Connect for Microsoft Outlook Frequently Asked Questions

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Table of Contents

Background

What is Connect for Microsoft Outlook?

Connect for Microsoft Outlook is a module for Vision and GovWin CM that allows you to enter, maintain, and review key Customer Relationship Management (CRM) data from within Microsoft® Outlook® forms.

Does Connect for Microsoft Outlook replace Microsoft Office Desktop Integration (MODI)?

Connect for Microsoft Outlook has improved features for handling the email related activities currently performed by MODI, so there is no longer a need to use MODI with Microsoft Outlook. The Outlook portion of MODI is disabled when you install Connect for Microsoft Outlook. However, other components of MODI will still be available.

I am a Sync Server customer. Is Connect for Microsoft Outlook a replacement product for Sync Server?

Yes, Connect for Microsoft Outlook replaces Deltek Vision Synchronization Server, which entered sustaining support on October 31, 2010. Sustaining support is a period in which users continue to have access to all fixes and service packs that existed prior to the sustaining support date, but no new software enhancements, hot fixes, service packs, or regulatory updates are introduced.

Will customers need to buy licenses to use Connect for Microsoft Outlook?

Yes, you must purchase a minimum of 20 licenses to use Connect for Microsoft Outlook. The product is licensed in 12-month terms, which commence upon delivery of the product. Early termination will not release the licensee from an obligation to pay for the full term. The term license automatically renews for an additional 12-month period unless the licensee gives Deltek written notice of cancellation before the 12-month period ends.

Deployment and On-boarding

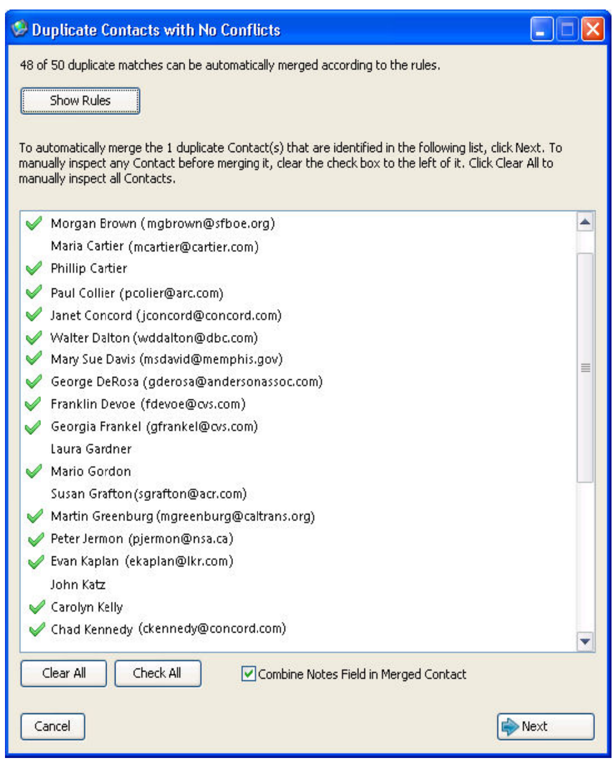
Is there a recommended methodology for deploying Connect for Microsoft Outlook?

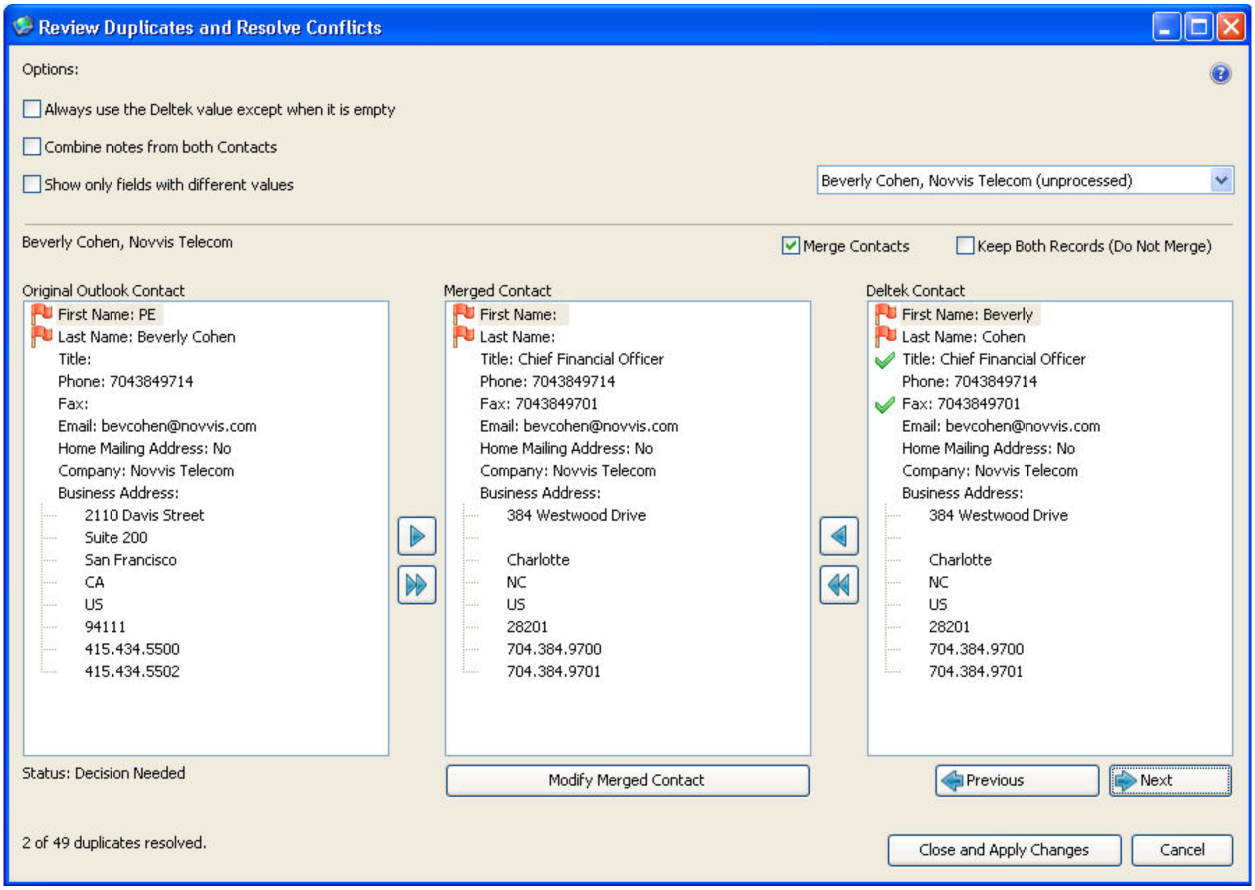
Your deployment methodology is an organization-specific decision in which your company's culture, technical knowledge, data integrity and user demographics need to be factored. However, experience with other Connect for Microsoft Outlook customers has demonstrated the benefits of starting with a subset of three to six users acting as early adopters. Experience with this early adopter group is used to verify that the software is working as intended, develop an orientation/on-boarding plan, assess the need to scrub data, and identify some organization-specific best practices for use of Connect for Microsoft Outlook. These early adopters then act as champions and change agents as Connect for Microsoft Outlook is deployed throughout the rest of the organization.

What is the best way to clean up the Outlook data belonging to potential Connect for Microsoft Outlook users before the data is synchronized with Vision or GovWin CM?

On-boarding users requires deliberate thought and consideration and is a key part of a successful Connect for Microsoft Outlook implementation. You should discuss this issue with your Deltek implementation consultant prior to implementation to arrive at the best on-boarding approach for your firm.

Vision and GovWin CM 6.2 or later versions of Connect for Microsoft Outlook provide you with— a *Compare and Merge Duplicates* tool to make the on-boarding process easier. This allows for a mass compare and merge of all contact records that pre-existed in a user's Outlook Contacts folder with all contact records that have been synchronized from Vision or GovWin CM. This tool employs logic to quickly and automatically merge duplicate contacts that meet the auto-merge rules. This tool also provides you with the ability to manually merge contacts. During this process, you pickthe values that will make up the merged contact (see the following screenshots). While you should still give the on-boarding process deliberate consideration, the *Compare and Merge Duplicates* tool can significantly streamline the deployment process.





Will this module require an installation on the end user workstation?

Yes, Connect for Microsoft Outlook requires an installation on the end user workstation, similar to the MODI plug-in. This installation is not incorporated into the main Smart Client installation. Client installations can be automated via Active Directory Group Policy or SMS.

The Connect for Microsoft Outlook Installation Guide provides more detailed information and instructions for the various ways to install the Connect for Microsoft Outlook client.

What training does Deltek offer?

Deltek offers a self-paced eLearning course about Connect for Microsoft Outlook. This series of self-directed, interactive, instructional sessions introduces the essential elements needed to work seamlessly with data shared between Connect for Microsoft Outlook and Deltek Vision or GovWin CM. Students review data synchronization between the applications, learn to resolve synchronization conflicts, and learn how to manage Deltek's vendors, clients, contacts and activities from within Outlook. This essential course for Connect for Outlook users features five eLearning modules, a review section to check understanding, and Frequently Asked Questions.

Services and Customization

What services does Deltek offer in relation to Connect for Microsoft Outlook?

Deltek's Global Services team can provide a number of consulting services to assist you with implementation, including help installing, configuring, and customizing the software, designing business rules, and ensuring data integrity. If you have questions about implementation and customization services, contact Deltek Global Services.

What about all my Vision or GovWin CM user-defined fields? Are those included on the forms in Connect for Microsoft Outlook?

As purchased, Connect for Microsoft Outlook does not recognize or display user-defined fields. We recommend a consulting engagement with Deltek Global Services or a certified Deltek partner to add these fields to your Connect for Microsoft Outlook forms.

Environment

Is Vision Connect for Microsoft Outlook supported in other languages?

Currently, Connect for Microsoft Outlook supports only US English and International English implementations of Vision.

Does an organization need to have CRM to use Connect for Microsoft Outlook?

No. However, if an organization does not have the CRM module activated, the non-CRM objects—opportunities and activities—are not accessible.Instead, only clients, contacts and vendors are accesssible. The same is true if an organization has a mixture of CRM and non-CRM users as a result of having CRM licensed on a named user basis. In this scenario, non-CRM users can still use Connect for Microsoft Outlook, but they will not have access to opportunities or activities.

Does Connect for Microsoft Outlook work with public folders in Outlook?

No, Connect for Microsoft Outlook does not work with public folders in Outlook.

Does Connect for Microsoft Outlook work in a disconnected state?

Yes, you can add and edit data when you are not connected to your network. The changes will be made to the Vision or GovWin CM database during the synchronization process the next time you connect to the network.

Does Connect for Microsoft Outlook work with Outlook Anywhere?

Outlook Anywhere® provides connectivity between Outlook and Exchange Server via the Internet, without the need for a direct or VPN connection to the corporate network. Connect for Microsoft Outlook is not reliant on the Outlook Anywhere connectivity model. As long as Connect for Microsoft Outlook has a connection to the Vision application server (either through the LAN, WAN, Internet, or VPN) it will function properly regardless of whether Outlook is connecting to an Exchange Server via a direct connection or through Outlook Anywhere.

Does Connect for Microsoft Outlook work with Outlook Web Access?

Outlook Web Access (OWA) can be used with Connect for Microsoft Outlook. However, OWA provides access only to native Outlook items and fields. The Connect for Microsoft Outlook-enabled items and fields (Clients, Opportunities, Activities, and so on) are not available through the OWA interface.

Are mobile devices supported?

Connect for Microsoft Outlook is not implemented to support any mobile devices. The native functionality available within Connect for Microsoft Outlook does not extend to mobile devices in any way. However, because Connect for Microsoft Outlook integrates and manages native Outlook contact data, contact data that is shared via Connect for Microsoft Outlook will synchronize (via ActiveSync or BES) to mobile devices in the same manner as native Outlook contact data. This means that contacts that synchronize from Vision or GovWin CM to Outlook via Connect for Microsoft Outlook can then synchronize to mobile devices. However, when this contact data is viewed on mobile devices, only native Outlook fields will be present. Deltek CRM-specific fields and grids will not be visible within these contact records on mobile devices. Please refer to the Connect for Microsoft Outlook Installation Guide for more information and for details on a specific iPhone related limitation.

Are there any known compatibility issues with other Outlook add-ins?

The following third-party Outlook add-ins are known to be incompatible with Connect for Microsoft Outlook. The Connect for Microsoft Outlook Installation Guide tells users how to check for and disable third-party add-ins.

- **Skype** — Outlook remains in memory after closing.
- **iTunes** — Outlook crashes.
- **Microsoft Outlook Connector** — Outlook fails when you switch languages.
- **Colligo** — Outlook crashes.
- **Adobe PDF** — You receive the error message "Outlook experienced a serious problem with the 'pdfmoutlook' add-in'" if using pre 8.0 versions of the Adobe PDF add-in.

- **Kaspersky Outlook Anti-Spam Addin** and **Kaspersky Outlook Anti-Virus Addin** — You receive an application error when you synchronize Connect for Microsoft Outlook if using pre-2012 versions of the Kaspersky add-in.

Usage and Functionality

Is there a way to share multiple contacts in Outlook, as opposed to clicking the Share with Deltek option one contact at a time?

Currently, you must click Share with Deltek for each contact. We explored the ability to mass share, but we ran into problems, most of them related to the inconsistent way in which users enter data into Outlook text fields. This capability will be re-visited in the next major version.

Is there "gatekeeper" functionality that creates an approval mechanism for controlling whether data can be added or changed via Connect for Microsoft Outlook?

There is no "gatekeeper" functionality within the Connect for Microsoft Outlook software that would enable an administrator to approve the addition or modification of data. However, Connect for Microsoft Outlook honors all role-based security settings from Vision or GovWin CM. Users will not be able to manipulate data via Connect for Microsoft Outlook in ways that conflict with their role security.

In addition, Connect for Microsoft Outlook honors both Vision or GovWin CM workflow functionality and audit reporting. Workflows can be created to monitor and send notifications when data is changed or added, and audit reporting can be used to track the history of record changes and additions. While workflows and audit reports are not a formal approval mechanism, they can be used to approximate gatekeeper functionality.

Are Leads part of Connect for Microsoft Outlook? If not, will they be in the future?

Leads are not a part of Connect for Microsoft Outlook. Unlike Contacts, Leads do not have a relationship with Clients, Opportunities, or Vendors. Therefore, there is no plan to add them to Connect for Microsoft Outlook.

Are users able to link Marketing Campaigns to Activities from Outlook?

No, users are not able to link Marketing Campaigns to Activities from Outlook.

How does Connect for Microsoft Outlook know which Contacts are mine in Vision or GovWin CM?

The typical way to associate contact and client records with a Vision/GovWin CM user is by using the Associations tab of the Contacts and Clients Info Centers to link one or more employee records. If Connect for Microsoft Outlook synchronization filters are configured to include a “Linked to Me” operator for contact and client records, those records then synchronize to Outlook.

Can Outlook delegates be used with Connect for Microsoft Outlook?

Microsoft Outlook delegates cannot be used with Connect for Microsoft Outlook in the same way in which they are used in native Outlook. Someone designated as a delegate for another user will not be able to access that user’s Connect for Microsoft Outlook-enabled data or functionality. Connect for Microsoft Outlook functionality applies only to the user and mailbox where the Connect for Microsoft Outlook client is installed.

Where are the basic rules for records that are to be shared and synchronized between Vision or GovWin CM and Connect for Microsoft Outlook? Do I have control over those rules?

Connect for Microsoft Outlook uses synchronization **filters** to share records between Vision or GovWin CM and Outlook. You configure the filters within the Connect for Microsoft Outlook Synchronization Control Panel on each user's workstation. Administrators or users can modify the filters. In addition, administrators can push out default for their organization as part of the client installation.

Can I synchronize all records from Vision or GovWin CM? Are there any limitations on the number of records?

Connect for Microsoft Outlook is designed to synchronize data related to your specific context. For example, you would use Connect for Microsoft Outlook to view and edit contacts with which you actually have a relationship.

For optimal performance, we recommend that you set your filters so that 5,000 or fewer total records will be synchronized to Connect for Microsoft Outlook. You cannot save your filters if more than 7,000 records match your filter.

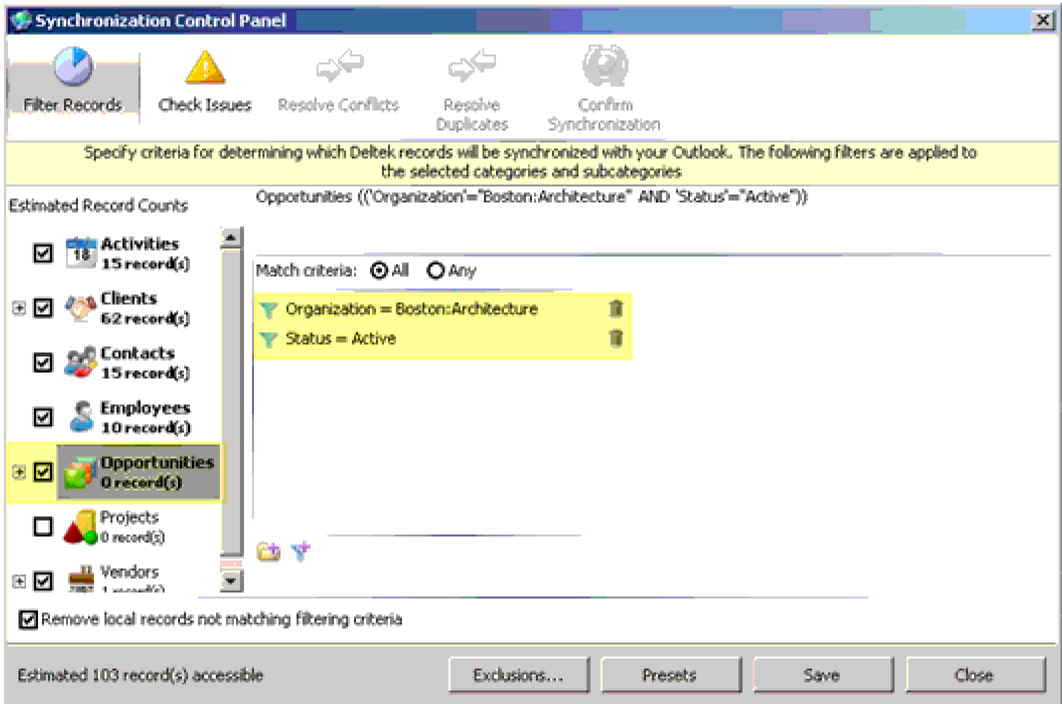
How do filters control the Vision or GovWin CM records that are synchronized to Connect for Microsoft Outlook?

You use the Connect for Microsoft Outlook Synchronization Control Panel to set up filters for each record type (activities, clients, contacts, opportunities, vendors, employees and projects) to be synchronized. These filters are similar to Vision and GovWin CM lookups. For each record type, you select filter criteria that controls which records synchronize to Connect for Microsoft Outlook.

For example, you could use the following selection criteria for opportunities:

`Organization =` *`Boston:Architecture`* `AND Status = Active`

The following screenshot shows how this filter looks in the Connect for Microsoft Outlook Synchronization Control Panel dialog box.



In this example, only opportunity records that meet this criteria will be synchronized to Connect for Microsoft Outlook. The selection criteria for the filters include the most commonly used fields from a record's info center.

In addition, Vision or GovWin CM records can be filtered based on a *Linked to Me* criteria. If you use this criteria as part of a filter, only records that are associated with the user for which Connect for Microsoft Outlook is configured will be synchronized to Outlook. The *Linked to Me* operator works as follows for the records within Connect for Microsoft Outlook:

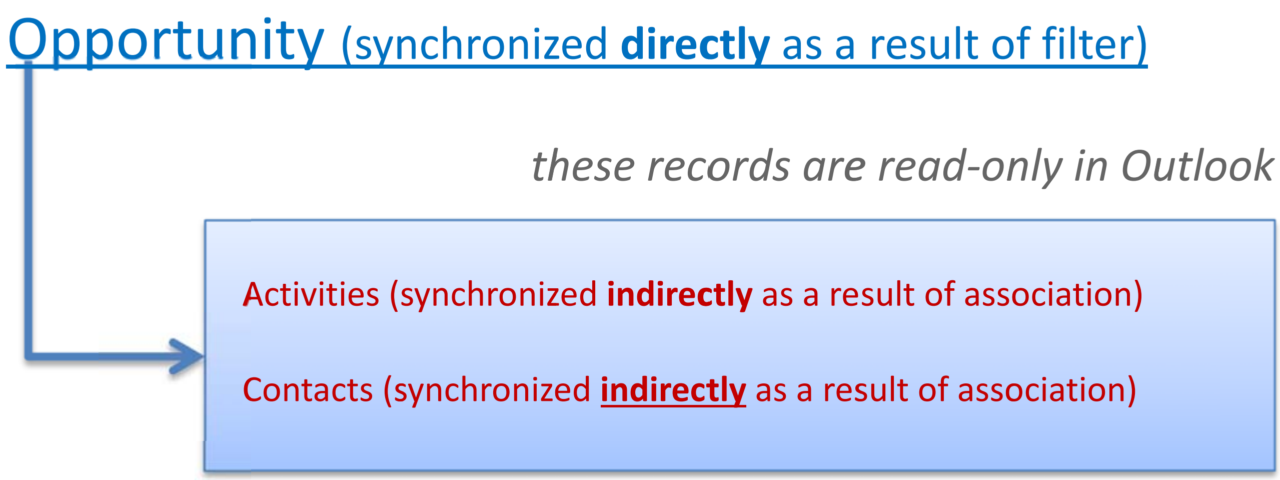
- **Activities** – The user is specified as the *Owner* of an activity.
- **Clients** – The user is associated with the client via the *Associations* tab of the Client Info Center.
- **Contacts** – The user is associated with the contact via the *Associations* tab of the Contact Info Center.
- **Opportunities** – The user is associated with the opportunity via the *Team* tab in the Opportunity Info Center, *or* the user is specified as the *Project Manager*, *Supervisor,* or *Principal in Charge* for the opportunity.
- **Employees** – The *Linked to Me* operator is not applicable for employees.
- **Projects** – The user is associated with the project via the *Team* tab in the Project Info Center, *or* the user is specified as the *Project Manager*, *Supervisor,* or *Principal in Charge* for the project.
- **Vendors** – The user is associated with the vendor via the *Associations* tab of the Vendor Info Center.

Will only the records that match the synchronization filters appear in Connect for Microsoft Outlook?

No. Vision and GovWin CM records are synchronized to Outlook under the following two conditions:

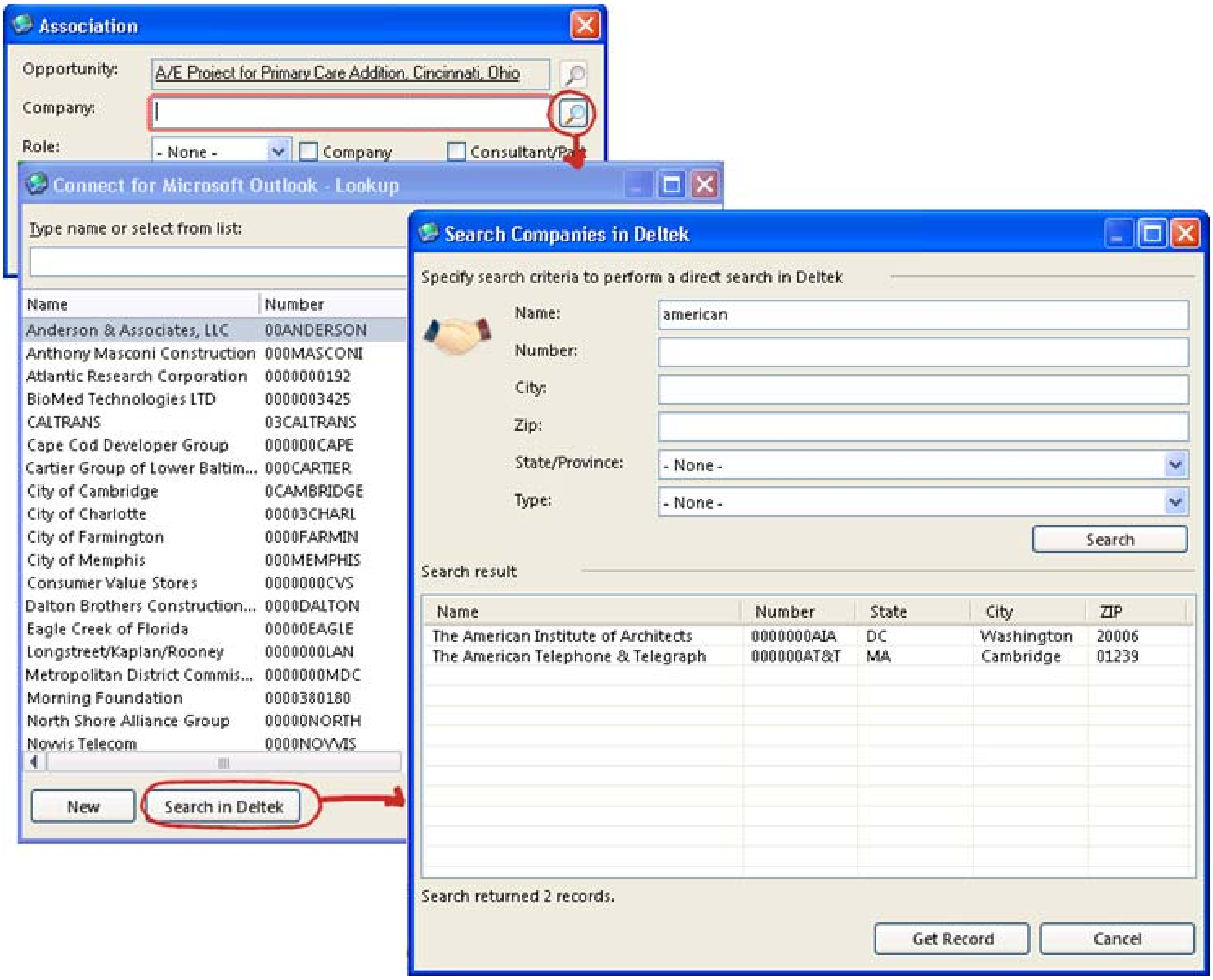
- The records that directly match the filters you create in the Connect for Microsoft Synchronization Control Panel (as described in the previous question) are synchronized. These records synchronize *directly*.
- Records are also synchronized to Connect for Microsoft Outlook if they are associated with a record that is being synchronized directly.

For example, you set up filters to synchronize a set of opportunity records. These opportunity records have contacts associated with them that are not being synchronized *directly* (the contacts do not match the contact filter criteria in the Connect for Microsoft Outlook Synchronization Control Panel). However, these contact records will be synchronized to Connect to Microsoft Outlook *indirectly* as a result of their association with the opportunities. These indirect records are marked as **incomplete** and **will** be read-only in Connect for Microsoft Outlook. In Connect for Microsoft Outlook, you can edit only records that are synchronized *directly*. The figure below graphically represents the concept of *direct* and *indirect* records.



In Connect for Microsoft Outlook, will I have access to Vision or GovWin CM records that are not synchronized to Outlook?

Yes. With Vision 6.2 or later, Connect for Microsoft Outlook includes a *Remote Lookup* feature that allows you to search directly in Vision or GovWin CM for a record. For example, if you are creating a new opportunity and would like to associate that opportunity with a client record that is not currently synchronized to Outlook, you can look up the client record directly in Vision from Outlook and associate it with the opportunity (see the following screenshots. That client record would then be indirectly available in Connect for Microsoft Outlook.



Do Vision or GovWin CM employees appear as contacts in Connect for Microsoft Outlook?

Employees do not appear in Connect for Microsoft Outlook as contact records. Employee records are synchronized as a part of Connect for Microsoft Outlook so that they are available to be associated with other Connect for Microsoft Outlook records (for example, as the project manager for an opportunity). The Employee records themselves are not fully exposed anywhere within Connect for Microsoft Outlook.

Can I disable parts of Connect for Microsoft Outlook?

Currently, you cannot disable any of the Vision or GovWin CM functionality within Connect for Microsoft Outlook. For example, if you do not use vendors and do not want the Vendor folder and vendor records to be visible in Connect for Microsoft Outlook, there is no option to disable or hide vendors. However, Vision and GovWin CM role security is always honored, so if users do not have access to a record within Vision or GovWin CM, they do not have access to that record in Connect for Microsoft Outlook. In addition, you can choose to uncheck objects in the Connect for Microsoft Outlook Synchronization Control Panel, so that no records for a certain record type (such as Vendors) are synchronized. The folder for a record type still appears in the Folder List of the Outlook Navigation Pane even if no records are synchronized.

Can personal contacts be maintained separately from the shared Vision or GovWin CM contacts in Connect for Microsoft Outlook?

Yes. When Connect for Microsoft Outlook is installed, contacts can be either native Outlook contacts or Deltek contacts. Native Outlook contacts act and look just like regular Outlook contacts and are completely ignored by Connect for Microsoft Outlook—these contacts will not be shared with Vision or GovWin CM and will be recognized only in Outlook.

After Connect for Microsoft Outlook is installed, these native contacts can be converted to Deltek contacts and shared with Vision or GovWin CM. If there is ever a need to unshare a contact and revert it back to a native Outlook contact, this can also be done through a simple conversion process within Connect for Microsoft Outlook.

How do we keep the integrity of our Vision or GovWin CM records intact, but still allow users to perform synchronization from Outlook?

The best way to ensure data integrity when using Connect for Microsoft Outlook is through the same security measures that your organization has put in place for general Vision and GovWin CM use.

Connect for Microsoft Outlook honors all role-based security defined in **Configuration » Security » Roles** and through the Info Center Screen Designer. For example, if a group of Deltek users does not have the security permission to add or edit Contact records in Vision or GovWin CM proper, they will not be able to add or edit Contact records using Connect for Microsoft Outlook.

When do field validations occur in the context of Connect for Microsoft Outlook?

Standard Vision or GovWin CM fields that are either required or have specific input requirements (numeric, limited length, etc.and so on) will have the same requirements in Connect for Microsoft Outlook forms. Validation occurs in real-time.

When user-defined fields are added to Connect for Microsoft Outlook forms by a Deltek consultant, the consultant can design the new fields to have the same validation functionality as standard fields.

If you have user-defined fields in Vision or GovWin CM but opt not to have a consultant add them to your Connect for Microsoft Outlook forms, these fields will not be validated. You may end up with records that contain no value for required fields. Assume, for example, that you have a required user-defined field in the Opportunities Info Center in Vision or GovWin CM, but you have not customized the Connect for Microsoft Outlook Opportunity form to include the field. If a user adds an Opportunity through Connect for Microsoft Outlook, the user will not be able to enter data for the user-defined field. When synchronization occurs, the Opportunity record will have an empty required field in Vision or GovWin CM. The user will need to enter data into the field via Vision or GovWin CM.

Do workflows still function when associated data is changed or added via Connect for Microsoft Outlook and, if so, when are the workflows triggered?

Workflows associated with data managed through Connect for Microsoft Outlook still function as they would in Vision or GovWin CM. The workflows are triggered during synchronization. Assume, for example, that your Vision or GovWin CM configuration includes a workflow that is triggered when a new Contact record is created. The workflow sends an email to an administrator, notifying the administrator of the new Contact. In this scenario, when a Contact is created via Connect for Microsoft Outlook, the workflow will not be triggered when the Contact is saved in Outlook, but instead will be triggered during the next Connect for Microsoft Outlook synchronization. The end user can control how frequently synchronization occurs.

If a Connect for Microsoft Outlook user never processes record conflicts, will the user run into a situation where Connect for Microsoft Outlook just stops synchronizing?

There is currently no logic in the Connect for Microsoft Outlook software that will prevent synchronization from continuing to occur if there is a threshold number of outstanding unresolved conflicts.