Core Product 2014

2014

- **Internationalization/Localizations**
  - Belgium, Germany
  - HOAI
- **Capture Management Enhancements**
- **Approvals**
- **Security**
  - Multiple roles per user
  - Transactions / company
- **Core Planning Enhancements**
- **Fixed Assets**
- **Refined Kona Integrations**
- **VPM enhancements**
- **Multi-Company Enhancements**
- **Miscellaneous Billing Enhancements**
- **Credit Card Data Uploading**
- **TDM Expansion**
- **Extensibility**
- **Archiving**



The screenshot displays a software application with a sidebar menu on the left containing items like 'Centro de Información', 'Clientes', 'Oportunidades', 'Proyectos', 'Textos no traducidos', 'Proveedores', 'Bibliotecas de textos', 'Cuentas', 'Calendario/Actividades', 'Propuestas', 'Planificación', 'Facturación', 'Centro de transacciones', 'Contabilidad', 'Recursos humanos', 'Tiempo y gastos', and 'Compras'. The main window shows a 'Proyectos' form with fields for 'ente de facturación', 'Dirección de facturación', 'Contacto de facturación', 'Organización', 'Cliente primario', 'Dirección de cliente', 'Contacto primario', 'Principal', 'Gestor de proveedor', 'Supervisor', 'Lead Engineer', and 'Lead Draughtsman'. Below the form is a 'Memorandum' field. At the bottom, a 'Structure' tree view shows a hierarchy of assets, and a table lists items with columns for 'Rego', 'Plant ID', 'Name', and 'Supplier'.

Rego	Plant ID	Name	Supplier
65		USAP Document assets	
71		Capture Professional v5	Creative Software Incapac
74		WinZip	Digibiz
103		Colorektor Casa D30 M	Difensora's Superstore PA
110		Keyboard Logitech	Digital Store Computers Mar
122		Mouse Inceptor 3-Button	Dick Smith
130		Keyboard & Mouse MS Wireless	Diy Software
132		Keyboard & Mouse MS Wireless	Diy Software
142		Veritas Backup Software	Express Data
184		USB 2 Portable Hard Drive	Harvey Norman Gibraltar
202		HP 781 LCD Flat Screen Monitor	Difensora's Superstore PA
205		Qc Canton Med Back Chair with Arms	Kent Business Furniture
214		Ergon 200 Forge Mesh Chair No Arms	Kent Business Furniture
216		Square White Paper Bin	Kent Business Furniture
221		Mobile Pouching/Whiskard	Kent Business Furniture
225		AS PREDI Dell PowerEdge R400 Rack	Dell Computer Pty Ltd
225		NYM Keyboard/Console on Tray with Trackball	Dell Computer Pty Ltd
227		W850 Smart UPS	Dell Computer Pty Ltd
228		31709 RapidPower PDU	Dell Computer Pty Ltd
232		AS PC272 Dell PowerConnect 3720 Network Switch	Dell Computer Pty Ltd
235		Netgear Wireless G302 Router	Diy Software
240		31709 Dell Power Connect Power Distribution	Diy Software



# Future – Navigator

## NAVIGATOR

### PM Workspace

- ▶ % complete updating
- ▶ Plans without project refinements
- ▶ Project initiation
- ▶ Invoice approvals
- ▶ ETC and spreading behaviors

### Employee Workspace

- ▶ Units in timesheets
- ▶ Start/End times on timesheets
- ▶ Timesheet approvals

The image displays two screenshots of the Navigator software interface. The top screenshot shows the 'ABC Plaza Study' project workspace. It features a navigation pane on the left with a search bar and a project list. The main area is divided into 'Dashboard' and 'Planning' tabs. The 'Planning' tab shows a table with columns for 'Level/Resource', 'Start Date', 'End Date', 'Contract', 'Budget', 'Planned', 'JTD', 'Planned Less JTD', and 'Contract Balance'. Below this, there are detailed views for 'Consultant Type', 'Type', 'Account', 'Consultant Name', 'Budget', 'Planned', 'JTD', and 'Plan - JTD'. The bottom screenshot shows the 'Employee Workspace' with a timesheet grid. The grid has columns for 'Project', 'Phase', 'Task', 'Labor Code', and 'Labor Category'. A dropdown menu is open over the grid, showing options for 'Project number and name', 'Phase', 'Task', and 'Labor Code'. The bottom of the interface shows a summary table with columns for 'Client', 'Project', 'Phase', 'Regular', 'Overtime', and 'Contract'.



# Future – Touch

## TIME

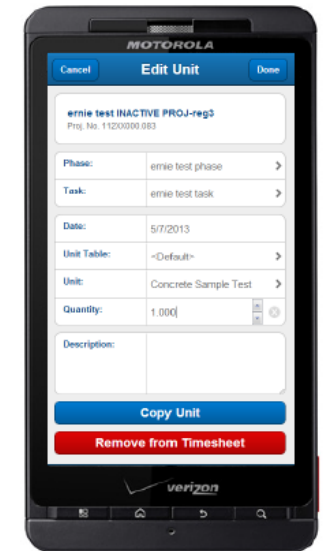
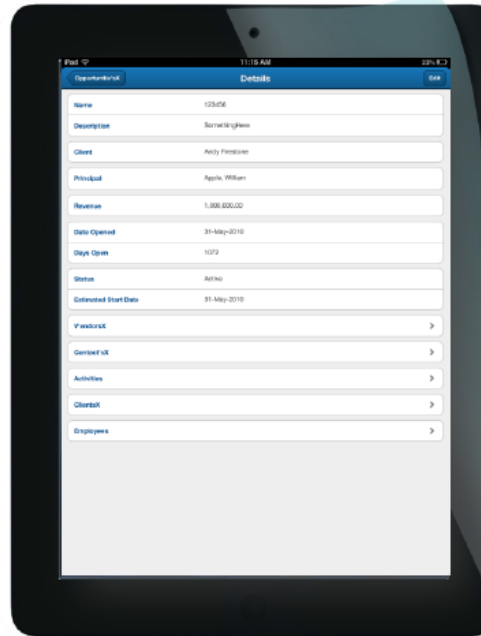
- ▶ Approvals / Line item approval
- ▶ Timesheet auditing
- ▶ UI refinements

## CRM

- ▶ Social Integration
- ▶ Tablet optimization
- ▶ GovWin Integration
- ▶ Native Contacts Integration

## EXPENSES

- ▶ Expense report editing and submittal
- ▶ Approvals



# Questions/Comments?





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# **Thank you for attending!**

***For more information contact:***

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***Senior Consultant***

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