

Deltek Vision® 6.1 User Options Quick Reference Card

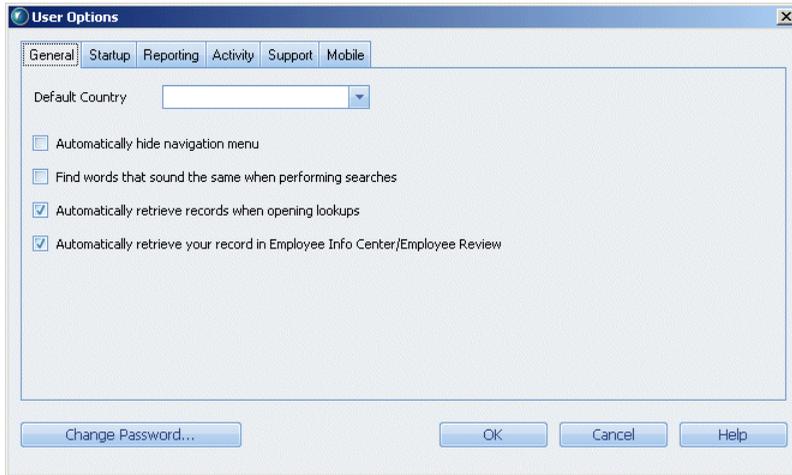
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User Options Tabs

Use Vision User Options to configure personal default settings for reporting, printing, lookups, startup, and more. You set up these options on an individual basis by user name.



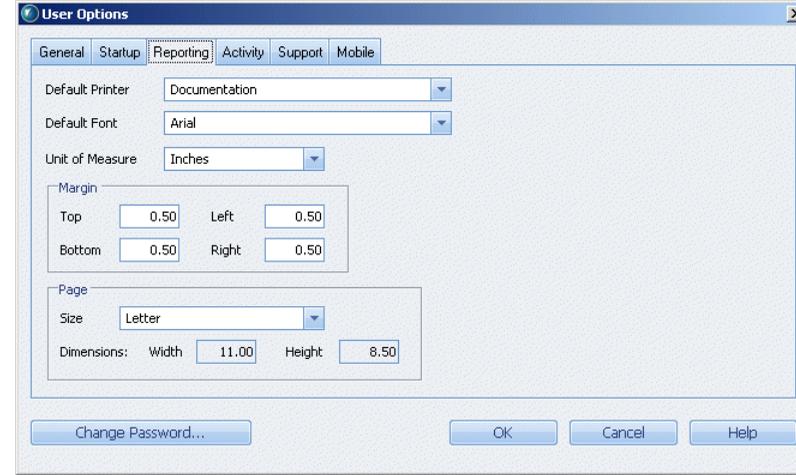
To access User Options form, click the Options icon on the Vision title bar. You can change these options at



General Tab

Use this tab to determine:

- The default country for your system.
- Whether or not you want Vision to hide the navigational menu after you select a menu item.
- Whether or not you want Vision to include words that sound alike in search results.
- Whether or not you want Vision to automatically search for all records when you open lookups.
- Whether or not you want your employee record to automatically load when you open Employee Info Center or Employee Review.

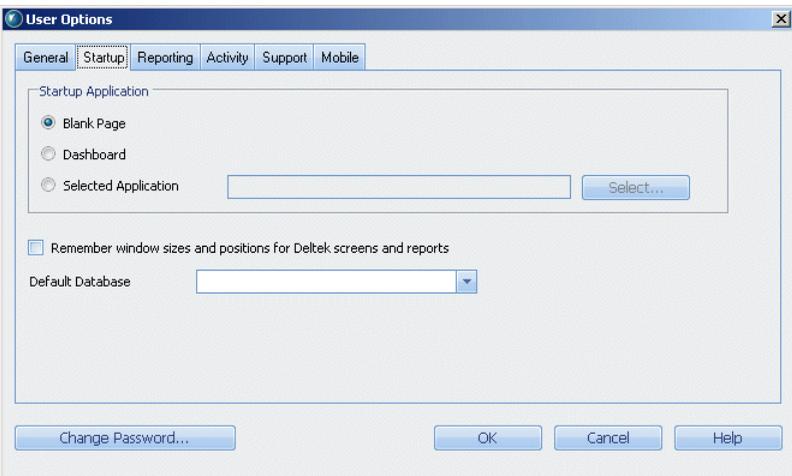


Reporting Tab

Use this tab to set up the following Reporting default settings:

- Default printer
- Default font
- Unit of measure
- Margins
- Page size

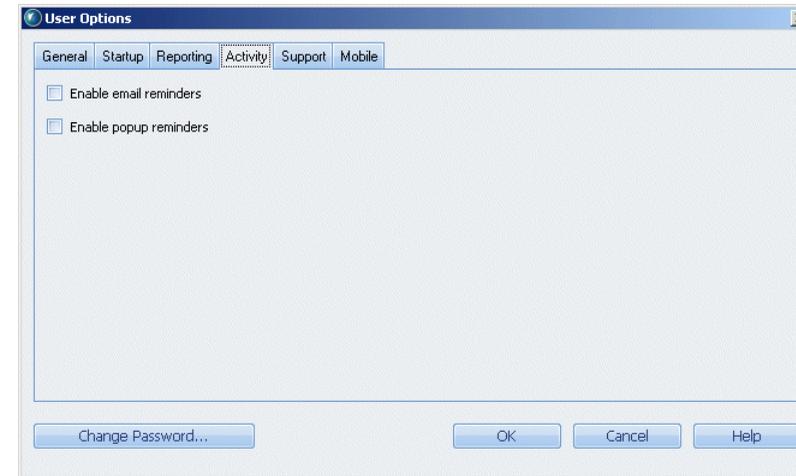
You can override any of these default settings when you generate a report if the report has an Options page.



Startup Tab

Use this tab to determine:

- What displays when you start up Vision (blank page, dashboard, or selected application).
- Whether or not you want Vision to remember the size and position that you specified for windows and reports.
- Whether or not you want Vision to automatically connect to a particular database.



Activity Tab

Use this tab to enable:

- Email reminders. Vision sends an email reminder for an activity to the email address specified in your Employee Info Center record at the reminder time that is specified for the activity.
- Popup reminders. A popup for an activity displays on your screen at the reminder time that is specified for the activity.



User Options Tabs (continued)

The screenshot shows the 'User Options' dialog box with the 'Support' tab selected. The 'Support' tab contains two text input fields: 'Username' and 'Password'. At the bottom of the dialog, there are four buttons: 'Change Password...', 'OK', 'Cancel', and 'Help'.

Support Tab

Use this tab to enter or change:

- Your user name that is required to access Deltek's Customer Care Connect site.
- The password that is assigned to your user name.

The screenshot shows the 'Change Password' dialog box. It contains four text input fields: 'Username' (with 'ADMIN' entered), 'Old Password', 'New Password', and 'Confirm Password'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Help'.

Change Password

- To change your Vision system password, click the **Change Password** button on the User Options form (from any of the tabs). On the Change Password dialog box, enter your old and new password. Then reenter your new password in the **Confirm Password** field.
- You can change your Customer Care Connect username and password on the Support tab of User Options.

The screenshot shows the 'User Options' dialog box with the 'Mobile' tab selected. The 'Mobile' tab is divided into two sections: 'Timesheets and Expense Reports' and 'CRM'. Under 'Timesheets and Expense Reports', there is a 'Projects to Download' dropdown menu with '<records selected>' selected. Under 'CRM', there are four dropdown menus: 'Activities to Download' (with '<no criteria>' selected), 'Clients to Download' (with '<records selected>' selected), 'Contacts to Download' (with '<records selected>' selected), and 'Opportunities to Download' (with '<no criteria>' selected). At the bottom, there are four buttons: 'Change Password...', 'OK', 'Cancel', and 'Help'.

Mobile Tab

This tab is available only if you are using the Vision Mobile Application Suite.

Use this tab to select the following items to download to your mobile device:

- Projects for timesheets and expense reports if you use these mobile applications.
- Activities, clients, contacts, and opportunities if you use these Mobile Customer Relationship Management (CRM) applications.