Deltek Vantagepoint

Transition Services

Full Sail Partners' 3-Step Process

A Smoother Journey to Deltek Vantagepoint

STEP 1

Vantagepoint
Readiness Report (VpRR)

- 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, where to focus, and how to be more efficient.
- The cost is well worth the money vs. the amount of time you would spend manually.
- Re-runs are included.
- Depending on the results, you may be able to start cleanup immediately after the VpRR review meeting.
- Your consultant will start scoping portions of Step 2 upon request.

STEP 2

Vantagepoint
Transition Assistance

- Additional cleanup can be guided by us; the work can be divided up between your team and ours, if needed.
- Clean and ready data is loaded into a Vantagepoint (Vp) test environment.
- Together, we will map out new Vp processes that incorporate our advice derived from best practices, as well as leverage new Vp efficiencies and functionality.
- We'll ensure Vp is ready to go and help your business grow.
- Test, and repeat as necessary.
- Train your staff.
- Configure settings to prepare your test environment for production. Copy as needed.

STEP 3

Vantagepoint
Transition Copy Scripts (TCS)

- Now your test environment is ready to move to production.
- Capture changes to the test environment and apply them to the final upgraded version.
- Eliminate redundancy and rework between each test upgrade and your final conversion.
- Capture changes to the screen designer, security, saved searches, reports, Dashboards, and workflows.
- The scripts are bundled and sold at one fixed fee price; you'll use all scripts at least twice typically, but should your engagement require it, the scripts can be customized and ran independently.
- Re-runs are included.

1815 Central Park Drive | Suite 110, PMB 368 | Steamboat Springs, CO 80487 | 888.552.5535

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 obtaining your preview environment and upgrade. The cost 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.
- Identified potential duplicate contacts.
- Produces a list of all your workflows.
- Displays 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, obtain a preview environment, 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 include technical services, weekly meetings, establishing new processes, training and configuration changes, and programming to automate clean-up.

Some firms want to take the lead and only need guidance, while others want a more hands-on approach. For projects that require more coordination, our firm will 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. Firms might also need an IT consultant for 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.

{{_es_signer1_initials}}

STEP 3: The third step is moving the preview environment to production. With our Transition Copy Script, firms can capture many of the changes in the preview 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 bundled pricing. The execution of the scripts can be customized and/or ran independently of each other.

Below are the available scripts:

Screen Designer:
- Properties including Hidden, Locked, Required Fields, Tool Tips, and other Security Field Settings
- Design layout location for User Defined Fields
- All Screen Designer layouts
- 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/Templates:
- Private and Shared reports with options and selection criteria
- Proposal Templates
- Invoice Templates

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

Workflows:
- Hub Workflows
- Approval Engine Workflows

{{_es_signer1_initials}}