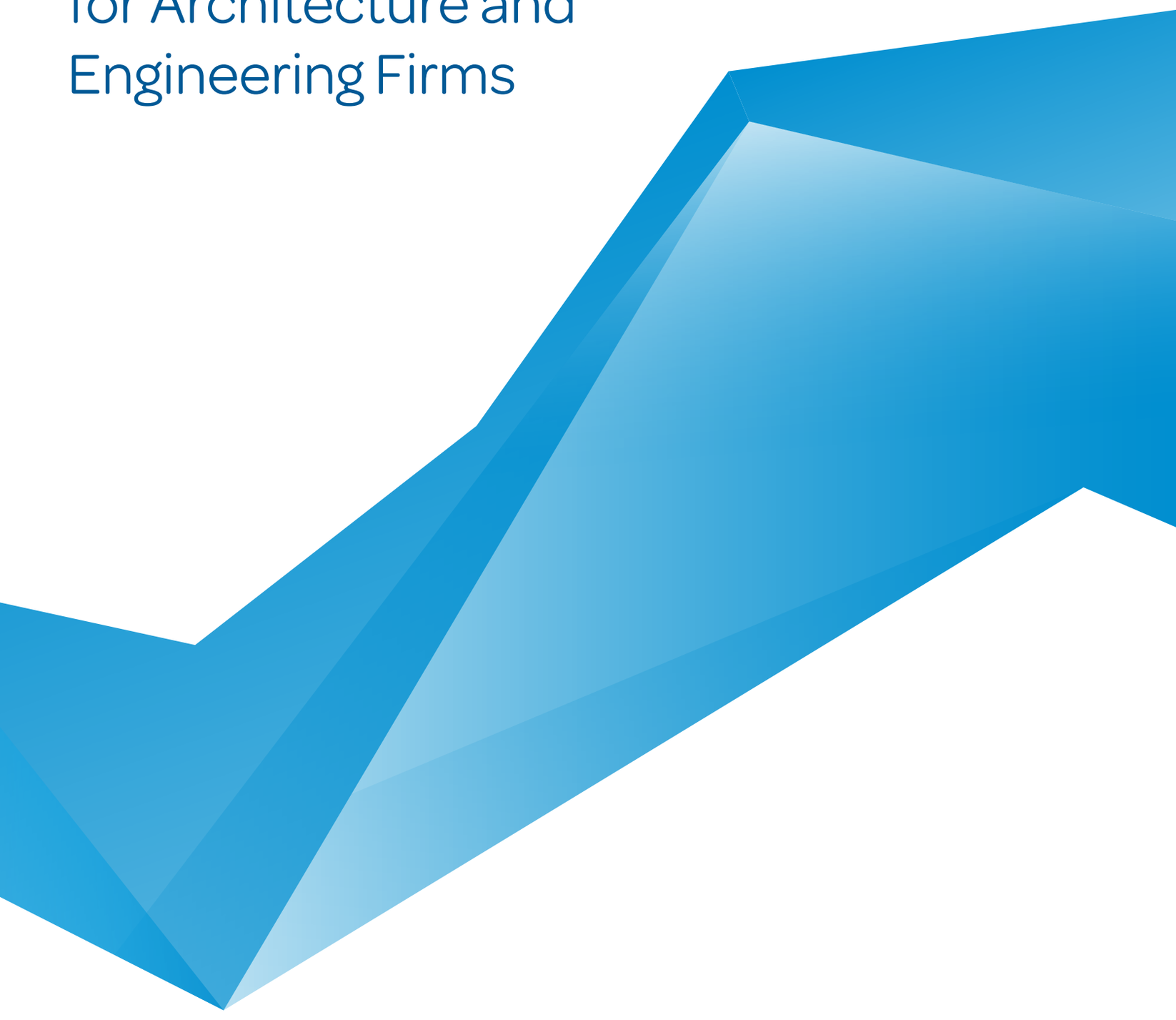
Professional Services

Deltek Know more. Do more.®

Deltek Vision

for Architecture and Engineering Firms



deltek.com/vision

A higher level of integration, collaboration and success

Managing the profitability of a project-based business requires instant visibility into your staff, clients and projects 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 project 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 projects and improve performance. Vision users commonly experience measurable benefits, such as improved employee utilization, streamlined project management and improved profitability.

Win More Business

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 a project
- Forecast projects accurately and manage future staffing requirements

Estimate service costs up front

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

Execute Projects

Free-up technical staff 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 projects, access past projects and collaborate with co-workers

Simplify account management

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

Plan and track projects from a resource perspective

- Easily view your current resource capacity against project 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 project bookings
- Share resources across multiple business units

Improve Performance

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 project 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 project

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-project 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

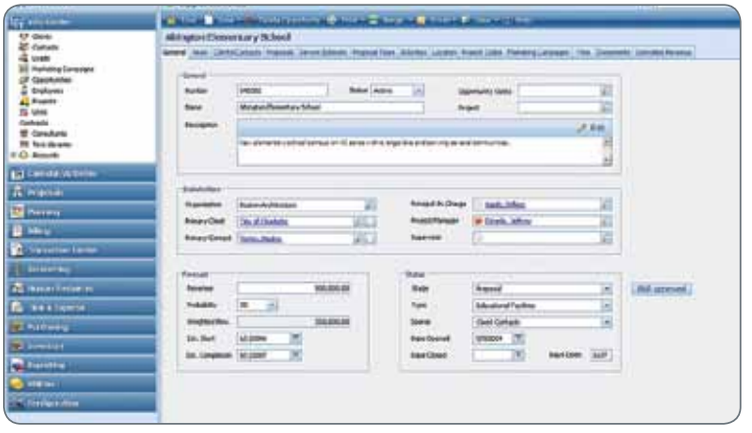
Achieve effective collaboration, no matter where your team members are located. Vision Document Management fosters information-sharing by providing a single, web-based document collaboration platform for your team to share. Within Vision, team members from around the world can upload, share, review and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

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 forms about their professional qualifications.

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.



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

Deliver profitable projects

"With Vision Resource Planning, we can easily examine and analyze how our resources are allocated for each project, by individual, group, business, unit, or service offering, and re-assign accordingly to maximize our productivity. I truly have not seen such intuitive integration between resource planning and project management in any other solution."

- Sebasta Blomberg

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.

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.

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.

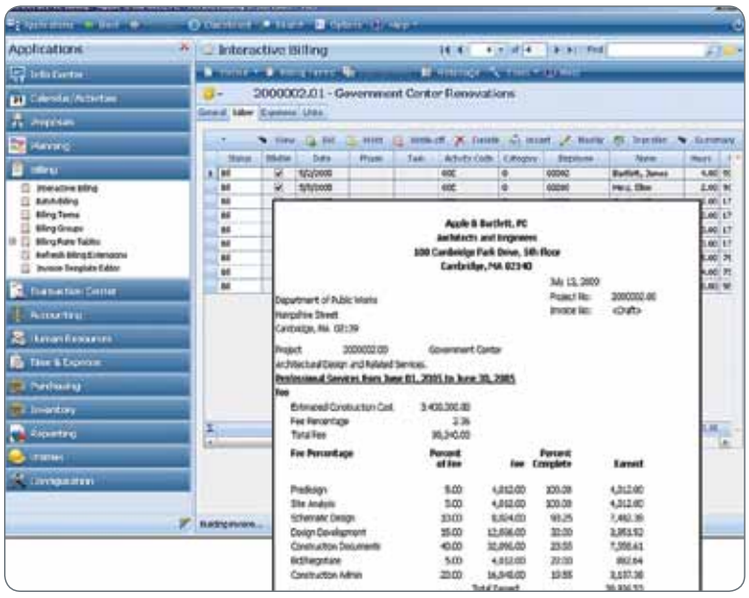
For Vision customers that also provide products, Vision Purchasing includes a feature set for managing inventory. It tracks inventory by location, calculates average product cost and automatically creates a purchase order when quantities reach a specified level. When an inventory item is sold, it automates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

"Making the move to Deltek Vision helped us look at things differently and to bring them back into a single, integrated database for our business."

– *Baxter and Woodman, Inc.*



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.

"Information is truly power and that's exactly what Vision brings to the table–with a high degree of flexibility, integration and complete transparency."

- Eppstein Uhen Architects

Maximize Utilization and Streamline Delivery Cycles

With Vision Resource Planning, you can combine past-project and future planning data to proactively manage the results of your projects. It will help your managers complete projects 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 project plan, providing your managers with up-to-the-minute detail to ensure everything stays on track.

Support for Multiple Currencies

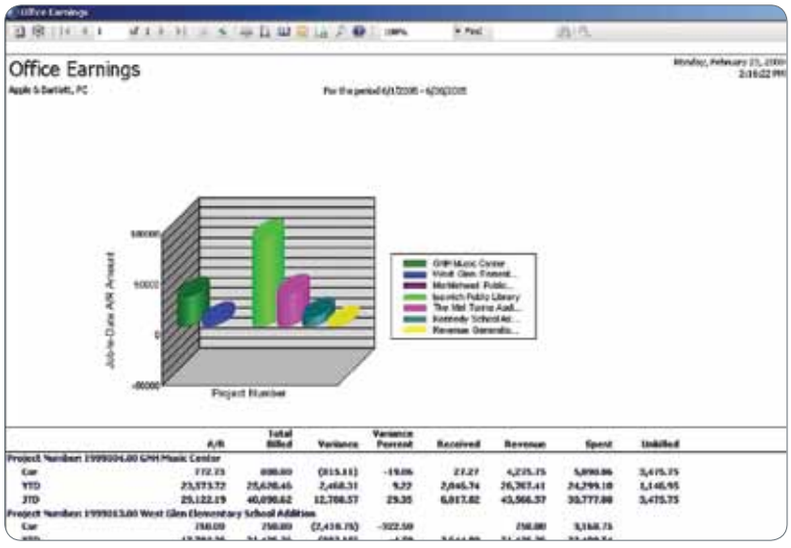
The Vision Multicurrency module allows you to complete business transactions in any number of global currencies, while maintaining core financial records in a single "functional currency." It is designed to meet the accounting, project control, planning, resource management and CRM needs of any enterprise 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 project 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 project and financial reporting. Vision Accounting is seamlessly integrated with all Vision modules, ensuring that costs are shared automatically, while maintaining a comprehensive audit trail.



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

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.

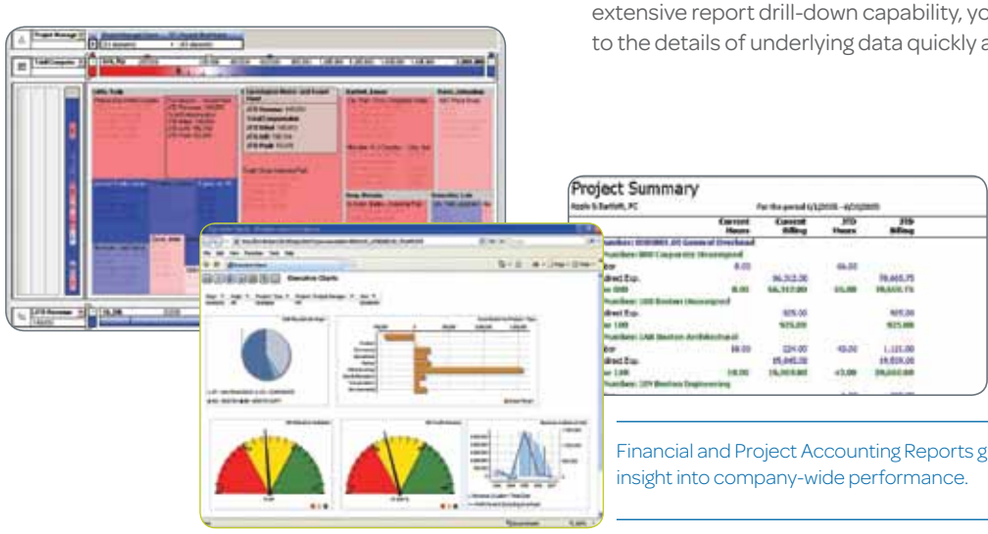
Through a combination of shapes and colors representing job-related metrics and risks, Vision Performance Management provides a single, interactive snapshot into the health of your agency. Trends and risks can be analyzed quickly by drilling-down to underlying data to determine an appropriate course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

Tailor Reports to Meet your Unique Needs

Access and analyze Vision data—from key financial metrics and project 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 a project'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.



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

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.

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.

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

Deltek (Nasdaq: PROJ) is the leading global provider of enterprise software and information solutions for professional services firms and government contractors. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. Over 14,500 organizations and 1.8 million users in approximately 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resources, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.® deltek.com

© 2011 Deltek, Inc. All rights reserved. All referenced trademarks are the property of their respective owners. 102411-v2

deltek.com/vision info@deltek.com +800.456.2009