

New and Enhanced
Features for DPS 1.1.x
To Vantagepoint 2.0

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Contents of the Release Notes

Vantagepoint 2.0 is the next generation of Deltek for Professional Services. Along with a new name, this version includes many reimagined, enhanced, and new features.

These release notes provide high-level descriptions of these features. The release notes are not intended to provide detailed documentation or training. To learn more, go to the Vantagepoint portal, where you will find videos and other resources.

These release notes address all of the modules associated with Vantagepoint 2.0, some of which your firm may not use. Skip the sections that do not apply to you.

In addition to Information about new and enhanced features, the release notes list all of the bugs fixed in Vantagepoint 2.0.0 and 2.0.1.

Upgrade Preparations and Considerations

Vantagepoint 2.0 contains extensive improvements to the features and functionality in DPS 1.0. Before upgrading, be sure to review the information provided at the Vantagepoint portal, to learn about things that you should consider and steps that you should take to prepare for the upgrade.

In Vantagepoint 2.0, the vast majority of applications are in the browser user interface. However, you must still access some applications from the desktop user interface. For more information, see the remainder of these release notes, including the Navigation Menu section.

New and Enhanced Features

General

Navigation Menu

- Browser Menu
 - Many applications that were previously in the desktop user interface are now in the browser user interface. The browser menu is the starting point for almost all Vantagepoint users.
 - Some processing and Settings applications are rearranged on the browser menu to make it easier to assign security access by user role. Review your users' security access to make sure that it works with the new menu arrangement, especially if some roles have only partial access to processing or Settings submenus.

- You can now search for an item on the browser menu. Go to the **Find Application** field at the top of the menu and enter the first few characters of the item that you want. Vantagepoint searches the menu and lists all matching items.
- To open an application in a new browser window, select the application from the menu and press the CTRL key at the same time.
- The option to change the accounting period has been moved from the menu to the top of the screen for easier access. See the **Period Ending** drop-down list on the toolbar.
- The option to change the active company has been moved from the menu to the top of the screen for easier access. See the company name drop-down on the toolbar.

Before you can give a role access to change companies in the browser user interface, you must use the Access Rights tab of the Roles form in **Settings » Security » Roles** in the browser application to give the role security access to more than one company.

Before you can give a role access to change companies in the desktop user interface, you must complete two steps on the Roles form in **Settings » Security » Roles** in the browser interface:

1. Use the Overview tab to give the role access to the Change Company utility.
2. Use the Access Rights tab to give the role access to more than one company.

- Desktop (Smart Client) Menu
 - A few applications remain in the desktop user interface. You launch the following applications from the desktop menu:
 - Payroll
 - Purchasing
 - Asset Management
 - Settings and reports related to Payroll, Purchasing, and Asset Management
 - Some Accounting-related applications, including Intercompany Billing
 - Some settings
 - Some seldom-used utilities
 - Launch all other applications from the browser interface. To access the browser menu from the desktop menu, click the **Browser** icon at the top of the screen.
- Customized Menus
 - If you upgrade from Vision to Vantagepoint, any changes that you made to the Vision navigation tree are removed. Browser and desktop menus are reset to their standard format.

Support for Multiple Languages

Vantagepoint now supports eight different languages. Previously, only English-US and English-International were available. To use a non-English language, contact your Deltek Account Manager about purchasing the Multilingual module at an additional cost.

Hey Deltek!

This new feature lets you interact with Vantagepoint using natural language. Ask Hey Deltek! to create a contact or open a project by typing or talking, in the same way that you would communicate with a smart device. Use Hey Deltek! to create any standard hub record, to add activity reminders, or to open any hub record from anywhere in Vantagepoint. For more information, see the [Vantagepoint online help](#).

If you are not interested in Hey Deltek!, go to **Settings » General » Options** to turn it off. No one in your company will have access to it.

Column Selection

Throughout Vantagepoint, the process for selecting columns, groups, and fields to include on grids has been streamlined.


Transaction Document Management

You can now use drag and drop functionality when you upload supporting documents to transactions.

My Stuff

The Employee Review application has been moved from the desktop menu to the browser menu, where it appears under **My Stuff » Self Service**. If a role had access to Employee Review in the desktop user interface, the role will have access in the browser user interface. The actions on the Employee Review screen have also been streamlined.

My Preferences

You can now set your default reporting preferences on the My Preferences screen in the browser user interface as well as in the desktop user interface. Click the  on the Vantagepoint toolbar. The My Preferences screen in the browser user interface now includes the same Reporting tab that appears in the desktop user interface.

Server Side Printing

If you host Vantagepoint on-premises, you can no longer configure network printers so that you can print reports directly from Vantagepoint. Instead, you must first generate a report in a preview window or as a PDF, and then print or save it.

In both the browser and desktop user interfaces, print actions now display whatever you are printing in a preview pane. On the preview pane, you can then use the icons to print or save the report.

Help

You can now find additional information, and do so more easily, via the Help menu that displays when you click the **?** in the browser user interface. The Help menu now contains these options:

Option	Previous label
Online Help	Contents
Data Dictionary	
Email Help Desk	Help Desk
Deltek Support Center	Customer Care Connect Knowledge Base Contact Us
Videos (new)	
About	

Dashboards

General Dashboard Improvements

As in DPS, Vantagepoint offers two types of dashboards:

- System dashboards, available in **My Stuff » Dashboards**
- Record-specific dashboards, available in the Projects hub

System dashboards have a new look and new functionality:

- Use the new interface for dashboards.
- To display in the Navigation pane a list that includes every dashboard that has been shared with you, click **My Stuff » Dashboards**.
- Access Dashboard Designer and Dashpart Designer in **My Stuff » Dashboards**.
- Projects and opportunities are now combined:
 - Existing or old dashparts created using the opportunity base are removed.
 - The Pipeline, Upcoming Milestone, and My Activities system dashparts now use project information.

- The My Opportunity dashpart is no longer available. Check out the new predefined My Pursuit Projects dashpart as a possible replacement. You can add this dashpart to any dashboard where you could previously add the My Opportunity dashpart.

For information about enhancements to record-specific dashboards, see Projects Area.

Dashboard Security

You specify security access by role to determine which users are allowed to design and edit dashboards. On the Overview tab of the Roles form in **Settings » Security » Roles**, in the Save Rights section, set the **Dashboards and Dashparts** option to **Save for All Roles**.

By default, in Vantagepoint 2.0, the **Dashboards and Dashparts** option is set to **Save For All Roles** for those security roles that had access to the Dashboard Designer in DPS 1.0.

Designing and viewing dashboards honors record-level access rights and view cost access rights. However, field-level access rights assigned to a security role are not recognized. Because of this, it is primarily an administrator role to design dashboards.

Dashboard Designer

The Dashboard Designer is now available from **My Stuff » Dashboards**. Employees with appropriate security role access to design dashboards will see the **Edit** option on the Dashboards toolbar.

Use the Dashboard Designer to:

- View all dashboards on the Navigation pane.
- Create, save, share, copy, or delete dashboards.
- Create, save, edit, or delete dashparts.
- Use list view.
- Add dashparts to the dashboard by dragging them from the Dashpart Library to the dashboard area. The Dashpart Library displays all dashparts organized by type.
- Organize your dashboard by moving and resizing dashparts in the dashboard area.

Dashpart Designer

The dashpart designer in DPS 1.0 introduced the building blocks needed to create table and favorite report dashparts. In Vantagepoint 2.0, a new Dashpart Designer is now available, providing additional table dashpart options and access to the new chart dashpart.

The Dashpart Designer offers these options:

- **New Dashpart Wizard:** Easily create dashparts by following the dashpart wizard steps.
- **Support for Search Functionality:** Control what records are included on the dashpart by selecting an existing search preference or by assigning an ad-hoc search to the dashpart. Filtering through the search function allows you to control what information is displayed on the dashpart and this also helps improve performance

- **Add Calculated Fields for Dashparts:** Create calculated fields for dashboard purposes only. Newly created calculated fields in the dashpart designer are associated with the dashpart base. You create and maintain these calculated fields in the Dashpart Designer. They are not available in **Settings » Calculated Fields**. The calculated fields become a new column on the base, available for any dashpart that uses the base.
- **Select a Presentation Currency:** Define a presentation currency for the dashpart. If you create a chart that displays amount columns containing multiple currencies, a presentation currency is required.
- **Display Top Records:** Return top records in a dashpart by defining the number of records to return in table options or chart options and control the sort order (ascending and descending) and grouping of the top records that you want to return.
- **Apply Date Range Filtering:** View information for a defined period of time by applying date ranges to amount column based on transactional information.
- **View and Edit Associated Columns:** View all the columns that are currently associated with the dashpart. Corresponding column options are displayed in the column table area, based on the column type. Some possible configuration options include:
 - Click and drag a column to change the order in which it displays on the dashpart.
 - Add a filter to any column to further refine what information displays, including filtering on amount columns.
 - Hide a column that you added for filtering purposes only, which does not need to be displayed in the dashpart.
 - Copy or delete a column.

Table Dashparts

Table dashparts now have improved flexibility for controlling how the table dashpart information is displayed. The new table options include:

- **Grouping Options:** Assign grouping to table dashparts. You can group a dashpart by multiple columns and can group **Expanded**, **Collapsed**, or **No Detail**.
- **Conditional Formatting:** You can change the text color or background color of an entire row of the dashpart based on a condition that exists, by assigning conditional row formatting in table options.
- **Column Properties:** Use column properties to:
 - Control how the information displays in the dashpart, including column heading descriptions, wrap text, decimal places, and currency options.
 - Control grand totals and subtotals by column.
 - Add conditional cell formatting to change the text or background color of a cell based on conditions in the dashpart.

Chart Dashparts

Designers can now create chart dashparts in the Dashpart Designer. These charts provide an easy-to-read-format that displays the values you have chosen, based on the dashpart bases available. Chart

types include: bar, column, scatter, line, spline, area, area spline and pie. To define the values that you want to display on the chart, select numeric or decimal columns from the base. You can select other column types as well to define grouping and filtering for the dashpart.

Design options for charts include the following:

- **Chart Options:** Control how the information is presented in the chart, including the legend location, how values display on the chart, and how many decimals to use.
- **Grouping Options:** Define how the numeric information is grouped:
 - **By Column:** Group the dashparts based on the column that you select. For example, you may want to display your project revenue and cost, grouped by project type. In this case, you would group the chart by project type.
 - **By Date Range:** View the values over time. For example, you may want to view the project revenue and cost for the last 6 fiscal periods.
- **Sorting Option:** If you grouped the chart by a column, you can control how the information is displayed by assigning a sort option to the dashpart.
- **Column Properties:** Configure the columns with the available column property options:
 - Control the color used on the chart for the amount, as long it is not a pie chart.
 - Display a column as a plot line or second axis.
 - Display values directly on the chart.
- **Date Range Filter:** You can also limit the values displayed on the chart, based on a date range that you define. For example, if you only wanted to show project revenue and cost grouped by project type for the current year, you would apply the fiscal year range on the revenue and cost columns.

Dashpart Bases

Project Dashpart Base

The Project dashpart base has been enhanced to include the following information:

- You can view the project WBS structure by selecting the new **Name** and **Number** columns.
- User-defined project fields are now available.
- Other new columns are now available:
 - Billed Amount
 - Add On Billed
 - Consultant Billed
 - Expense Billed
 - Fee Billed
 - Interest Billed
 - Labor Billed
 - Other Billed
 - Taxes Billed
 - Unit Billed

- Unbilled Amount
- Adjusted Unbilled
- Consultant Unbilled
- Expense Unbilled
- Labor Unbilled
- Unbilled (revenue Category 4) (only if enabled)
- Unbilled (Revenue Category 5) (only if enabled)
- Other Unbilled Amount
- Unbilled Gan/Loss
- Rev. Multiplier/Amount
- Rev. Multiplier/Amount (Sum)
- Consultant Revenue Amount
- Consultant Revenue Type
- Expenses Revenue Amount
- Expenses Revenue Type
- Expenses Unbilled Amount
- Labor Revenue Amount
- Labor Revenue Type
- Other Revenue Amount
- Revenue Category 4 Amount (only if enabled)
- Revenue Category 5 Amount (only if enabled)
- Overall Percent Complete
- Labor Percent Complete
- Expense Percent Complete
- Source
- Days Open
- Won/Lost Date
- Won/Lost Reason
- Won/Lost Notes
- Contract Awarded
- Estimated Start
- Owner Value
- Opportunity fields:
 - Marketing Coordinator Name
 - Proposal Manager Name
 - Business Development Lead Name
 - Marketing Coordinator Number
 - Proposal Manager Number
 - Business Development Lead Number
 - Master Contract
 - Solicitation #

- NAICS description
- NAICS code
- Award Type
- Competition Type
- Contract Type
- Period of Performance
- Duration
- Ajera integration totals
 - Ajera Spent - Total
 - Ajera Spent - Labor
 - Ajera Spent - Reimbursable
 - Ajera Spent - Consultant
 - Ajera Cost - Total
 - Ajera Cost - Labor
 - Ajera Cost - Reimbursable
 - Ajera Cost - Consultant
 - Ajera WIP - Total
 - Ajera WIP - Labor
 - Ajera WIP - Reimbursable
 - Ajera WIP - Consultant
 - Ajera Billed - Total
 - Ajera Billed - Labor
 - Ajera Billed - Reimbursable
 - Ajera Billed - Consultant
 - Ajera Received - Total
 - Ajera Received - Labor
 - Ajera Received - Reimbursable
 - Ajera Received - Consultant
- Linked Project Totals
 - Linked Project Firm Cost
 - Linked Project Hours
 - Linked Project Labor Cost
 - Linked Project Actual Cost
 - Linked Project Direct Expense
 - Linked Project Other Expense

See the online help for descriptions of the columns that are available for the Project dashpart base.

Account Dashpart Bases

You can now create financial dashparts using the new account dashpart bases:

- **Account Dashpart Base:** Display general ledger account information summarized by account. Available columns include: Account Name, Number, Type Amount Accrual Basis, Amount Cash Basis, Credit and Debit Amounts for Accrual and Cash, and accounting-related user-defined fields.
- **Account Detail Dashpart Base:** Display general ledger activity down to the detail level. In addition to the columns available for the Account base, you can select the following: organization level, WBS level name and number, fiscal period start and end date, and additional transactional information such as description, period, posting date and sequence, and transaction amount.

The Dashpart Designer offers additional flexibility for these account dashpart bases:

- Use table or chart options to reverse the sign of liability, revenue, and net worth accounts.
- Use column filters to display amounts based on selected accounts and organization levels.

Account dashpart bases automatically filter by active company and assume that the current fiscal period is the fiscal period that you have selected. You can filter the account information based on fiscal and calendar date range options.

See the online help for descriptions of the columns that are available for the Account and Account Detail dashpart bases.

Default Dashboards and Dashparts

Vantagepoint comes pre-populated with a predefined dashboard and dashparts. You can use these defaults as they are or use them as a starting point for customization. See the Vantagepoint portal for details on the available defaults.

Desktop Dashboard

Dashboards are no longer available in the desktop application.

Employees

Enhancements

The **Approved for Use in Processing** check box was moved from the Overview tab to the Accounting tab for better access and usability.

Firms

Enhancements

For easier accessibility to receivables and payables information, the AR Review and Voucher Review applications were consolidated into the Firms hub. Use AR Review to review invoices and information about accounts receivable, and Voucher Review to review vouchers and purchase orders for the active firm. This consolidation allows for easy navigation between all related information.

Projects

Projects Hub Expansion

The Projects hub has been removed from the desktop and is available only in the browser interface. The Accounting, Contract Management, Budget & Revenue, Time & Expense, and Intercompany Billing tabs that were previously available only in the desktop interface have all been moved to the browser. Several screen layouts were updated and reorganized as a result. Your screen designer and security administrators should thoroughly review the revised layout, as well as menu item, tab, and field security access rights, after upgrading to Vantagepoint 2.0.x.

The Projects hub now supports a secondary menu structure in the Navigation pane to provide quick access to individual areas in the hub.


Project Creation

Vantagepoint includes several improvements that facilitate project creation:


- As part of the convergence of opportunities and projects, you can now create a linked promotional project at the same time that you create an in pursuit regular project. Values entered for the regular project are copied to the linked promotional project to streamline the entry process. The Edit Project Structure form is an important part of this new project creation flow. The Edit Project Structure grid on this form displays both the regular project and its linked promotional project, so that you can edit fields in both projects at the same time.
- The Project Structure dialog box and the Actions bar now include a **Create Linked Promotional Project** option. This option is available if the selected regular project does not yet have a linked promotional project. When you use this option to quickly create a linked promotional project, Vantagepoint creates and then maintains the link between the regular project and its promotional project.
- To provide a consistent project creation process, the **Copy Project** option on the Actions bar now leverages the same project creation flow that is used when you choose to create a new project from an existing project.

- If a user's security role identifies them as an Accounting user and they create a new project, phase, or task, the **Approved for Use in Processing** check box is automatically selected for that work breakdown structure (WBS) element.
- Primary client and billing client addresses are no longer required for projects that are not approved for use in processing.
- When you make a change to the primary client or billing client, a new prompt displays to give you the option to keep the two clients in sync.
- You can now choose to copy billing terms when you create a project from another project. This feature takes into account any WBS levels that you may have chosen not to include in the new project.
- A project's charge type can no longer be changed after it has been saved on the New Project form during project creation. This change is necessary due to business logic related to managing linked promotional projects.
- As before, you can create new projects in the browser based on a project template. However, you must still go to the desktop application to create or modify the project templates.

Project Structure Dialog Box

The Project Structure icon, , has been updated and relocated to the left of the project name. When the currently selected project is either a regular project with a linked promotional project or a promotional project with a linked regular project, the Project Structure dialog box now displays both the structure of the currently selected project and the structure of its linked project.

Billing Group Dialog Box

If the currently selected project is part of a billing group, the Billing Group icon, , is now located under the Project Structure icon to the left of the project name. Click this icon to open a dialog box that displays all the projects in the billing group and that allows you to navigate to any WBS level of those projects. This easy access to billing groups is available in all areas of the Projects hub and in Interactive Billing.

Dashboard Area

The dashboard for the Projects hub has been converted from a tab on the Projects form to a separate hub area. To navigate to it, select **Hubs » Projects » Dashboard**.

Project Review Area

Most features in Project Review are now in the browser. Project Review also offers a new interface. To navigate to it, select **Hubs » Projects » Project Review**. Because purchasing and equipment

features are only available in the desktop application, the former version of Project Review is still available in the desktop, as well.

The new Project Review interface in the browser includes most of the functionality that existed in the desktop. In addition, it enables you to view budgeted and planned amounts at the same time. Use grid settings to select the columns that you want to view. Project Review also offers several new key performance indicators (KPIs) to help you to better understand the status of your project.

Projects Area

The Projects form contains some or all the following standard tabs, depending on how Vantagepoint is set up and the modules that are activated: Overview, Accounting, Team, Dates & Costs, Collaboration, Activities, Marketing Campaigns, Competition, Proposals, and Files & Links.

As a result of combining opportunities and projects into a single hub, the Overview tab and the project summary pane were reorganized. Both are now split into sections, depending on the project's stage. If the project is in an in pursuit stage, the project pursuit information is front and center. After the project is won, we collapse the pursuit information and expand the project information. You can collapse or expand these sections manually at any time.

The Actions bar has also been updated to provide easy access to project-specific actions from most tabs.

A **Capacity Calculation** setting is now available on the summary pane in the Projects hub. This setting determines if a resource assignment is included in scheduled or utilization calculations on Resource Management forms and reports as well as Resource Planning alerts and reports. It also affects the Scheduled % on Add Assignments and Reassign dialog boxes that are available from the Plan form in the Projects hub and from Resource Management forms.

Capacity Calculation is set as follows:

- **Project with the Overhead or Promotional charge type:** Disabled and set to **Included in Scheduled**.
- **Project with the Regular charge type and a won stage:** Disabled and set to **Included in Scheduled and Utilization**.
- **Project with the Regular charge type and a lost stage or do not pursue stage:** Disabled and set to **Excluded from Scheduled and Utilization**. (This applies only if Resource Planning and/or one of the CRM modules is activated.)
- **Project with the Regular charge type and an in pursuit stage:** May be editable. The behavior and default for this setting is specified on the Plan Settings form (**Settings » Resource Planning » Plan Settings**). (This applies only if Resource Planning and/or one of the CRM modules is activated.)

Estimates Area

Service estimates functionality has been moved to the Projects hub from the Opportunities hub as part of the convergence of projects and opportunities. For more information, see [Convergence of Projects and Opportunities](#).

Contract Management Area

Vantagepoint Contract Management is made up of three primary features: Compensation, Contracts, and Estimated Fee. These were originally found in the desktop version in these locations:

- Budget & Revenue tab of the Projects form
- Contract Management tab of the Projects form
- Estimated Revenue tab of the Opportunities form

The features are now all available in the Contract Management area of the Projects hub in the browser application (**Hubs » Projects » Contract Management**):

- **Compensation tab:** All of the project compensation and percent complete fields from the desktop version are on this tab. New browser functionality enables you to expand sections. For projects using more than one level of work breakdown structure, click the Project Structure icon to open the Project Structure dialog box and select the WBS element that you want to view or update.
- **Contracts tab:** All of the contract management functionality from the desktop version is now on this tab. New browser functionality enables you to filter grid data and select the columns displayed in the grid. The new Contract Details grid provides a tree view of project structure for projects with more than one WBS level.
- **Estimated Fee tab:** Estimated fee allocation functionality from the Opportunities hub now resides on this tab. For more information, see [Convergence of Projects and Opportunities](#). (This tab is only available if a CRM module or the Resource Planning module is activated.)

Plan Area

This release includes these changes related to project planning:

- You now access project plans by selecting **Hubs » Projects » Plan** in the Navigation pane, rather than using a toggle on the Projects form.
- The most common actions (**Check Out**, **Save Baseline**, and **Publish**) have been moved from the Other Actions menu to the Actions bar so that you can access them more easily.
- You can now change the width of columns in the middle grid on the Labor tab and in the right grid on all tabs, and those changes remain in effect if you leave the Plan form and then return to it later.
- If Vantagepoint is set up to have multiple companies, the Plan form uses some settings from the project's company and some that are globally set:
 - Hours decimal places: Global setting.

- Amounts decimal places: Global setting.
- Non-work days and holidays: Project company's settings.
- Starting day of the week: Project company's settings.

Locations for these settings are **Settings » Resource Planning » Plan Settings** and **Settings » Resource Planning » Non-Work Days**.

Budget Area

The Project Budget Worksheet is now in the browser application. To access it, select **Hubs » Projects » Budget** in the Navigation pane. While the basic functionality remains the same, standard user interface behavior for Vantagepoint in the browser has been applied. In addition, you can now budget projects that are not yet approved for use in processing. If you need to change the project or billing currency for a project with a budget but with no accounting transactions, you can now make that change without first having to remove the budget.

The settings that affect project budgets have also been moved from the desktop application to the browser. Select **Settings » Project » Budget**.

Billing Terms Area

Billing Terms have been moved from the desktop application to the browser, and are available in the Projects hub (**Hubs » Projects » Billing Terms**).

Billing terms usability improvements include the following:

- Billing Terms have been integrated with the Projects hub. You can now easily navigate between key project information and billing terms without having to reselect the project record. Also, you can display the WBS on the Project Structure dialog box from the Billing Terms form and leave it open while reviewing or entering terms, so that you can quickly move from one WBS element to another.
- It is now more clear when a project is missing billing terms, and you can easily create new billing terms either from default values or by copying them from an existing project.
- A **Project Manager** field has been added to the summary pane on the Billing Terms form.
- Rates tab
 - All fields related to the calculation of labor, consultant, expense, and unit rates are included on this tab.
 - **Rates for Reporting (Not Invoicing)** replaces the old **Use as Project Reporting Default Terms Only** label.
- Fees tab
 - The new Fee grid provides a better, more consistent visual display of fee values for all fee methods and basis. Values from the Show Fee dialog box, including the current fee amount, are incorporated into the Fee grid.

- The Fee grid displays read-only fee totals for methods that include calculation (unit based or percent of construction).
- A consistent Fees tab is also available in Interactive Billing.
- You can easily expand the contents of the Fee Billing Phases grid and the Fee Schedule grid to see the complete fee structure.
- Format Tab
 - All format-related values are organized on the Format tab.
 - Fields are hidden when they are not applicable to the selected billing terms options. For example, if you are not billing labor, labor format options are hidden.
- More Calculations Tab
 - Calculations not related to labor/consultant/expense billing or fee billing are included on this tab. This includes add on, taxes, retainage, and so on.
 - Retainer balance always displays if a balance exists.
- Sublevel Terms Tab and Billing Backup Tab
 - All fields are consistent.

Invoices Area

The Invoices tab is now a separate form in the Projects hub. Select **Hubs » Projects Hub » Invoices** in the Navigation pane. The billing client is no longer displayed on the Invoices form. It is now on the Accounting tab on the Projects form (**Hubs » Projects » Project**).

Draft Invoice Approval Area

Interactive Approvals has been relabeled Draft Invoice Approvals and moved from the desktop application to the Projects hub in the browser (**Hubs » Projects » Draft Invoice Approvals**).

The Draft Invoice Approvals area includes a number of usability improvements:

- Draft Invoice Approvals is integrated with the Projects hub. You can now easily navigate between key project information and Draft Invoice Approvals without having to reselect the project record.
- A predefined project search of My Draft Invoices is available to all users with access to Draft Invoice Approvals. The search only returns projects for which the user is a defined approver and for which a draft invoice is awaiting approval.
- The ability to view fees and update percent complete is now available on a tab in Draft Invoice Approvals. The ability to update percent complete continues to be dependent on security access.
- A new Invoice Preview tab provides the ability to preview the invoice while updating approvals comments.
- The General tab includes the ability to view and edit the invoice description.

Convergence of Projects and Opportunities

To streamline the project lifecycle, opportunities have been merged with the Projects hub. If you own a CRM module, the Projects hub now has a win/loss process. If Accounting or PSA is activated, promotional projects and regular projects are now more tightly connected to give a better view of the entire cost of winning and executing work.

Win/Loss Process in Projects

If you own one of the CRM modules, projects now have a win/loss process. New potential projects are added to the Projects hub as **in pursuit** regular projects. As you learn more about a project, you update it until it is won, it is lost, or you decide not to continue pursuing it. During project execution, you continue to update that same project. The entire history of the project is maintained in one record, providing a single source of the truth.

On the settings dialog box for the Project Stage list, your administrator defines the stages for a regular project and specifies whether each stage indicates that a project is won, lost, in pursuit or no longer pursued. For example, you could have the following stages:

Stage	Step in Project Lifecycle
Awarded - New Business	Won
Awarded - Repeat Client	Won
Lost	Lost
Not Funded	Do Not Pursue
Not Qualified	Do Not Pursue
Proposal Creation	In Pursuit
Proposal Submitted	In Pursuit
RFP	In Pursuit
Shortlisted	In Pursuit

When you change a regular project's stage from an in pursuit stage to any other stage, you are prompted for additional win/loss information so that you can perform win/loss analysis. For example, if you changed a project from the Proposal Submitted stage to Awarded - New Business, you would be prompted to enter the won date, a won reason, and further notes about why you won that project. You

could then run a report or create a dashpart to see trends in your company's business development success. Overhead and promotional projects do not have stages.

Security and Projects

Your administrator can set security based on any of the new pursuit project fields (see the list below). For example, some users may only edit projects that are in pursuit and in their own organization.

If you own the Accounting module, it is important to note that the **Approved for Use in Processing** check box still controls which projects can be used in timesheets, expenses, and other transactions. Only users with Accounting security roles can select or clear **Approved for Use in Processing**. Also, administrators can now define the charge types for which users with a particular security role can create projects. For example, business developers might be able to create regular projects, but not overhead or promotional projects. For more information, see [Security](#).

Promotional Projects

If you have Accounting or PSA, promotional projects are still used to track indirect costs for marketing activities and the cost of winning new work. As before, you can create a promotional project and link it to a regular project. Employees can use the promotional project to track time and expenses for that marketing or business development effort.

The association between promotional and regular projects has been enhanced so that you can more easily see all aspects of the project, including both the effort to win a project and the execution of the actual work. For details, see [Tighter Connection Between Regular and Promotional Projects](#).

Project Numbers

You must assign a project number when you create a project, regardless of the project's stage, and that project number is used for the life of the project. Your administrator can set up auto numbering to automatically generate and assign a new project number when you add a project.

Charge Type

If the Accounting, Resource Planning, or PSA module is activated, **Charge Type** on the Accounting tab of the Projects form is a required field and cannot be changed after the project has been saved. The setting for **Charge Type** is defaulted and hidden if your security role is limited to only creating projects with a single charge type.

New Project Fields

All opportunity fields and functionality have been added to projects, and the Opportunities hub has been removed. These fields, described in the table below, are available throughout Vantagepoint, including in project reports, the dashboard, and project list view. Except where noted, these fields are only available if one of the CRM modules is activated.

Field	Notes
Stage	<p>Stage is available and required if you own Resource Planning or CRM.</p> <p>If you own Resource Planning without CRM, there are three options: In Pursuit, Won, and Lost. Your administrator can change these labels but cannot add new ones to the list.</p> <p>If you own CRM, your administrator defines your stages on the Lists settings form and specifies for each stage whether it indicates that a project is won, lost, in pursuit, or no longer pursued.</p>
IQ Record	<p>If a project was imported from GovWin IQ, the IQ number is included in this field with a link to the corresponding opportunity in GovWin IQ.</p>
SF Record	<p>If a project was imported from Salesforce, the Salesforce number is included in this field.</p>
Estimated Fee	<p>This field contains your estimation of the amount that your firm would receive if you win the project. This field is available if you own Resource Planning or CRM.</p>
Probability	<p>Your administrator defines the win probabilities using the Lists settings form. This field is available if you own Resource Planning or CRM.</p>
Weighted Fee	<p>This calculated field is useful when forecasting the pipeline of in pursuit projects. $\text{Weighted Fee} = \text{Estimated Fee} \times \text{Probability}$. This field is available if you own Resource Planning or CRM.</p>
Owner Value	<p>If you are a subconsultant, this is the value of the project for the owner or your client's client. This field is available if you own Resource Planning or CRM.</p>
Source	<p>Use this field to indicate how you learned about this project. Your administrator defines the sources on the Lists settings form.</p>
Opened	<p>This field contains the date on which you learned about this project.</p>
Days Open	<p>This calculated field contains the number of days this project has been open, based on the open date and either today's date or the won/lost date.</p>
Won/Lost Date	<p>This field contains the date on which the project was won, lost, or you decided not to pursue it.</p>

	<p>When you change a project's stage from an in pursuit stage to a won, lost, or do not pursue stage, you are prompted to provide the won/loss information. Won/lost details are only visible if the project is not in pursuit.</p>
Won/Lost Reason	<p>This field contains the reason that the project was won or lost, or that you decided not to pursue it. Your administrator defines the won/lost reasons. In order to analyze why you won or lost projects, you should use the same reasons for evaluating both won and lost projects.</p> <p>When you change a project's stage from an in pursuit stage to a won, lost, or do not pursue stage, you are prompted to provide the won/loss information. Won/lost details are only visible if the project is not in pursuit.</p>
Won/Lost Notes	<p>Use this field to enter further clarification on why you won, lost, or decided not to pursue a project.</p> <p>When you change a project's stage from an in pursuit stage to a won, lost, or do not pursue stage, you are prompted to provide the won/loss information. Won/lost details are only visible if the project is not in pursuit.</p>
Marketing Coordinator	<p>This field displays the employee who is the marketing coordinator for this project.</p>
Proposal Manager	<p>This field displays the employee who is the proposal manager for this project.</p>
Business Development Lead	<p>This field displays the employee who is the business development lead for this project.</p>
Master Contract	<p>This field contains the master contract with which this project is associated. Your administrator defines master contracts on the Lists settings form.</p>
Solicitation #	<p>This field contains the client's solicitation number.</p>
NAICS	<p>This field contains the relevant North American Industry Classification System (NAICS) code for this project.</p>
Award Type	<p>This field only displays for Vantagepoint customers with a database set up for Government Contracting.</p>

Competition Type	This field only displays for Vantagepoint customers with a database set up for Government Contracting.
Contract Type (on the Overview tab)	This field only displays for Vantagepoint customers with a database set up for Government Contracting.
Period of Performance (PoP)	This field only displays for Vantagepoint customers with a database set up for Government Contracting.
Duration	This field only displays for Vantagepoint customers with a database set up for Government Contracting.
Milestones grid	<p>The Milestones grid contains the following system milestones, which you can rename, but cannot remove:</p> <ul style="list-style-type: none"> ● Estimated Start ● Estimated Completion ● Bid Submitted ● Contract Awarded ● Actual Start ● Actual Completion ● Professional Services Completion <p>System milestones can be included as columns in project reports without selecting the Milestones grid. Any milestone can be included in project list view, and all milestones are included in the project milestone dashpart. All customers, regardless of their activated modules, have the Milestones grid with the system milestones. If you own a CRM module, your administrator can add milestones to the list.</p>
Competition grid	Use this grid to track the firms with which you are competing. You can describe their strengths and weaknesses, enter additional notes, and indicate whether each firm is the current incumbent.
Proposals grid	This grid is available for CRM Plus users. It includes a link to the proposal in the proposal builder, as well as the proposal properties. Creating a new proposal from this grid will add a new proposal in the Proposals application. You can also use the new Add Proposal option on the Other Actions menu to create a new proposal for the currently selected project.
Marketing Campaigns grid	This grid is available for CRM Plus users. Use this grid to associate the project with the marketing campaigns from which you learned about the project. The calculations for the number of awarded projects and total projects and for actual and potential revenue generated by

	<p>the marketing campaigns are updated according to the stage of the project.</p>
Service Estimate	<p>If a CRM module or the Resource Planning module is activated, you can now create a service estimate for projects and print the Service Estimate report for the client. The service estimate can include estimates for labor, expenses, consultants and units.</p> <p>This functionality is disabled by default. To enable and change the default settings, go to Settings » Project » Estimates.</p>
Estimated Fee	<p>If the Accounting, PSA, or Resource Planning module is activated, the Estimated Fee tab is included on the Contract Management form.</p> <p>You can specify how the fee for a regular project will be allocated when awarded, including the ability to select specific dates for fees. Your administrator can create allocation templates in Settings if you often have similar fee structures.</p>
Opportunity User-Defined Fields	<p>User-defined fields from the Opportunities hub have been added to the Projects hub as new user-defined fields with a prefix of [OPP], regardless of whether they were previously mapped. Your administrator may need to use the Search and Replace utility to clean up the data in these fields and then delete some fields that were added.</p>
Opportunity User- Defined Grids	<p>User-defined grids from the Opportunities hub have been added to the Projects hub as new user-defined grids with a prefix of [OPP], regardless of whether they were previously mapped. You may need to manually move information from the new [OPP] user-defined grid to a previously existing project user-defined grid.</p>
Opportunity User- Defined Tabs	<p>User-defined tabs from the Opportunities hub have been added to the Projects hub as new user-defined tabs with a prefix of [OPP]. Any [OPP] user-defined fields and grids that were previously on this tab in the Opportunities hub will now be placed on the [OPP] tab in the Projects hub.</p>

Merging Opportunities with Projects

During upgrade, any opportunities that were linked to projects in a 1-to-1 relationship (one opportunity linked to one project) will be automatically merged with those projects.

Any opportunities that are not linked to projects are added to the Projects hub as regular projects with the same stage and other details that they had in the Opportunities hub. If the opportunity had a plan, then the plan's structure is used to create the project structure, and the plan is retained for the project.

If a project is linked to an opportunity in a 1-to-1 relationship, the opportunity is merged with the project using the following rules:

- Any new field that was added to projects because of the merging of opportunities into the Projects hub is updated from the opportunity. This includes all the fields in the New Project Fields table above.
- Any field that already existed in projects (for example, **Project Name**, **Project Manager**, or **Primary Client**), is not updated from the opportunity. It is assumed that the project has the most up-to-date information. However, that data may be added to some grids.
- Activities that were associated with the opportunity but not with the project are appended to the Activities grid for the project.
- Employees with the following roles are added to the Team Members grid: marketing coordinator, proposal manager, and business development lead. No other employee team members for the opportunity are added to the project team members.
- Contacts in the opportunity's Team Members grid are added to the project's Team Members grid in order to include any contacts that you may have worked with prior to when the project was awarded. However, no firms from the opportunity are added to the Firms grid on the Team tab.
- Data rows from the opportunity are also added to the following project grids if they do not already exist in the project's grid: Marketing Campaigns, Files, and Links.
- If the opportunity had a plan, the opportunity plan is removed, and the project plan is retained.
- User-defined fields, grids, and tabs are added to the Projects hub as new user-defined project fields, grids, and tabs with a prefix of [OPP], regardless of whether they were previously mapped. You should review this data and, as necessary, change or delete it.

An opportunity could be linked to more than one project, while a project could be linked to multiple opportunities. In these cases, Vantagepoint merges the project with the opportunity that is included on the Overview tab of the project record. If a project does not have an associated opportunity on the Overview tab, then Vantagepoint merges the first project/opportunity match that it finds, and the rest of the opportunities are added as new projects.

Changes to Contact Qualification

When qualifying a contact, you now have an option to create an In Pursuit project. Contact qualification has also been added to the Mobile CRM app and includes the ability to create new projects from mobile devices.

Changes to Marketing Campaign Calculations

The calculations for marketing campaigns have been updated to use projects and their stages instead of opportunities.

Calculation	Description
Actual Revenue	<p>If Accounting or PSA is activated, Actual Revenue = the sum of the compensation of all won regular projects associated with the marketing campaign.</p> <p>If neither Accounting nor PSA is enabled, Actual Revenue = the sum of the estimated revenue of all won projects associated with the marketing campaign.</p>
Potential Revenue	Sum of the estimated fee for all active in pursuit regular projects.
Total Project Count	Number of regular projects, regardless of stage, that are associated with the marketing campaign.
Awarded Project Count	Number of won projects associated with the marketing campaign.

Changes to the Project Search

You can search for projects using most of the new fields and grids in project records. This includes both **Stage** and the **Stage Step**. Use the **Stage Step** field to select all projects that are in pursuit, won, or lost, or that you decided not to pursue.

Previously saved project searches will be brought into Vantagepoint as uneditable legacy searches, but opportunity searches will be discarded. For more information, see [Search](#).

Changes to Estimated Fee and Associated Project Forecast Report

The Estimated Fee tab (formerly Estimated Revenue in the Opportunities hub) now enables you to allocate future fee values by project, for both in pursuit and won projects. This tab is now located on the Contract Management form in the Projects hub (**Hubs » Projects » Contract Management**).

Changes include the following:

- This tab enables you to define how the fee value (estimated fee for in pursuit projects and compensation for awarded projects) is allocated over time.
- If you select **Specific Date** in **Allocation Method** and enter values in the Fee Allocation grid, those values will be updated based on the percentage allocation in the grid when the project stage moves from an in pursuit to a won stage.

- A new allocation method was added: Allocate All Fees to Estimated Completion Date.
Important: If no estimated or actual start or completion date is assigned, no fee will be allocated. If both an estimated date and an actual date are available, the actual date is used.

The associated Project Forecast report incorporates all the changes noted above.

Changes to Mobile CRM and Mobile T&E for Vantagepoint

Mobile CRM has been updated to add projects and a win/loss process. No changes were required for the convergence of opportunities and projects in Mobile T&E; however, users must uninstall and reinstall new apps with this release. For more information, see [Mobile Time & Expense](#) and [Mobile CRM Install](#).

Changes to the Outlook Add-in

The Outlook integration has been updated to remove the opportunity grid. You can now add new projects through the Outlook add-in in the same way that you added opportunities previously.

Changes to the Salesforce Integration

The Salesforce integration has been changed to create new in pursuit projects instead of opportunities. For more information, see [Salesforce Integration](#).

Changes to the GovWin IQ Integration

The GovWin IQ integration has been changed to create new in pursuit projects instead of opportunities.

Tighter Connection Between Regular and Promotional Projects

The connection between regular projects and their related promotional projects is enhanced in Vantagepoint:

- Vantagepoint uses the new **Linked Project** field to link a promotional project and regular project. The **Promotional Project** field is removed during the upgrade.
- A promotional project can only be linked to one regular project in Vantagepoint. Prior to upgrading, make sure that you do not have more than one regular project linked to a single promotional project via the **Promotional Project** field.
- You can manually link an existing promotional project to the currently selected regular project by selecting the promotional project in the **Linked Project** field on the Overview tab of the Projects form.
- Fields related to the billing client are hidden for linked promotional projects. Select the linked regular project to access that information.
- Primary client and contact information is kept in sync between linked regular and promotional projects.

- You can view both the regular and linked promotional project while in the grid on the Edit Project Structure form. This enables you to view and modify the structure and fields for both at the same time.

List View and Edit Project Structure Grid (EPSG)

The following types of fields are now available in the list view for the Projects hub and in the grid on the Edit Project Structure form:

- All accounting fields moved from the Project Info Center in the desktop application to the Projects hub in the browser.
- All opportunity fields that have been moved from the Opportunities hub to the Projects hub.
- Milestones from the Milestones grid.

Accounting

Account Group Names and Tables

Account Group Names and **Account Group Tables** were moved from **Settings » Advanced Settings** in the desktop application to **Settings » General Ledger** in the browser application.

Security roles that had access to the desktop menu items have access to the new menu items in the browser.

AR Review

Invoice Review was renamed and moved from **Cash Management » Invoice Review** in the desktop application to **Hubs » Firms » AR Review** in the browser application. Security roles that had access to the desktop menu item have access to the new menu item in the browser.

Voucher Review

Vendor Review was renamed and moved from **Cash Management » Vendor Review** in the desktop application to **Hubs » Firms » Voucher Review** in the browser application. Security roles that had access to the desktop menu item have access to the new menu item in the browser.

Adjust Salary Job Cost

Adjust Salary Job Cost was moved from **Accounting » Adjust Salary Job Cost** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item have access to the menu item in the browser.

Overhead Allocation

Overhead Allocation was moved from **Accounting » Overhead Allocation** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item have access to the menu item in the browser.

Revenue Generation

Revenue Generation was moved from **Accounting » Revenue Generation** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item have access to the menu item in the browser. In Vantagepoint 2.0, you must recreate any Revenue Generation saved options that you had created in DPS 1.1.x.

User Defined Revenue was moved from **Settings » Advanced Accounting » User Defined Revenue** in the desktop application to **Settings » Accounting » User Defined Revenue** in the browser application. User-defined revenue methods now support the ability to build calculations based on project planning data.

Consultant Accruals

Consultant Accruals was moved from **Accounting » Consultant Accruals** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item have access to the menu item in the browser. In Vantagepoint 2.0, you must recreate any Consultant Accrual saved options that you had created in DPS 1.1.x.

Absence Accruals

The Absence Accrual applications, **Accruals** and **Adjustments**, were moved from **Human Resources » Absence Accruals** in the desktop application to **Accounting » Absence Accruals** in the browser application. In the browser application, they were renamed to **Absence Hours Accruals** and **Hours Adjustment**. Security roles that had access to the desktop menu items have access to these new menu items in the browser.

Labor Cross Charge

Labor Cross Charge was moved from **Accounting » Labor Cross Charge** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item have access to the menu item in the browser.

Gains and Losses

Gains/Losses and Revaluations was renamed and moved from **Accounting » Gains/Losses and Revaluations** in the desktop application to **Accounting » Gains and Losses** in the browser

application. Security roles that had access to the desktop menu item have access to the new item in the browser.

Form 1099 Processing

Form 1099 Processing was moved from **Accounting » Form 1099 Processing** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item have access to the menu item in the browser.

Items that Remain in the Desktop Application

Intercompany Billing, Tax File Generation, FEC File Generation remain in the desktop application.

Billing

Invoice Approvals

Invoice Approvals was moved from **Billing » Invoice Approvals** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item now have access to the the menu item in the browser.

Interactive Approvals/Draft Invoice Approvals

Interactive Approvals was renamed and moved from **Billing » Interactive Approvals** in the desktop application to **Hubs » Projects » Draft Invoice Approvals** in the browser application. See the “Draft Invoice Approvals” subsection in the “Projects” section of these release notes for a list of enhancements in Draft Invoice Approvals.

Billing Terms



Billing Terms was moved from **Billing » Billing Terms** in the desktop application to **Hubs » Projects » Billing Terms** in the browser application. See the “Billing Terms” subsection in the “Projects” section of these release notes for a list of enhancements for Billing Terms.

Interactive Billing


Interactive Billing was moved from **Billing » Interactive Billing** in the desktop application to the same location in the browser application.

The following are usability improvements made in Interactive Billing:

- **Project Search/Selection**
 - When you are in Interactive Billing and you use the main Vantagepoint navigation pane to open any of the areas in the Projects hub (Budget, Plan, Project Review, and so on), Vantagepoint automatically opens the project record that you have open in Interactive Billing.

- To pin the Project Structure dialog box that opens when you click  to the left of a project name on the Interactive Billing form, drag the dialog box to a new location on the screen.
- **Billing Session options**
 - After you open Interactive Billing for the first time and you enter options on the Billing Session Options dialog box, you are not prompted again to enter billing session options each time you open Interactive Billing unless you use diaries. Instead, the billing session options that you entered are remembered and applied for the next session. You can change the billing options at any time by clicking the **Billing Session Options** action on the Interactive Billing form.
 - The invoice date that you enter on the Billing Session Options dialog box is not remembered for each session. You can enter the invoice date in the new **Invoice Date** field below the project name on the Interactive Billing form or on the Billing Session Options dialog by clicking the **Billing Session Options** action on the Interactive Billing form. For easy access, the **Period** field from the Billing Session Options dialog box is also repeated directly on the Interactive Billing form, below the project name.
 - You no longer define the report printer on the Billing Session Options dialog box. When you print an invoice, the invoice displays in a separate browser dialog box so that you can preview it first and then print it.
- **General Tab**
 - You can view and edit the invoice description in the **Invoice Description** field on the General tab.
 - If approvals are enabled for a project, you can view invoice approval comments in the **Draft Invoice Comments** field on the General tab.
- **Labor, Expenses, and Units Tabs**
 - You can now edit the **Comment** field directly in the detail grid on these tabs.
 - Use  in the grid toolbar on these tabs to add columns to the grids. You can add fields that were previously located on the Modify dialog box, such as **Project Description**, tax fields, labor hours breakout fields.
- **Fees Tab**

You can now view fees and update the percent complete on the new Fees tab, which replaces the Update Fee dialog box.
- **Invoice History Tab**
 - The new Invoice History tab replaces the Invoices on File dialog box.
 - You can now email final invoices directly in Interactive Billing. Use the **Email** action on the invoice grid on the Invoice History tab to email invoices instead of emailing them from the print viewer. In addition to emailing specific employees or contacts, you can email people based on project roles that are defined for the associated project (billing contact, project manager, principal, biller, and so on).
- **Linked Promotional projects**

You can easily navigate to linked promotional projects in Interactive Billing. The linked promotional projects display on the Project Structure dialog box that displays when you click  to the left of a project name on the Interactive Billing form.

- **Invoice Accept**

- If a project uses an approval process, all project records (projects from billing group and phase/task records) that are associated with an invoice are visible in a single grid as part of accepting an invoice.
- When you click the **Accept** action in Interactive Billing to accept an invoice, the **New File Name** field on the Invoice File Selection dialog box prefills with **[Employee First Name] [Today's Date]** if **Use Files to Group Transactions** is set to **No** in **Settings » Accounting » Transactions**.

- **Actions**

You can now click **Other Actions » Billing Terms** on the Interactive Billing form to launch the Billing Terms application to create billing terms for any projects with missing billing terms.

Batch Billing

Batch Billing was moved from **Billing » Batch Billing** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item now have access to this menu item in the browser.

Screens have been modified to provide easier user actions, but all functionality remains the same with the exception of the **Run** action. This has been replaced with the **Create Invoices** action, which schedules the batch to a dedicated Accounting queue on the process server.

Billing Group

Billing Groups was moved from **Billing » Billing Groups** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item now have access to this menu item in the browser.

You can now easily navigate to the subprojects of a billing group in all areas of the Projects hub as well as Interactive Billing.

Employee Realization

Employee Realization was moved from **Billing » Employee Realization** in the desktop application to the same location in the browser application. Security roles that had access to the desktop menu item now have access to the menu item in the browser. Screens have been modified to provide easier user actions, but all functionality remains the same.

Billing Utilities

The **Refresh Billing Extensions** and **Update Billing Status** utilities were moved from the Billing menu in the desktop application to **Utilities » Updates** in the browser application. Security roles that had access to the desktop menu items have access to these menu items in the browser.

Cash Management

Vendor Payments

AP Payment Processing has been renamed and moved from **Cash Management » AP Payment Processing** in the desktop application to **Cash Management » Vendor Payments** in the browser application. Security roles that had access to the desktop menu item now have access to the new item in the browser.

Enhancements

- Vendor Payments processing has been updated to use a wizard-like flow that leads you through the process.
 - Vendor-type firms are now presented in a list so that you can easily identify vouchers to be paid and drill down into voucher details. This list replaces the Vendor Review tab in DPS 1.1.x.
 - You can now create ACH payment distribution text files on the Electronic Files page as the final step of the Vendor Payments processing flow. You can access this page after the payment run has been posted. The Electronic Files page replaces the **Cash Management » AP EFT** menu item in DPS 1.1.x.
- You can now convert automatic payment runs into manual payment runs, eliminating the need to delete a payment run to make voucher selection changes.
- The Transaction Auto Numbering options for banks in **Settings » Accounting » Transactions** have been updated to allow you to autonumber only your electronic payments and to prefix your payments with alphabetical characters so the reference numbers for your electronic payments are alphanumeric.

Employee Payments

Employee Expenses Payment Processing was moved from the desktop application to **Cash Management » Employee Payments** in the browser application. Security roles that had access to the desktop menu item now have access to this new item in the browser.

Enhancements

- Employee Payments processing has been updated to use a wizard-like flow that leads you through the process.

- Employees are now presented in a list so you can easily identify expense reports to be paid and drill down into expense report details. This list replaces the Employee Review tab.
- You can now create ACH payment distribution text files on the Electronic Files page as the final step of the Employee Payments processing flow. You can access this page after the payment run has been posted. The Electronic Files page replaces the Employee Direct Deposit menu item.
- You can now convert automatic payment runs into manual payment runs, eliminating the need to delete a payment run to make expense report selection changes.
- Transaction Auto Numbering options in **Settings » Accounting » Transactions** have been updated to allow you to autonumber your electronic payments and to prefix your electronic payments with alphabetical characters so the reference numbers for your electronic payments are alphanumeric.

Payment Review

Payment Review was moved from the desktop application to **Cash Management » Payment Review** in the browser application. Security roles that had access to the desktop menu item now have access to this new item in the browser.

Enhancements

- You can now void payments from the Payment Review application by clicking **Void** on the Payments grid. Security access rights to the Void action requires that Void Payment Transaction Type posting rights are configured in Roles Security.
- The Void Payment application can still be found in the desktop interface under **Cash Management » Void Payment**. You can void vendor and employee payments by using either Payment Review in the browser or Void Payment in the desktop. However, you can only void payroll payments from the Void Payment application in the desktop.

Bank Reconciliation

Bank Reconciliation was moved from the desktop application to the browser application at **Cash Management » Bank Reconciliation**. Security roles that had access to the desktop menu item now have access to this new item in the browser. The Bank Reconciliation application flow is now similar to hubs when creating new statements and retrieving existing records. The screens have been updated to make user actions easier to perform, but all functionality remains the same.

Credit Card Reconciliation

Credit Card Reconciliation was moved from the desktop application to the browser application at **Cash Management » Credit Card Reconciliation**. Security roles that had access to the desktop menu item have access to this new item in the browser. The Credit Card Reconciliation application

flow is now similar to hubs when creating new statements and retrieving existing records. The screens were updated to make user actions easier to perform, but all functionality remains the same.

Credit Card Review

Credit Card Review was moved from the desktop application to the browser application at **Cash Management » Credit Card Review**. Security roles that had access to the desktop menu item now have access to this new item in the browser. The Credit Card Review form has been updated to make user actions easier to perform, but all functionality remains the same.

CRM

Proposals

CRM Plus users can now create proposals using a new visual Custom Proposal builder. The builder lets you drag, drop, and format elements directly on the screen. As you work in the builder, you see exactly how your finished proposal will look. For more information, view the proposal videos, accessible from the Vantagepoint online help.

Highlights include the following:

Contents

- Include a cover page, employee biographies, project experience sheets, boilerplates, firm references, letters to contacts, and other proposal sections.
- Include information from hub records, including user-defined hub records, and format this information. For example, you can format a number field to include thousands separators and no decimals.
- Include headers and footers that contain your company logo, page numbers, the client name, and other elements.
- Add an unlimited number of images as links or file attachments, including images associated with project and employee records. The images can be links to pictures in an external Digital Asset Management (DAM) system. Images are uploaded as file attachments and stored with the proposal.

Formatting

- Specify page properties, such as the page size, margins, whether headers and footers are displayed, and background colors.
- Select any color for text, borders, and background, using CMYK, Pantone, Hex #, or RGB values.
- Drag and drop images, text, and records onto the proposal and resize them.
- Crop images.
- Select from hundreds of Google fonts.

- Export proposals into PDF documents.

Reuse

- Create templates from existing proposals.
- Copy existing proposals to create similar proposals.
- Create master elements, which are reusable collections of elements that you can drag and drop into new proposals.
- Create a proposal from an in pursuit project to auto-complete proposal properties such as the client's name.

Elimination of Opportunities Hub (Convergence of Projects and Opportunities)

Opportunities and projects have been combined in the Projects hub. For more information, see [Convergence of Projects and Opportunities](#).

New Features for CRM-Only Customers

Some CRM-related features have been moved from the desktop menu to the browser menu. These features are now available for the first time to customers who own the CRM module but do not own the CRM Plus, Accounting, or Resource Planning modules.

Reporting for CRM-Only Customers

CRM-only customers can take advantage of a new reporting area with many new reports. For most of these reports, you can select and format columns, groups, and charts, and select the records that you want to include. For many reports, you can create your own calculated fields.

Depending on your security rights, you can save reports for reuse by yourself or by a group.

The new reports are:

- Activity Audit
- Activity Audit Detail
- Activity List
- Activity Summary
- Boilerplate Audit
- Boilerplate Audit Detail
- Boilerplate List
- Boilerplate Summary
- Contact Audit
- Contact Audit Detail
- Contact List
- Contact Summary
- CRM Project Summary

- Employee Audit
- Employee Audit Detail
- Employee Export
- Employee List
- Employee Summary
- Field Security
- Firm Audit
- Firm Audit Detail
- Firm Employee Assignment and Activity Status
- Firm Export
- Firm List
- Firm Summary
- Marketing Campaign Audit
- Marketing Campaign Audit Detail
- Marketing Campaign Export
- Marketing Campaign List
- Marketing Campaign Summary
- Project Audit
- Project Audit Detail
- Project Forecast
- Project Hit Rate
- Project List
- Project List Export
- Role Audit
- Role Audit Detail
- Role Summary
- Screen Designer Security Audit
- Screen Designer Security Audit Detail
- User Accounts
- User Audit
- User Audit Detail
- User Defined Hub Audit
- User Defined Hub Audit Detail
- User Defined Hub List
- User Defined Hub Summary

Workflow for CRM-Only Customers

Administrators can now create workflows to support their companies' business processes. Set up a workflow in any hub, including user defined hubs, to accomplish a task:

- Validate that a user has entered data correctly and generate an error or warning message if not. For example, if a user marks a project as lost, but does not enter a win/loss reason, generate an error message.
- Send an email or notification center alert based on certain triggers. For example, send a notification to the project manager and accounting group when a project is marked as awarded.
- Automatically update a field based on the value of another field. For example, when a user marks a project as lost, automatically update the project's **Status** field to **Inactive**.
- Create an activity based on certain triggers. For example, when a project is marked as lost, create a debriefing meeting one week in the future.
- Create an advanced workflow that calls a stored procedure or invokes a web service.

Choose from several types of workflows:

- **User Initiated:** A workflow is triggered when a user creates a new record or edits an existing record and then saves the record. For example, when a user saves a new project record, the workflow updates a field in a different record.
- **Scheduled:** A workflow checks for conditions on a predetermined schedule or when a user clicks a workflow button. For example, a workflow checks employee registrations regularly and sends a notification 30 days before an employee's registration will expire. Or, a user clicks a button to perform a go/no-go calculation.
- **Numbering:** When you create a new record, a workflow automatically generates a record number based on information in the record.

Audit Trail for CRM-Only Customers

An administrator can now enable auditing in hubs, so that Vantagepoint tracks all changes made to hub records. You can see who changed a record and what was changed.

General Ledger

General Ledger Budgets

General Ledger Budgets moved from the desktop application to the browser application at **General Ledger » General Ledger Budget**. Security roles that had access to the desktop menu item now have access to this new item in the browser. General Ledger Groups remain in the desktop application.

Consolidated G/L Budgets

Consolidated G/L Budgets moved from the desktop application to the browser application at **General Ledger » Consolidated G/L**. Security roles that had access to the desktop menu item now have access to this new item in the browser.

Consolidations

The Consolidations process was moved from the desktop application to the browser application at **General Ledger » Consolidations**. Security roles that had access to the desktop menu item now have access to this new item in the browser.

Payroll

Export to Pay Interface

Export to Pay Interface was moved from **Human Resources » Payroll » Export to Pay Interface** in the desktop application to **Payroll » Export to Pay Interface** in the browser application. Security roles that had access to the desktop menu item have access to the menu item in the browser. Screens have been modified to provide easier user actions, but functionality remains the same.

Mobile

Updated Reply URL in the Azure Active Directory Authentication

To make sure that your mobile application can use the Azure for Deltek Vantagepoint, your administrator must add the following URLs to the Reply URL's blade in the Azure application:

- <https://<installation path>/visionshared/backend/oauth2idtokennativereturn.php>
- <https://<installation path>/visionshared/backend/oauth2idtokenreturn.php>

The value of *<installation path>* depends on the location where you installed the Deltek Vantagepoint mobile application. Deltek recommends that your administrator enter the Reply URLs in lower case. For more information, see the Cloud Administrator Online Help.

Mobile CRM

Important Note: Because of significant technology and functionality changes in Mobile CRM for Vantagepoint, you must install a new app and uninstall the Deltek for Professional Services app.

Combination of Opportunities and Projects into Projects Hub

Since opportunities and projects were converged into the Projects hub, opportunities were removed from the mobile app and projects have been added with a win/loss process. You can create new projects, edit projects, and delete projects, depending on your security rights. A new search has been added to the mobile app to find only those projects that are currently in pursuit.

Your administrator defines the project stage list and whether each stage means that a project is won, lost, in pursuit, or your firm decided not to pursue it. When you change the stage to something other

than an In Pursuit stage, you have additional fields to indicate why you won or lost that particular project and, if lost, who you lost it to.

Support for User-Defined Fields

You can now add user-defined hub lookup fields to Mobile CRM.

Technology Updates

Mobile CRM has been updated with the following new technology:

- Cordova has been updated to 4.5.4 for iOS and 7.1.0 for Android.
- PHP has been updated to 7.2.14.
- The app migrated from Sencha Touch to Ext JS 6.2.1.

Mobile Time & Expense

Important Note: Because of significant technology changes in Mobile T&E for Vantagepoint, you must install a new app and uninstall the Deltek for Professional Services app.

Mobile T&E has been updated with the following new technology:

- Cordova has been updated to 4.5.4 for iOS and 7.1.0 for Android.
- PHP has been updated to 7.2.14.
- The app migrated from Sencha Touch to Ext JS 6.2.1.

Reporting

General

Most Vantagepoint reports were moved from the desktop application to the browser application, under **My Stuff » Reporting**. The Reporting application has an updated interface, where you can quickly and easily select report options.

You can now access the following features from the browser:

- Schedule reports to be archived or emailed to users, employees, and contacts.
- Email reports to contacts, employees, and users. Some project reports also include options for emailing a report to the project's principal, project manager, supervisor, primary contact, or billing contact.
- Create personal or shared favorite reports. If you have security rights to share favorites, you can save them for your role, specific roles, or everyone.
- Save a favorite report as a new report to quickly create a report with similar features.
- Create and edit calculated fields.
- Download a report from the report preview.
- Create an activity when running a CRM report.

Reports in the Desktop Application

Because the Payroll, Purchasing, Equipment, and Inventory modules remain in the desktop application, their corresponding reports remain in the desktop application under Reporting.

Reports in the Browser Application

The following reports are now available in the browser application:

Report	Notes
Account Analysis	
Account List	
Accounts Payable Export	
Accounts Receivable Export	
Accrued Time	
Activity Audit	
Activity Audit Detail	
Activity List	
Activity Summary	
AR Aged	
AR Comments	
AR Ledger	
AR Statement	
Asset Item Export Report	
Balance Sheet	
Billing Terms Audit	
Billing Terms Audit Detail	

Billing Terms List	
Boilerplate Audit	
Boilerplate Audit Detail	
Boilerplate List	
Boilerplate Summary	
Budget Worksheet	<p>Updated with 4 new KPIs:</p> <p>Labor</p> <ul style="list-style-type: none"> - Budgeted Less JTD Billing - Budgeted Less JTD Cost <p>Expenses</p> <ul style="list-style-type: none"> - Budgeted Less JTD Billing - Budgeted Less JTD Cost
Cash Flow Forecast	
Cash Flow Statement	
Cash Journal	
Cash Receipts	
Cash Requirements	
Cash Requirements Bank Summary	
Chart of Accounts Audit	
Chart of Accounts Audit Detail	
Consolidated Balance Sheet	
Consolidated Eliminations	
Consolidated Income Statement	

Consolidated Profit Planning Monitor	
Consultant Ledger	
Contact Audit	
Contact Audit Detail	
Contact List	
Contact Summary	
Contract Management	Removed Plan Name and Plan Number from available columns
CRM Project Summary	Updated with new pursuit fields from the convergence of opportunities and projects
Daily Exchange Rate Audit	
Daily Exchange Rate Audit Detail	
Diary	
Employee Audit	
Employee Audit Detail	
Employee Export	
Employee Labor Audit	
Employee Labor Audit Detail	
Employee Labor Summary	
Employee Ledger	
Employee List	
Employee Summary	

Expense Detail	
Expense Line Approval	
Expense Summary	
Fee Remaining	
Field Security	Updated to show the roles that can see a field rather than the roles from which the field is hidden.
Firm Audit	
Firm Audit Detail	
Firm Employee Assignment and Activity Status	
Firm Export	
Firm List	
Firm Summary	
Gains Losses and Revaluations Detail	
General Ledger Export	
Income Statement	
Intercompany Billing	
Invoice Approval	
Invoice Register	
Invoice Transaction Detail	
Key Financial Metrics	Updated with new pursuit fields from the convergence of opportunities and projects
Labor Cross Charge	

Labor Detail	
Labor Plan Charts	New report for Vantagepoint
Labor Plan Summary	New report for Vantagepoint
Labor Resource Actuals	New report for Vantagepoint
Labor Resource Forecast	Now uses Project Search rather than Plan Lookup
Labor Resource Planned and Actuals	Now uses Project Search rather than Plan Lookup
Labor Resource Requirements	New report for Vantagepoint
Labor Summary	
Marketing Campaign Audit	
Marketing Campaign Audit Detail	
Marketing Campaign Export	
Marketing Campaign List	
Marketing Campaign Summary	
Missing Billing Terms	
Office Earnings	
Overhead Allocation	
Payment Register	
Payroll Export	
Period Audit	
Period Exchange Rate Audit	

Period Exchange Rate Audit Detail	
Profit Planning Monitor	
Project Audit	
Project Audit Detail	
Project Detail	
Project Earnings	
Project Expense Export	
Project Forecast	<p>The Opportunity Forecast report was recreated for projects and enhanced with the following:</p> <ul style="list-style-type: none"> • New option to Allocate All Fee to Estimated Completion Date. • Calculate forecast for awarded projects using compensation.
Project Hit Rate	<p>The Opportunity Hit Rate report was recreated for projects and enhanced with the following:</p> <ul style="list-style-type: none"> • Hit Rate can be calculated for multiple stages. For example, you can now calculate the hit rate of all projects with both Awarded - New Business and Awarded - Repeat Client stages. • New date ranges were added for This Year, This Fiscal Year, Next Quarter, Next Fiscal Quarter, Next year, Next Fiscal Year, Last 7 Days, Last 14 Days, Last

	<p>30 Days, Last 60 Days, and Last 90 Days.</p> <ul style="list-style-type: none"> Only regular projects with the selected stages are included in the calculation. Overhead and promotional projects are never included. <p>Removed Plan Name and Plan Number from available columns.</p>
Project List	<ul style="list-style-type: none"> Updated with new pursuit fields from convergence of opportunities and projects. Removed Plan Name and Plan Number from available columns.
Project List Export	
Project Planning Analysis	Now uses Project Search rather than Plan Lookup
Project Planning List	New report for Vantagepoint
Project Planning Performance	Now uses Project Search rather than Plan Lookup
Project Planning Schedule	Now uses Project Search rather than Plan Lookup
Project Progress	
Project Summary	
Project Summary Export	
Project Template Audit	
Project Template Audit Detail	
Proposal Firm List	

Proposal Firm Summary	
Resource Utilization by Organization	Options were refined to make it clearer how key selections affect the report.
Retainer Ledger	
Role Audit	
Role Audit Detail	
Role Summary	Updated to include the new setting that governs which roles can create which types of projects and access right options.
Sales Credit	
Sales List	
Screen Designer Security Audit	
Screen Designer Security Audit Detail	
Service Estimate	The Opportunity Service Estimate report was recreated for projects.
Tax Analysis	
Time Analysis	
Timesheet Audit Detail	
Timesheet Line Approval	Available in the Approval Center only.
Top Bottom Performers - In Pursuit Projects	Updated for In Pursuit Projects.
Top Bottom Performers - Won Projects	

Trial Balance	
Unbilled Detail and Aging	
Unbilled Summary	
Unit Audit	
Unit Audit Detail	
Unit Detail	
Unit List	
Unposted Labor	
User Accounts	
User Audit	
User Audit Detail	
User Defined Hub Audit	
User Defined Hub Audit Detail	
User Defined Hub List	
User Defined Hub Summary	
Vendor List Export	
Vendor Summary	
Voucher Ledger	
Voucher Schedule	
Vouchers by Project	

Retired Reports

The contact, firm, and employee mailing label reports have been retired.

Report Favorites

You can customize the Vantagepoint standard reports and save them as new favorite reports that will be included on the Favorites tab.

Because of enhancements made to Reporting, as well as improvements made to searches and lookup fields in the browser, most report options, search criteria, and favorite reports that were previously saved in Deltek for Professional Services 1.1 will be migrated to the 2.0 browser as legacy reports. These can be identified by the asterisk beside their names. You can run legacy reports as-is or delete them, but you cannot edit the options or search criteria. If you need to change a legacy report, you must use the browser to create a new report based on the legacy report's options and search criteria.

Any opportunity reports that were saved as favorites will not be migrated to 2.0. You must recreate them using the new project report options.

Resource Management

Settings

If Vantagepoint is set up for multiple companies, Resource View and Project View use some settings from the project's company, employee's company, or active company, while others are globally set:

- Hours decimal places: Global setting.
- Non-work days and holidays at WBS levels: Project company's settings.
- Non-work days and holidays at the resource level: Employee home company's settings.
- Range available hours: Employee home company's settings.
- Starting day of the week: Active company's settings.

These settings are available in **Settings » Resource Planning » Plan Settings** and **Settings » Resource Planning » Non-Work Days**.

Resource View

The Resource View grid now has higher contrast between capacity colors. In addition, you can now change column widths in the middle grid, and the changes remain in effect if you leave Resource View and then return to it later.

Project View

Project View has been upgraded to support the convergence of opportunities and projects. A project search has replaced the plan search provided in earlier versions.

In the Project View grid, you can now change column widths in the middle grid, and those changes remain in effect if you leave Project View and then return to it later.

Resource Management Reporting

Reporting has been upgraded to support the convergence of opportunities and projects. A project search replaces the plan search provided in earlier versions, and a number of other usability refinements have been implemented.

Opportunity/Opportunity Plan Structure

Because opportunities are now in pursuit projects and have project structure that you establish in the Projects hub, the **Opportunity/Opportunity Plan Structure** menu options are no longer available.

Search

Search

The Vantagepoint Search feature was enhanced to allow use of predefined and custom-created searches that include additional fields and operators, so that you can more easily locate the exact information that you need.

Simple Search

In a simple, or basic search, you can add an unlimited number of conditions to the search, and operators will become available based on the type of field that you select. For example, if you search by actual completion date in projects, you have date-specific operators for is today, this week, last month, and so on, in addition to the standard options, such as =, >, <.

As you build your search, you can see a preview of the results. In some searches, you can also show the number of results returned based on your conditions.

Advanced Search

Users that need more powerful options can now use Advanced Settings to create complex searches, save these searches, and share them with others.

Use advanced search settings to:

- Separate conditions by AND or OR conjunctions.

- Group, ungroup, and reorder conditions to control the order in which the operations of the search are executed.
- Embed conditions and create different levels of the search.
- Search on conditions at various levels of the Work Breakdown Structure (WBS), to find conditions on phases and tasks in addition to the project level.
- View search conditions in a plain text view, to better see the entire search criteria.

Predefined Searches

Use Vantagepoint's predefined searches to quickly locate a specific type of record. Because they are system searches, you cannot modify a predefined search.

The Projects predefined searches have been updated to include the following:

- **Active:** Includes all projects with a status of active.
- **All:** Includes all projects regardless of status or associated employees.
- **My Active:** Includes all projects where you are associated as a team member or as a key employee on the Overview tab. This search replaces several previous predefined searches, such as the Supervisor and Principal searches.
- **Project Manager:** Includes all projects where you are associated as the project manager on the Overview tab.
- **My Company:** In a multicompany database only, includes all projects in your company.
- **My Organization:** Includes all projects in the same organization as you.
- **My Draft Invoices:** If you have access to interactive approvals, includes all projects that has an invoice waiting your approval.

The Firms predefined searches have been updated to include the following:

- **Active:** Includes all firms with a status of active.
- **Active Clients:** Includes all active firms marked as a client type.
- **Active Vendors:** Includes all active firms marked as a vendor type.
- **All:** Includes all firms regardless of status and type.
- **Clients with Outstanding AR:** Includes all client firms that have outstanding accounts receivable.
- **My Active:** Includes all active firms where you are associated on the team or you are associated as the owner.

Saved Searches

Depending on your security rights, you can save searches for yourself as personal searches, or you can share searches with your own security role or other security roles. You can also copy any shared search as a personal favorite in order to tweak it for your own needs, and create folders to organize your personal and saved searches.

Because of the enhancements made to the Vantagepoint Search feature, searches that were previously saved in Deltek for Professional Services 1.1 will be migrated as Legacy Searches in 2.0. These searches can be run as is, but cannot be edited. If you need to make a change to a legacy search, you must create a new search based on the legacy search's criteria.

Opportunity searches are not migrated to Vantagepoint 2.0 because of the merging of opportunities and projects. You will need to recreate any opportunity searches in Projects.

Transaction Center

Transaction Entry

The Transaction Center has been moved from the desktop application to the browser application. Transaction Entry, Transaction Posting, Transaction Lists, and Posting Logs have been combined into a single application at **Transaction Center » Transaction Entry**.

Because of these menu structure changes, you must review each role security to confirm that access rights are correctly set up. For example, you now limit access to posting and reporting on the Accounting tab in **Settings » Security » Roles**. In DPS 1.0, user access was a combination of Navigation menu access and Transaction type access on the Accounting tab.

Enhancements

- To make it easier to find the transaction type that you need, all transaction types now display on the left-side navigation pane.
- Transaction Entry landing pages
 - You now complete all actions related to a transaction from a single screen. The transaction entry landing page allows you to create a new transaction, edit an existing transaction, review the transaction list report, post the transaction, and review the posting log report. You can view the actions for each transaction type on the landing page for each application in the Transaction Entry menu (for example, **Transaction Center » Transaction Entry » AP Disbursements**) as well as for all transactions on a single screen in **Transaction Center » Transaction Entry » All Transactions**.
 - The Transaction Entry landing page now provides additional column selections, including a new **Post User** column that you use in addition to the **Creator** column.
 - You can view both in-progress and posted transactions. You can open and view posted transactions, but all fields are not editable.
 - Transaction file names no longer need to be unique across users. A new internal ID has been added to make each transaction unique.

- Recurring entries
 - When creating a new transaction, you can now define a transaction as recurring by selecting **Other Actions » Make Recurring** on the transaction entry detail screen, rather than using a Control Total dialog box. You can make this decision at any time prior to posting.
 - Recreating a recurring transaction creates a copy of the original transaction rather than reusing the original file to be posted as a new sequence. This allows a complete history of the all transactions associated with the recurring file to display on the Transaction Entry landing page.
 - Recurring transactions that are available to recreate now show a status of Available to clearly indicate where they are in the recurring process.
- Transaction entry detail screen
 - You can display both project and account names and numbers in the Project Information grid on the transaction entry detail screen. Description fields that were previously listed below the grid are now included as optional grid columns, allowing the grid to better accommodate more rows on screen.
 - For each user, you can define if you want the default display for the project to be project name or project number. You define this using the **Project List Sort Order** option on the Project Settings dialog box at **Hubs » Projects » Project » Other Actions » Project Settings**.
- Transaction-specific enhancements
 - AP Vouchers/AP Disbursements: You can now create a new vendor from within voucher entry.
 - Journal Entries: The option to include asset entries is now on the transaction entry detail screen rather than the Control Total dialog box. The option to include tax entries is now defined by selecting a tax code rather than the Control Total dialog box.

AP Invoice Approvals

AP Invoice Approvals was moved from the desktop application to the browser application at **Transaction Center » AP Invoice Approvals**. Security roles that had access to the desktop application item now have access to this new item in the browser. Screens have been modified to provide easier user actions, but functionality remains the same.

Enhancements

- The application opens in List View mode, to make it easier to locate individual records.
- The AP Invoices grid supports drag and drop functionality to upload AP Invoice documents.
- In Detail view, the Progress tab has been replaced by an approval timeline, which contains the approval audit trail for the record.
- You can access Notes from the **Other Actions** menu in Detail view.

Time and Expense Posting

Time and Expense Posting was moved from the desktop application to the browser application. Time and Expense tabs previously located in Transaction Posting are now under **Transaction Center » Time and Expense Posting**. You will need to review role security to ensure proper access to this menu item.

Time Posting now includes regular, overtime, and totals hours by employee. Transaction posting for all other transactions is available in **Transaction Center » Transaction Entry**.

Posting Review

Posting Review (previously Posting Logs) has been moved from the desktop application to the browser application. Posting Logs and Posting Review Report have been combined into a single application, **Transaction Center » Posting Review**.

Enter Transactions Individually Rather Than as Files/Batches

A new company-specific setting allows you to enter transactions individually, removing requirements for using files or batches. You can enter, review, and post transactions in a single step on the transaction entry detail screen.

To take advantage of this functionality, select **No** for the **Use Files to Group Transactions** option in **Settings » Accounting » Transactions**. For multicompany databases, you define this option for each company.

The ability to enter transactions individually provides the following benefits:

- **Landing page:**
 - Each row on the Transaction Entry landing page represents an individual transaction, rather than a file of transactions. Powerful grid filters provide a streamlined solution to limit and find records in the list of transactions for the fiscal period.
 - When you enter transactions individually rather than in files, you can display additional columns that provide valuable details on the transaction. For example, the column selection on the AP Vouchers landing page includes vendor, vendor address, amount, invoice number, invoice date, bank, and payment method.
- **Transaction posting:** When entering transactions individually, you can post from the detail screen.
- **New transactions:** When creating a new transaction, you are brought directly to the detail screen. You no longer need to enter details on a Control Totals dialog box.
- **Settings:** A new, company-specific option for selecting batch or individual transaction entry is available in **Settings » Accounting » Transactions**. Accounting applications that import transaction data and create transactions files (revenue generation, consultant accruals, labor

cross charge, Create VO from PO, depreciation processing, intercompany billing, bank reconciliation, credit card reconciliation) were updated to support this new setting.

Considerations

Review the following when you initially choose to enter transactions individually rather than in files:

- You need to post all In Progress transactions.
- You need to recreate recurring transactions. You need to recreate as individual transactions any recurring transactions that were previously part of a file.
- Unpost utility: Transactions posted as part of a file will be available to unpost; however, the file will not be recreated in Transaction Entry. For new transactions that you create individually, you will have the option to unpost and recreate.

Transaction Posting Web Service Updates

Transaction posting web services will no longer treat errors as warnings

Timesheets

You can now add user-defined fields (UDFs) to timesheets entered with the Time application. You set up these UDFs in **Settings » Time » Options**. You can add up to 3 UDFs (drop-down choice, note, and/or numeric field types), per company. Like UDFs in a hub, these timesheet UDFs can be required or not, can be made Active or not, and can have a caption and/or a tooltip.

Once posted, Time transactions with UDFs can be grouped, sorted, or selected based upon these UDF values. You can do this on the Employee Labor Detail report.

Utilities

Period Setup

The Period Setup utility has been moved from the desktop menu to the browser menu, where it appears in **Utilities » Periods**.

Posted Transaction, Undo Posting, Locked Transactions, and Incomplete Postings

The Posted Transaction, Undo Posting, Locked Transactions, and Incomplete Postings utilities have been moved from the desktop menu to the browser menu, in **Utilities » Transactions**.

In these utilities, access to transactions is based on a combination of menu item access and transaction type access, both defined in **Settings » Security » Roles**. Review your employees' role security settings to make sure that they are appropriate.

Integrations

Ajera Integration

As part of moving all Projects hub data from the desktop user interface to the browser, the Ajera Totals tab and the Budget & Revenue tab have been moved out of the Projects hub. You can find this information in a new Ajera CRM Projects dashboard, available in **My Stuff » Dashboards**. To share this dashboard with your team, you will need security rights to save dashboards for all roles.

Because opportunities and projects are now combined, you can sync a project to Ajera while it is still in the pursuit stage, when you are ready to start tracking time and expenses against the pursuit. Use the **Sync to Ajera** check box on the Overview tab of the Projects form. The sync process works the same with a project in the pursuit stage as it does for regular projects. Be sure that your Ajera template includes a Business Development phase to track the pursuit effort.

Deltek Project Information Management (PIM)

Vantagepoint can now integrate with the Deltek Project Information Management application (PIM). PIM connects you and your team to all the right documents and emails, from a project-centric or company-wide view. Eliminate silos by maintaining all information in one central location, and use powerful tagging and searching features to put the right documents at your user's fingertips.

The Vantagepoint/PIM integration brings key features of document management from PIM directly into selected Vantagepoint hubs. It also provides access from Vantagepoint to the PIM Information Zone (**Hubs » PIM Information Zone**) and Personal Zone (**My Stuff » PIM Personal Zone**).

Go to **Utilities » Integrations » PIM** to enable the integration. You will see a new PIM menu item for each of the following hubs:

- Contacts
- Employees
- Firms
- Marketing Campaigns
- Projects

Click the PIM menu item to open a PIM pane that contains all the relevant PIM data for the selected hub record.

Salesforce Integration

The integration between Vantagepoint and Salesforce now supports multicurrency Salesforce instances. Setting up the integration is easier, too, with the addition of a dynamically created callback URL. For more information, see the Vantagepoint [online help](#) or the Salesforce Technical Guide.

Talent Management Integration

The Talent Management integration has been moved from the desktop menu to the browser menu, where it appears in **Utilities » Integrations » Talent Management**. If a role had access to Talent Management integration in the desktop user interface, the role will have access in the browser user interface. The actions on the Talent Management screen have also been streamlined.

Import and Exports

Imports

No additional import processes have been moved from the desktop user interface to the browser user interface. However, a Projects-Firms Import process was added to the desktop user interface. This import lets you associate additional firms (clients or vendors) to projects.

Planning Data Export

The Planning Date Export process was updated to reflect the convergence of opportunities and projects. All saved searches and searching by In Pursuit fields and stages is supported.

Search and Replace

The Search and Replace utility was moved from the desktop menu to the browser menu, where it appears under **Utilities » Updates » Search and Replace**. If a role had access to the Search and Replace utility in the desktop user interface, the role will have access in the browser user interface. The actions on the Search and Replace screen have also been streamlined.

File Reconciliation Report

The File Reconciliation report was moved from the desktop menu to the browser menu, where it appears under **Utilities » Analysis » GL Reconciliation**.

Tolerance Report

The Tolerance report was moved from the desktop menu to the browser menu, where it appears under **Utilities » Analysis » GL Reconciliation**.

Batch Deletes

The Batch Deletes utility has been moved from the desktop menu to the browser menu, where it appears under **Utilities » Updates » Batch Deletes**.

History Loading

The following History Loading applications have been moved from the desktop menu to the browser menu, in **Utilities » History Loading**:

- Labor and Expense
- Invoice and Receipt
- Accounts Payable
- Absence Accrual
- Account Balances

If a role had access to History Loading in the desktop user interface, the role will have access in the browser user interface.

Employee Payroll History Loading remains in the desktop application.

Key Conversions

The following Key Conversion applications were moved from the desktop menu to the browser menu, in **Utilities » Key Conversions**:

- Accounts
- Banks
- Contacts
- Discount Codes
- Employees
- Firms
- Organizations
- Projects
- Phases
- Tasks
- Enable Phases/Tasks
- Disable Phases/Tasks
- Projects' Organization
- Labor Codes
- Organization Sub-Codes
- Liability Codes
- Withholding Codes
- Contribution Codes
- Absence Accrual Codes
- Tax Codes
- Units

The former Client Key Conversion is now referred to as Firm Key Conversion. If a role had access to Key Conversions in the desktop user interface, the role will have access in the browser user interface.

Key Formats

All Key Formats applications were moved from the desktop menu to the browser menu, in **Utilities » Key Formats**. If a role had access to the Key Formats applications in the desktop user interface, the role will have access in the browser user interface.

The Key Formats applications are:

- Accounts
- Clients
- Employees
- Projects
- Phases
- Tasks
- Units
- Organizations
- Labor Codes
- Vendors
- Reference Numbers

Process Server

All Process Server utilities have been moved from the desktop menu to the browser menu, in **Utilities » Process Server**. If a role had access to Process Server utilities in the desktop user interface, the role will have access in the browser user interface.

The Process Server utilities are:

- Queue Manager
- Profile Editor
- Server Management (for on-premises installations only)

Settings

Security

Roles

The majority of Role Security has been moved from the desktop application to the browser application in **Settings » Security » Roles**. Use these options to establish security access rights to all areas of

the browser application. However, because there are still some features in the desktop application, there is still an Access Rights tab option in **Settings » Security » Roles** in that application as well.

Browser Security

- **Navigation Menu Items:** Several items in the Navigation menu were added, expanded, and reorganized for Vantagepoint 2.0. For this reason, the security administrator must review the Navigation menu item access rights for each role after the upgrade is complete. In some cases, you may need to reconfigure menu security due to applications being split into multiple Navigation menu items.
- **Record Level View & Update Security:** The record-level searches that are applied for record level view and update access rights leverage the new Search feature in the browser. As a result, the existing searches cannot be edited and will be reflected as legacy searches with existing security enforced. If the security administrator needs to change the record level rights, it will also be necessary to configure and apply new search criteria.
- **Saved Reports:** The saved report options on the Access Rights tab apply to the saved reports in the browser only. The saved reports access rights for the saved reports in the desktop interface are managed by the Organize Favorites action in Reporting.
- **Saved Searches:** The saved searches options on the Access Rights tab apply to the saved searches in the browser only. The saved searches access rights for the saved searches and legacy searches in the desktop interface are managed by the Organize action in the desktop search dialog boxes.
- **Saved Options:** The saved options settings on the Access Rights tab apply to the saved options in the browser only.
- **Lookups:** Lookup access rights for searches in the browser are managed by a combination of Navigation menu access rights and field level security. If a field has been hidden using the screen designer field security property, then the field will not be available to use as a search field. For applications that have a unique search control, the access rights for the search are tied to the access rights for the navigation menu item (for example, Transactions, Payments, AP Invoice Approvals, Banks, Tax Codes, and so on).

Desktop Application Security

- **Saved Reports:** The access rights for the saved reports in the desktop application interface are managed by the Organize Favorites action in Reporting.
- **Saved Searches:** Access rights for the saved searches and legacy searches in the desktop application are managed by the Organize action on dialog boxes.
- **Saved Options:** Access rights for the saved options in the desktop application are managed by the Organize action on dialog boxes.
- **Lookups:** Access rights for searches on lookups in the desktop application are managed in **Settings » Security » Roles-Desktop** in the desktop application. These access rights apply to the lookups that are available in the desktop application only.

Enhancements

- **Additive Security:** When a security role is granted access to a hub, it is only granted access to the Overview tab and Summary pane, as well as the fields on the tab and in the pane. As access is provided to each additional tab in the hub, the fields on the tab are made available as well. As tab access is removed, access to the fields on the tab are removed as well. If access to an entire hub is removed, access to all of the tabs and fields in the hub are removed.
- **Save Rights for Dashboards and Dashparts:** A new **Save Rights** setting was added to the Overview tab to provide rights to save dashboards and dashparts for other roles.
- **Project Creation Rights:** A new setting has been added on the Record Access tab to determine the Charge Types that can be selected by a role that has project creation rights.
- **Application Tab Security:** Application tab security rights for the hubs in the browser can now also be controlled from the Roles application, as well as the Screen Designer. An update to tab access rights in role security will be reflected in the Screen Designer and vice versa.
- **Report Group/Column Access Rights:** Report Group/Column access rights have been combined with Report access rights.
- **Screen Designer properties:** When a security role is copied to create a new role, the source role's screen designer properties will be copied as well.

Users

When the Lead Qualification Process is enabled, a new **Default Qualified Status** setting is available in **Settings » Security » Users**. Use this option to specify the default value for the Qualified Status when a new contact is created in the Contacts hub. This setting synchronizes with the setting of the same name in My Preferences.

Password Policies

Blank passwords are no longer supported.

Workflow

Administrators can create workflows to support your company's unique processes. A workflow can be set up for any hub, including user defined hubs, and includes the following capabilities:

- Validate that users have entered data correctly by displaying an error or warning message if certain conditions exist.
- Send an email or notification center alert for certain conditions.
- Automatically update a field based on the value of another field.
- Create an activity based on certain conditions.
- Create advanced workflow such as calling a stored procedure or invoking a web service.

There are several types of workflows available:

- **User Initiated:** Triggered when the user creates a new record or edits an existing record and saves.
- **Scheduled:** Checks for conditions on a predetermined schedule or when a user clicks the **Workflow** button.
- **Web Services:** SOAP API validations can be created for time, expense, purchasing, and other transaction processes.
- **Numbering:** Automatically generate record numbers based on information in the new record.

User Initiated Workflow

User Initiated Workflow was moved from the desktop application to the browser application, in **Settings » Workflow » User Initiated Workflows**. Security roles that had access to the desktop application menu item will have access to this new item in the browser. Approval Workflow Types can be accessed but not edited from User Initiated Workflow.

Scheduled Workflow

User Initiated Workflow was moved from the desktop application to the browser application, in **Settings » Workflow » Scheduled Workflows**. Security roles that had access to the desktop application menu item will have access to this new item in the browser. Approval Workflow Types can be accessed but not edited from Scheduled Workflow.

Web Services

The Web Services workflow was moved from the desktop application to the browser application, in **Settings » Workflow » Web Services**. Security roles that had access to the desktop application menu item will have access to this new item in the browser.

Numbering

The Numbering tab of **Settings » General System** was moved from the desktop application to the browser application, in **Settings » Workflow » Numbering**. Security roles that had access to the desktop application menu item will need to have access restored to this new item in the browser.

Alerts

General

Saved searches that reference the old opportunity standard and custom fields are removed from the alert rule during upgrade to 2.0. Any alert rule that had the saved search removed still exists, but is no longer active. Recreate the search and enable/activate after the upgrade.

AR Aging Alerts

Accounting » AR Aging Alert was moved from the desktop application to the browser application, in **Settings » Billing » Alerts**. Security roles that had access to the desktop application menu item will need to have access restored to this new item in the browser application.

Time, Expense, & Transaction Alerts

Time, Expense, and Transaction Alerts (previously Company Alerts) were moved from the desktop application to the browser application:

- **Settings » Time » Alerts**
- **Settings » Expense » Alerts**
- **Settings » Accounting » Alerts**

Security Roles that had access to the desktop application menu item will need to have access restored to these new items in the browser application.

Resource Planning Alerts

All resource planning alerts are now available in the browser application, in **Settings » Resource Planning » Alerts**. The Resource Assignment and Resource Utilization alerts now use the new **Capacity Calculation** status for projects in the Projects hub to determine the projects to include.

Purchasing Alerts

Purchasing Alerts remain in the desktop application, but are now found in **Settings » Purchasing & Inventory » Purchasing Alerts**.

General Settings

General Settings were moved from the desktop application to the browser application and restructured into multiple areas to group similar options together. As a result of these menu structure changes, you should review role security.

The new navigation menu structure for General Settings is:

- **Settings » General**
 - Options
 - Firm Hierarchy
 - Communications
 - Process Servers
 - Audit Trail
 - Modules
 - Screen Designer
 - Calculated Fields

Accounting Settings

Accounting System Settings (**Settings » Advanced Accounting » System**) and Accounting Company Settings (**Settings » Accounting » Company**) in the desktop application have been moved to the browser application. In some cases, settings have been combined on a single screen, to group similar options in a logical arrangement.

As a result of this menu structure change, you need to review role security settings and update accordingly.

The settings that were in Accounting System Settings and Accounting Company Settings in the desktop application are now in the following locations in the browser application:

- **Settings » Accounting**
 - Labor Options
 - Time Analysis
 - Labor Codes
 - Absence Accruals
 - Accrual Schedules
 - Posting Accounts
 - Transactions
 - User Defined Revenue
 - Revenue
 - Units

- **Settings » Cash Management**
 - Options
 - Banks
 - Tax Codes
 - Accounts Payable
 - Credit Cards
 - Cash Flow Statement

- **Settings » General Ledger**
 - Options
 - Chart of Accounts
 - Account Group Names
 - Account Group Tables
 - Consolidated Reporting

Enhancements to settings now in the browser application include the following:

- **Accounting » Transactions**

- A new **Use Files to Group Transactions** option was added. For more information, see [Enter Transactions Individually Rather than in Files/Batches](#).
- New options for the Transaction Auto Numbering settings for bank transactions allow you to:
 - Have automatic payment numbering apply only to electronic payments instead of all payment types.
 - Add a prefix to automatic payment numbers. The prefix can be alphabetical or numerical.

- **Accounting » User Defined Revenue**

Planning data is now available for the revenue method calculations.

- **Accounting » Units**

In DPS 1.1.x, unit settings were in two locations: on the Unit Tables tab in **Settings » General » General System** in the browser application (used for cost and billing estimates) and in **Settings » Units** in the desktop application (for Accounting and Timesheet applications). In Vantagepoint, all the unit settings are now in **Settings » Accounting** in the browser application.

New Unit Functionality: In a given Unit table, when a user adds a unit, a lookup as been added to the dialog in the Unit number field to select an existing Unit to be added to the Unit table.

Billing Settings

Most of the Billing settings were moved from **Settings » Billing** in the desktop application to the same location in the browser application.

Some of the menu items under **Settings » Billing** in the browser application have the same names that they had in the desktop application, and other menu items are new. For some menu items, fields have been reorganized to more logically group similar information. System settings and company settings are now available on the same screen with a clear indication of global settings (enterprise-wide) versus company settings.


Invoice Approval Process and **Invoice Template Editor** remain in **Billing » Settings** in the desktop application.

Menu Item Under Settings » Billing in Vantagepoint 2.0	Former Location in DPS 1.1.x in the Desktop Application
Options	Settings » Billing » General: General tab
Invoice Accounts	Settings » Billing » General: Accounts tab
Fee	Settings » Billing » General: Fees tab
Invoice Format	Settings » Billing » General: General tab
Default Terms	Settings » Billing » Default Terms
Reporting Default Terms	Settings » Billing » Reporting Default Terms
Accounts Receivable	Settings » Accounting » Accounts Receivable
Alerts	Settings » General » System Alerts

Screen Designer

The following are enhancements and usability improvements made to the screen designer.

- Screen Designer, previously located in Settings, was moved to **Settings » General » Screen Designer**.
- As a result of the rest of the Projects hub being moved to the browser, the Projects hub supports the Screen Designer only in the browser.
- User-defined components (fields, grids, and so on) on the Screen Designer form are now indicated with a ★ beside them.
- The name of the **Hidden** field in the Field Properties section in Screen Designer has been changed to **Field Security**. The functionality is the same, but instead of a drop-down list, you now use a dialog box to select multiple security roles to hide a field, grid, or tab from.
- The **Locked** and **Field Security** fields in the Field Properties section in Screen Designer have been updated to support setting the property for multiple roles at a time.
- Compound fields (fields that consist of multiple related fields, such as address fields) now support the ability to apply screen designer properties (locked, required, and field security) on the individual fields that make up the compound field. For example, you can set properties for the **State** field that is part of a compound address field).
- The **Required** field in the Field Property section in Screen Designer no longer applies for compound fields.
- Support for column properties (locked, required, field security) has been expanded for grids.

- The Screen Designer Audit Trail report now includes the edits made in the Screen Designer in the browser application. The report no longer includes the edits made to the Equipment hub in Screen Designer in the desktop application.
- A new **Include in Proposals** grid setting has been added on the Grid Settings dialog box to support custom proposals. The setting lets you indicate that a column from a grid can be included in custom proposals.
- For the Projects hub, you can now move user-defined fields, grids, and tabs to and from the following areas in the Projects hub: Projects, Contract Management, and Invoices. To do this, you use the new **Move Field to Area** and **Move to Tab Area** actions in the Actions section of the actions and properties pane on the Screen Designer form for the Projects hub.
- The **Project Defaults** application in **Settings » General » Project Defaults** in the desktop application was removed. You now use Screen Designer instead of the Project Defaults application to set up default values for standard fields in the Projects hub. In Screen Designer, select a standard project field that supports a default value. In the Field Properties section of the actions and field properties pane, click the  beside the **Field Type** field. On the Field Settings dialog box, enter a value in the **Default Value** field.
- You can now add user-defined Mobile Touch CRM sections in the Projects hub as a result of the convergence of the Opportunities and Projects hubs.
- The default values that you enter for standard Projects hub fields in Screen Designer now populate fields for new records that you create in Mobile Touch CRM.
- Field captions and tool tips now support the HTML editor. A text editor tool has been added on the Tooltip dialog box that allows you to format tool tip text.
- Field captions and tool tips now support multiple languages. You must enter the caption for a component or the text for a tooltip in each different language that you use in Vantagepoint. To do this, log in to Vantagepoint in each language that you have enabled, and enter the caption and tooltip text in Screen Designer in the language that you logged in with.

Vantagepoint API

Versioning

Backward/Forward Compatibility

Any integrations with DPS 1.1.x will need to be reintegrated with Vantagepoint 2.0.

New API Reference

The new API reference is interactive. You can download the documentation as a Postman collection in your client to run with your instance of Vantagepoint credentials, data, and environment. This is especially useful with your sandbox or pre-production environment to test before pushing your integration to production.

Using the API Reference

Access the new API reference from the Vantagepoint 2.0 online help. In the Contents pane of the online help, go to **Development Guide » API Reference**. This opens the following API Reference help topic:

https://help.deltek.com/Product/Vantagepoint/2.0/DPS_REST_API.html. The API Reference topic contains the following link to the new API Reference: <https://api.deltek.com/Product/Vantagepoint/api>.

A section has been added to the new API reference to introduce the features of the API reference documentation. Click the following link to open this section in the API reference:

<https://vantagepoint2api.deltek.com/#f0cc475d-00da-48d8-a8a7-63a280e6b661>

The reference includes code samples in the following programming languages generated by a third party. Additional code is available in the Postman client (C#, for example).

- cURL
- jQuery
- Ruby
- Python
- Node
- PHP
- Go

What's New in the API Reference?

Organization API

- 2.x supports only GET calls. The organization code that returns will not exceed 14 characters. The total length of the full organization code for the company includes characters, digits, and delimiters.
- 1.x supports PUT, POST, GET and DELETE calls. However, PUT and POST only apply to variable organization structures. Fixed organization structures should be set up in the product rather than using the API.

Lists

The list of valid code table values is now available to use with GET `{{url}}/codeTable/{{CodeTable}}`.

Utilities

There is a new endpoint to facilitate invoking stored procedures.

Hubs

- Opportunity endpoints are now deprecated since the information now lives in the Projects hub for Vantagepoint. In addition, any opportunity-related hubs endpoints are also now folded into Project endpoints for Contacts, Employees, Firms, and Marketing Campaigns.
- Project plan endpoints have been removed.
- The Firm's campaign endpoint /firm/{ClientID}/campaign has been removed.
- New Projects hub endpoints are available to retrieve associated competition, milestones, and revenue.
- New endpoints are available to interact with user-defined hubs.

Accounting Transactions

Read and insert endpoints have been added for the following transaction types:

AP	AP Vouchers
CD	Cash Disbursements
CR	Cash Receipts
CV	AP Disbursements
ER	Employee Repayments
EX	Employee Expenses
IN	Invoices
JE	Journal Entries
LA	Labor Adjustments
MI	Miscellaneous Expenses
PR	Prints and Reproductions
TS	Timesheets
UN	Units
UP	Units by Project

These endpoints will be documented in the API Reference sometime in the first quarter of 2019.