Vantagepoint Upgrade Terminology

This document is a reference guide to topics outlined in our Vantagepoint Upgrade Questionnaire. Please ensure you are familiar with these terms before filling out the questionnaire.

- **ERP** – Stands for Enterprise Resource Planning, which is a category of business management software – typically a suite of integrated applications – that an organization can use to collect, store, manage, and interpret data from these many business activities.
- **Deltek Vision** – A project-based ERP solution that was released in September 2002. The final version of the solution is version 7.6.
- **Deltek Vantagepoint** – A project-based ERP solution. It is an upgraded platform for Deltek Vision. As of May 2019, version 2.0 was released.
- **Deltek SaaS Subscription** – Software as a Service (SaaS) is a software licensing and delivery model in which software is licensed on a subscription basis and is centrally hosted. Deltek's software is hosted by Amazon Web Services.
- **On-Premise** – On-premise is a software licensing model where software is installed and runs on computers on the premises of the person or organization using the software, rather than at a remote facility. The software license is purchased, and the firm pays a yearly maintenance cost for support, updates and hotfixes.
- **Hosted** – Hosted software refers to software that is installed, hosted and accessed entirely from a remote server or location and is managed by an outside company.
- **Info Center** – Each Info Center consists of a set of tabs that contains data grids or data entry fields to manage all of your business-related data.
- **Hub** – A hub replaces the term Info Center and is the new term used in Vantagepoint.
- **Client Info Center** – The Client Info Center contains information about your company's current and prospective clients. The Client Info Center is used to maintain all client information, including addresses, phone numbers, contact names, related activities, and details about future opportunities in Deltek Vision. This Info Center will merge with the Vendor Info Center to become a hub named the Firms Hub.
- **Vendor Info Center** – The Vendor Info Center is used to enter and manage information about the vendors and consultants that your company uses to purchase materials and services in Deltek Vision.
- **Leads Info Center** – The Leads Info Center is used to maintain information about the people and companies who are leads to future business. The lead data that you track includes names, addresses, phone numbers, and links to marketing campaigns in Deltek Vision.
- **Opportunity Info Center** – The Opportunity Info Center contains information about project opportunities that your company wants to pursue. This Info Center is used to maintain all opportunity information, including opportunity names, contacts, addresses, phone numbers, and status in Deltek Vision.
- **Resource Planning** – The Resource Planning application, also known as Resource Management, is a separate module that can be acquired in Deltek Vision and is a part of Vantagepoint Front Office, Full Office Suite, or can be purchased separately. It is used to assign employees to project plans and monitor their utilization. Typically, project managers are responsible for updating their plans on a monthly basis by looking at planned assignments and adjusting resources as needed. When using Resource Planning, project managers can make changes to future planned hours or employee assignments.
- **Purchasing** – This is a separate module that can be acquired in Deltek Vision and Deltek Vantagepoint. It is used to keep electronic records of both internal and project-related procurement and receiving of services, materials, supplies, and capital items.
- **Payroll** – This is a separate module that can be acquired in Deltek Vision and Deltek Vantagepoint. It is used to process your company's payroll for all posted timesheets, or for timesheets posted within a particular date

range, and then to generate employee paychecks and direct deposits. Some firms elect to use the Payroll Interface to connect to their outside payroll firm.

- **Asset Management** – This is a separate module that can be acquired in Deltek Vision and Deltek Vantagepoint. It is used in conjunction with the Equipment Info Center to track and process depreciation and amortization for asset items that you capitalize. The Asset Management application automatically creates assets from purchase orders, change orders, release orders for blanket purchase orders, and AP vouchers. You maintain depreciation and amortization information for asset items in the Equipment Info Center, and you process depreciation and amortization for asset items in the Asset Management application.
- **VPM** – Stands for Vision Performance Management. VPM provides graphical representation of data in Deltek Vision and includes a dashboard authoring tool from Tableau Software. In version 2.0 of Vantagepoint, firms can potentially utilize Vantagepoint dashboards instead. A comparable product has not been released by Deltek for Vantagepoint. Alternatively, Full Sail Partners has a robust solution that may serve as a replacement. For more information visit our Blackbox Connector website.
- **Analysis Cubes** – Vision Analysis Cubes is part of the Vision Performance Management module in the Deltek Vision product. Analysis Cubes provides you with a Vision project data cube and a general ledger data cube from which you can create custom Vision reports with Microsoft Excel® or any business intelligence tool that supports SQL Server Analysis Services OLAP cubes. This feature will no longer be available in Deltek Vantagepoint.
- **Visualization** – The Visualization feature in Vision Reporting is a visual data analysis tool with interactive graphics. Visualization enables you to display key metric values for your projects, project plans, and opportunities in a graphical format to help you analyze performance, determine trends, and identify risks to your business. This feature will no longer be available in Deltek Vantagepoint nor has a comparable product been released by Deltek for Vantagepoint. Alternatively, Full Sail Partners has a robust solution that may serve as a replacement. For more information visit our Blackbox Connector website.
- **Document Management** – The Vision Document Management application allows users to store, share, and collaborate on a set of documents for every client, contact, lead, marketing campaign, and opportunity record in your Info Center. This application is used in tandem with SharePoint. You can link a single document to either one record, or to multiple records in multiple Info Centers. This feature is no longer supported in Deltek Vision and will not be available in Deltek Vantagepoint. Alternatively, users can move to Project Information Management (PIM).
- **ABRA HR Interface** – The ABRA HR interface imports payroll-related data from Sage Abra or exports data to Abra from the Vision Payroll application. This feature will no longer be available in Deltek Vantagepoint. Alternatively, users can investigate Deltek Talent.
- **Proposal Module** – Custom Proposals is a separate module in Deltek Vision to create proposals using merge templates based on data from an Info Center. Merge templates also contain your company's styles for proposals: page layouts, font settings, graphics locations, and other details. In Deltek Vision, you can create merge templates with Adobe InDesign (.indt file) and Microsoft Word (.rft files). In Deltek Vantagepoint, Adobe InDesign and Microsoft Word will not be supported. A new template format has been provided and will require new templates to be created.
- **Info Center Templates** – Merge templates contain merge codes that determine the Info Center data to be retrieved when you produce merged documents. Merge templates also contain the formatting for merged documents. The Merge feature in Info Centers selects one or more Info Center records and uses the merge template created to produce a merged document or proposal. This feature is not available in Deltek Vantagepoint 2.0.
- **Info Center Email Functionality** – In Deltek Vision, users can send email messages from within Info Centers. Users can set up email templates and insert database fields into an email message's subject or body. These fields are then replaced with actual data when the email message is sent. The email features are available in the Employee, Contact, Lead, Project, and Opportunity Info Centers. This product is replaced by Vantagepoint Microsoft Outlook Add-in and is a part of Vantagepoint CRM.

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- **Microsoft Office and Desktop Integration (MODI)** – MODI integrates Vision information with Microsoft Word, Microsoft PowerPoint, and Microsoft Outlook. You can set up a default location for MODI email attachments. You can also save MODI email attachments to a specific location, write a description for the attachment, and associate the attachment with an activity.
- **Connect for Microsoft Office (CMO)** – Connect for Microsoft Office is a separate module in Deltek Vision. It provides users with flexibility by making it possible to perform CRM tasks in Vision or directly in Microsoft Outlook. This add-in software can manage Vision business appointments, email messages, clients, and contacts, as well as Vision activities, vendors, and opportunities, all from Outlook. This product is replaced by Vantagepoint Microsoft Outlook Add-in and is a part of Vantagepoint CRM.
- **Mobile Expense & Timesheet** – Mobile Expense & Timesheet can be downloaded from an app store. It is an application that allows users to enter timesheets and expense reports into Deltek Vision from their mobile devices.
- **Mobile CRM** – Mobile CRM can be downloaded from an app store. It is an application used to access the Deltek Vision system from users' mobile devices. It allows users to enter Client, Contact and Opportunity information from their mobile devices.
- **SF330** – Federal agencies use the SF330 form to obtain information from architecture and engineering firms about their professional qualifications. Deltek Vision automates the process of filling out the SF330. This feature is not available in Deltek Vantagepoint 2.0.
- **254/255** – Federal agencies use the 254/255 form to obtain information from architecture and engineering firms about their professional qualifications. Deltek Vision automates the process of filling out the 254/255. This feature will not be available in Deltek Vantagepoint.
- **GovWin IQ** – GovWin IQ is a market intelligence and lead generation service. The subscription service integrates with the Deltek Vision Opportunities Info Center. It will continue to work with Deltek Vantagepoint in the Project hub moving forward.
- i**Access** – iAccess is a portal that allows front-end users to access Deltek Vision data from any browser or device including a MAC. iAccess is the precursor to Deltek Vantagepoint and allows users to access timesheets, expense reports, business development data and to manage one project at a time, including planning, budget, invoice, and reporting statistics.
- **Cross Searching** – An Info Center Search in Deltek Vision lets you search across all record types in the Info Centers to find any record in your Vision database that has certain characteristics. On an Advanced Lookup, the cross-searching feature allows users to search on field values in another Info Center. For example, a user can search for Contact records based on searching the Client Type field in the Client Info Center or the Project Type field in the Project Info Center. Additional security access is required to use this feature.
- **SQL Where Clause** – On the Advanced Lookup in Deltek Vision, you can perform Info Center queries based on a field in another Info Center. This means that you can build a query from multiple Info Centers without creating a SQL Where Clause.
- **Workflows** – Workflows allow users to specify conditions in Info Center applications for which they want to be alerted. With Workflows, you can automate the process of being alerted each time that a given event takes place. Users can set-up three different kinds of workflows in Deltek Vision: 1. User initiated workflow; 2. Scheduled workflow; and 3. Web services.
- **Stored Procedure** – A stored procedure is a set of Structured Query Language (SQL) statements with an assigned name, which are stored in a relational database management system as a group, so it can be reused and shared by multiple programs. In Deltek Vision, a stored procedure is triggered by a workflow.
- **Firm Hierarchy** – The Firm Hierarchy feature is used to create a hierarchy of records in the Client Info Center to display parent and subsidiary relationships between multiple clients. If you have large firms or agencies as clients, you can obtain and view project and opportunity data at a corporate-wide level for all records in the hierarchy.