

Deltek Vision® Connect for Microsoft® Outlook 7.1

Customizing Configuration Settings for
Connect for Microsoft Outlook

June 27, 2013

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This edition published June 2013.

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Overview

A system administrator, IT staff, or a custom developer can use this guide to create preset configurations for Deltek Vision Connect for Microsoft Outlook. Presets are a component of the Connect for Microsoft Outlook customization package that you can use to pre-configure various settings and behaviors of Connect for Microsoft Outlook.

This guide provides instructions on how to create presets to:

- Control how native (pre-existing) Microsoft Outlook contacts are handled when users open Microsoft Outlook after installing Deltek Connect for Microsoft Outlook for the first time. This applies to the contact conversion process that converts Outlook contacts to display on the Deltek Contact form when users run the Connect for Microsoft Outlook First Run Assistant (FRA) wizard.
- Change the notification behavior when synchronization issues, update conflicts, and duplicate-record conflicts are found during synchronization.
- Implement default and custom synchronization filters for Connect for Microsoft Outlook users. These filters control which Vision records are downloaded to Connect for Microsoft Outlook during synchronization. With pre-defined filters, users can avoid the task of building correct filters from scratch in the Connect for Microsoft Outlook Control Panel.




Deltek's Global Services team can also provide you with presets as a consulting service.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it [here](#) free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at the far right.
2. In the **Annotations** pane that displays, click  **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.



Deltek recommends that you save the document to a slightly different filename so as to keep the original file from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

Configure Default Behavior for Converting Microsoft Outlook Contacts

Overview

This information applies for Connect for Microsoft Outlook version 1.1.29.0 and later.



For more information on how to locate the Connect for Microsoft Outlook version number, see "Appendix A: Connect for Microsoft Outlook Version Number."

You can create preset configurations to control how users' native (pre-existing) Microsoft Outlook contacts are handled when Microsoft Outlook is opened for the first time after Deltek Connect for Microsoft Outlook is installed.

After Connect for Microsoft Outlook is installed on users' workstations, when they open Microsoft Outlook for the first time, the Connect for Microsoft Outlook First Run Assistant (FRA) wizard guides them through the process of configuring Connect for Microsoft Outlook. At the end of the wizard, users choose whether or not to convert their native Outlook contacts to display on the Deltek Contact form. If Outlook contacts are not converted, they display on the native Outlook Contact form in Connect for Microsoft.



For more information about the consequences of selecting **Yes** or **No** on the Confirm Outlook Contact Conversion dialog box, see the "Deploy and Configure Connect for Microsoft Outlook on a Workstation" section in the Deltek Vision Connect for Microsoft Outlook Installation Guide. You can download this guide from the [Deltek Customer Care Connect site](#).

The **Yes** button on the Confirm Outlook Contact Conversion dialog box is highlighted by default. Users can select **Yes** or **No**.

As a system administrator, you can enter preset configuration settings to change the default so that the **No** button is highlighted by default. You can also suppress the Confirm Outlook Contact Conversion dialog box so it does not display in the FRA wizard. When you suppress the dialog box, you also choose whether or not to have the contacts converted automatically without the dialog box.

You define the presets that control the Confirm Outlook Contact Conversion dialog box in the **platform_configuration.xml** file on your Vision Web server.

When preset configurations are applied as part of the package during the FRA wizard, contact conversion preset settings are stored in the registry on a user's workstation in HKCU\Software\Deltek\Connect for Microsoft Outlook\.

Implementation Steps

You must make changes to the contact conversion settings for the FRA wizard before users deploy Connect for Microsoft Outlook because the contact conversion process occurs only when users first launch Outlook after installing Connect for Microsoft Outlook or when users change their Deltek database connections.

To change the contact conversion setting to highlight the No button as the default or to remove the Confirm Outlook Contact Conversion dialog box completely from the FRA wizard, complete the following steps:

1. Use an XML Editor (recommended) or Microsoft® Notepad to open the platform_configuration.xml file that is on the Vision Web server.
The file is located in <InstallDir>\Deltek\Vision\Web\Packages\Default Files.
2. Navigate to the text between the <platform> and </platform> tags within the file.
3. Use the following information to create a <initialization_script> and </initialization_script> subtag if it does not already exist within the <platform> tags, or revise the content in the existing <initialization_script> subtag.

Supported Settings for the <initialization_script> Tag	FRA Wizard Behavior
"FRA:SuppressConvertItemsMsgBox",x	<p>This controls whether or not the Confirm Outlook Contact Conversion dialog box displays in the FRA wizard.</p> <ul style="list-style-type: none"> ▪ If x = 0, the dialog box displays. ▪ If x = 1, the dialog box is suppressed and does not display.
"FRA:ConvertItemsMsgBoxDefaultNo",x	<p>This controls whether the Yes or No button on the Confirm Outlook Contact Conversion dialog box is highlighted by default.</p> <ul style="list-style-type: none"> ▪ If x = 0, the Yes button is highlighted by default. ▪ If x = 1, the No button is highlighted by default.



You must include both the "FRA:SuppressConvertItemsMsgBox" and the "FRA:ConvertItemsMsgBoxDefaultNo" settings between the <initialization_script> and </initialization_script> tags. If you do not include both settings, you may experience unexpected results.

Examples

The following examples show the <initialization_script> subtags entries and FRA Wizard behavior:

Scenario 1:

This matches the default behavior of the Connect for Microsoft Outlook FRA wizard after a new Connect for Microsoft Outlook installation (The Confirm Outlook Contact Conversion dialog box displays in the FRA wizard. The Yes button is highlighted by default.)

<initialization_script> Subtag:

```
<initialization_script>
  <![CDATA[
    application.settings.set("FRA:SuppressConvertItemsMsgBox",0);
    application.settings.set("FRA:ConvertItemsMsgBoxDefaultNo",0);
  ]]>
</initialization_script>
```

Scenario 2:

The Confirm Outlook Contact Conversion dialog box displays in the FRA. The No button is highlighted by default.

<initialization_script> Subtag:

```
<initialization_script>
  <![CDATA[
    application.settings.set("FRA:SuppressConvertItemsMsgBox",0);
    application.settings.set("FRA:ConvertItemsMsgBoxDefaultNo",1);
  ]]>
</initialization_script>
```

Scenario 3:

The Confirm Outlook Contact Conversion dialog box does not display at all in the FRA. However, native Outlook contacts will be converted automatically to display on the Deltek Contact form.

<initialization_script> Subtag:

```
<initialization_script>
<![CDATA[
application.settings.set("FRA:SuppressConvertItemsMsgBox",1);
application.settings.set("FRA:ConvertItemsMsgBoxDefaultNo",0);
]]>
</initialization_script>
```

Scenario 4:

The Confirm Outlook Contact Conversion dialog box does not display at all in the FRA. Native Outlook contacts are not converted to display on the Deltek Contact form.

<initialization_script> Subtag:

```
<initialization_script>
<![CDATA[
application.settings.set("FRA:SuppressConvertItemsMsgBox",1);
application.settings.set("FRA:ConvertItemsMsgBoxDefaultNo",1);
]]>
</initialization_script>
```

4. After you finish adding the initialization script settings, save the file.

Configure Notification for Synchronization Conflicts

Overview

This information applies for Connect for Microsoft Outlook version 1.2.0.1 and later.



For more information on how to locate the Connect for Microsoft Outlook version number, see the "Appendix A: Connect for Microsoft Outlook Version Number" section.

By default, Connect for Microsoft Outlook automatically displays the Synchronization Control Panel when a synchronization issue, update conflict (the same record is updated independently in both Outlook and Vision), or duplicate-record conflict occurs. Then you immediately review the synchronization issue or resolve the conflict. If displaying the Synchronization Control Panel is too disruptive, you can change the default so that users receive a balloon pop-up on the Windows taskbar instead.

You can also choose to hide all synchronization issues from users. When you hide them, users will not receive warning and error messages during the synchronization process. The Synchronization Control Panel or balloon pop-up on the taskbar does not display.

Change the Notification Behavior for Synchronization Conflicts

To change the behavior of the Synchronization Control Panel when synchronization issues, update conflicts, and duplicate-record conflicts are found, complete the following steps:

1. Use an XML Editor (recommended) or Microsoft® Notepad to open the platform_configuration.xml file that is on the Vision Web server.
The file is located in <InstallDir>\Deltek\Vision\Web\Packages\Default Files.
2. Navigate to the text between the <platform> and </platform> tags in the file.
3. Create <initialization_script> and </initialization_script> subtags if they do not already exist within the <platform> tags. Or, revise the content in the existing <initialization_script> subtags with the following parameters:

Supported Settings for the <Initialization script> Tag	Synchronization Control Panel Behavior
"SuppressSyncIssues", x	<p>This controls whether or not synchronization issues are displayed in the Synchronization Control Panel when they occur.</p> <ul style="list-style-type: none"> ▪ If x = 0, synchronization issues are always displayed in the Synchronization Control Panel. ▪ If x = 1, synchronization issues are never displayed in the Synchronization Control Panel.

Supported Settings for the <Initialization script> Tag	Synchronization Control Panel Behavior
"ForceControlPanelOnConflicts", x	<p>This controls whether or not the Synchronization Control Panel is displayed automatically when duplicate-record conflicts or update conflicts occur during synchronization.</p> <ul style="list-style-type: none"> ▪ If x = 0, users will receive a balloon pop-up notification in the Windows taskbar. The Synchronization Control Panel must be opened manually to resolve conflicts. ▪ If x = 1, the Synchronization Control Panel will display automatically for users when a conflict occurs.
"ForceControlPanelOnIssues", x	<p>This controls whether or not the Synchronization Control Panel is displayed automatically when synchronization issues are found during synchronization.</p> <ul style="list-style-type: none"> ▪ If x = 0, users will receive a balloon pop-up notification in the Windows taskbar. The Synchronization Control Panel must be opened manually to review synchronization issues. ▪ If x = 1, the Synchronization Control Panel will display automatically for users when a synchronization issue occurs. <p>If synchronization issues are suppressed, the Synchronization Control Panel will not display automatically when an issue occurs.</p>

Examples

The following examples show the <initialization_script> subtags entries and the Synchronization Control Panel behavior:

Scenario 1

Default behavior of the Synchronization Control Panel for Connect for Microsoft Outlook:

Synchronization issues are not suppressed.

The Synchronization Control Panel displays automatically when an update or duplicate conflict is found during synchronization.

<initialization_script> Subtag:

```
<initialization_script>
  <![CDATA[
    application.settings.set("SuppressSyncIssues", 0);
    application.settings.set("ForceControlPanelOnConflicts", 1);
    application.settings.set("ForceControlPanelOnIssues", 1);
  ]]>
</initialization_script>
```

Scenario 2

Users receive balloon pop-up notifications when synchronization issues, update conflicts, and duplicate-record conflicts occur. Users must manually open the Synchronization Control Panel to view synchronization issues and resolve the conflicts.

<initialization_script> Subtag:

```
<initialization_script>
  <![CDATA[
    application.settings.set("SuppressSyncIssues", 0);
    application.settings.set("ForceControlPanelOnConflicts", 0);
    application.settings.set("ForceControlPanelOnIssues", 0);
  ]]>
</initialization_script>
```

Scenario 3

Users receive balloon pop-up notification when update conflicts and duplicate-record conflicts occur, and synchronization issues are suppressed. Users must manually open the Synchronization Control Panel to resolve conflicts. Users do not see any synchronization issues in the Synchronization Control Panel.

<initialization_script> Subtag:

```
<initialization_script>
  <![CDATA[
    application.settings.set("SuppressSyncIssues", 1);
    application.settings.set("ForceControlPanelOnConflicts", 0);
    application.settings.set("ForceControlPanelOnIssues", 0);
  ]]>
</initialization_script>
```

Configure Default and Custom Synchronization Filters for the Connect for Microsoft Outlook Control Panel

Overview

You can set up pre-defined synchronization filters for the Connect for Microsoft Outlook Control Panel. This allows users to avoid the complex task of building the correct filters from scratch. These filters control which Vision records are downloaded to Connect for Microsoft Outlook during synchronization.

The Connect for Microsoft Outlook Control Panel filter presets are defined in the **connector_configuration.xml** file on your Vision Web server.

During the Connect for Microsoft Outlook installation, or when a new customization package is applied, the first preset defined in the package is activated by default. This allows you to start the synchronization process with realistic filters that narrow your data set so you are not synchronizing the whole Vision database.

Experienced users can customize any synchronization filters by adding, modifying, or removing criteria in the Connect for Microsoft Outlook Control Panel. However, the presets themselves cannot be modified by end users. A system administrator can modify presets and publish a customization package with new presets as needed.

The synchronization engine requires that every type, down to the child object (such as Client Alias) or association, be assigned a specific restriction to retrieve objects. In most cases the restriction for children types can be derived from restrictions for parent types at the time the preset is applied. As a result, a partial preset definition is allowed for some types.

Type Hierarchy and Required Types

The preset structure and the set of required types depend on the type hierarchy defined by the connector, which also controls how types are presented in the Control Panel and which fields are available for filtering, and so on. Any changes to your data model may require updates to the presets to support the new model.

The currently implemented type hierarchy is outlined below.



This tree representation is the same as the one that appears on the Control Panel— with the types in brackets hidden.

Types displayed in **Bold** in this list:

- Have visual representation on the Control Panel.
- Require that a preset restriction be defined.

Types displayed in [square brackets] in this list:

- Do not have visual representation on the Control Panel.
- Do not require that a preset restriction be defined because it can be generated from the parent type.

- **Activity**
 - [ContactActivity]
 - [EMActivity]
- **Client**
 - [CLAddress]
 - [ClientFileLinks]
 - [ClientAlias]
 - **Activity**
 - [EMClientAssoc]
 - [OpportunityClientAssoc]
 - [PRClientAssoc]
 - **Contacts**
- **Contacts**
 - [CLAddress]
 - [VEAddress]
 - [ContactFileLinks]
 - [EMContactsAssoc]
 - [OpportunityContactAssoc]
 - [PRContactAssoc]
 - [ContactActivity]
- **Opportunity**
 - [OpportunityClientAssoc]
 - [OpportunityContactAssoc]
 - [OpportunityEMAssoc]
 - [OpportunityFileLinks]
 - [OpportunityVEAssoc]
 - **Activity**
- **Vendor**
 - [VEAddress]
 - [VEFileLinks]
 - [VendorAlias]
 - [VEProjectAssoc]
 - [OpportunityVEAssoc]
 - **Contacts**
- **Employee**
- **Project**

Composing Restrictions from the Hierarchy

When you save changes on the Connect for Microsoft Outlook Control Panel, a special process combines restrictions for the same type set on different levels into a complex restriction (one per type).

For example in the tree presented in the previous section, type **Activity** exists on the top level and also under **Clients** and **Opportunities**. As a result, the restriction for type **Activity** will contain three components combined by **OR**, as follows:

Final Restriction (Activity) = **Restriction** (Activity top level) OR **Restriction** (Activity for matched Clients) OR **Restriction** (Activity for matched Opportunities).

The latter two components of this restriction are examples of Foreign Key restrictions, which are defined later in this document.

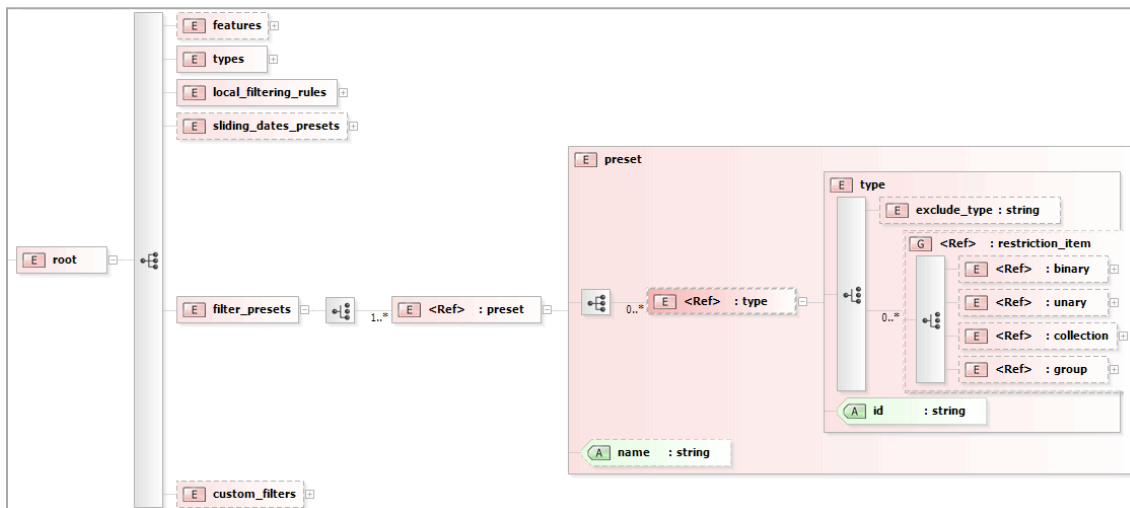
These rules should be followed when you define presets so that the Control Panel can parse presets correctly. Using a restriction processing code that generates child restrictions from parent types significantly simplifies this task because there is no need to take any action for non-visual types. However, the hierarchical display of visual types requires a higher level of attention to ensure the correct representation of the restriction in XML.

Preset Definition

Presets are defined manually in XML. Each XML file in the customization package has XSD schema defined, which allows the XML files to be validated against XSD.

Preset XML Format

Presets are defined under the **<filter_presets>** tag that is located under the document root of the **connector_configuration.xml** file.



- The tag **<filter_presets>** is a container for the set of **<preset>** tags defined.
- Each **<preset>** has a name (shown to user) and a collection of **<type>** tags.
- Each **<type>** has an ID (internal) and either a sub tag **<exclude_type>** (indicating that the type should not be checked on the Control Panel) or a definition of the restriction for that type.

- If a particular type is not provided, all records of this type will be retrieved during synchronization.

Sample XML

The following sample XML defines a preset named **Test filters** that contains two restrictions—an explicit no match for Opportunity and a restriction for Action.

```
<root>
...
  <filter_presets>
    <preset name="Test filters">
      <type id="Opportunity">
        <exclude_type/>
      </type>
      <type id="Action">
    ...
      </type>
    </preset>
  </filter_presets>
  ...
</root>
```

Restriction XML Format

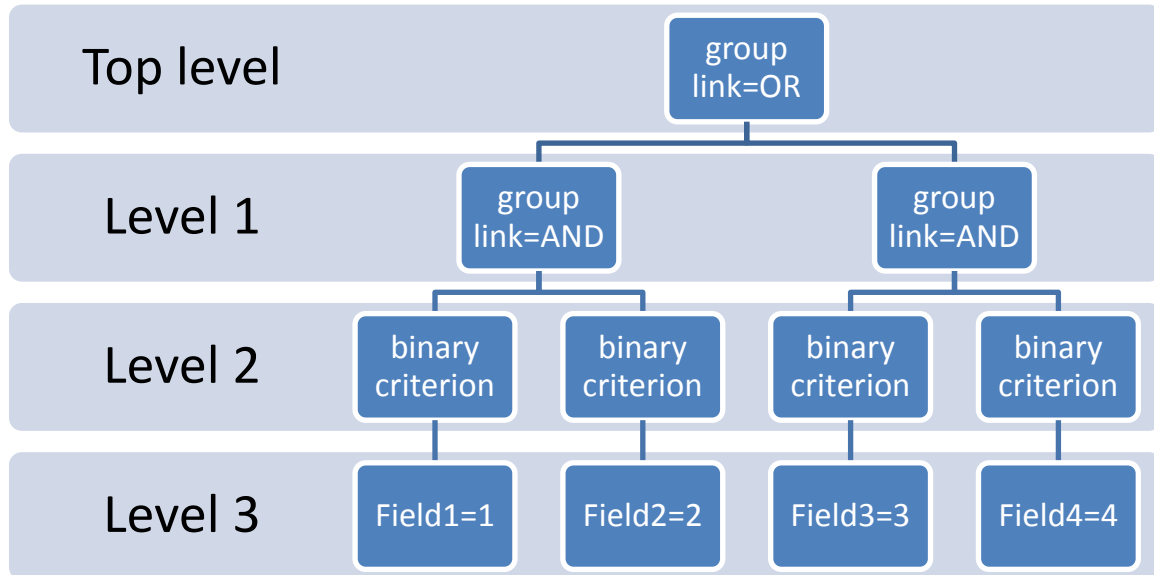
Restriction is defined as a hierarchical tree of groups and criterions. Nodes from the same level can be linked either by **AND** or by **OR**. Some nodes may have children nodes.

The following types of nodes are available:

- **Group** — Group can contain any other node including group itself.
- **Binary** — Binary criterion contains reference to field, to value, and to comparison operation.
- **Unary** — Unary criterion contains reference to field and comparison operation.
- **Collection** — Foreign key criterion defines linkage between two entities.

This model allows representing any restriction as a tree.

For example, restriction **((Field1=1 AND Field2=2) OR (Field3=3 AND Field4=4))** would appear as follows in a tree format:

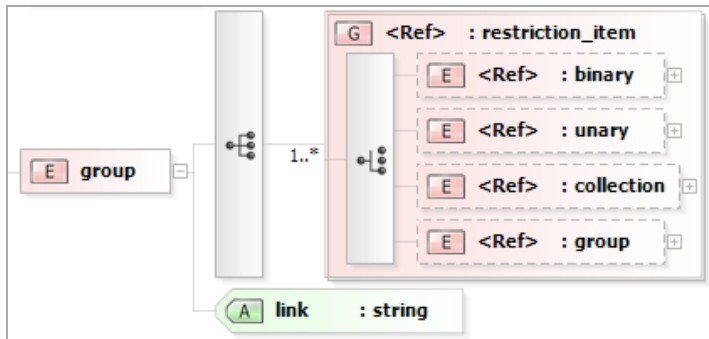


This tree structure is encoded to XML as:

```
<root>
...
  <type id="Opportunity">
    <group link="or">
      <group link="and">
        <binary field="Field1" condition="eq">
          <value type="integer">1</value>
        </binary>
        <binary field="Field2" condition="eq">
          <value type="integer">2</value>
        </binary>
      </group>
      <group link="and">
        <binary field="Field3" condition="eq">
          <value type="integer">3</value>
        </binary>
        <binary field="Field4" condition="eq">
          <value type="integer">4</value>
        </binary>
      </group>
    </group>
  </type>
...
</root>
```

The <group> Tag and Nesting

The <group> tag allows you to define a group of nodes that are linked by either **AND** or **OR**. Nested groups are possible.



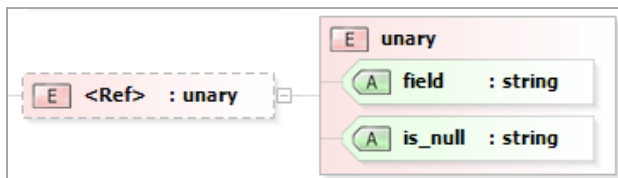
```
<group link="and">
  <group link="or">
    . . .
  </group>
</group>
```

Allowed values for **link** attribute are:

- AND
- OR

The <unary> Criterion

The <unary> tag allows you to define unary criterion that is comprised of field names and operations. For unary restriction, only **IS NULL** and **IS NOT NULL** operations are supported.



```
<group link="and">
  <unary field="Field5" is_null="true"></unary>
  <unary field="Field6" is_null="0"></unary>
</group>
```

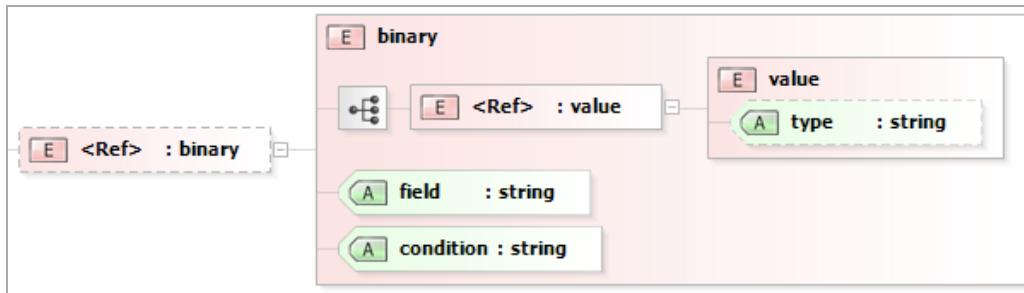
The above example can be translated as: **Field5 IS NULL AND Field6 IS NOT NULL.**

The allowed values for the **is_null** attribute are:

- 0
- 1
- true
- false

The <binary> Criterion

The <binary> tag allows you to define binary criterion that is comprised of field names, values, and operations (conditions).



```
<binary field="Field6" condition="eq">
  <value type="integer">6</value>
</binary>
```

The following set of conditions is supported:

- lt — less than
- gt — greater than
- le — less or equal
- ge — greater or equal
- eq — equal
- ne — non-equal
- like — SQL LIKE analogue
- in — one of the listed

The value is stored in a separate <value> tag. Values may have one of the following types:

- string
- integer
- bool
- double
- datetime
- array
- binary
- function

Type **array** indicates that the **<value>** tag may contain children **<value>** tags that describe array elements:

```
<binary field="Status" condition="in">
  <value type="array">
    <value type="string">Accepted</value>
    <value type="string">Pending</value>
    <value type="string">Rejected</value>
    <value type="string">Rerouted</value>
  </value>
</binary>
```

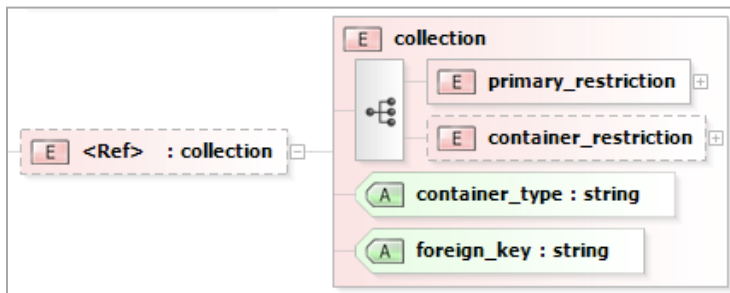
The **function** type allows special function output to be embedded as values of the binary criterion. This function is evaluated at the time the preset is applied and the result of the function is stored in the restriction. The only function available is **today** (which returns the current date).

The following snippet will be actualized so that the restriction derived from this preset will compare **Planned** against the date when the preset was applied, and only newer records will get selected.

```
<binary field="Planned" condition="ge">
  <value type="function">today</value>
</binary>
```

Foreign Key Restriction

Foreign key restriction provides a way to limit records by leaving only records which are children to selected parent types.



This is achieved by creating this restriction from two restrictions. One restriction is set for parent type (container_restriction); another is set on the type being restricted (primary_restriction). Both restrictions are located under the **<collection>** tag. A record matches the restriction only if the record matches the primary restriction and the specified record parent matches the container restriction.

The **<collection>** tag specifies the target parent type (**Account** in the example below), and the field holding the foreign key in a children object pointing to a parent object (**AccountId** in the example below).

```
<collection container_type="Account" foreign_key="AccountId">
  <primary_restriction>
    <group link="and">
      </group>
    </primary_restriction>
    <container_restriction>
      <group link="and">
        </group>
      </container_restriction>
    </collection>
```

Foreign key restriction is an effective way of representing hierarchy relationships in which only children under selected parents need to be selected. This way, the container restriction is set to limit parents as needed, and primary restriction can further limit objects being retrieved.

For hidden types, primary restriction is always set to **return all values**, which means all children of matched parents will be retrieved. For non-hidden types, you can further limit children objects, so primary restriction can be set to a specific type.

Each restriction may contain multiple Foreign Key restrictions. The container restriction of a Foreign Key restriction may also contain another Foreign Key restriction (this approach is used to support a hierarchy of types).

Fields Available for Defining Presets

Vision API metadata defines set of fields available for defining presets. This list is modified by connector as follows:

- Some fields get hidden from the InvisibleSync data model.
- Some artificial fields may be introduced by the connector/API. For example, **LinkedToMe**.
- Some fields get denormalized to respective parent objects. CLAddress and VEAddress fields are propagated to parents (Client, Vendor, Contact).

The following tables list the fields available for filtering.

Client

Type Name	Field Name	Filtered As Type
Client	Name	String
Client	Number	String
Client	Client Flag	Boolean
Client	Vendor Flag	Boolean

Type Name	Field Name	Filtered As Type
Client	Vendor	Foreign Key to Vendor
Client	Parent	Foreign Key to Vendor
Client	Type	Picklist
Client	Website	String
Client	Status	Picklist
Client	Relationship	Picklist
Client	Disadvantaged Business	Boolean
Client	Small Business	Boolean
Client	Veteran Owned Small Business	Boolean
Client	Dis. Vet. Owned Small Business	Boolean
Client	Minority Business	Boolean
Client	Woman Owned	Boolean
Client	HBCU	Boolean
Client	Alaska Native	Boolean
Client	Specialty	Picklist
Client	Prior Work	Boolean
Client	Recommended	Boolean
Client	Address.Description	String
Client	Address.Primary	Boolean
Client	Address.Accounting Only	Boolean
Client	Address.Billing	Boolean
Client	Address.Address1	String
Client	Address.Address2	String
Client	Address.Address3	String
Client	Address.Address4	String
Client	Address.City	String
Client	Address.State	Picklist

Type Name	Field Name	Filtered As Type
Client	Address.ZIP	String
Client	Address.Country	Picklist
Client	Address.Phone	String
Client	Address.Fax	String

Vendor

Type Name	Field Name	Filtered as Type
Vendor	Name	String
Vendor	Number	Number
Vendor	Associated Client	Foreign Key to Client
Vendor	Organization	Picklist
Vendor	Website	String
Vendor	Status	Picklist
Vendor	Minority Status	Boolean
Vendor	Disadvantage Business	Boolean
Vendor	Small Business	Boolean
Vendor	Veteran Owned Small Business	Boolean
Vendor	Disabled Veteran Owned Small Business	Boolean
Vendor	Minority Business	Boolean
Vendor	Woman Owned	Boolean
Vendor	HBCU	Boolean
Vendor	Alaska Native	Boolean
Vendor	Specialty	Picklist
Vendor	Prior Work	Boolean
Vendor	Recommended	Boolean
Vendor	Address.Description	String
Vendor	Address.Primary	Boolean

Type Name	Field Name	Filtered as Type
Vendor	Address.Accounting Only	Boolean
Vendor	Address.Billing	Boolean
Vendor	Address.Address1	String
Vendor	Address.Address2	String
Vendor	Address.Address3	String
Vendor	Address.Address4	String
Vendor	Address.City	String
Vendor	Address.State	Picklist
Vendor	Address.ZIP	String
Vendor	Address.Country	Picklist
Vendor	Address.Phone	String
Vendor	Address.Fax	String

Contact

Type Name	Field Name	Filtered as Type
Contact	First Name	String
Contact	Last Name	String
Contact	Middle Name	String
Contact	Preferred	String
Contact	Title	String
Contact	Type	Boolean
Contact	Client	Foreign Key to Client
Contact	Vendor	Foreign Key to Client
Contact	Email	String
Contact	Business Phone	String
Contact	Business Fax	String
Contact	Mobile	String

Type Name	Field Name	Filtered as Type
Contact	Home	String
Contact	Pager	String
Contact	Status	Picklist
Contact	BusinessAddress.Description	String
Contact	BusinessAddress.Address1	String
Contact	BusinessAddress.Address2	String
Contact	BusinessAddress.Address3	String
Contact	BusinessAddress.Address4	String
Contact	BusinessAddress.City	String
Contact	BusinessAddress.State	Picklist
Contact	BusinessAddress.ZIP	String
Contact	BusinessAddress.Country	Picklist

Opportunity

Type Name	Field Name	Filtered As Type
Opportunity	Name	String
Opportunity	Number	String
Opportunity	Organization	Picklist
Opportunity	Primary Client	Foreign Key to Client
Opportunity	Primary Contact	Foreign Key to Contact
Opportunity	Project Manager	Foreign Key to Employee
Opportunity	Supervisor	Foreign Key to Employee
Opportunity	Principal	Foreign Key to Employee
Opportunity	Regular Project	Foreign Key to Project
Opportunity	Status	Picklist
Opportunity	Stage	Picklist
Opportunity	Type	Picklist

Type Name	Field Name	Filtered As Type
Opportunity	Source	Picklist
Opportunity	Date Open	Date
Opportunity	Date Closed	Date
Opportunity	Revenue	Number
Opportunity	Probability	Picklist
Opportunity	Estimated Start	Date
Opportunity	Estimated Completion	Date
Opportunity	CSI Contract	Number
Opportunity	Contract Vehicle	Picklist
Opportunity	Contract Type	Picklist
Opportunity	Procurement Type	Picklist
Opportunity	Proposal Due Date	Date
Opportunity	BAFO Date	Date
Opportunity	Award Date	Date

Activity

Type Name	Field Name	Filtered As Type
Activity	CreateDate	Date
Activity	Subject	String
Activity	Location	String
Activity	Type	Picklist
Activity	Priority	Picklist
Activity	Completed	Boolean
Activity	Private	Boolean
Activity	Client	Foreign Key to Client
Activity	Primary Contact	Foreign Key to Contact
Activity	Opportunity	Foreign Key to Opportunity

Type Name	Field Name	Filtered As Type
Activity	Project	Foreign Key to Project
Activity	Owner	Foreign Key to Employee
Activity	StartDate	Date

Employee

Type Name	Field Name	Filtered As Type
Employee	FirstName	String
Employee	LastName	String
Employee	Number	Number
Employee	Email	String
Employee	WorkPhone	String
Employee	MobilePhone	String
Employee	Status	Picklist
Employee	CreatedBy	Foreign Key to Employee


User Independent Presets

To define a user independent preset, the restriction in the preset should refer to the current user as **\$CurrentUserId\$**.


This value is replaced with the real user ID when the preset is applied. This allows each user to get different restrictions based on his or her unique user ID.

Appendix A: Connect for Microsoft Outlook Version Number

To find your **Connect for Microsoft Outlook version number**, complete the following steps:

1. In the Windows desktop taskbar, which displays at the bottom of your desktop by default, right-click .
2. On the shortcut menu, click **Options**.
3. On the Connect for Microsoft - Options dialog box, click the About tab on the left.
4. The Connect for Microsoft Outlook version displays in the **invisibleCRM** section of the screen.

Also, you will see the Connect for Microsoft Outlook version number in Vision on the Download Connect for Microsoft Outlook form in **Utilities » Download Connect for Microsoft Outlook**.

A blue geometric graphic consisting of several overlapping triangles and polygons, located in the top-left corner of the page.

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