Deltek Vantagepoint
Transition Services

Full Sail Partners' 3-Step Process
A Smoother Journey to Deltek Vantagepoint

STEP 1
Vantagepoint Readiness Report

- Every journey requires a map. This is your starting point.
- It reveals your "sins" over the years in Vision.
- It helps answer the question of where to start and where to focus.
- It provides necessary insight to be more efficient.
- The cost is $2500 and well worth the money vs. the amount of time you will spend manually getting these answers.

STEP 2
Data Cleanup and Vantagepoint Training

- *Before* you obtain a preview environment, cleanup your existing data that was revealed from the Readiness Report.
- Cleanup may be handled internally, or our guidance can be provided by our team to make the process easier.
- We will outline recommended resources based on results of the Readiness Report.
- A preview environment would be set-up and your team would outline new processes, if required
- Train your staff.
- Configure settings to prepare your test environment.

STEP 3
Vantagepoint Transition Copy Scripts

- Now your test environment is ready to move to production.
- Capture changes to the test environment and apply them to the final upgraded version.
- Eliminates redundancy and rework between each test upgrade and your final conversion.
- Captures changes to the screen designer, security, saved searches, reports, Dashboards, workflows, newly created components, and values.
- The scripts are a bundled price.

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STEP 1: The first step is to identify the issues before upgrading. Our Vantagepoint Readiness Report identifies things that need to be cleaned-up prior to an upgrade. The cost is **$2,500.00** and includes a consultant that will meet with you to review everything and discuss areas of importance. The report gives you a snapshot of your entire database and the items your firm needs to address. Step 1 is the most critical and helpful. It starts you down the path of knowing what you need to know. See details below.

Vantagepoint Readiness Report - This custom Vision 7.6 report will review your entire database configuration and provide you with details as the first step in your Vantagepoint preparation process. This service includes 1 hour with a consultant to review the report.

This report:
- Identifies potential duplicate vendors and clients
- Produces a list of all your workflows
- Compiles a list of all your user defined fields and grids
- Identifies custom report files in use
- Identifies duplicate columns across vendors and clients and across leads and contacts
- Displays all the key formats for various info centers
- Shows labor cross charge, overhead allocation, and revenue generation settings for all companies
- Displays the database table size
- Identifies unposted transactions, timesheets, expense reports, and transaction center files
- Identifies plans which do not comply with Vantagepoint (iAccess) requirements
- Identifies info center numbering that differs from your key formats
- ...and more.

STEP 2: The second step is to clean-up the data, discuss desired changes and train your team. Step two may be handled internally, or clients may ask for our assistance. Many firms are seeking our guidance to make the process easier. Some of those things can be automated by our custom group. For example, when people have hyperlinks on the Files tabs, our group can help convert them to the correct format. There are also areas that require rethinking of processes.

We would assign you a consultant to oversee the project and offer additional resources depending on what is revealed when doing step 1. Should we need any additional custom scripts, that would be handled by a developer. You might also want an IT consultant on any technical items. It is hard to estimate needs since the Readiness Report helps to outline what is necessary. This step is done at your hourly rate schedule.

STEP 3: The third step is moving the test environment to production. With our Transition Copy Script, firms can capture many of the changes in the test environment and move them to production which eliminates having to redo things. The scripts can be run as many times as you would like at no additional charge.

During the Deltek Vantagepoint transition, firms can save time by capturing the changes made in the test environment. During the Vision upgrade, the upgrade scripts to Deltek Vantagepoint will bring over all of your data and custom fields. However, the field order is not retained, and screen design properties, saved searches, reports, and dashboard/dashparts will reset. Using Full Sail Partners' Transition Copy Scripts allows firms to retain their changes and eliminates redundancy and rework between each test upgrade and your final production environment. The pricing is a bundled pricing.

Below are the available scripts:

Screen Designer:
- Design layout location for User Defined Fields
- Properties including: Hidden, Locked, Required Fields, Tool Tips
- Resource Planning Configuration

Security:
- Security user role for each employee
- Security options for each user role
- Email Configuration

Saved Searches:
- Private and Shared search options

Reports:
- Private and Shared reports with options and selection criteria

Dashboards/Dashparts:
- Dashboard layout
- Dashpart widgets
- Dashpart calculations

Workflows:
- Hub Workflows
- Approval Engine Workflows

Newly Created Components and Values:
- Standard field values and labels
- Custom fields and labels
- Custom grids and labels
- Custom files
- Custom tabs
- Custom hubs
- Navigation tree

OUR CLIENTS SAY IT BEST

The transition copy scripts from Full Sail Partners definitely make my life easier. I'm surprised more firms haven't gotten in on this gold mine!

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