Deltek Vision® 6.1

Mobile Application Suite Installation Guide

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Overview

The Deltek Vision Mobile Application Suite (MAS) is a set of downloadable modules that you install on laptops, tablet PCs, or pocket PC hand-held devices.

When you are disconnected from the Vision database, you can use the Vision Mobile Application Suite on a mobile device to enter and store Vision Timesheet, Expense Report, and Customer Relationship Management (CRM) information. At another time, you connect to the Vision database and transfer the stored Vision data from your mobile device to the Vision database.

This guide identifies the mobile devices and operating systems that are supported for use with the Mobile Application Suite and provides the following information on how to:

- Enable the Mobile Application Suite on your Vision server.
- Select the Vision data to download to mobile devices.
- Install and configure the Mobile Application Suite on a laptop.
- Install and configure the Mobile Application Suite on a pocket PC.

For more information about how to use the Mobile Application Suite, see the topics in the Mobile Application Suite book in Vision online help.

Supported Devices for the Mobile Application Suite

The following tables list the mobile devices and operating systems that you can use with the Deltek Vision Mobile Application Suite.

Windows Operating Systems	
Supported Devices	▪ Laptop PC ▪ Tablet PC ▪ Ultra-Mobile PC ▪ Desktop PC
Supported Operating Systems	▪ Microsoft® Windows® 7 ▪ Microsoft Windows Vista (SP2) ▪ Microsoft Windows XP (SP3)
Supported Resolutions	800 x 600 or higher
Synchronization Options	▪ HTTP/HTTPS via LAN/WAN ▪ Wireless network
Notes	The prerequisite components—Microsoft .Net Framework 2.0 and Microsoft SQL Express—are distributed with the Vision Mobile Application Suite for Windows.

Windows Mobile (Pocket PC) Operating System	
Supported Operating Systems	▪ Windows Mobile® 2003 ▪ Windows Mobile® 2003 SE ▪ Windows Mobile® 5.0 ▪ Windows Mobile® 6 ▪ Windows Mobile® 6.1 ▪ Windows Mobile® 6.5

Windows Mobile (Pocket PC) Operating System	
Supported Resolutions	▪ 240 x 320 ▪ 240 x 240 ▪ 320 x 240 ▪ 320 x 320 ▪ 480 x 480 ▪ 480 x 640 ▪ 480 x 800
Synchronization Options	▪ USB (Microsoft ActiveSync®) ▪ Wireless Network HTTP
Notes	▪ The prerequisite components—Microsoft .Net Compact Framework 2.0 and Microsoft Mobile SQL Mobile Edition—are distributed with the Vision Mobile Application Suite for Windows Mobile. ▪ HTTPS is supported. ▪ SmartPhone devices are not supported.

Identify Your Device

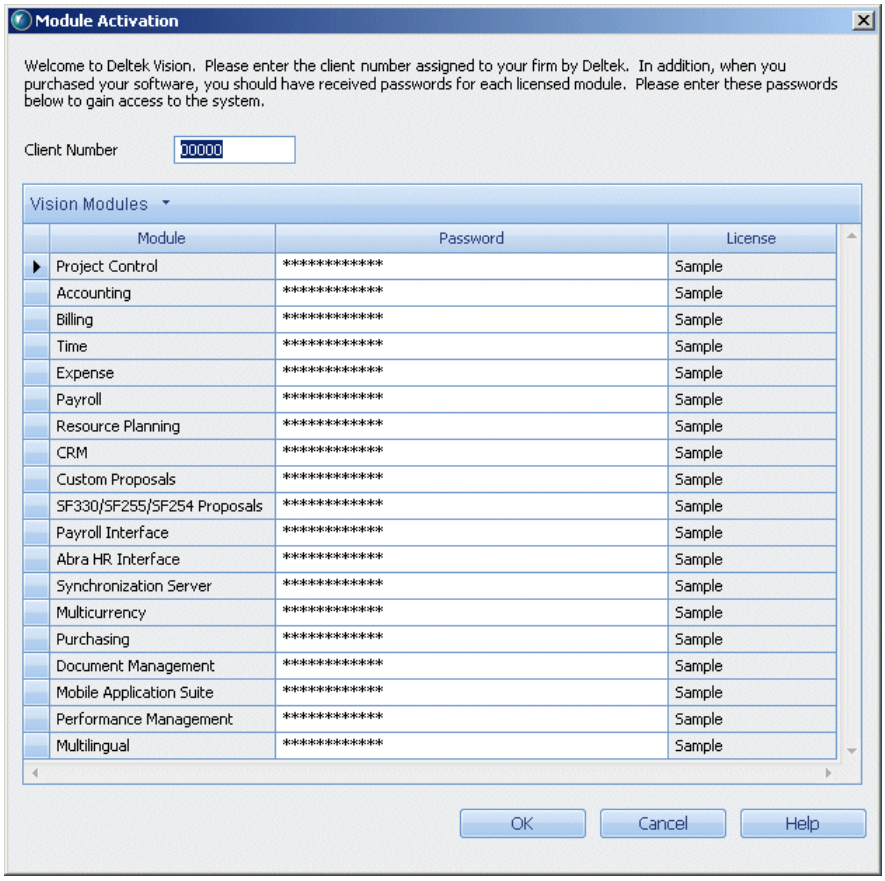
Turn your device over, and check for the logo or sticker on the back.

If you see a Windows logo, you have a Pocket PC.

Enable the Mobile Application Suite on Your Vision Server

You must enable the Deltek Vision Mobile Application Suite on your Vision server to enable MAS functions in Vision.

From the Vision Applications menu, click **Configuration » Module Activation**, and on the Mobile Activation dialog box, enter a valid activation code (password) for the Mobile Application Suite module.



After you enter a valid module password, you can access the Download Mobile Application Suite form in **Utilities » Mobile Application Suite** to download MAS installation files.

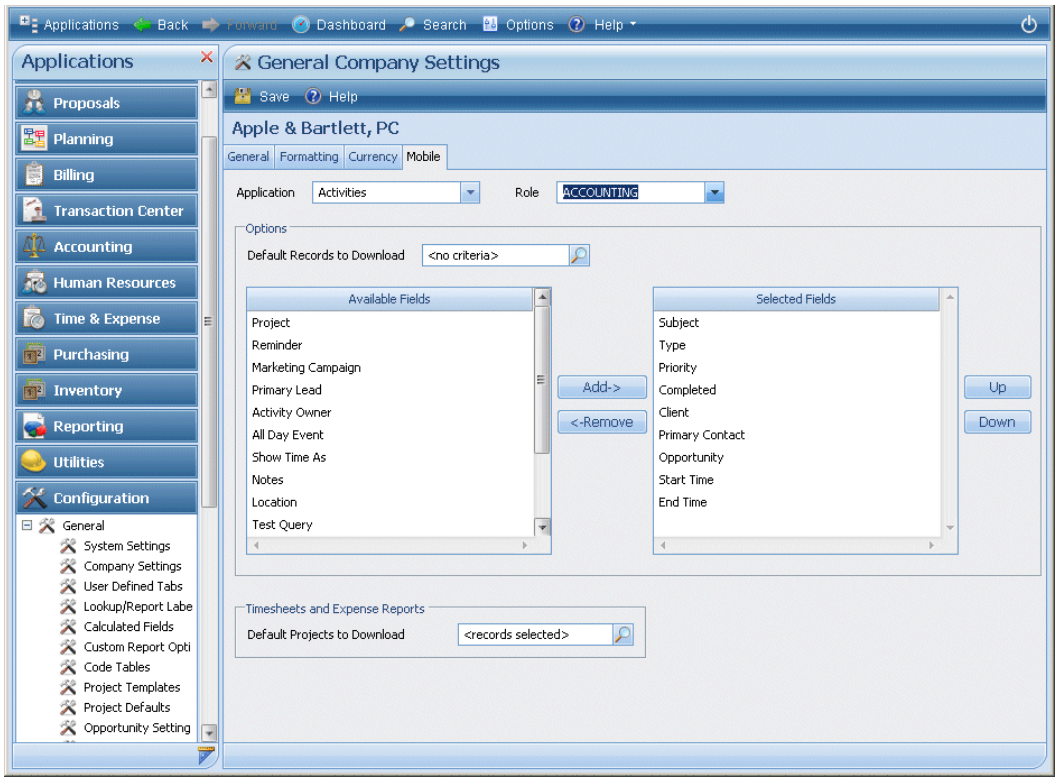
Select Vision Data to Download

Before mobile Time and Expense Report users can retrieve data or synchronize their device with Vision, the appropriate project data must be made available to them.

The appropriate clients, contacts, activities, and opportunities must be made available to mobile Customer Relationship Management users before they can download this information to hand-held devices.

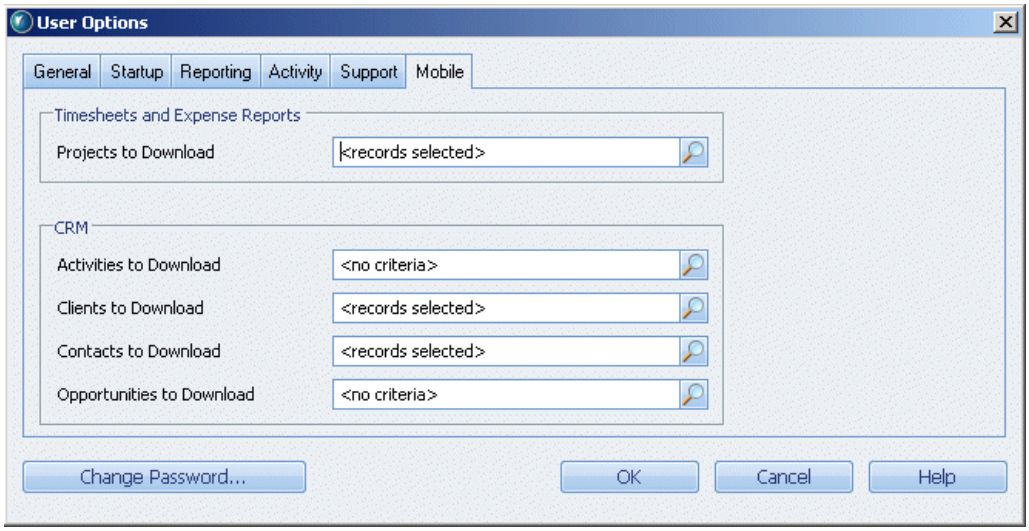
A system administrator can select data for Vision users to download, or Vision users can select the data to download to their mobile devices.

- On the Mobile tab in **Configuration » General » Company Settings**, a system administrator selects projects, clients, contacts, activities, and opportunities to be downloaded for Vision roles to which users are assigned.



- On the Mobile tab of the User Options dialog box, each user selects projects, clients, contacts, activities, and opportunities to download to their mobile devices. On the Vision toolbar, click **Options** to open this dialog box.

  A user's selection on the User Options dialog box overrides the selections made on the General Company Settings form by a system administrator.



See Vision online help for more information on how to select records to download to mobile devices.

Install Mobile Application Suite for Laptops

These instructions to install the Mobile Application Suite for laptops also apply when you install MAS on a desktop or tablet PC.

Complete the following steps to install the Mobile Application Suite on a laptop:

1. Download the laptop prerequisite file to your Deltek Vision Web/application server.
2. Install the prerequisite software components on a laptop.
3. Install the Mobile Application Suite software on a laptop.
4. Configure the Mobile Application Suite software.

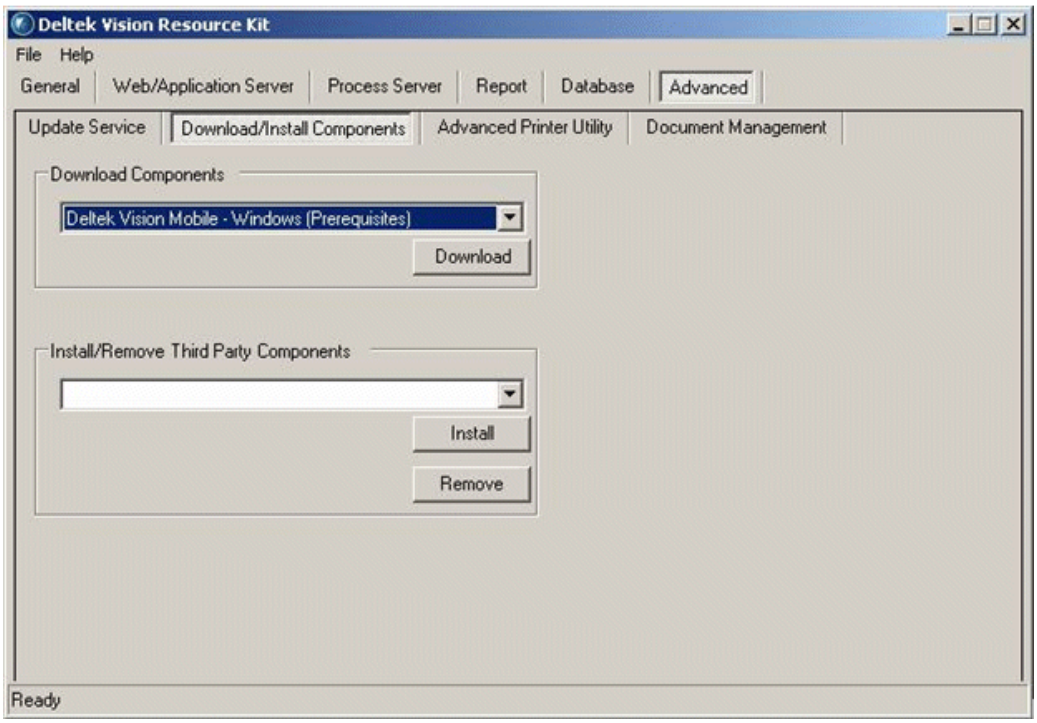
1. Download the Laptop Prerequisite File to Your Deltek Vision Web/Application Server

A prerequisite file, specific for laptops, must be downloaded to your Deltek Vision Web/application server before Mobile Application Suite users can install the prerequisite software on their laptops.

To download the prerequisite file to your Web/application server, complete the following steps:

1. From your Vision Web/application server, click Windows **Start » Programs » Deltek Vision » Deltek Vision ResourceKit** to launch the Deltek Vision Resource Kit.
2. On the Deltek Vision Resource Kit form, click the Advanced tab.
3. On the Advanced tab, click the Download/Install Components tab.
4. From the drop-down list in the **Download Components** field, select **Deltek Vision Mobile - Windows (Prerequisites)**, and click the **Download** button.

   This downloads the **DeltekVisionMobileApplicationSuitePreReq.exe** file (approximately 90 MB) to your <*Installation Directory*>\Web\Mobile directory.



If you have Mobile Application Suite users who use a laptop and some who use a pocket PC device, after you choose **Deltek Vision Mobile – Windows (Prerequisites)** and download the file for laptops, you can choose **Deltek Vision Mobile – Windows Mobile (Prerequisites)** to download the file for pocket PCs. You must download separate prerequisite files for laptops and pocket PCs.

2. Install Prerequisite Software on a Laptop

Before you install Deltek Vision Mobile Application Suite for Windows on a laptop, you must install the following prerequisite software on the laptop:

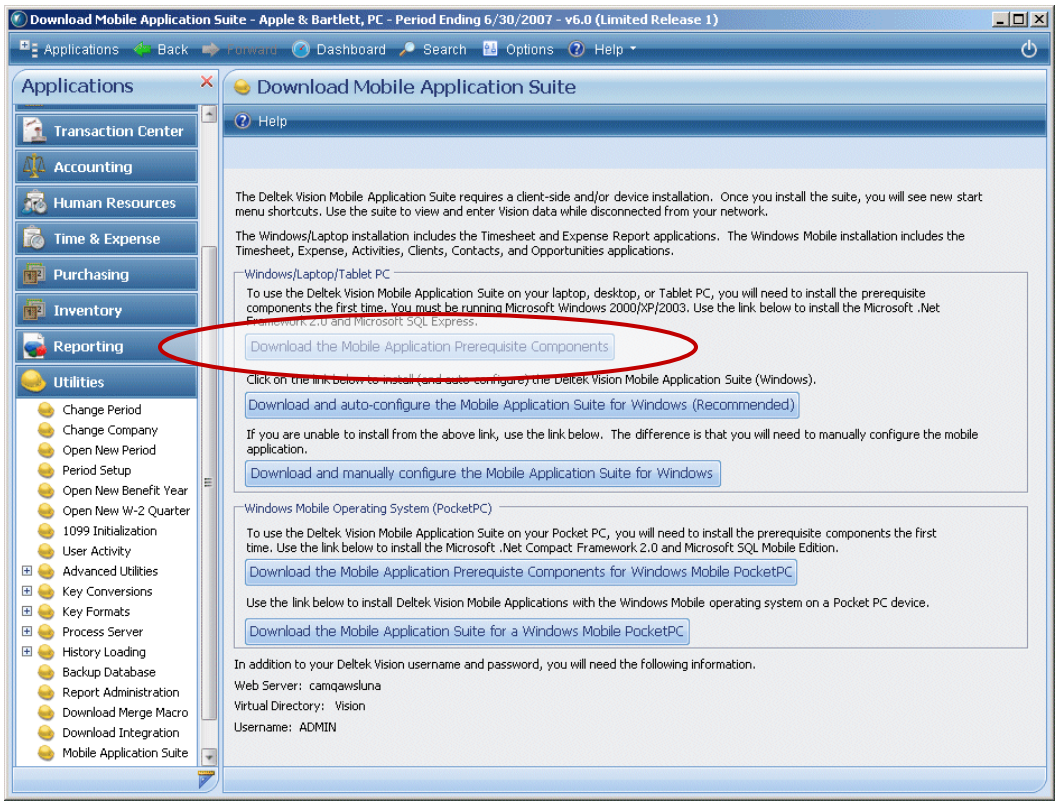
- Net Framework Version 2.0
- Microsoft SQL Express

This prerequisite software is provided with Vision.

To download and install the prerequisite software on a laptop, complete the following steps:

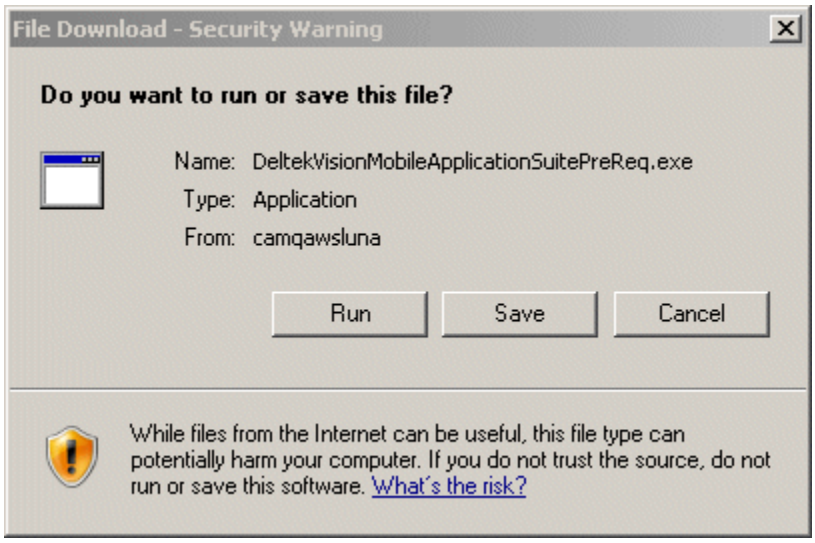
You must have Windows 2000, Windows XP, or Windows 2003 installed on the laptop.

1. Open Vision on a laptop, and from the Vision Applications menu, click **Utilities** » **Mobile Application Suite**.
2. In the **Windows/Laptop/Tablet PC** section of the Download Mobile Application Suite form, click the **Download the Mobile Application Prerequisite Components** button.

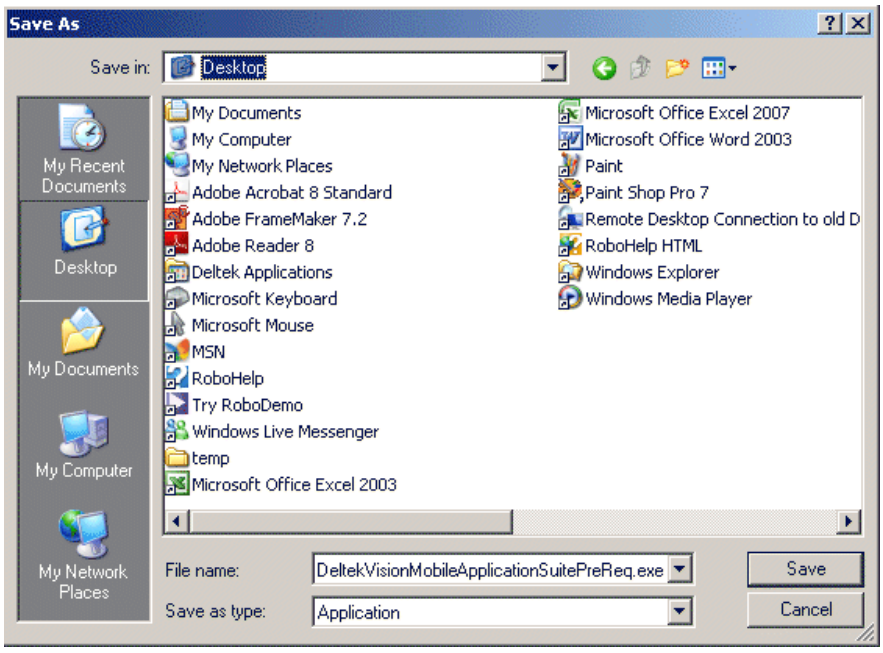


If you have not completed the steps in the previous section to download the **DeltekVisionMobileApplicationSuitePreReq.exe** file to your Vision Web/application server, when you click the link to install the prerequisites to a laptop, you receive an error.

3. On the File Download - Security Warning dialog box, click **Save** to save the **DeltekVisionMobileApplicationSuitePreReq.exe** file to a local drive.

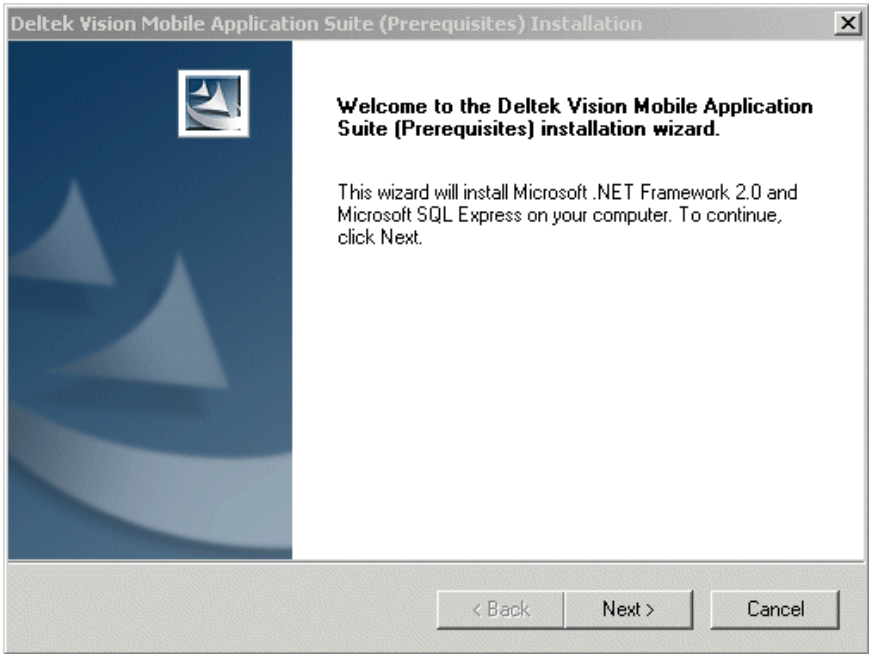


4. On the Save As dialog box, select the location on your local drive where you want to save the program and click **Save**.

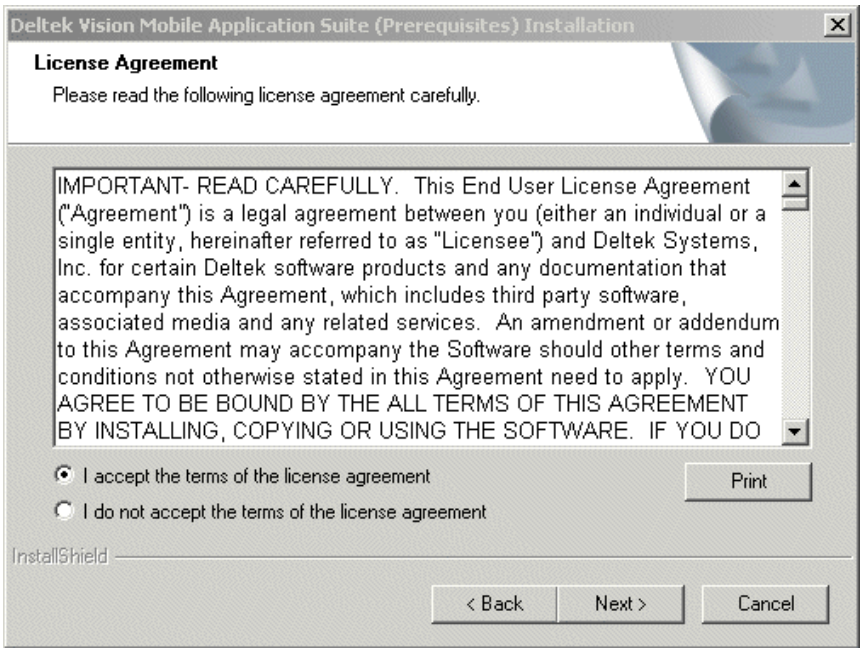


5. When the save is complete, navigate to the saved **DeltekVisionMobileApplicationSuitePreReq.exe** file, and double-click it to install the prerequisite software.

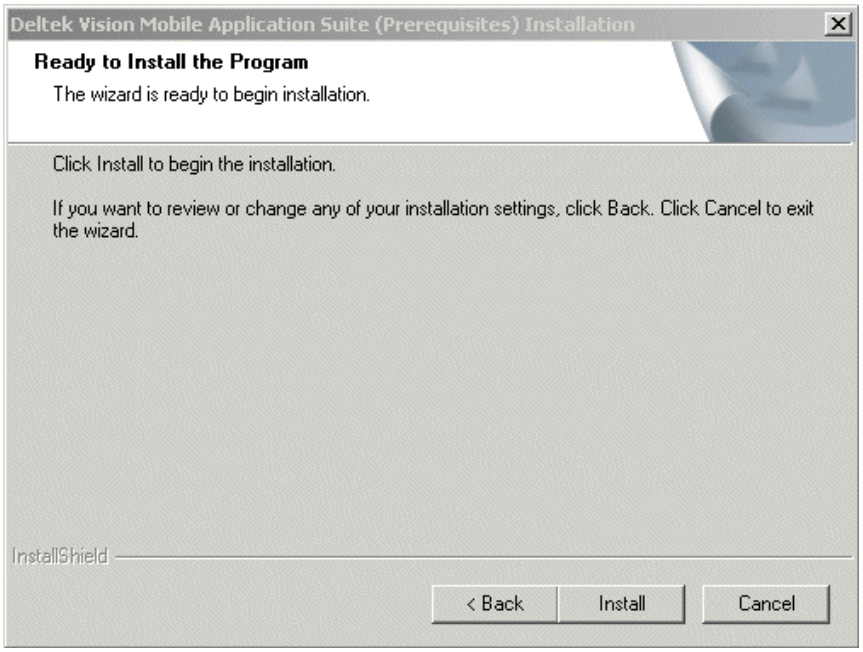
6. On the Welcome to the Deltek Vision Mobile Application Suite (Prerequisites) installation wizard page, click **Next** to start the prerequisite installation.



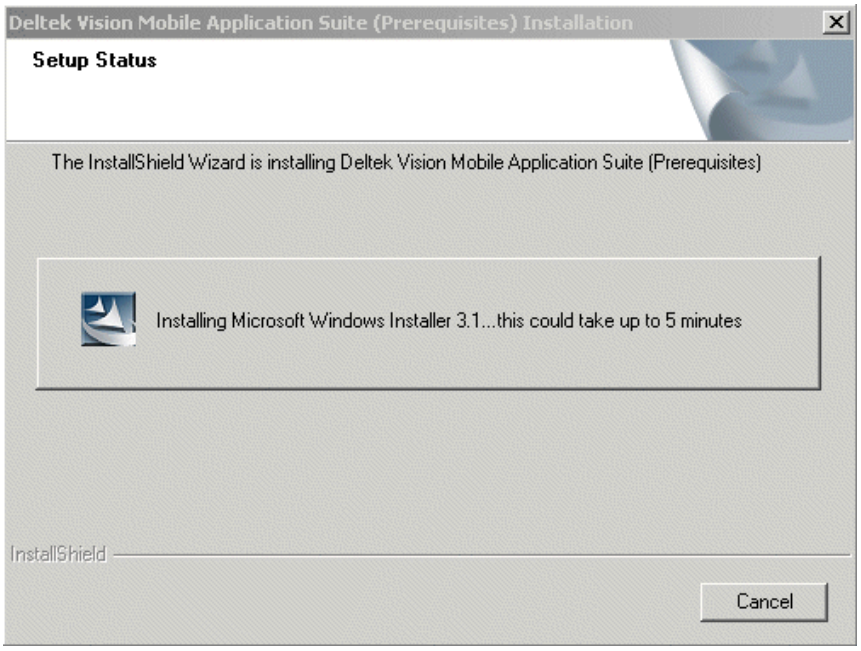
7. On the License Agreement page, read the agreement, select the **I accept the terms of the license agreement** option, and then click **Next**.



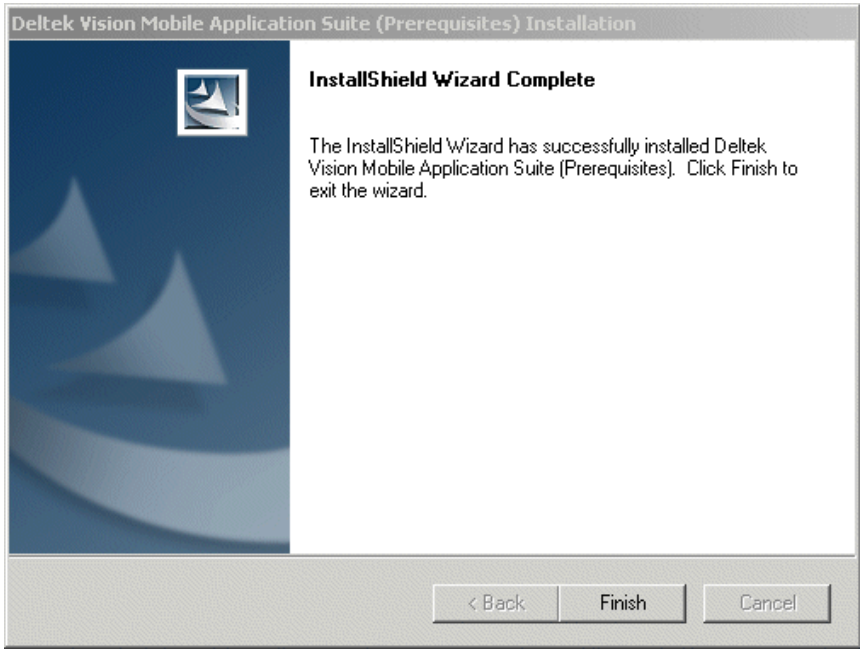
8. On the Ready to Install the Program page, click **Install** to begin the installation.



The Setup Status page displays while the prerequisite files are installed.



9. When the installation completes, click **Finish** on the InstallShield Wizard Complete page to finish the process and exit the wizard.

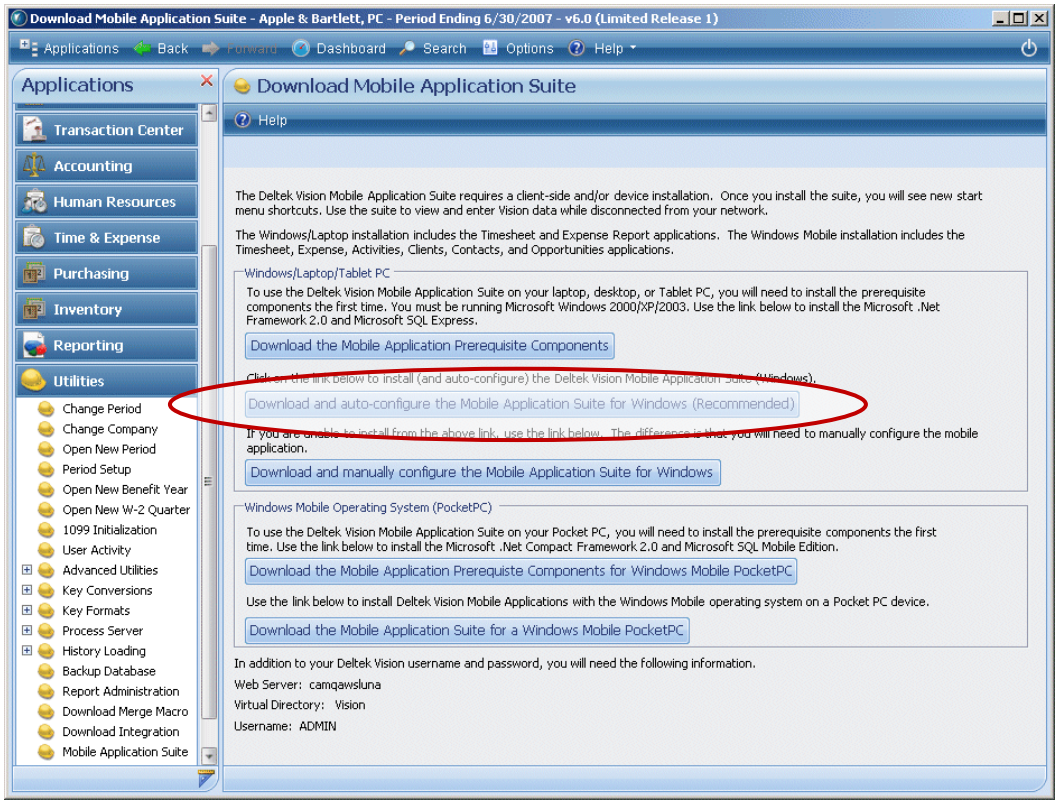


3. Install the Mobile Application Suite on a Laptop

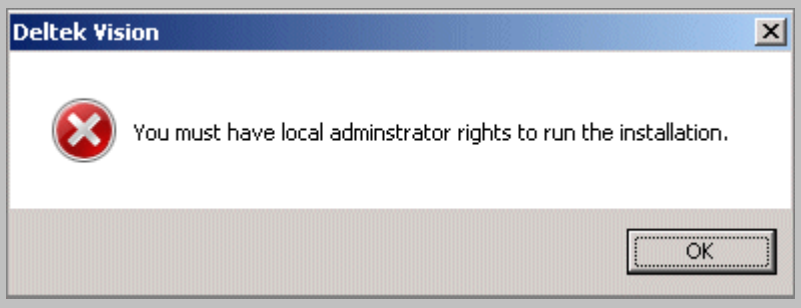
To install the Deltek Mobile Application Suite on a Laptop, complete the following steps:

1. From the Vision Applications menu, click **Utilities » Mobile Application Suite**.
2. In the **Windows/Laptop/Tablet PC** section of the Download Mobile Application Suite form, click the **Download and auto-configure the Mobile Application Suite for Windows (Recommended)** button.

> If the **Download and auto-configure the Mobile Application Suite for Windows (Recommended)** option does not work or is disabled, click the **Download and manually configure the Mobile Application Suite for Windows** button (the last button in **Windows/Laptop/Tablet PC** section) and manually configure the software.



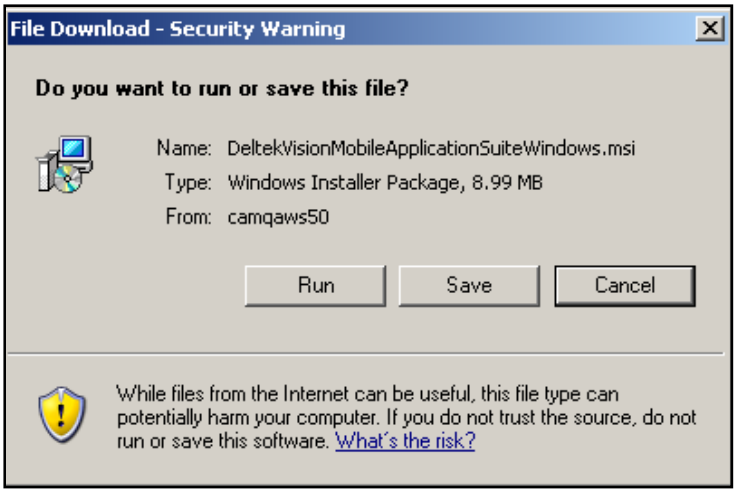
If you use Windows 7 or Windows Vista and User Account Control (UAC) is enabled, you may receive the following message when you attempt to use the **Download and auto-configure the Mobile Application Suite for Windows (Recommended)** option:



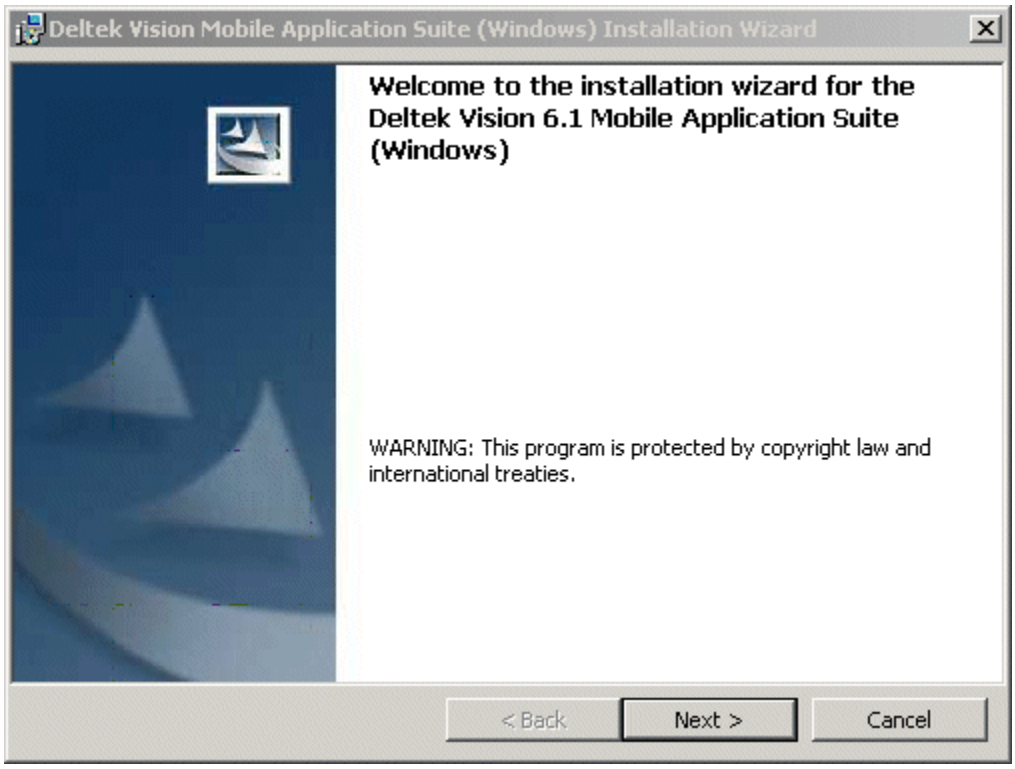
To get past this error, click **OK** on the message box, and complete either of the following options:

- On the Download Mobile Application Suite form, click the **Download and manually configure the Mobile Application Suite for Windows** button. Use the information at the bottom of the form to configure your connections.
- Exit Vision, and launch Microsoft Internet Explorer using the Run as Administrator option. This will allow you to run the installation with elevated privileges. Log onto Vision from that Windows Explorer session and perform the Mobile Application Suite installation. (To access the Run as Administrator option, click Windows **Start » All Programs**. Right-click the Microsoft Internet Explorer shortcut, and select the **Run as Administrator** option from the shortcut menu.)

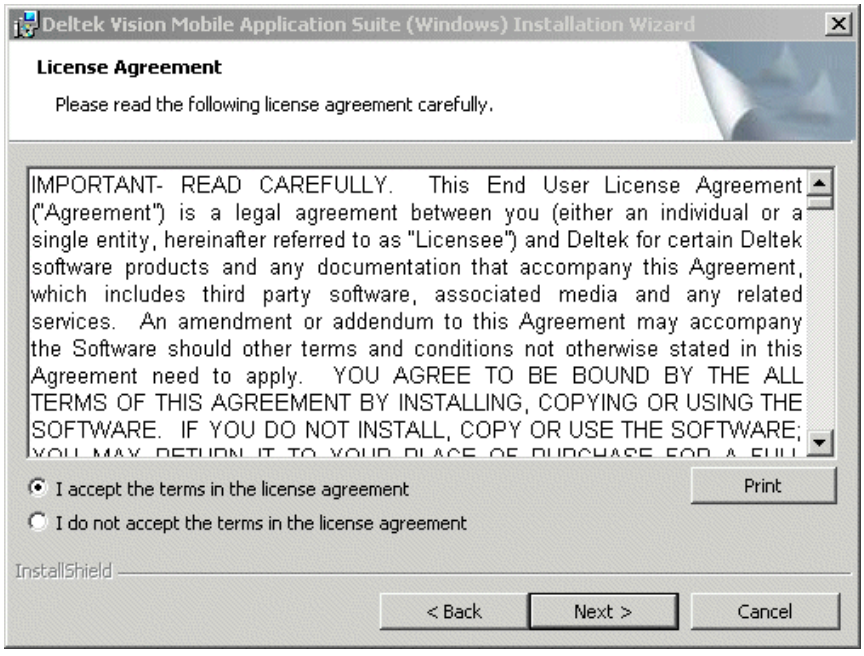
3. On the File Download – Security Warning dialog box, click **Run**. The Deltek Mobile Application Suite for Windows Installation Wizard starts and guides you through the installation steps.



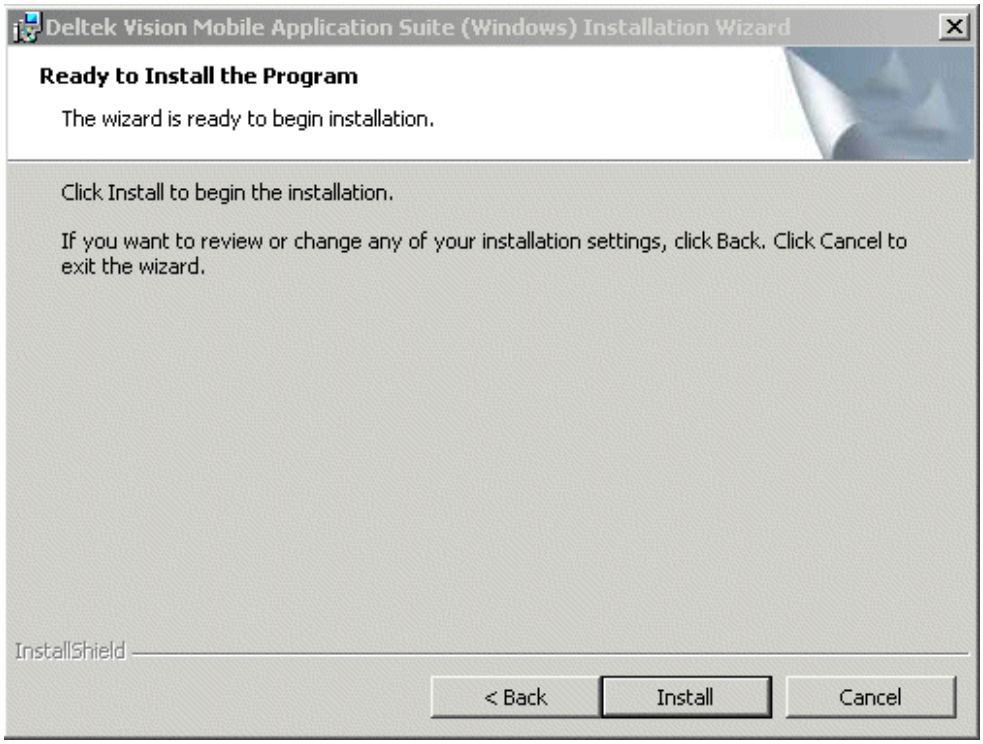
4. On the Welcome to the installation wizard for the Deltek Vision 6.1 Mobile Application Suite (Windows) page, click **Next**.



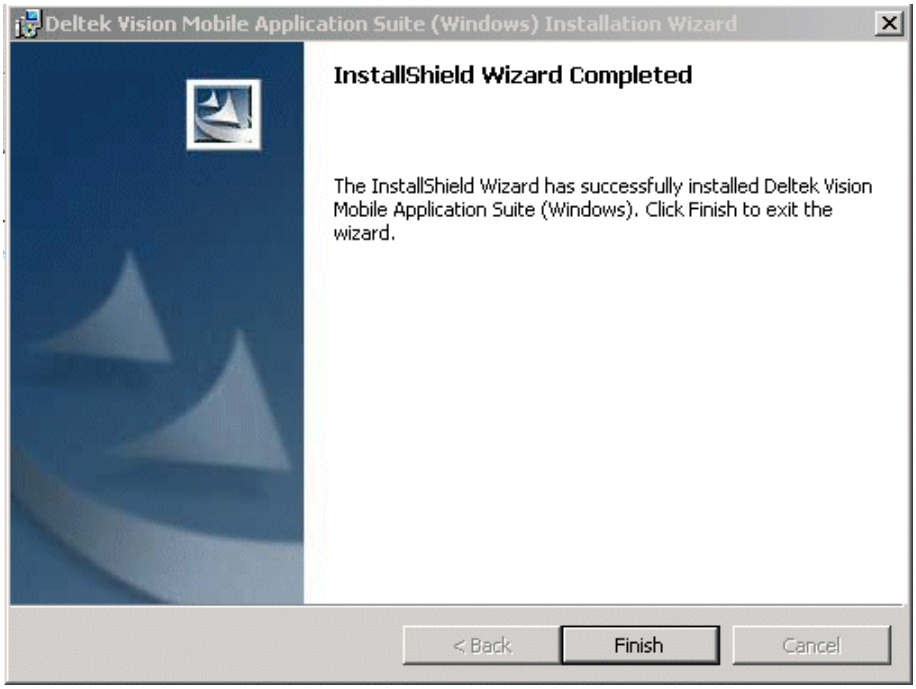
5. On the License Agreement page, review the agreement, select the **I accept the terms in the license agreement** option, and click **Next**.



6. On the Ready to Install the Program page, click **Install** to run the installation.



7. When the installation is finished, click **Finish** in the InstallShield Wizard Completed page to finish the process and exit the wizard.

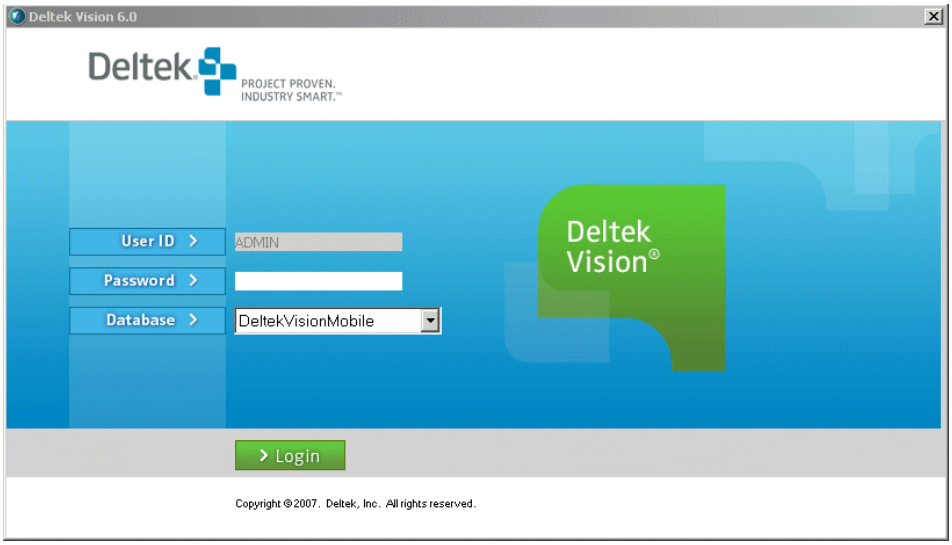


4. Configure the Mobile Application Suite

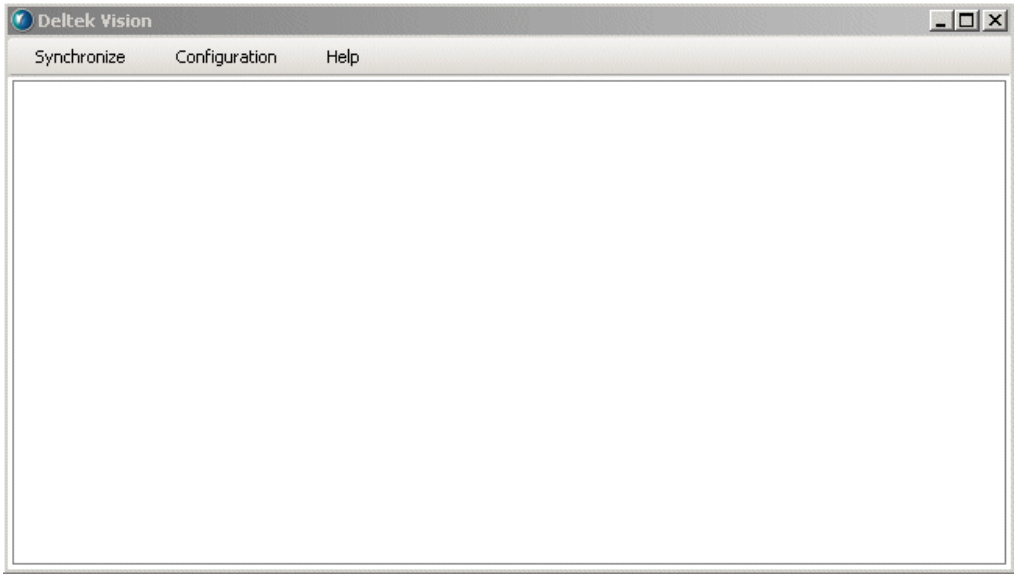
After the Mobile Application Suite application is installed on a laptop, you configure it to communicate with the Vision server.

To configure the Mobile Application Suite, complete the following steps:

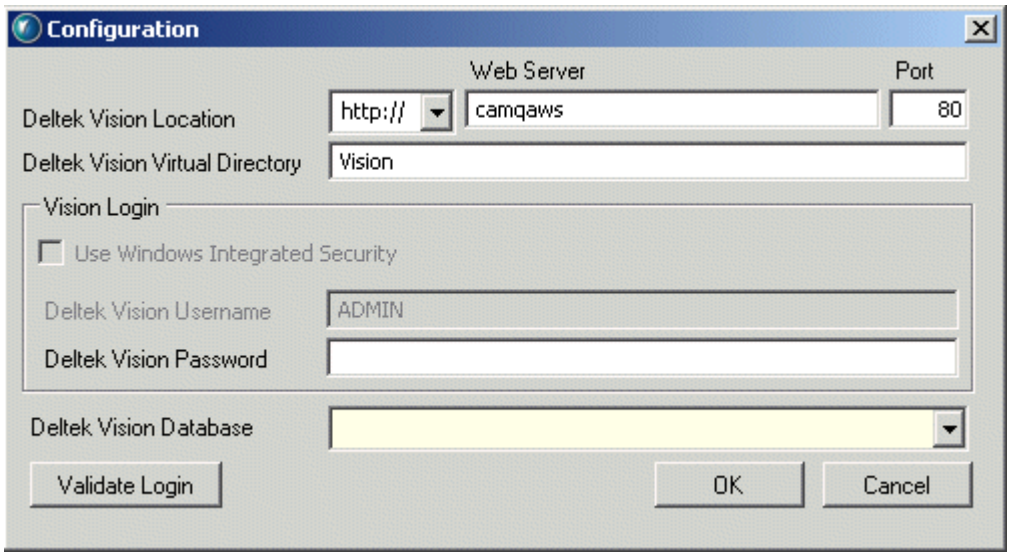
1. On your laptop, click **Start » Programs » Deltek Vision » Deltek Vision Mobile**.
2. On the Deltek Vision splash screen, click the **Login** button to open the Deltek Vision Mobile Application Suite.



3. On the menu bar, click **Configuration**.

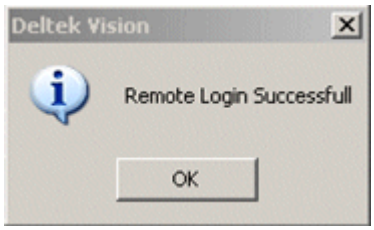


4. On the Configuration dialog box, enter the Deltek Vision server, login, and database information.



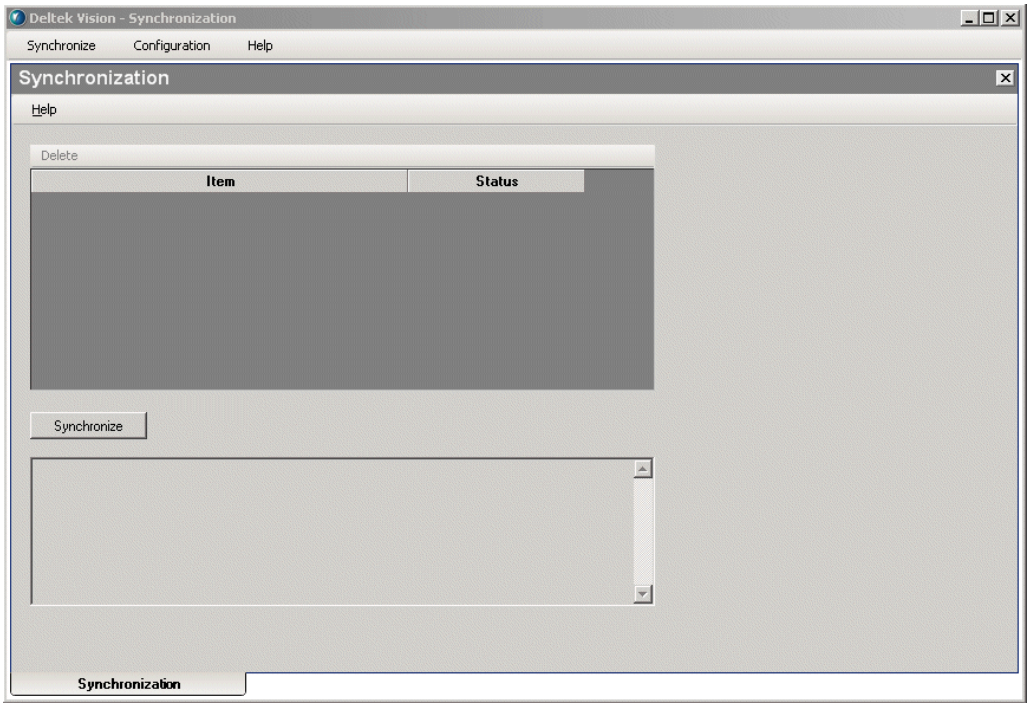
If your Deltek Vision username does not display correctly on the Configuration dialog box, and you cannot modify it, click Windows **Start » Programs » Deltek Vision » Configuration** from your desktop to modify your username.

5. Click the **Validate Login** button to test the connection. Vision validates the login and displays the **Remote Login Successful** message when complete. Click **OK**.

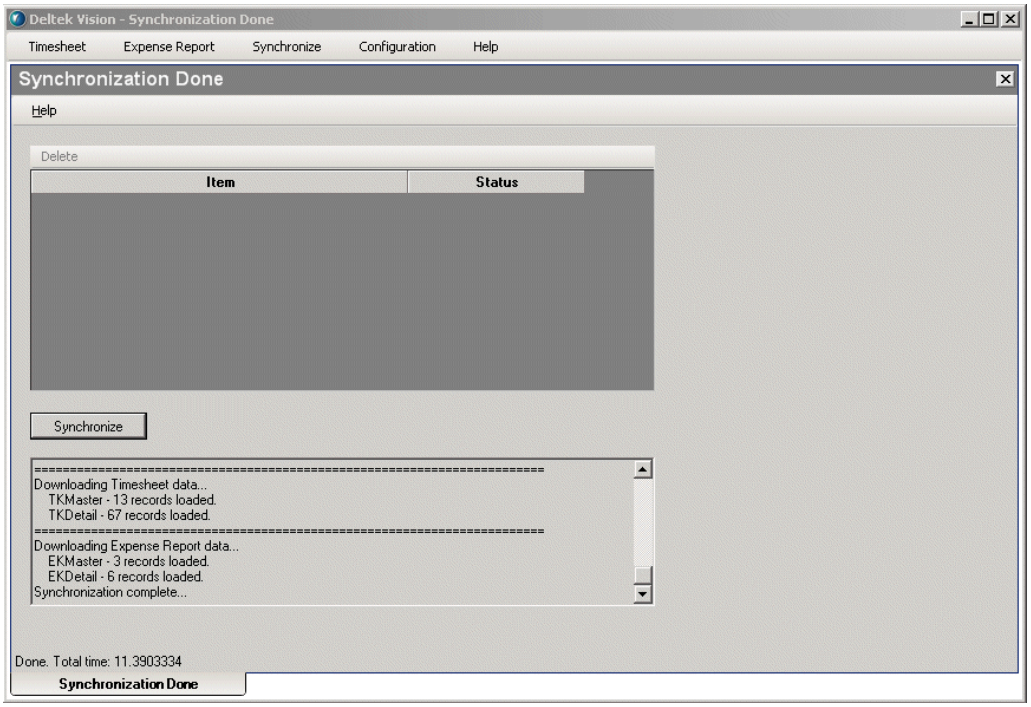


If Vision displays a login error (for example, “Invalid Login Attempt” or “Vision URL is invalid”), check with your Vision administrator to verify the correct URL, database, username, and password. Also, ensure that your device can access the Internet. If neither is the issue, contact Vision Support.

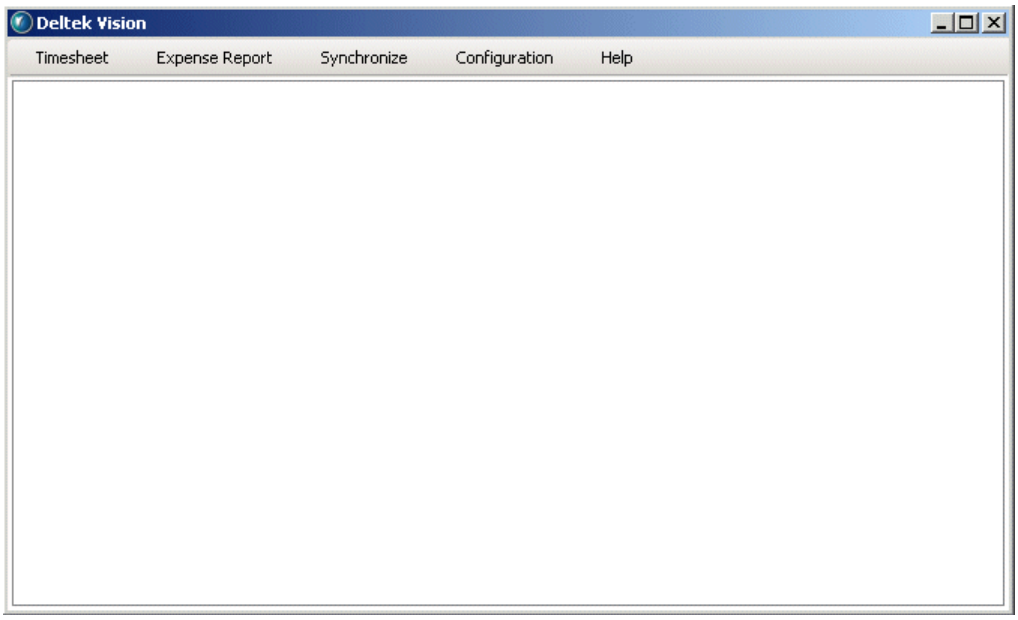
6. On the Configuration dialog box, click **OK** to close the dialog box.
7. On the menu bar, click **Synchronize** to open the Synchronization form.



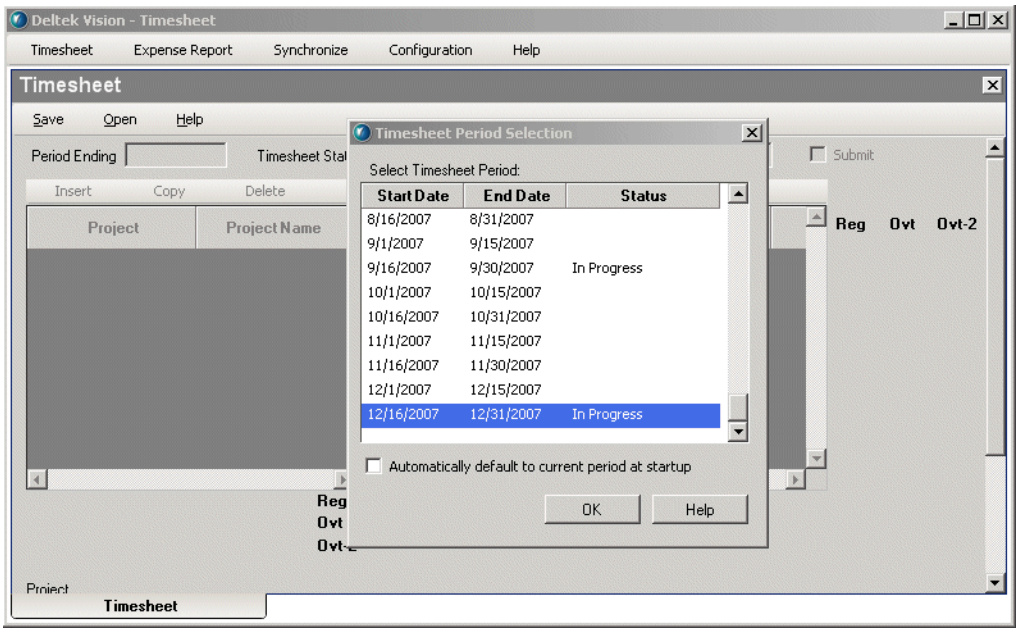
8. On the Synchronize form, click the **Synchronize** button in the middle of the screen to start the synchronization process. The progress displays in the lower section of the form. When it finishes, **Synchronization Done** displays at the top and bottom of the form.



When the synchronization is complete, you can access the mobile **Timesheet** and **Expense Report** applications on the menu bar. Mobile Customer Relationship Management applications are available only on hand-held devices.



For example, on the menu bar, click **Timesheet** to open the mobile Timesheet application.



Refer to the Mobile Application Suite online help for details on how to use the Timesheet and Expense Report application.

Install Mobile Application Suite for Pocket PCs

Complete the following steps to install the Mobile Application Suite on pocket PC hand-held devices:

1. Download the pocket PC prerequisite file to your Vision Web/application server.
2. Install the prerequisite software on your pocket PC mobile device.
3. Install the Mobile Application Suite on your pocket PC mobile device.
4. Set up Vision connection parameters and synchronize.

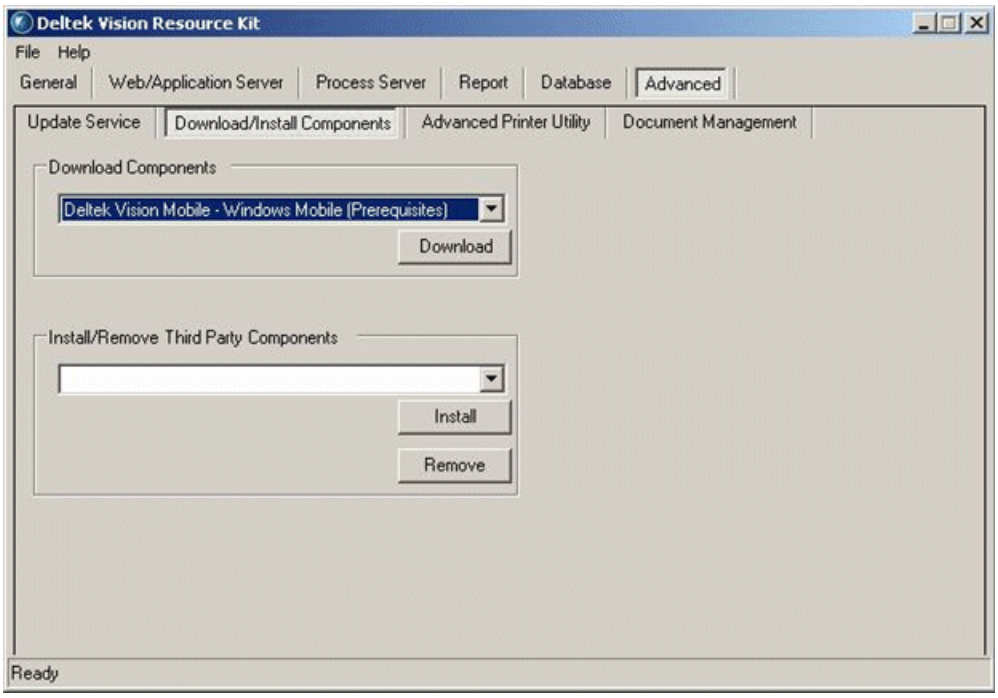
1. Download the Pocket PC Prerequisite File to Your Vision Web/Application Server

A prerequisite file, specifically for pocket PCs, must be downloaded to your Vision Web/application server before Mobile Application Suite users can install the prerequisite software on their mobile devices.

To download the pocket PC prerequisite file to your Vision Web/application server, complete the following steps:

1. From your Deltek Vision Web/application server, click Windows **Start » Programs » Deltek Vision » Deltek Vision ResourceKit** to launch the Deltek Vision Resource Kit.
2. On the Deltek Vision Resource Kit form, click the Advanced tab.
3. On the Advanced tab, click the Download/Install Components tab.
4. From the drop-down list in the **Download Components** field, select **Deltek Vision Mobile - Windows Mobile (Prerequisites)**, and click the **Download** button.

   This downloads the **DeltekVisionMobileApplicationSuiteWindowsMobilePreReq.msi** file (approximately 130 MB) to your <*Installation Directory*>\Web\Mobile directory. It does not install 130 MB of software onto the mobile device. To support the large number of Windows mobile devices, this installation includes Microsoft .NET Compact Framework 2.0 and Microsoft SQL Mobile 2005 for a number of different hardware platforms.



For your Vision Web/application server, you must download separate prerequisite files for laptop users and pocket PCs users.

In the **Download Components** field on the Download/Install Components tab, select:

- **Deltek Vision Mobile – Windows (Prerequisites)** if you have laptops users.
- **Deltek Vision Mobile – Windows Mobile (Prerequisites)** if you have pocket PC users.

2. Install Prerequisite Software on a Pocket PC Device

Before you install Deltek Vision Mobile Application Suite for Windows on a pocket PC device, you must install the following prerequisite software on the mobile device:

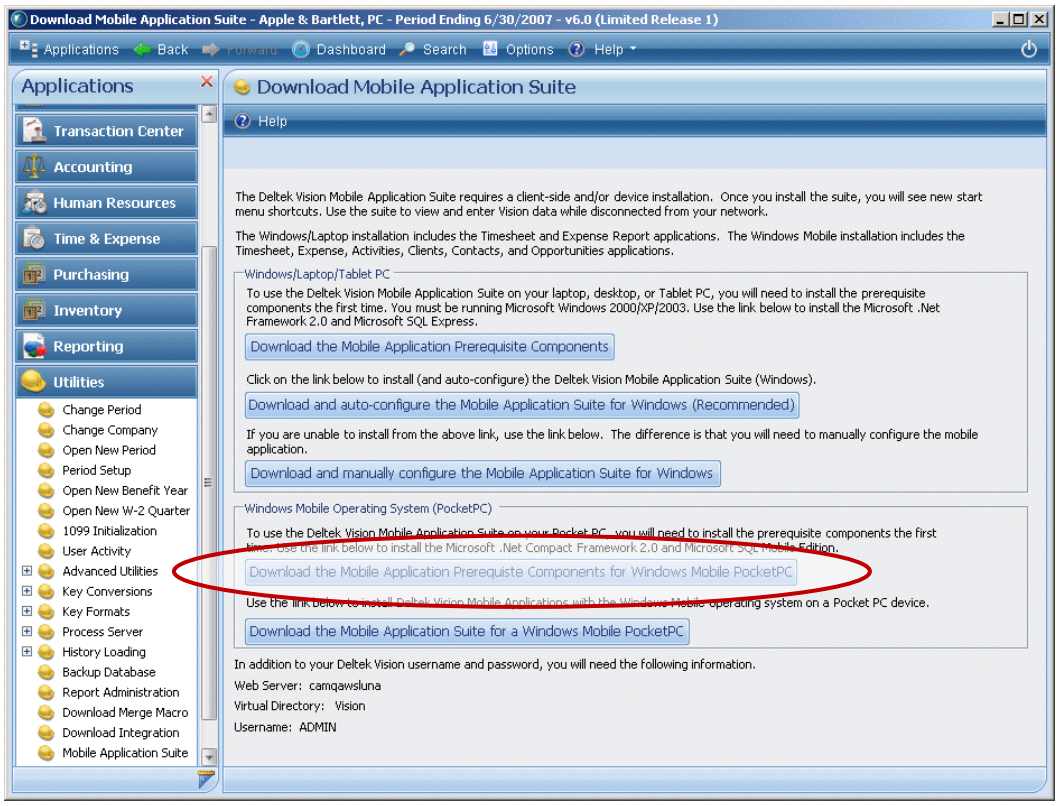
- .Net Compact Framework Version 2.0
- Microsoft SQL Mobile Edition on the mobile device

This prerequisite software is provided with Vision.

To install the prerequisite software, you download and run the prerequisite file on a desktop or laptop computer. Then, the next time you connect the mobile device to this computer, the prerequisites are installed on the mobile device.

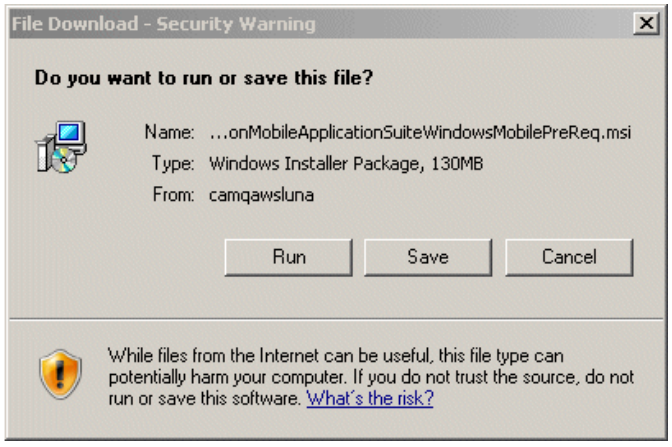
To download and install the prerequisite software on a pocket PC, complete the following steps:

1. From a user's desktop or laptop computer, open Vision.
2. From the Vision Applications menu, click **Utilities** » **Mobile Application Suite**.
3. In the **Windows Mobile Operating System (PocketPC)** section of the Download Mobile Application Suite form, click the **Download the Mobile Application Prerequisite Components for Windows Mobile PocketPC** button.

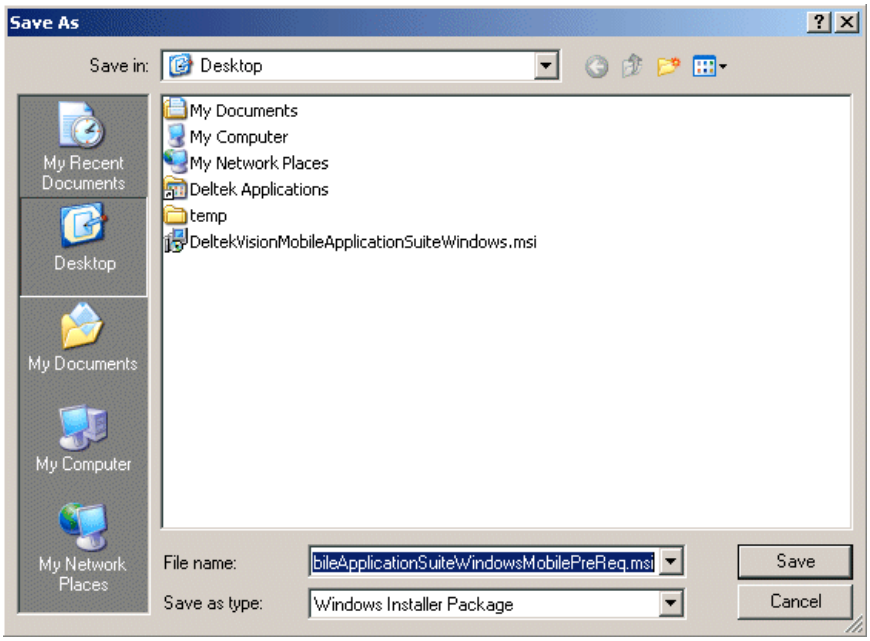


If you have not completed the steps in the previous section to download the **DeltekVisionMobileApplicationSuiteWindowsMobilePreReq.msi** file to your Deltek Vision Web/application server, when you click the link to install the prerequisites on a pocket PC, you receive an error.

4. On the File Download Security Warning dialog box, click **Save** to save the **DeltekVisionMobileApplicationSuiteWindowsMobilePreReq.msi** file to a local drive.

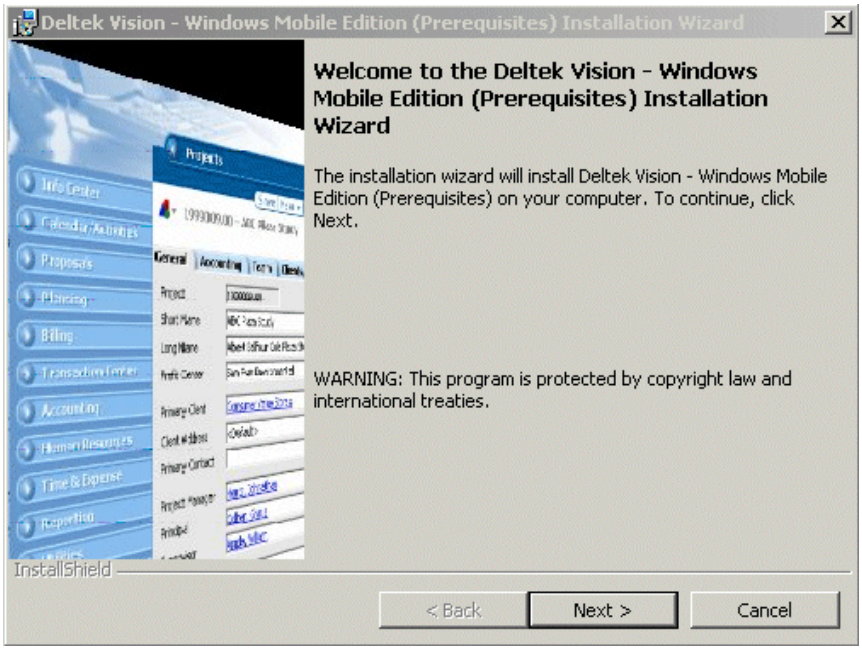


5. Select the location on your local drive in which to save the program and click **Save**.

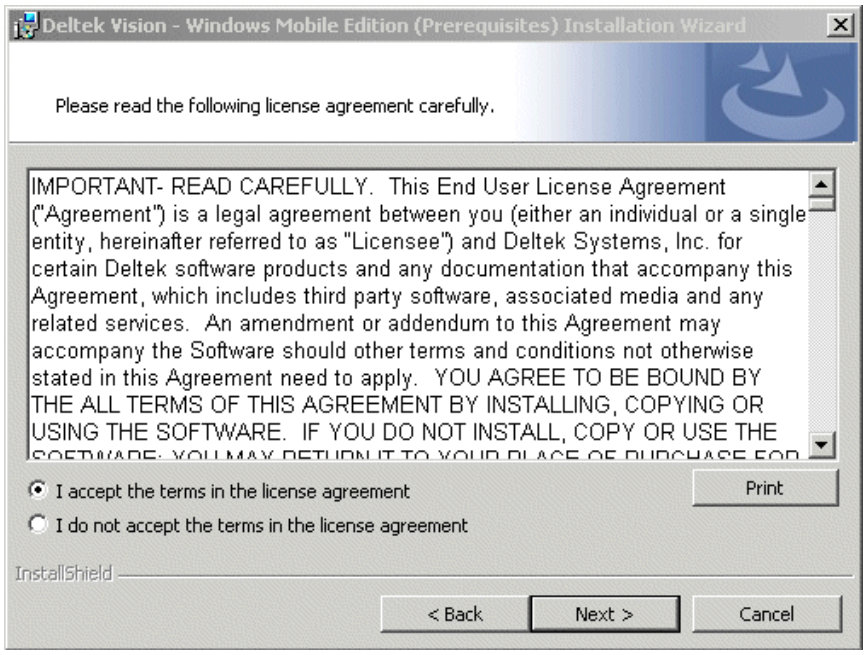


6. When the save is complete, double-click the **DeltekVisionMobileApplicationSuiteWindowsMobilePreReq.msi** file to install the prerequisite software.

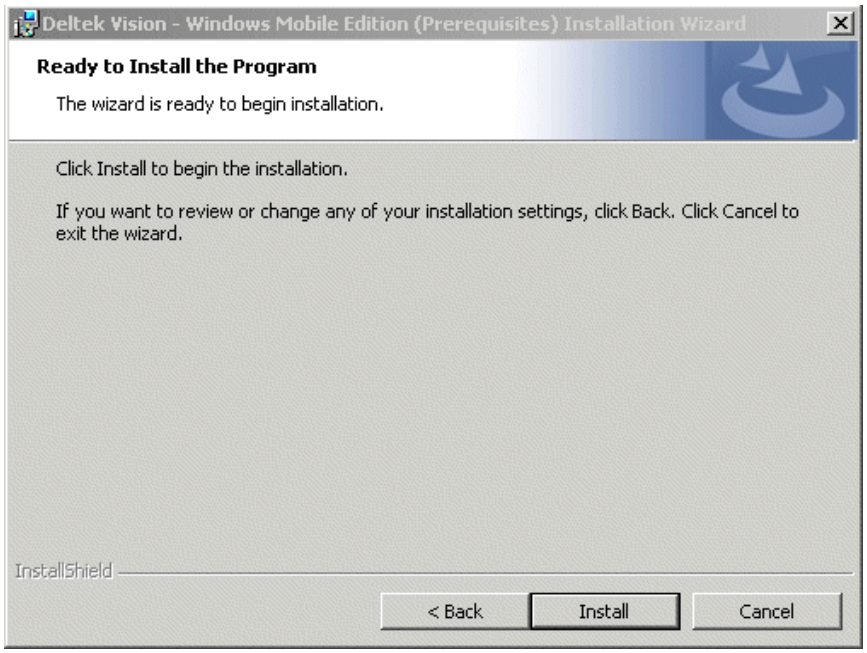
7. On the Welcome to the Deltek Vision – Windows Mobile Edition (Prerequisites) Installation Wizard page, click **Next** to start the prerequisite installation on your desktop machine.



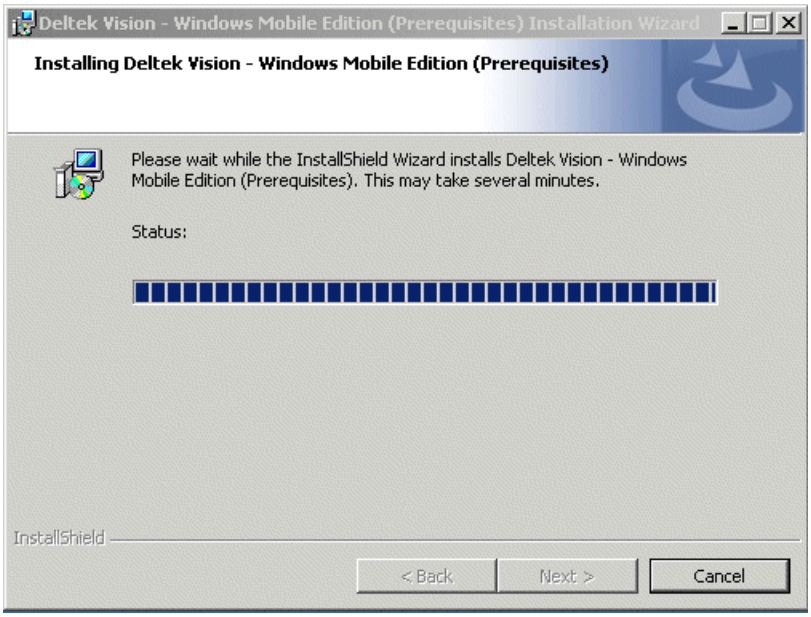
8. On the license agreement page, read the agreement, select the **I accept the terms in the license agreement** option, and click **Next**.



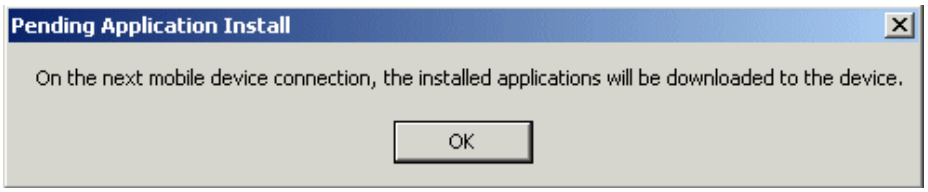
9. On the Ready to Install the Program page, click **Install** to start the installation.



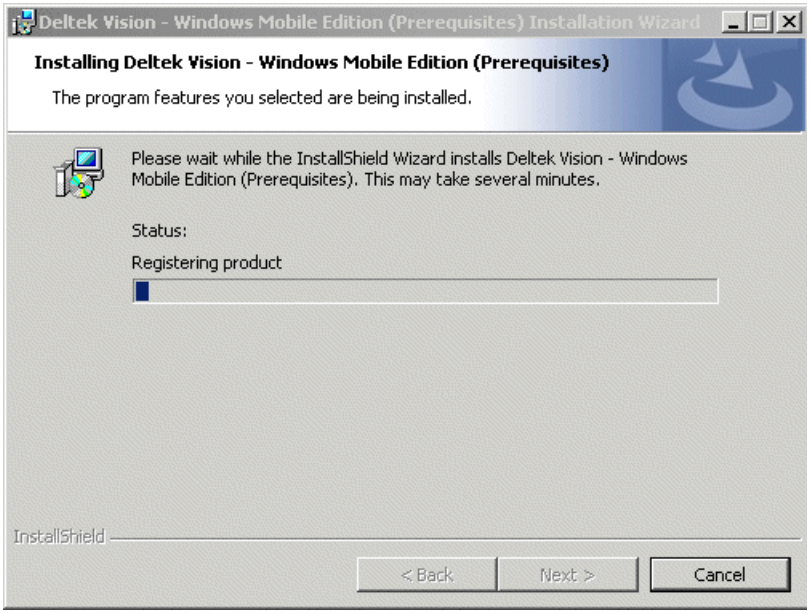
The status displays while the files are installed.



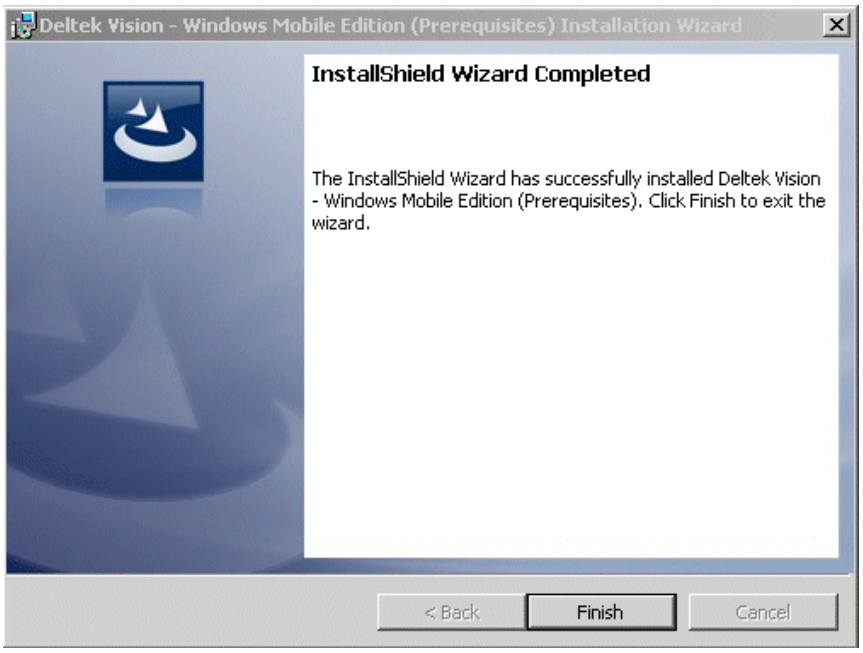
10. The Pending Application Install dialog box informs you that the next time you connect a mobile device to this computer, the prerequisites will be installed to the device. Click **OK** to continue.



On the Installing Deltek Vision – Windows Mobile Edition (Prerequisites) page, you again see the status of the installation.



11. When the installation completes, click **Finish** on the InstallShield Wizard Completed page to finish the process and exit the wizard.

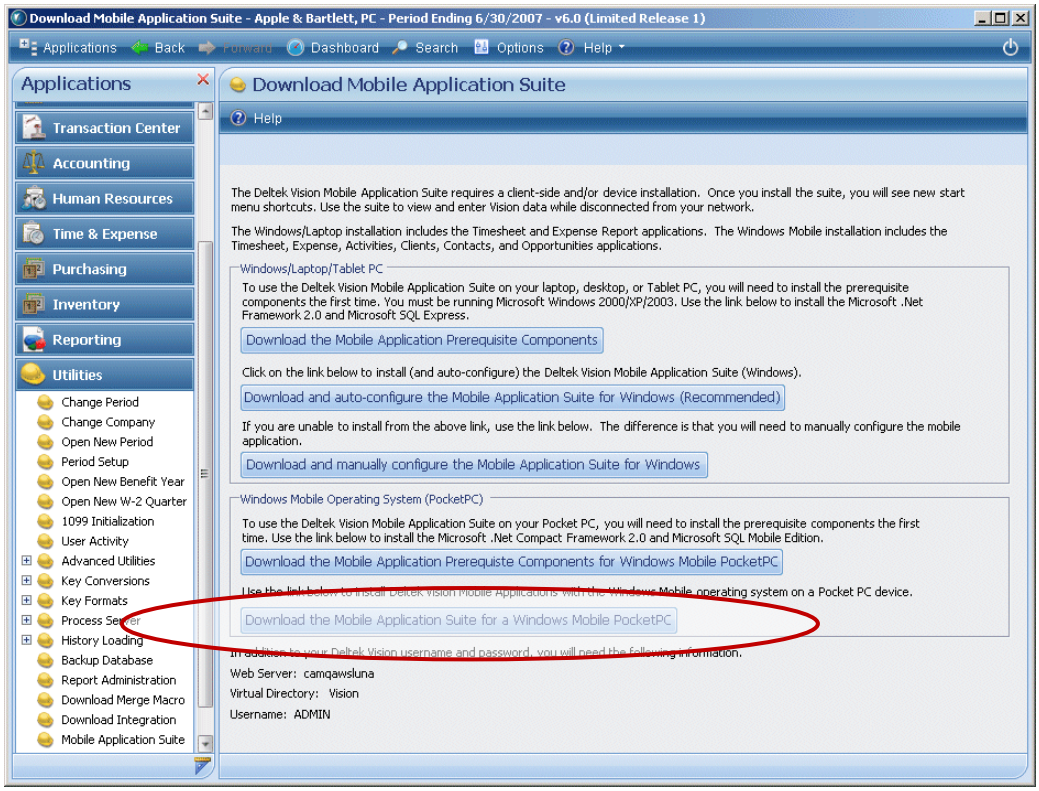


12. To install the prerequisites on your mobile device, connect your mobile device to the computer that now has the mobile device prerequisites installed.

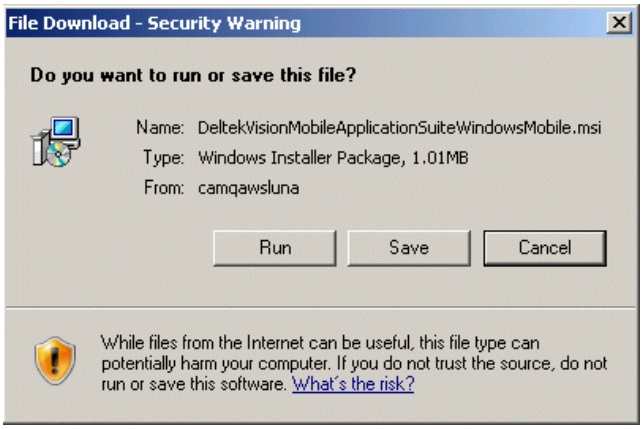
3. Install the Mobile Application Suite on a Pocket PC Device

To install Vision MAS on a pocket PC device, complete the following steps:

1. Cradle the pocket PC device, and ensure that it is connected to a workstation that can access the Vision server.
2. From the Vision Applications menu, click **Utilities » Mobile Application Suite**.
3. In the **Windows Mobile Operating System (PocketPC)** section of the Download Mobile Application Suite form, click the **Download the Mobile Application Suite for a Windows Mobile PocketPC** button.

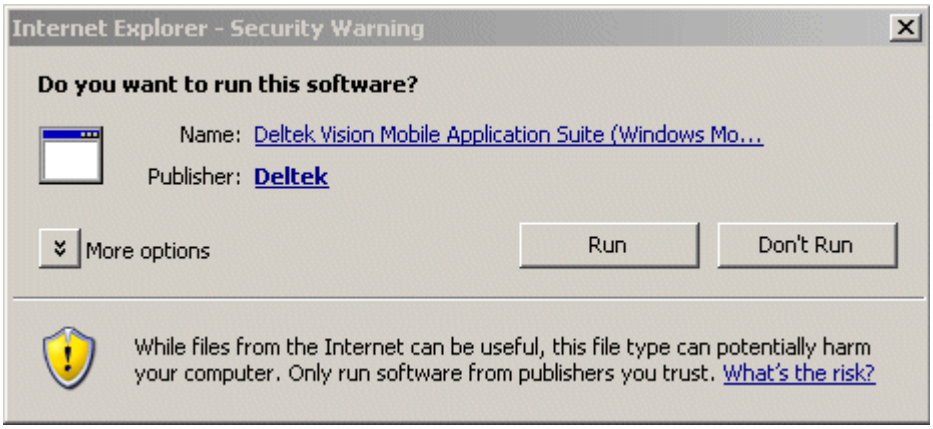


4. In the File Download – Security Warning dialog box, click **Run**.

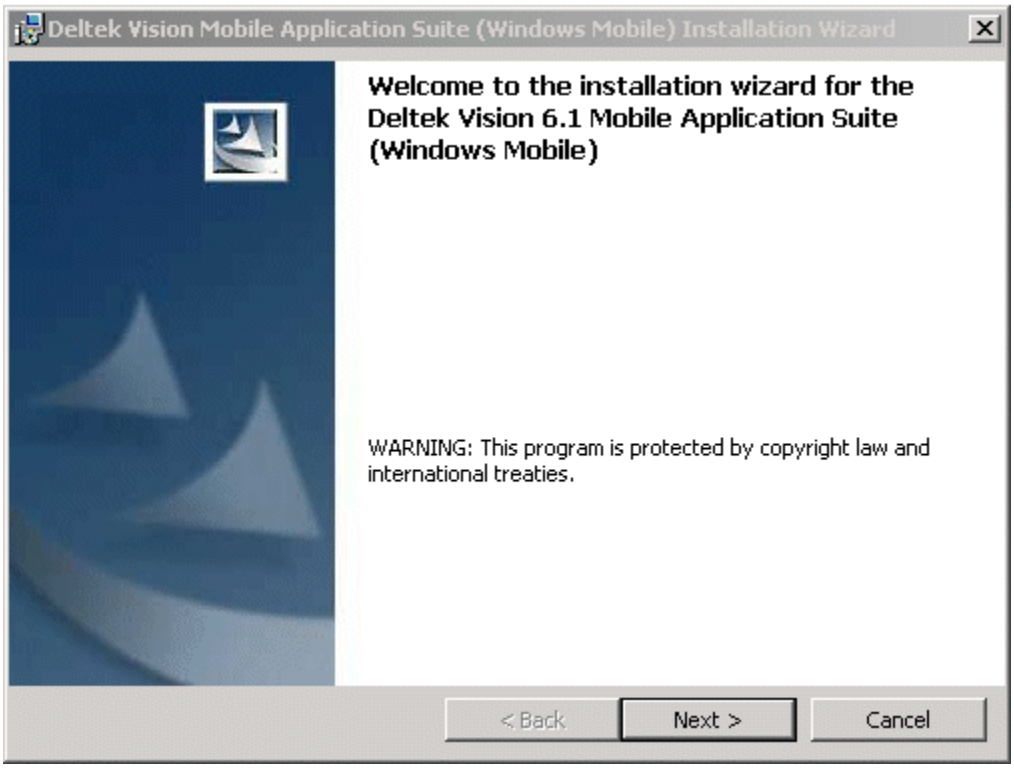


The screenshots in this procedure may not reference your device in use. The dialog boxes may vary based on the type of device that you use in the installation.

5. If you receive the following Internet Explorer Security Warning dialog box, click **Run**.

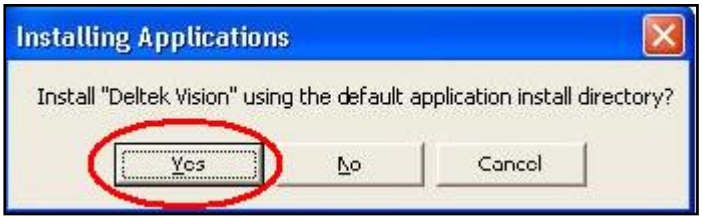


6. On the Welcome to the installation wizard page, click **Next** to start the installation wizard.



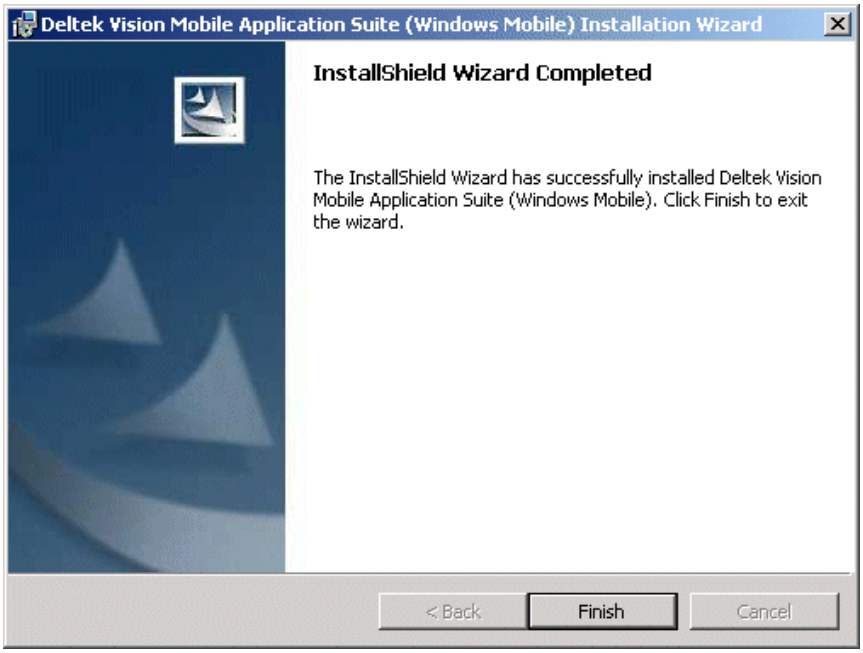
7. On the Add/Remove Programs dialog box, select the **Install program into the default installation folder** check box.

8. On the Installing Applications dialog box, click **Yes** to install the Mobile Application Suite to the default application install directory.



The status of the installation displays as follows.

9. On the InstallShield Wizard Completed page, click **Finish** when the desktop portion of the installation completes.



10. On the Application Downloading Complete dialog box, click **OK**, and then check the pocket PC device to see whether or not additional steps are required to complete the installation.

The pocket PC device displays a Deltek Vision installation progress screen as follows.

When the Vision installation completes, the Vision icon displays on the pocket PC Programs screen.

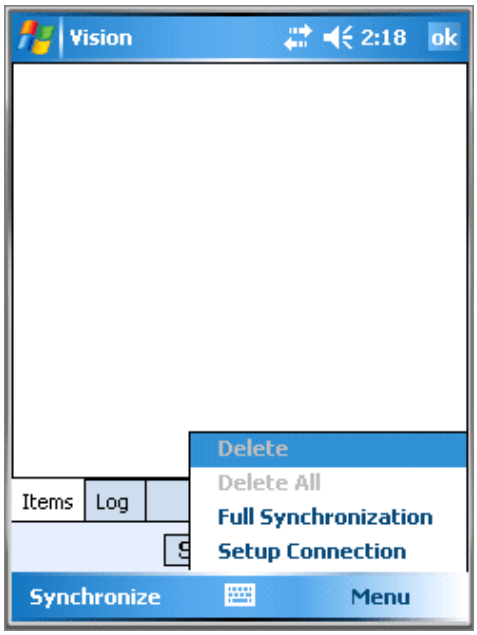
4. Set Up Vision Connection Parameters and Synchronize

To set up Vision connection parameters on a pocket PC and synchronize, complete the following steps:

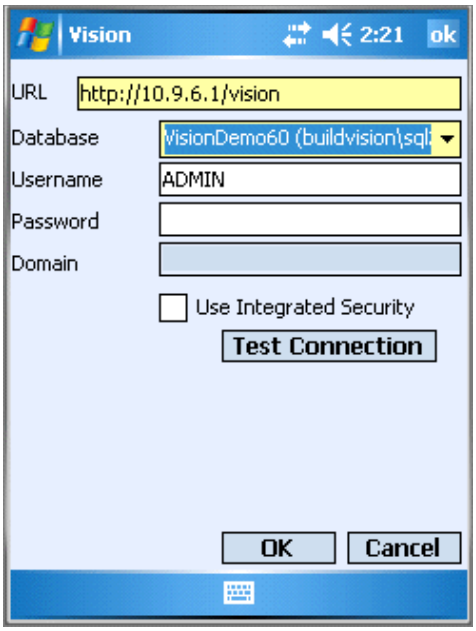
1. On the pocket PC Programs screen, tap the **Vision** icon.

2. On the Vision main form, tap the **Synchronize** icon to enter the Vision connection parameters and synchronize with the Vision database.

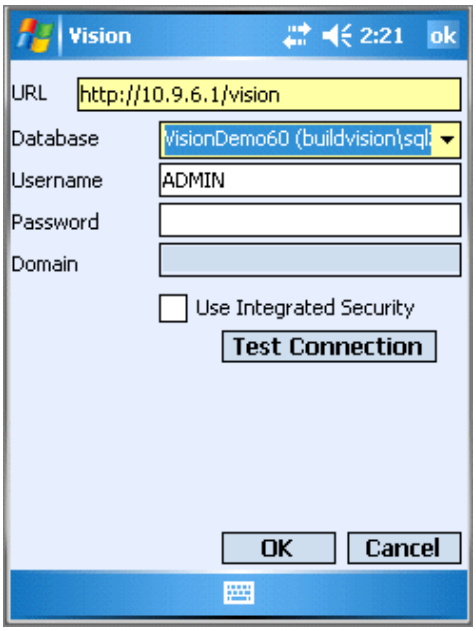
3. At the bottom of the Synchronize form, tap **Menu » Setup Connection**.



4. On the Connection Setup form, enter a valid URL for the Vision server. To access the Vision server with a wireless connection via the ISP service, the Vision URL must be publicly available on the Internet.

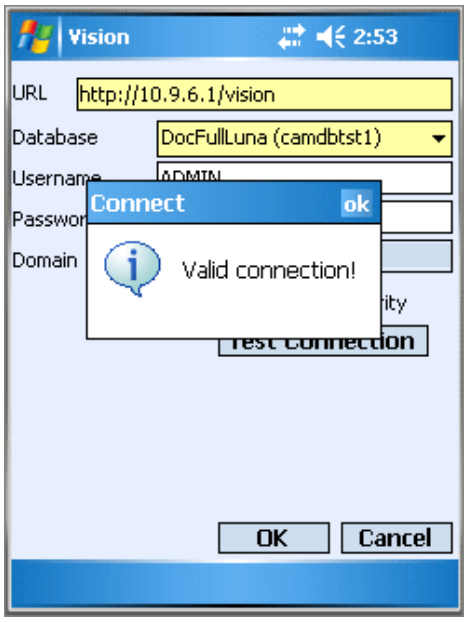


5. From the drop-down list in the **Database** field, select a database on the Vision server. (After you enter a valid URL, the drop-down list in the **Database** field is populated.)



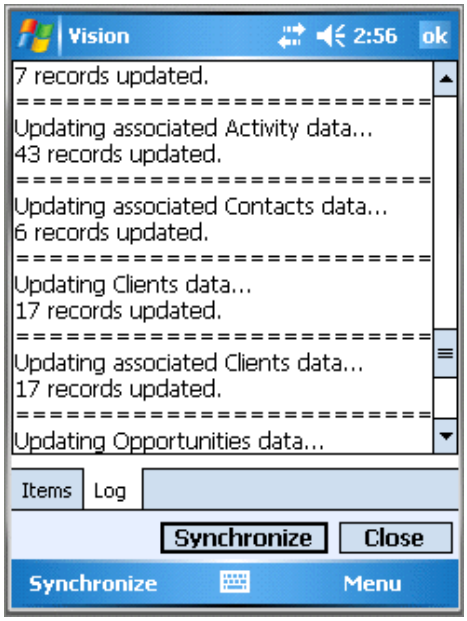
6. Enter a username, password, and domain (if you use integrated security).

7. Tap the **Test Connection** button to test the access to the selected database with the credentials and selected URL. The following **Valid connection!** message displays when the connection is successful.

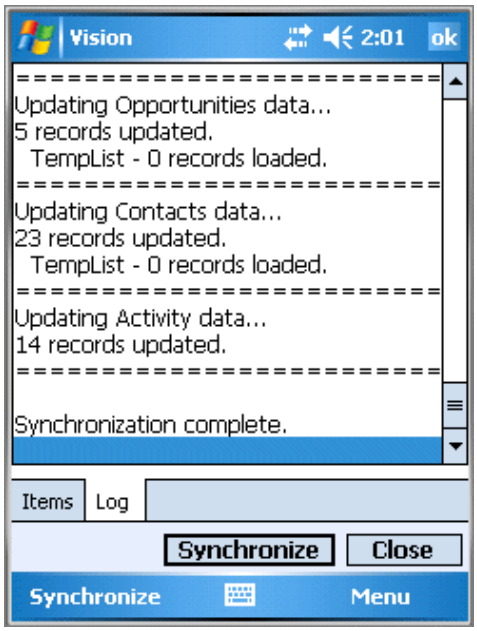


If Vision displays a login error (for example, “Invalid Login Attempt” or “Vision URL is invalid”), check with your Vision administrator to verify the correct URL, database, username, password, and domain. Also, ensure that your device can access the Internet. If neither is the issue, contact Vision Support.

8. Tap **OK** to return to the Synchronize form.
9. Tap the **Synchronize** button to synchronize your device with the Vision database. Vision downloads reference data.



10. A **Synchronization complete** message displays to indicate that the reference data is downloaded.



11. Tap **Close** to close the Synchronize form and return to the Vision main form. The Pocket PC installation is complete and you are ready to use the Vision mobile applications.