



Deltek Vision® User Manual

1 Introduction



Welcome to Deltek Vision, the Web-based software solution for professional services organizations. Vision combines our data into one integrated system and enables all the members of Caracle Creek to use and share the same information—thereby helping increase the efficiency and productivity of our business.

✓ User Manual Content

This notebook has training content for users of Deltek Vision 7.6 professional services accounting software designed and presented by role. You will be provided with only those components necessary for your role.

- Timesheet User
- Project Manager
- Accounting
- Senior Management
- Administrator

✓ If You Need Assistance

If you need assistance using Vision, Vision Help is a Web-based online documentation that is fully integrated with the Vision applications and provides both conceptual and procedural information for all areas of Vision.

Access Vision Help

You can access Vision Help in the following ways:

- From any Vision application, click Help on the Vision toolbar at the top of the Vision window.
- Click Help on the toolbar at the top of any Vision form to view help for that form.
- Click the Help button in the lower right corner of a dialog box to view help for that dialog box.

Alternatively you may contact Caracle Creek's Accounting Department, 1-705-671-1801, ext.301 and the Group Administrator will be more than happy to assist you.

2 Access & Dashboard



This section describes how to access Vision and how to configure and navigate through your Dashboard.

✓ Access to Vision

Deltek Vision is accessed through the web via 3 portals:

1. For use with Explorer <https://caraclecreek.deltekfirst.com/CaracleCreekClient/>
2. Alternative access using iAccess is available <https://caraclecreek.deltekfirst.com/CaracleCreek/iAccess/> (Functional with other browsers such as Firefox, Chrome)
3. Alternative access using Touch Time: <https://CaracleCreek.DELTEKFIRST.com/CaracleCreek/Time/> (Touch Time app available in Apple App Store and Google Play Store)

It is highly recommended that you save these links as a favorite in your browser.

At the prompt enter your User Name and Password. Your User Name is full first name followed by the initial of your last name, no space, for example Jane Doe would be JANED. Your username is not case sensitive. Note the software automatically converts it to capitals. The default password is caracle. You will be prompted to change your password the first time you log on. Should you forget your password you will have to contact the System Administrator to have it reset.

✓ Dashboard

After you have logged in you will find yourself at your own customizable Dashboard. The following is a Quick Reference Card of your Dashboard.

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