

# Deltek INSIGHT > 2017

October 23-26 • Nashville, TN  
Gaylord Opryland Resort



## PRE-CONFERENCE WORKSHOPS

Monday, October 23

9:00 am – 12:00 pm

\*Add to your schedule during Insight registration!\*

PCW	Instructor	Title	Abstract
PCW-01	Will Armstrong	Make Your Investment Count: Leveraging the Deltek Learning Zone to Increase Product Adoption and User Fluency	You've dedicated significant budget and resources to rolling out your new Deltek solution. The goal is for increased efficiencies, productivity and process improvement... ultimately helping your organization achieve greater profitability. But how do you ensure your people are ready to make a high ROI your reality? How do you as an end user make certain you know how to get the most out of the Deltek system? Whether it's Ajera, Costpoint, DPS, Maconomy, Vision or one of our PPM solutions like Cobra or Acumen, or even one of our function-specific add-ons like Talent and PIM our Deltek Learning Zone has what you need to be ready and we'll cover it all in this dynamic interactive session.
PCW-02	Jose Morales	Manage Your Change FAST	In this session, you will be introduced to Deltek's proprietary model for managing organizational change. Built on proven principles of change management, supported by efficient tools, and tested in dozens of real world scenarios, Deltek's FAST methodology arms you to navigate the most challenging aspect of project success: the people. You will be introduced to the 4 phases of the fast methodology and share in scenarios from past Deltek projects. You will also be armed with a comprehensive toolset for implementing the FAST methodology and equipped with the knowledge of how to put them into practice to achieve the success you expect with your Deltek solution.

PCW-03	Val Higgins	Maximizing the Ajera Project Management Tools for YOUR Firm	This session is designed for firm leaders and those involved in project delivery at your firm that want to maximize Ajera's capabilities to increase project profitability. We'll cover tools necessary to execute projects successfully and to collaborate effectively with your team. Our Project Management consultants have over 50 years of combined industry experience to guide you in the most effective use of Ajera for project management implementation, delivery, and reporting. Bring your laptop; a cloud login will be provided for a sample database which will allow you to work along with the instructor.
PCW-04	Joanna McMurray	MPM/Cobra Migration and Consolidation	This session will cover the differences and similarities between MPM and Cobra and will also review how to migrate projects from MPM to Cobra.
PCW-05	Rich Hardin	Costpoint Enterprise Reporting (Cognos)	Need Data Analytics? See how leveraging the Cognos suite (Report Studio, Workspace, Work space Advanced, Active Reports, etc....) can improve performance for end users while offering a rich reporting experience with improved visualizations, drilling, and graphics. Discover the best practices of Cognos and see for yourself the power of the tool and the delivered CER offering. Unlock the power of building and sharing self-run reports, automated queries, and dashboards all at your fingertips.
PCW-06	Marilyn Hoare	Plan Your Company's Future: Career Development & Succession Planning	You work hard to attract the right talent to your organization. This session is designed to help to retain your top talent and keep them engaged as you plan for your company's future. Identify the potential gaps for key positions and learn how to develop and groom your talent to ensure those gaps are filled, thereby maximizing overall productivity.
PCW-07	Debbie Hofheimer	Costpoint: Reports, Processes, & Utilities. Oh My!	Learn about the Compare Labor History to General Ledger Comparison and Defer Unposted Transactions utilities, their purpose and function. Learn how to correctly read and understand your Revenue Worksheet and T&M Analysis Reports. You will learn tips and tricks of those unknown reports, processes and utilities to make the most of your Costpoint experience.
PCW-08	JC Barnhart	Usage and Best Practices: Vision	This workshop will be broken into two parts going in depth on using Data import and troubleshooting errors, followed by a session on creating simple workflows.

PCW-09	TBD	Vision: Information Center Approval System	This 3 hour workshop will cover using workflows, security, and info center designer to create an info center approval system. For example, when new vendor records are created you might want to make sure they are approved before they can be used. We can create a series of relatively simple workflows that could help create this. We'll go over how to create a process that users could then create on their own.
PCW-10	Diane Hanks	Costpoint: Understanding & Planning for T&E 10 Upgrade	Have you started planning for the next generation of Time & Expense, Time & Expense 10? If not or if you're just starting, join us for this workshop where you will learn about Time & Expense 10. Topics discussed will include overviews of functionality, deployment options, upgrade process, and the best practices related to end user training. Workshop will also include overview of what assistance Deltek services can provide via their various packaged services.
PWC-11	Teresa Bever, Mike Klaus, Melissa Coffey, Waymond Eng, Bret Tushaus, Ellen Keeley	It's Time to Migrate from Vision to Deltek for Professional Services - Prepare Now!	The Vision product has been evolving in recent years and, as you are more than likely already aware, is embarking on its next chapter under the solution name Deltek for Professional Services. The Deltek for Professional Services product will be familiar to Vision customers and will continue to meet the needs of Vision using organizations in new, more powerful and more streamlined ways. As a result, you will want to get your company ready to migrate from Vision to Deltek for Professional Services. Come to this pre-conference workshop to learn about the logistical side of the migration, learn about the current timelines, see the key functional highlights and hear about all the things you will want to understand and to do to prepare for your migration. We will talk about the technical side of the migration, provide highlights of the key functional difference, provide guidance on some pre-migration data cleansing that may be in order and provide education on the key topics you will want to socialize within your organizations. You will leave this pre-conference workshop with the comfort and knowledge level necessary to move forward and with excitement around the next generation of Vision and how it will be able to make your organizations better.

PCW-12	Dawn Gajewski, Caulene Henderson, Sarah Dickinson	Resource Planning Anytime, Anywhere - Next Generation Resource Planning in Deltek for Professional Services	<p>Deltek for Professional Services - Resource Planning allows project managers and resource managers to effectively manage resources and projects throughout the project lifecycle. Join us for this pre-conference workshop where will take a deep dive into the functionality of this powerful product. This session is appropriate for Vision, Costpoint and Deltek Resource Planning customers. We will show you how you can begin planning a project during the opportunity stage to ensure that you have the right staff available to execute the project and also make you aware of hiring needs. We will show you how you can do "what if" scenarios to determine the best mix of resources, set the schedule and determine fees in order to remain competitive but also profitable. We will walk you through how to create the project from that opportunity and determine which plan to use for the project and then continue managing the project and resources during execution.</p> <p>In addition, we will show how you can use charts, reports and alerts to ensure you are immediately aware of potential issues on your projects so that you can proactively respond. Those proactive responses may include changes to the project plan, swapping or adding resources and rescheduling phases and tasks. The making of these adjustments will also be covered during the workshop. Lastly, this workshop will demonstrate how Resource Managers will be able to evaluate capacity across all their employees and ensure that employees aren't over-booked and approaching burn out and that as a project nears the end, they are being considered for other projects that fit their skills and aspirations in order to eliminate down time and increase productivity. Attendees will leave this workshop with deep knowledge on how you can use Deltek for Professional Services Resource Planning to manage more and profit more.</p>
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