

Deltek Vision[®]

Advanced Topics Beyond Standard Reporting

Turn Data into Knowledge, Streamline Processes and Master Reporting

PROGRESS FROM USER TO REPORTING EXPERT

- Automate key business processes
- Create custom reports tailored to specific business requirements
- Drive decisions faster with accurate, timely representations of business results
- Learn from home, office, or on the road with virtual, online courses
- Gain practical experience with hands-on activities

The implementation of an Enterprise Resource Planning (ERP) system such as Vision requires that users develop the skills necessary to successfully go-live with the new system. Often, these skills are limited to the tasks required for configuration, daily processing, and the running of standard reports. At Deltek, we encourage our customers to fully utilize all features of our products in order to derive the maximum benefit from their investment. To optimize the way your organization uses your project-based enterprise software, we have created a curriculum specifically for Vision advanced topics. Within this curriculum, the courses have been designed to deliver maximum Vision proficiency for both the implementation team and application user, resulting in increased productivity.

Courses will be delivered as live, instructor-led virtual classes in which you can participate from any location – your home, office, or on the road – simply through your Internet browser. To reinforce the learning, hands-on lab activities are offered to enable clients to work with the applications.

SUGGESTED VISION ADVANCED TOPICS:

- Vision Analysis Cubes (1/2 day)
- Vision Performance Management (1 day)
- Vision Workflow (1/2 day)
- Vision Designer (1/2 day)
- Vision Reporting with Report Builder (1 day)
- Vision Reporting with Report Designer (3 days)

TURN CRITICAL BUSINESS DATA INTO KNOWLEDGE

VISION ANALYSIS CUBES

In this course, participants will use Deltek Vision Analysis Cubes to report on project and general ledger data using Microsoft® Excel® 2007 workbooks. Business system users can effectively use Excel pivot table reports connected to their Vision data to quickly perform analyses and see trends in their business.

Contact Deltek

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Deltek (NASDAQ: PROJ) is the leading provider of enterprise applications software and solutions 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.

VISION PERFORMANCE MANAGEMENT

In this course, you will learn how to use the Deltek Vision Performance Management application to report on consolidated project and general ledger data using Performance Management Canvases – a business intelligence tool that executives and managers use to interact with critical project and general ledger data using a variety of graphical representations published as Web dashparts on their Vision dashboards.

STREAMLINE BUSINESS PROCESSES

VISION WORKFLOW

In this course, you will focus on how to set up Vision Workflow functionality to create events, establish selection criteria, and trigger actions to occur automatically. Workflow facilitates a more collaborative working environment by automating the flow of information among various users. This involves the validation of information, automatic generation of user-defined email, dashboard alerts, creation of calendar activities, and the alteration of data.

VISION DESIGNER

This course enables you to customize the business foundation of Vision as delivered with Microsoft® Smart Client technology features. It demonstrates how to access the tools to design forms that support business practices – screens, tabs, and fields. Participants will learn how to customize standard Info Center tabs and fields in working with the enhanced Navigation Tree and Screen Designer applications. This course also demonstrates how to create rollover and pop-up “help topics” for forms that document business processes.

MASTER BUSINESS REPORTING

VISION REPORTING WITH REPORT BUILDER

In this course, you'll learn how to create reports and publish them in Vision using the Vision Report Builder tool. With Report Builder's existing set of formats and templates, you can connect to report models to select the fields to report against. Knowledge of SQL databases is not required. Ad hoc reports can be created by selecting a report-layout template and dragging data fields to a report-design area. Report Builder supports commonly used reporting features, such as filtering, grouping, sorting, and the creation of formulas. It also features templates for creating table, matrix, and chart or graph type reports.

VISION REPORTING WITH REPORT DESIGNER

The intuitive Report Designer application is a comprehensive report-authoring development tool. In this course, you will learn how to build Report Designer projects, add new or existing reports to these projects, modify the reports in the Report Designer tool, run them against a Vision training database, import them back into Vision standard reporting, set up report options, apply security, and test them in the Vision report preview window. Report Designer supports the ability to modify all standard Vision report files (including customizing standard Vision invoice files) that Deltek has created and deployed in Vision.

Visit Deltek University's website or email us at deltekuniversity@deltek.com

To contact an education representative, please call 800.456.2009 x3