

# Deltek Vision® 6.1 User Options Quick Reference Card

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## User Options Tabs

The screenshot shows the 'User Options' dialog box with the 'General' tab selected. The 'Default Country' is set to a dropdown menu. There are four checkboxes: 'Automatically hide navigation menu' (unchecked), 'Find words that sound the same when performing searches' (unchecked), 'Automatically retrieve records when opening lookups' (checked), and 'Automatically retrieve your record in Employee Info Center/Employee Review' (checked). At the bottom are buttons for 'Change Password...', 'OK', 'Cancel', and 'Help'.

The screenshot shows the 'User Options' dialog box with the 'Startup' tab selected. The 'Startup Application' section has three radio buttons: 'Blank Page' (selected), 'Dashboard', and 'Selected Application' (with a 'Select...' button). There is a checkbox for 'Remember window sizes and positions for Deltek screens and reports' (unchecked). The 'Default Database' is set to a dropdown menu. At the bottom are buttons for 'Change Password...', 'OK', 'Cancel', and 'Help'.

### 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.

### 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.

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



The screenshot shows the 'User Options' dialog box with the 'Reporting' tab selected. The 'Default Printer' is set to 'Documentation'. The 'Default Font' is set to 'Arial'. The 'Unit of Measure' is set to 'Inches'. The 'Margin' section has four input fields: 'Top' (0.50), 'Left' (0.50), 'Bottom' (0.50), and 'Right' (0.50). The 'Page' section has a 'Size' dropdown set to 'Letter' and 'Dimensions' for 'Width' (11.00) and 'Height' (8.50). At the bottom are buttons for 'Change Password...', 'OK', 'Cancel', and 'Help'.

### 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.

The screenshot shows the 'User Options' dialog box with the 'Activity' tab selected. There are two checkboxes: 'Enable email reminders' (unchecked) and 'Enable popup reminders' (unchecked). At the bottom are buttons for 'Change Password...', 'OK', 'Cancel', and 'Help'.

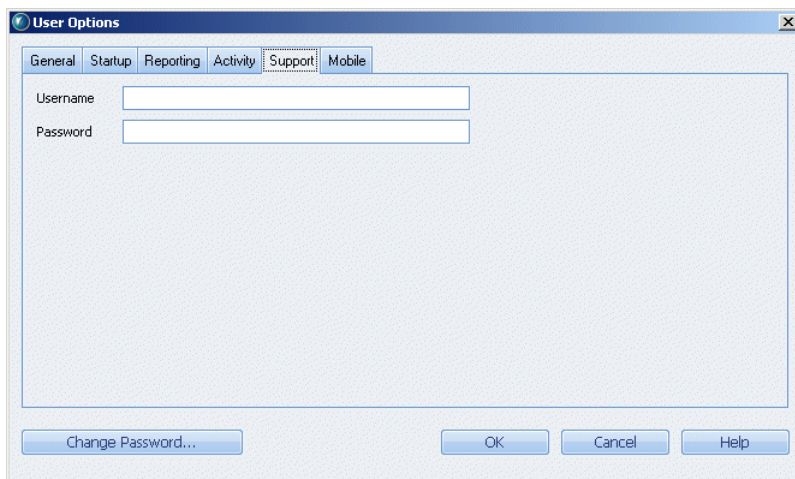
### Activity Tab

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)

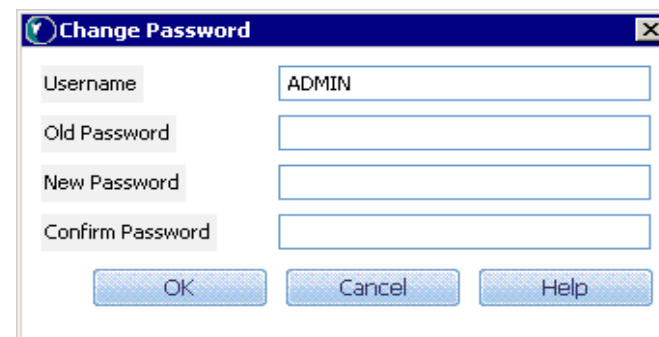


The 'User Options' dialog box is shown with the 'Support' tab selected. It features a 'Username' field with the text 'ADMIN' and a 'Password' field. At the bottom, there is a 'Change Password...' button and 'OK', 'Cancel', and 'Help' buttons.

### Support Tab

Use this tab to enter or change:

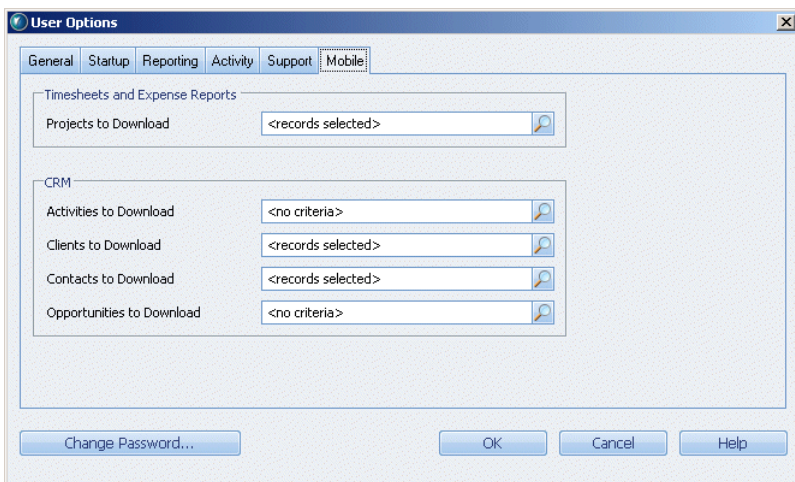
- Your user name that is required to access Deltek's Customer Care Connect site.
- The password that is assigned to your user name.



The 'Change Password' dialog box is shown. It contains four input fields: 'Username' (with 'ADMIN'), 'Old Password', 'New Password', and 'Confirm Password'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

### 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 'User Options' dialog box is shown with the 'Mobile' tab selected. It features a 'Timesheets and Expense Reports' section with a 'Projects to Download' dropdown (showing '<records selected>'). Below this is a 'CRM' section with four dropdowns: 'Activities to Download' (showing '<no criteria>'), 'Clients to Download' (showing '<records selected>'), 'Contacts to Download' (showing '<records selected>'), and 'Opportunities to Download' (showing '<no criteria>'). At the bottom, there is a 'Change Password...' button and 'OK', 'Cancel', and 'Help' buttons.

### 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.