



**Deltek Vision<sup>®</sup>**

for Consulting Firms



[www.deltek.com/vision](http://www.deltek.com/vision)

# DELTEK VISION

## A HIGHER LEVEL OF INTEGRATION, COLLABORATION AND SUCCESS

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Managing the profitability of an engagement-based business requires instant visibility into your staff, clients and engagements from anywhere at anytime. Deltek Vision® brings unparalleled focus to the challenges that make businesses like yours unique. This is a revolutionary end-to-end software solution designed specifically for organizations whose people are their biggest asset.

Deltek Vision supports the complete engagement lifecycle to help you manage and measure all of your critical business functions. Thousands of organizations, ranging in size from 10 employees to global enterprises, rely on Deltek every day to win more business, deliver engagements and improve performance. Vision users commonly experience measurable benefits, such as improved employee utilization, streamlined project management and improved profitability.





## WIN MORE BUSINESS...of the right kind

### MANAGE COMPLEX CLIENT ACCOUNT STRUCTURES

- Manage clients, contacts, opportunities and activities based on a client's organizational structure
- Integrate with Microsoft® Outlook to share contacts, activities and calendar events

### GET A TRUE READ ON PIPELINE AND BACKLOG

- Track opportunities from a lead to an engagement
- Forecast engagements accurately and manage future staffing requirements

### ESTIMATE SERVICE COSTS UPFRONT

- Record time and accurately estimate each engagement at the proposal stage
- Measure the cost to win business

## DELIVER ENGAGEMENTS...with the right mix of people and planning

### FREE-UP RESOURCES TO FOCUS ON CLIENT WORK

- Receive an email alert and enter time and expense from any location
- Use automated approval workflow to improve payment time
- Easily view all assigned engagements, access past engagements and collaborate with co-workers

### SIMPLIFY ACCOUNT MANAGEMENT

- Leverage workflows to streamline engagement initiation, budget planning and invoicing
- Proactively reduce engagement risk through real-time reports and key performance indicators
- Accurately capture all engagement-related costs, correctly invoice customers the first time and reduce DSO
- Easily create multiple invoice templates to meet client requirements

### PLAN AND TRACK ENGAGEMENTS FROM A RESOURCE PERSPECTIVE

- Easily view your current resource capacity against engagement demands to improve utilization rates
- Obtain accurate views of forecasted opportunities and make sound decisions on future staffing needs
- Keep-up with changing client needs and simply adjust your engagement bookings
- Share resources across multiple business units

## IMPROVE PERFORMANCE...with accurate measurement

### TRACK SUCCESS BASED ON CLIENT AND BUSINESS STRUCTURE

- Generate consolidated reports based on client, business unit or brand/product
- Drill-down from any report into the actual transactional data
- Distribute costs accurately with Vision's inter-company billing

### ACCESS BUDGET, ACTUAL AND COMMITTED AMOUNTS EASILY

- Manage each engagement with up-to-date estimates at completion vs. budget reports
- Receive notifications when key budget thresholds are reached and avoid budget overruns
- View all work in process (WIP) for each engagement

### CUSTOMIZE DASHBOARDS FOR PERSONALIZED CONTENT

- A graphical entry point to your company's data that configures a single Web page with real-time information
- Provide key decision makers with secure, role-based metrics tailored to their specific business requirements
- Access real time metrics that offer visibility into all areas of the organization, plus the capability to drill-down to more detailed information
- Display live reports, key financial indicators and alerts

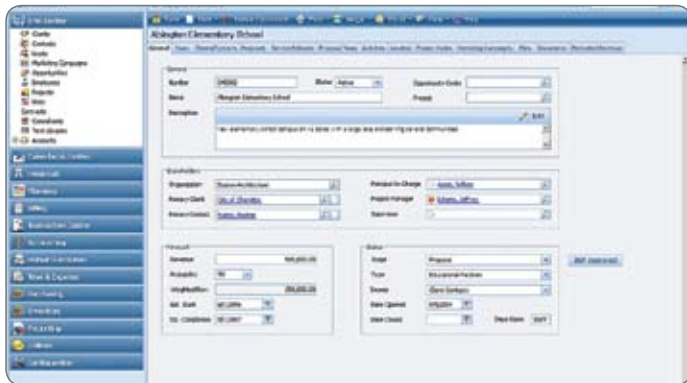
# WIN MORE BUSINESS

## MANAGE THE ENTIRE CLIENT AND OPPORTUNITY LIFECYCLE

Vision Customer Relationship Management (CRM) automates the entire opportunity-to-execution delivery cycle by providing all of the tools you need to win new business and strengthen your existing client relationships. Vision CRM automates your client and contact management, opportunity tracking, marketing campaign management, business development and activity management, and can be integrated with Microsoft® Outlook to facilitate collaboration throughout your organization. With a single central source of information accessible to everyone, you will empower your team to fully leverage their collective knowledge.

## ENCOURAGE INFORMATION SHARING

Achieve effective collaboration, no matter where your team members are located. Vision Document Management fosters information-sharing by providing a single, web-based document collaboration platform for your team to share. Within Vision, team members from around the world can upload, share, review and edit documents by using a web browser. Vision enables each document to be associated with clients, engagements, employees and opportunities—providing a total knowledge management solution.



**Figure 1:** Providing employees with a single view of your current and potential clients ensures that you are leveraging all interactions to win more business.

## EXCEED CUSTOMER EXPECTATIONS WITH TARGETED, ATTRACTIVE PROPOSALS

Empower your marketing and sales teams to efficiently produce custom proposals that stand out from the competition. Ensure your proposals contain the most recent and relevant information by giving employees access to a central source of company boilerplates, metrics and more. Integration with Microsoft Word and desktop publishing systems ensures that proposals are delivered in a graphical style that reflects your company's brand. With Vision Proposal Automation, you are focused on perfecting a winning image rather than spending valuable time searching through dated and irrelevant material.

Vision's Federal Proposal Automation Module automates the process of completing required Federal forms SF330, SF254 and SF 255. These forms are used by Federal agencies to obtain information from architecture-engineering firms about their professional qualifications.



**Linda J. Applegate**  
*Project Manager*

Linda Applegate specializes in the design and management of large-scale government infrastructure projects, including process and mechanical engineering, electrical and instrumentation engineering, factory floor software, systems integration, and information technology services.

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**Education**  
Bachelor of Science, Computer Engineering, MIT, 1987

**Adelphi Medical Research Facility, Project Manager for engineering services for this new medical research facility, including process, production, automation, air and ventilation, filling & packaging, and software engineering with validation protocols.**

**Caltrans Pharmaceutical, Project manager for several manufacturing plants for Caltrans. Projects included:**

- Waste Water Monitoring and Process Control
- Responsibilities for Implementation of cGMP for Control and Development Lab
- In-Line, Sanitary, Controls for Pilot Plant Scale-Up
- Development and Implementation for Monitoring of Process Variables for Pharmaceutical Reactor Systems: Reactors, Crystallizers, Reflux Systems, Scrubbers, Transfer and Distribution Manifolds
- SCA DA System Design for Isolators
- Automation of Granulation Modules Including Particle Coating, Tablet Coating.
- Fluid Bed drying and Granulation (GRA1)

**Registrations**  
MSCE

**Affiliations**  
Project Management Institute

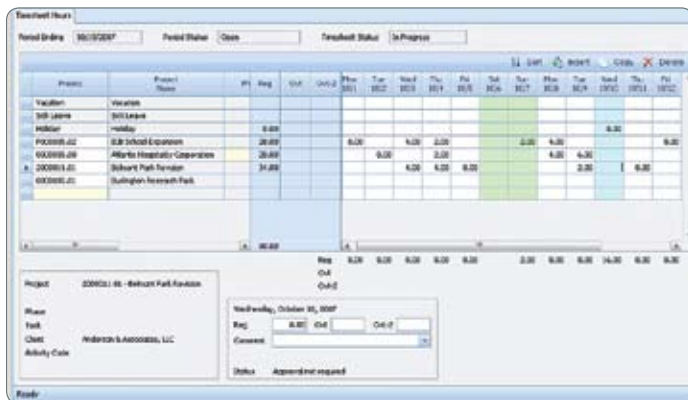
**Figure 2:** By creating proposals that showcase the experience of your employees, you can make the most of the asset that many services firms consider key to winning more business.

# DELIVER ENGAGEMENTS

## ENTER TIME & EXPENSES ANYWHERE, ANYTIME

Speed-up and increase the accuracy of your time collection process through an intuitive interface that is always accessible to employees. Integrated with Vision Billing, Resource and Project Management and Customer Relationship Management modules, Vision Time & Expense provides real-time visibility into costs that impact your clients, projects and profitability. Ensure that hours and expenses are immediately accessible throughout the system and eliminate redundant data entry that leads to errors and omissions. With Vision Time & Expense, you give managers a true picture of project labor hours so they can quickly invoice customers for improved cash flow.

The Vision Mobile Applications Suite allows your employees the convenience of accessing certain Vision features on their handheld devices. It allows the entry of time and expense data and access to Vision CRM's contacts, activities and opportunities. It even accommodates the entry of time and expenses from disconnected PCs for upload to Vision when an internet or LAN connection is available—a great feature for employees traveling without internet connectivity.



**Figure 3:** With easy access from anywhere, anytime, Vision Time & Expense Entry helps you capture time and expenses quickly, which minimizes time and expense leakage, provides managers with more timely project cost information, improves cash flow and improves your bottom line.

“Vision helped us manage our company better, helped us grow and helped us become more profitable.”

- *Optimation Technologies*

“With Vision we can easily access up-to-date, real-time information and ensure our projects are staying on track and on budget.”

-Fullhouse Media

## DELIVER ENGAGEMENTS

### MANAGE YOUR FIRM'S ENTIRE REQUISITION, PURCHASING, RECEIVING AND INVENTORY CYCLE

Vision Purchasing manages your firm's entire purchasing cycle—whether it's simple or sophisticated—while maintaining integration with Financial and Project Accounting and Resource and Project Management modules. It supports the creation and tracking of purchase orders for materials, supplies, capital items and services for both project-related and in-house needs. And, by using Vision's built-in workflow and approval features, all purchases can be tracked accurately and efficiently.

For Vision customers that also provide products, Vision Purchasing includes a feature set for managing inventory. It tracks inventory by location, calculates average product cost and automatically creates a purchase order when quantities reach a specified level. When an inventory item is sold, it automates the assignment of units, customer charge and cost to the job.

### DRAMATICALLY IMPROVE CASH FLOW

Ensure your invoices are accurate and in-line with your client's expectations, get them out the door on-time and get paid faster! Vision Billing supports complex and diverse billing requirements, including time and materials, fixed-fee, lump sum, percent-to-complete and more. Automatically capture every billable labor and expense transaction, apply rate tables, enable employee overrides, calculate fees, handle multiple currencies, generate draft and final invoices using templates and formats of your choice and manage write-offs and adjustments.

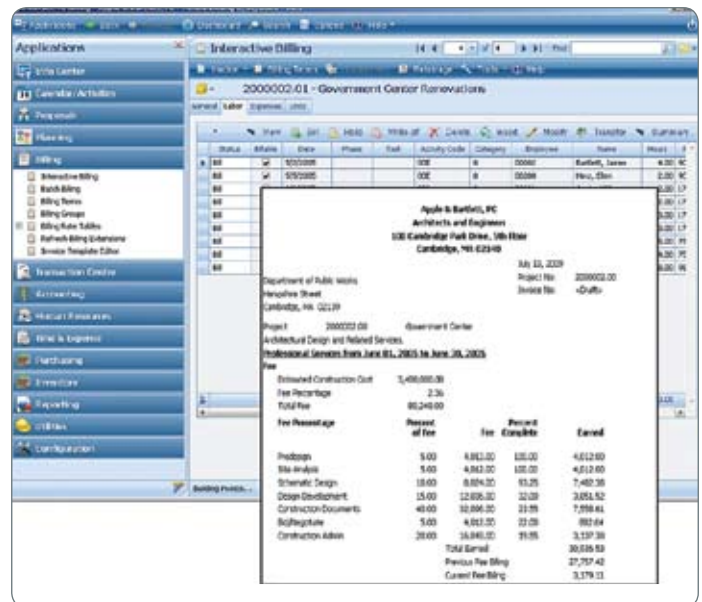


Figure 4: With the flexibility to bill customers based on unique rate structures, you can get invoices out the door quickly and accurately—improving cash flow and client satisfaction.

## MAXIMIZE UTILIZATION AND STREAMLINE DELIVERY CYCLES

With Vision Resource Planning, you can combine past-engagement and future planning data to proactively manage the results of your engagements. It will help your managers complete engagements on time and on budget, while maintaining high levels of utilization. The result is improved project performance and a stronger bottom line.

Vision Resource Planning automates project planning, resource scheduling and resource utilization. And, because it is fully integrated into Vision, all timesheet and expense actuals are automatically fed into each engagement plan, providing your managers with up-to-the-minute detail to ensure everything stays on track.

## SUPPORT FOR MULTIPLE CURRENCIES

The Vision Multicurrency module allows you to complete business transactions in any number of global currencies, while maintaining core financial records in a single “functional currency.” It is designed to meet the accounting, engagement control, planning, resource management and CRM needs of any enterprise that uses multiple currencies—from a complex global enterprise that has daily transactions, to a single company that occasionally does business in foreign currencies.

## FULFILL PAYROLL PROCESSES INTERNALLY OR EXTERNALLY

Vision Payroll simplifies every aspect of the payroll process. It increases accuracy, provides flexible payroll processing, generates automatic payroll runs and provides a full range of detailed reports. Payroll, when integrated with the other Vision modules, provides smooth and accurate information flows throughout the financial management system. If you’re not ready to take on the payroll process, you can export Vision directly to ADP® or Paychex® for processing.

## GAIN UNPRECEDENTED INSIGHT INTO COMPANY-WIDE PERFORMANCE

Managing financial performance by engagement is critical for today’s project-based businesses. Deltek Vision integrates project costing and control with the general ledger so you can track profitability in real-time and identify problems as they arise. Vision Accounting includes a complete set of business finance tools, including general ledger, accounts payable, accounts receivable, purchasing with inventory, revenue recognition, overhead allocation, multi-company/multi-currency support and engagement and financial reporting. Vision Accounting is seamlessly integrated with all Vision modules, ensuring that costs are shared automatically, while maintaining a comprehensive audit trail.

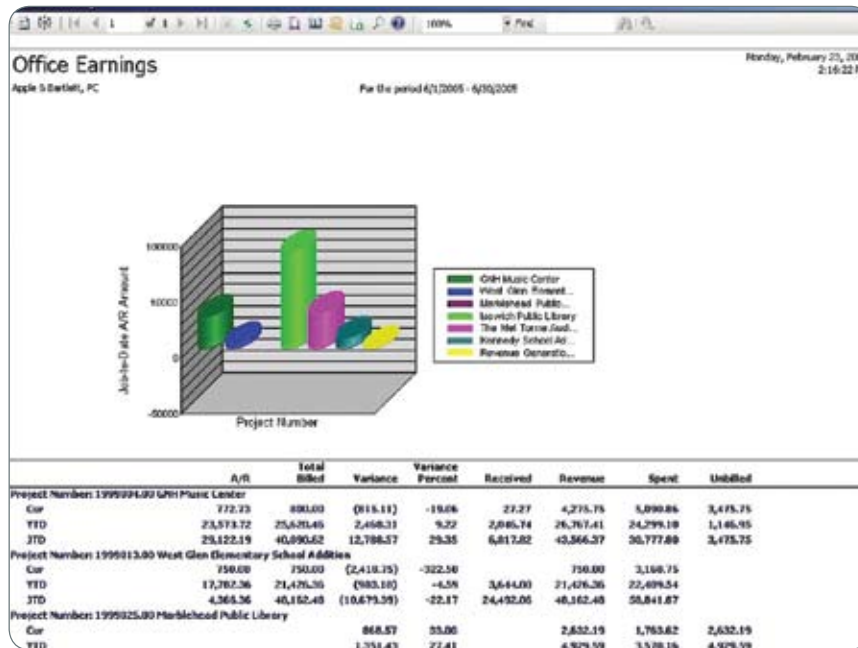


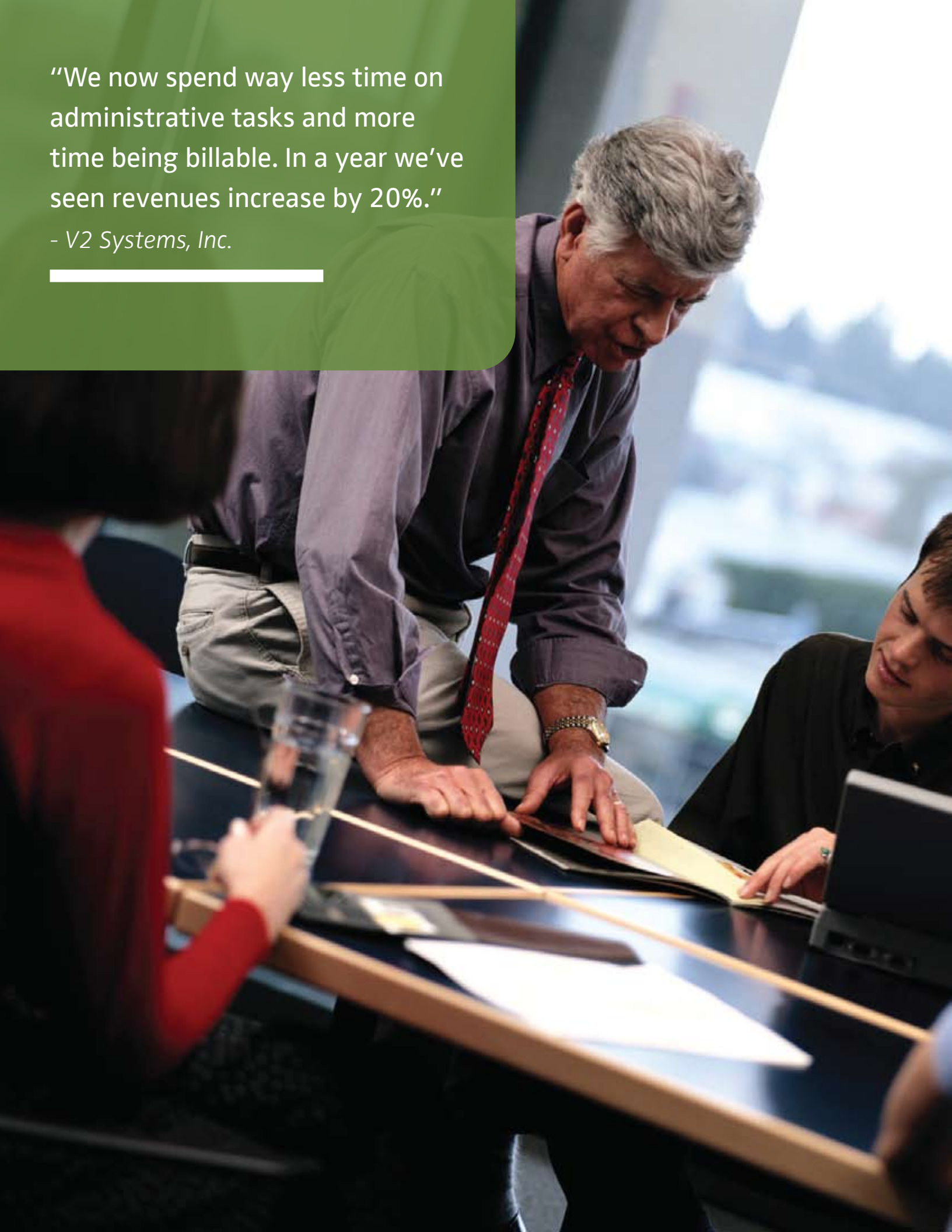
Figure 5: Financial and Project Accounting Reports give insight into company-wide performance.



“We now spend way less time on administrative tasks and more time being billable. In a year we’ve seen revenues increase by 20%.”

- V2 Systems, Inc.

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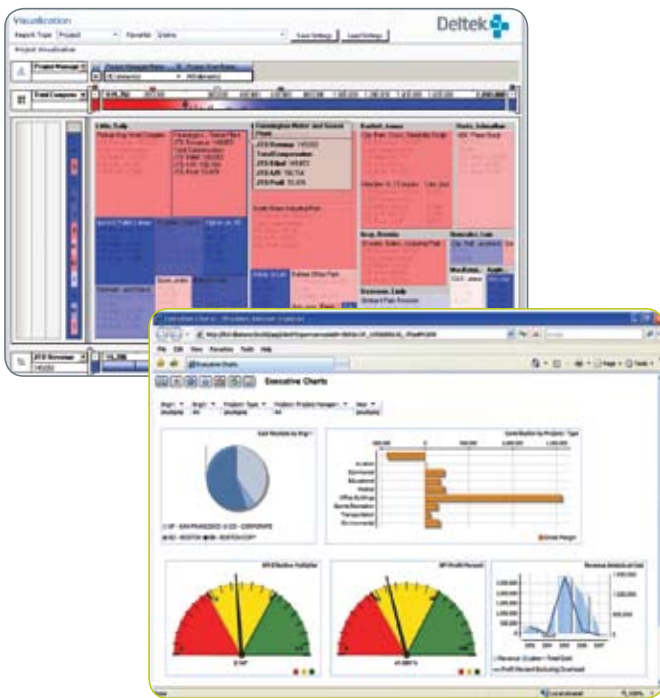


# IMPROVE PERFORMANCE

## VISION PERFORMANCE MANAGEMENT

Firms that thrive have an accurate view of their costs, profit, revenue, as well as visibility into trends that require timely corrective action. With Vision Performance Management (VPM), executives and key decision makers have flexible dashboards with point-and-click, multi-level metric filters and transaction-level drill-down capability to make timely business decisions. It also allows your managers to quickly identify issues that require attention and attend to them in order of greatest importance—all in substantially less time than reviewing reams of paper reports.

Through a combination of shapes and colors representing job-related metrics and risks, Vision Performance Management provides a single, interactive snapshot into the health of your agency. Trends and risks can be analyzed quickly by drilling-down to underlying data to determine an appropriate course of action, improving your business performance.



## TAILOR REPORTS TO MEET YOUR UNIQUE NEEDS

Access and analyze Vision data—from key financial metrics and engagement analysis, to opportunity tracking and resource utilization—tailoring each report to meet your specific needs. Vision’s reporting system includes more than 350 standard reports that range from simple to sophisticated. Whether you are preparing a basic report or an elaborate one, this flexible reporting model puts key information at your fingertips.

## EMPOWER USERS WITH FLEXIBLE, EASY-TO-USE REPORTS

Vision’s award-winning reporting system gives you an accurate, up-to-the-minute portrait of everything from an engagement’s status to the company’s overall performance. Firms of all sizes benefit from a wide variety of formatting options, and users can create effective and graphically-appealing reports. The flexible reporting framework makes it easy to configure, preview, print and e-mail reports. And with Vision’s extensive report drill-down capability, you can get to the details of underlying data quickly and easily.

Project Summary		Monday, July 13, 2009 11:14:10 AM			
Apple & Bartlett, PC		For the period 6/1/2005 - 6/30/2005			
		Current Hours	Current Billing	BID Hours	BID Billing
Project Number: 000001.00 General Overhead					
Phase Number: 000 Corporate Unassigned					
Labor		8.00		66.00	
Indirect Exp.			66,312.00		78,668.75
Total fee 000		8.00	66,312.00	66.00	78,668.75
Phase Number: 100 Boston Unassigned					
Indirect Exp.			925.00		925.00
Total fee 100			925.00		925.00
Phase Number: 1AR Boston Architectural					
Labor		10.00		43.00	1,128.00
Indirect Exp.			15,845.00		19,520.00
Total fee 1AR		10.00	15,845.00	43.00	20,648.00
Phase Number: 1EN Boston Engineering					
Labor				4.00	250.00
Indirect Exp.			18,218.00		18,218.00
Total fee 1EN			18,218.00	4.00	18,475.00
Phase Number: 1IN Boston Interiors					
Labor				7.00	512.00
Indirect Exp.					
Total fee 1IN				7.00	512.00
Phase Number: 200 San Francisco Unassigned					

Figure 6: Financial and Project Accounting Reports give insight into company-wide performance.

# DELTEK VISION: TECHNOLOGY THAT MAKES A DIFFERENCE

## ANYWHERE, ANYTIME ACCESS

Vision employs 100% browser-based technology, which makes it possible to access information from anywhere, anytime.

## MORE EFFICIENT SYSTEM MAINTENANCE

Other than a web browser, the computer that will be accessing Vision does not need any special software—no ActiveX® controls, plug-ins, applets or proprietary controls—and does not require set-up on individual workstations. Just install or update Vision software on your servers, and it is automatically available to all users.

## EXTEND VISION'S CAPABILITIES

The Deltek VisionXtend® platform gives you the power to develop real-time, transparent connections between Vision and other applications. Its feature-set:

- Allows you to access outside web services directly from the Vision user interface
- Implements data validation routines specific to your firm's needs
- Allows you to establish workflow features that keep key processes moving forward
- Delivers more personal, integrated experiences to users via the new breed of smart devices
- Synchronizes with Microsoft Outlook

Vision's leverages standard internet protocols, including XML and SOA, shared by otherwise diverse applications and devices.

## THE POWER OF WORKFLOWS

Think of the complexity of some of your company's business processes. Those that have numerous steps, require coordination between multiple departments or offices and span days, weeks or months. Each step of the way, the opportunity to make costly mistakes exists.

The Vision Workflow engine keeps processes on track, automates time-consuming manual tasks and keeps players informed and involved. The payoff is lower operational costs, greater agility and quicker response to your needs.









## RELY ON THE LEADING SOFTWARE SOLUTIONS FOR PROJECT-DRIVEN BUSINESSES

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Deltek (NASDAQ: PROJ) is the leading provider of enterprise applications software designed specifically for project-focused businesses. For more than two decades, our software applications have enabled organizations to automate mission-critical business processes around the engagement, execution and delivery of projects. More than 12,000 customers worldwide rely on Deltek to measure business results, optimize performance, streamline operations and win new business.



The Fitzgerald Group is a Deltek Partner and has the knowledge and experience to help you attain greater levels of profitability and success by maximizing the benefits of your Deltek Vision system. Just as importantly, we specialize in helping professional service organizations identify process improvements that positively impact both project and firm profitability. Our experienced consultants are not technicians, but rather professionals from a wide range of backgrounds, who know how to think creatively and understand how your business works.

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