Deltek Vision®

Deltek Award to Deltek Vision Migration Guide

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Introduction

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Welcome to Deltek Vision, the Web-based software solution for professional services organizations. Vision combines your front-office and back-office data into one integrated system and enables all the members of your firm to use and share the same information — thereby helping increase the efficiency and productivity of your business.

About This Guide

The *Deltek Vision Award Migration Guide* contains helpful information for firms migrating data from the latest version of Deltek Award to Deltek Vision. In this guide you will find steps to perform before, during and after migration to ensure success, as well as general information to help you familiarize yourself with navigation, usability, and feature changes in Deltek Vision.

The contents of this guide include:

Chapter 1	Introduction to Vision
Chapter 2	Overview and Introduction to Vision
Chapter 3	Migrating to Deltek Vision
Appendix A	Award to Vision Field Mapping

This guide can be used as a reference tool by the persons in your firm who are responsible for performing the actual migration of data from Deltek Award to Deltek Vision. Those performing the migration will find detailed migration instructions in Chapter 2. Those performing the migration should also refer to Chapter 1 for an overview of Vision, including the technical architecture.

Migration Approaches

You can approach your migration in one of two ways.

- Some firms rely on substantial on-site consulting assistance by experienced Deltek staff members. This approach is the most comprehensive and provides services that are tailored to your firm's specific needs.
- Another option is to take advantage of regularly scheduled classroom and Web-hosted training programs to supplement a smaller amount of on-site consulting service. This approach is more cost effective and allows staff in different locations to train at the same time.

Deltek offers a variety of services to help ensure a successful migration tailored to your firm's needs. For a complete list of services, see the Deltek Client Services section of this chapter, beginning on page iv.

- For firms also converting data from Advantage and/or Sema4, there are additional issues not addressed in this guide. Please contact your Deltek Vision representative before continuing.

Multicompany and Multicurrency

Deltek Vision offers a Multicompany feature and a Multicurrency application.

If your firm will enable the Multicompany feature, or if you have purchased and plan to enabled the Multicurrency application, you may have some additional considerations as you migrate from Award to Vision. Throughout this guide you will find fields, options, or issues specific to Multicompany or Multicurrency called out using one of two graphics.

Because using either Multicompany or Multicurrency, or both, presents unique issues that cannot be covered in the depth required in this guide, if you plan on using one or both of these features/applications, please contact your Deltek representative.

Multicompany

Using a single, enterprise-wide database, Deltek Vision's Multicompany feature provides a comprehensive view of the transactions, interactions, and activities of all your business entities. Designed to manage the special CRM, project planning, resource management, project control and accounting needs of multicompany enterprises, Deltek Vision offers each business entity the flexibility and independence it needs, while encouraging the enterprise-wide sharing of knowledge and resources.

When you see the icon shown to the left elsewhere in this guide, this represents an issue relevant to the Mutlicompany feature.

Multicurrency

The Multicurrency application allows a firm to transact business in any number of global currencies, while maintaining core financial records in a single, "functional currency." This application is designed for any enterprise that uses multiple currencies, from a complex global enterprise that transacts business daily in numerous currencies, to a single company that occasionally does business in foreign currencies.

When you see the icon shown to the left elsewhere in this guide, this indicates an issue relevant to Multicurrency.

Overview of the Migration Process

Migrating from Award to Vision means moving relevant data from the Award database to a new Vision database, and then using Vision to manage that data.

Migrating to Vision involves several manageable steps, listed below, that should be completed in the proper order for a successful migration. Deltek is available to guide you through each step in this process.

1. **Prepare to Install Vision**
   - Plan for the migration.
   - Select hardware and software.
2. **Install Vision and Prepare Data for Conversion**
   - Install Vision.
   - Configure Vision.
   - Update to Award 2005.05 or higher.
   - Prepare your data for migration.
   - Convert your Award database to a test database.
3. **Test Vision**
   - Connect to the Vision test database.
   - Spot check records in Vision against Award.
   - Train team to use Vision.
   - Update design, documentation, and reports, as necessary.
   - Perform segment testing.
4. **Go Live on Vision**
   - Prepare for live conversion.
   - Convert your Award databases to a live Vision database.
   - Connect to the Vision live database.
   - Begin using Vision.
   - Follow-up with additional Deltek consulting or training, as needed.

This list of steps is a general guide to which you can refer as you proceed through the migration process. In practice, some steps may overlap or may include additional procedures not mentioned here. Each of these steps is discussed in greater detail in Chapter 2-3 of this guide.

If You Need Assistance

If you need assistance installing, implementing, or using Vision, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal. (See Customer Care Connect Site below for more information.)
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services

- Receive alerts of new Deltek releases and hot fixes

> If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. From Vision, click **Help** on the Vision toolbar and click **Customer Care Connect** on the menu.

   Or

   From outside Vision, go to https://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.

   If you do not have a username and password for the Customer Care Connect site, contact your firm's Vision Administrator.

   If you forget your username or password, click the **Account Assistance** button on the Login page to get help.
3. Click **Log In.**

Deltek Vision Help System

Vision Help is Web-based online documentation that is fully integrated with the Vision applications and provides both conceptual and procedural information for all areas of Vision.

Access Vision Help

You can access Vision Help in the following ways:

- From any Vision application, click **Help** on the Vision toolbar at the top of the Vision window.
- Click **Help** on the toolbar at the top of any Vision form to view help for that form.
- Click the **Help** button in the lower right corner of a dialog box to view help for that dialog box.

Vision Help Menu

When you click **Help** on the Vision toolbar at the top of the Vision window, this menu displays:

The Vision Help menu provides the following options:

- **Contents —** Click this option to display Vision Help.
- **Help Desk —** Click this option to display the Send Email dialog box. Use that dialog box to compose and send a message to a designated Help Desk mailbox. You can send email directly to Deltek Customer Care, or you can set up an internal Help Desk mailbox to respond to questions from your staff.
- **Customer Care Connect —** Click this option to display the Deltek Customer Care Connect site. This site is available as part of the Deltek Vision Ongoing Support Plan (OSP). You must have a username and password to access this site.
- **Knowledge Base —** Click this option to display the Deltek Customer Care Connect site and go to the Knowledge Center, which provides thousands of solutions for issues and questions.
- **Contact Us —** Click this option to display the Deltek Customer Care Connect site. Select the **Contact Us** link available at the bottom of site pages to view Customer Care phone numbers, email addresses, and hours of operation. Also, you can chat with Customer Care personnel live!
- **About —** Click this option to view application, database, and server information for Vision.

Additional Documentation

In addition to Vision Help and this guide, Deltek provides other documentation in PDF format to help you install and use Vision. The documentation available for this release of Vision is listed below. Except where noted, each of the guides and quick reference cards is available for download from the Deltek Customer Care Connect site at https://support.deltek.com.

- ***Deltek Vision Release Notes* —** The release notes contain information about all the new features in the current release, as well as software issues resolved and database changes implemented.

- ***Deltek Vision Getting Started Guide* —** This guide contains an introduction to the Vision Web interface and all the Vision applications, with tips for navigating through the system, using the Dashboard, and finding and opening records.
- ***Deltek Vision Concepts Guide* —** This guide describes the concepts underlying the basic accounting, project control, and customer relationship management (CRM) functions of Vision.
- ***Deltek Vision Technical Installation Guide* —** This guide contains detailed instructions for installing all the technical components of Vision, including the servers, the database, and Vision itself.
- ***Deltek Vision Implementation Guide* —** This guide contains information about configuring and setting up the Vision applications.
- ***Deltek Vision Creating a Reverse Proxy for SQL Reporting Services Using IIS 7.0 Application Request Routing (ARR)* —** This guide contains instructions for configuring a reverse proxy using Microsoft's Application Request Routing (ARR) extension for IIS 7.0, which allows the direct forwarding of requests through the Vision Web server to the reporting services Web service with responses back to your Internet clients.
- ***Deploying Vision at a Hosting Provider* —** This guide contains instructions for deploying Vision at a hosting provider.
- ***Deltek Advantage to Deltek Vision Migration Guide* —** This guide contains information about migrating from Advantage to Vision, including the steps in the migration process and an overview of Vision features.
- ***Deltek Award to Deltek Vision Migration Guide* —** This guide contains information about migrating from Award to Vision, including the steps in the migration process and an overview of Vision features.
- ***Deltek CRM and Proposals to Deltek Vision Migration Guide* —** This guide contains information about migrating from CRM and Proposals to Vision, including the steps in the migration process and an overview of Vision features.
- ***Deltek FMS to Deltek Vision Migration Guide* —** This guide contains information about migrating from FMS to Vision, including the steps in the migration process, detailed discussions of the key migration decisions, and procedures for verifying the converted data. (This guide is provided by Implementation Services prior to the migration. It is not available on the Deltek Customer Care Connect site.)
- ***Deltek Sema4 to Deltek Vision Migration Guide* —** This guide contains information about migrating from Sema4 to Vision, including the steps in the migration process and an overview of Vision features. (This guide is provided by Implementation Services prior to the migration. It is not available on the Deltek Customer Care Connect site.)
- ***Deltek Vision Configure Vision Analysis Cubes*** — This guide describes the prerequisites and steps required to configure your database server when using Vision Analysis Cubes.
- ***Deltek Vision Configure Vision Analysis Cubes for Internet* —** If you want users to access Vision Analysis Cubes and Microsoft® Excel® via the Internet (from outside the corporate firewall), you must follow the configuration steps in this guide after you complete the configuration steps in the *Configure Vision*

Analysis Cubes guide. This guide describes the two methods for exposing data for Internet users.

- ***Deltek Vision Custom Reports and Microsoft SQL Server® Reporting Services* —** This guide provides instructions for creating, delivering, and generating Vision custom reports with Microsoft SQL Server Reporting Services and its report writing tools.
- ***Deltek Vision Performance Management Canvases Technical Installation Guide* —** Performance management canvases enable you to use Vision Project Cubes and General Ledger Cubes data sets and analysis services to create role-based graphical canvases. These canvases offer a customized graphical component for the Vision Dashboard. This guide describes the installation steps that are required to use performance management canvases with Vision.
- ***Deltek Vision Document Management Installation Guide* —** This guide contains detailed information on the prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.
- ***Deltek Vision Mobile Application Suite (MAS) Installation Guid*e —** This guide provides instructions for enabling MAS on your Vision server, installing prerequisite software components, and installing and configuring the MAS software. This guide also provides a list of all the mobile devices that you can use with MAS.
- ***Deltek Vision Synchronization Server Installation and Maintenance for Nokia Intellisync Mobile Suite 8.0 SP2 or higher* —** This guide contains an overview of the Vision Synchronization Server feature, as well as technical installation, setup, and maintenance information.
- ***Deltek Vision Server Synchronization Implementation Guide* —** This guide provides planning and best practices information for clients who are implementing the Deltek Vision Server Synchronization application.
- ***Deltek Vision Specification and Business Rules for Synchronization* —** This document lists the fields mapped in each of the three areas of Vision (contacts, appointments, and tasks/to-dos) for which you can use server synchronization to bi-directionally synchronize between Vision and your third-party groupware. This guide covers business rules and requirements, describes limitations, and discusses scenarios to watch for when mapping data.
- ***Deltek VisionXtend Guides* —** These guides explain how to use the Deltek VisionXtend platform to integrate Vision with other applications, access Web services, implement data validation routines, and establish workflow procedures using the Microsoft .NET Framework. The following VisionXtend guides are available:
  - Deltek VisionXtend Extending Data Validation Business Logic for Expense Reports
  - Deltek VisionXtend Extending Data Validation Business Logic for Timesheets
  - Deltek VisionXtend Invoking a Custom Method to Process Workflow Actions
  - Deltek VisionXtend Invoking a Web Service to Process Workflow Actions
  - Deltek VisionXtend Test Client Application for Vision Web APIs/Web Services

  - Deltek VisionXtend Web Services and API for Deltek Vision
- ***Deltek Vision Quick Reference Cards —*** The Vision quick reference cards provide snapshots of specific business processes or Vision forms with tips for entering data and using application toolbars. The following quick reference cards are available:
  - Accounts Payable (Create a Voucher from a Purchase Order)
  - Create Client from Vendor Utility
  - Dashboard
  - Desktop and Microsoft Office Integration
  - Expense Report
  - Mobile Timesheet and Expense Report for Hand-Held Devices
  - Navigation Tree Designer
  - Project Planning
  - Purchasing (Create a Standard Purchase Order)
  - Resource Management (Generic Resource Assignments)
  - SF330 Proposals
  - Template Based Email
  - Timesheet
  - User Options
  - Visualization

1 Overview and Introduction to Vision

❖ What's Different in Vision CRM and Proposals

What's Different in Vision CRM and Proposals

As you switch from Award to Deltek Vision, you should find that similarities between the programs pave the way for a smooth transition, and much has been done to make the conversion process as simple as possible.

The topics below provide more information about how the programs are different from each other and how these differences may affect the conversion process.For information about using Vision, refer to the following guides, both are available for download from the Deltek e-Support siteon the Deltek e-Support site at https://support.deltek.com:

- Deltek Vision Getting Started Guide
- Deltek Vision Concepts Guide

Program Differences That Affect Conversion

Required Fields

Many Award fields convert to required fields in Vision. If one of these Award fields is blank at the time of conversion, the record that contains it won't be converted. Your Deltek consultant will provide you with a pre-conversion report that identifies every Award record that is missing data in a required field.

You will also be advised on how to implement the changes. For example, Staff, Project, and Vendor IDs can be automatically generated by the conversion utility, as can Activity Types and Activity Subjects. Other fields may require manual data entry prior to conversion.

Conversion of Award Standard Fields to Vision

Many of Award's standard fields have no Vision equivalent, but they can be converted to Vision as custom fields. The Award tabs that contain the fields are also converted, and both of them retain their original Award labels after conversion.

Any fields you created on the Award Custom tab are automatically converted to the Vision Custom tab in the appropriate Vision Info Center.

Fields in the Company Database

Your Award Company database information is converted to Vision Organization Configuration, which does not support custom fields. Most of your Award Company data is converted to the Firm Setup - Proposals portion of Organization Configuration. If a Company database field does not have a direct Vision equivalent, it cannot be converted to Vision as a custom field.

Embedded Attachments

In Award, an attachment is created by either linking to a file in another location or by storing (embedding) it directly in the database. However, Vision supports only linked attachments.

Although your linked attachments in Award are automatically converted to Vision using existing path information, your embedded attachments must first be saved to a network location, so Vision can create links to the files in that location.

Embedded Word Documents

Vision uses a different text editor than Award does. This means your Award boilerplate and text items — such as those used to build resumes, proposals, and letters — will probably lose some formatting when they are converted to memo fields in the corresponding Vision Info Center.

You have the option, however, to create links to the original Word documents, which will appear on the Files tab in Vision after conversion. The links provide easy access to the original documents, so you can quickly identify formatting changes that occurred to the converted versions.

Clients and Vendors

In Award, vendors (subconsultants) and clients are combined in a single database, while in Vision, vendors and clients are stored in separate databases, either the Vendor Info Center or the Client Info Center, respectively.

Prior to conversion, your Deltek consultant will provide you with a pre-conversion report that identifies which firms will be converted to Vendors and which to Clients.

A firm is converted to the Client Info Center if **Client** is selected on the firm record, or if any of the following roles are assigned on the project or opportunity record: Client, Owner, JV Partner, Prime, Lost To, Competitor, or Contractor.

A firm is converted to the Vendor Info Center if **Subconsultant** is selected on the firm record, or if it is attached to the Subconsultant grid of any project or opportunity record.

If a record is categorized as both a client and a vendor, it is converted twice. In this case, two separate records exist, one in the Client Info Center and one in the Vendor Info Center.

> If an Award firm is converted to both the Client and Vendor Info Centers, any contacts attached to that firm are converted twice. This is because a contact record cannot be attached to both a vendor and client record in Vision, so instead, the conversion utility creates two contact records, one for vendor and one for client.

Vision Features Unavailable in Award

Vision Technology

Built on the Microsoft .Net framework, Vision is completely Web based, providing universal access to the application wherever you have Internet access. Any user who has Internet Explorer can enjoy global access to Vision CRM & Proposals. Other than a Web browser, you need no software — no ActiveX® controls, plug-ins, applets or proprietary controls.

Vision Dashboard

The Dashboard is an intuitive, personalized desktop portal that provides quick access to all of your relevant information and true visibility into the performance of your organization. By combining information drawn from various areas of Vision, you can configure a single Web page that brings together all of the information and tools you rely on most.

With all key metrics delivered to your firm's stakeholders in real time, Vision helps ensure that your entire staff is aligned with the strategic goals of the company. Whether you're an executive, project manager, salesperson, marketer, accountant, consultant or planner, you'll know instantly when things are working or whether adjustments need to be made to keep initiatives on target. Sales, marketing, and business development personnel can have personalized dashboards that provide them with access to critical metrics, such as sales pipeline, top/bottom opportunities, marketing campaigns, new leads, pending proposals, and more.

Vision Screen Designer

The Vision Screen Designer provides administrators with a powerful set of tools that allow them to modify the entry screens to match the workflow and unique requirements of their firms. Design features supported include:

- Resizing and moving all existing fields and labels
- Ability to change existing field labels or add new ones to the screen
- Ability to add custom fields and grids to any existing tab
- Ability to add custom columns to existing grids
- Ability to add new tabs to any screen
- By role, the ability to hide, lock, or require fields
- Ability to add custom help buttons with text as well as field tool tips

This combination of new configuration options allows firms to tailor information to meet the security and information requirements of each end-user.

Vision Workflow Manager

Think of the complexity of some of your firm's business processes, such as those that have numerous steps and require coordination between multiple departments or offices, or those that span days, weeks, or months. Each step of the way, the opportunity exists for someone to let something slip or make a costly mistake. The Deltek Vision Workflow Manager keeps processes on track, automates time-consuming manual tasks, and keeps players informed and involved.

Vision Document Management

Deltek Vision's Document Management module fosters information sharing by providing a Web-based document collaboration platform for all team members to share. With Vision Document Management, team members from around the firm and around the world can store, share, and collaborate on a set of documents for every project, employee, client, contact, opportunity or other key Vision record. Link a single document to just one record or to multiple records in multiple Info Centers. Vision Document Management provides:

- Web-based access to all documents
- Ability to link documents to specific Info Center records
- Ability to organize documents into libraries and folders
- Ability to store photos, graphics, and other digital assets
- Check-in/check-out capabilities, so that users don't update a document at the same time
- Document changes that are tracked and assigned different version numbers for auditing and rollback
- Cross-document text searches spanning various document formats, including Microsoft Word, Excel, and Adobe® PDF
- Security settings to control document access and editing
- Ability to share documents with clients, partners, and suppliers, by creating outward-facing portals

Marketing Campaign Management

With Vision CRM's Marketing Campaign Management functionality, your firm can create effective marketing campaigns targeted to key prospects, clients, and opportunities. From direct mail to e-mail campaigns, you'll have the tools to tailor your message and your mailing list, and create correspondence customized for each recipient. In addition, you will be able to measure the results of campaigns to ensure that your marketing programs are targeted and effective.

Web Services API

Deltek Vision's Web Services API allows your firm to more easily integrate Vision with your other mission-critical applications. Additionally, Deltek Vision can be extended to interface with other Web services that enhance the user's experience.

Award Features Unavailable in Vision

Below is a list of Award features that Vision does not offer. In Vision, you cannot:

- Add one activity to multiple project or opportunity records.
- Synchronize all activity types with Outlook or create new contact and activity records in Outlook and synchronize them with Vision.
- Create custom fields when configuring information for your own firm, but you can create custom fields in all of the other Vision Info Centers.
- Save the list of records produced from a query, nor can you manipulate the list results by removing records or by adding records with a new query.
- Include picture files in the resume, project, or additional information sections of either the SF 254/255 or SF 330.
- Generate a cover page and letter for private proposals.
- Add new records on the fly by entering a new value in look-up or drop-down fields; instead, Vision provides special look-up fields for this purpose.
- Link data in one field to that in another for use on proposals. (For example, if **Name on Proposals** has never been manually changed, Award automatically updates it with whatever information the user enters in **Name**.)
- View records in Grid View format.

Award Items Not Converted to Vision

The Award to Vision conversion utility does not convert:

- User and user options
- Saved queries
- Proposals
- Reports
- Document Templates
- Outlook synchronization or configuration

2 Migrating to Deltek Vision

In this chapter

Migration Checklist

The following checklist outlines the steps of a successful Vision install and migration. Where appropriate, the checklist contains references to pages within this guide or other Deltek documentation to help you perform each step.

> The steps in this guide are intended as guidelines to use in conjunction with other Deltek services. For a complete list of services, see the Overview of the Migration Process section in the Introduction to this guide.

Step		
1.	**Planning (onsite or teleconference)** • Plan expectations of Vision. • Review current processes. • Review reporting requirements and need for custom formats. • Review current workflow to determine any necessary changes to end-to-end process.	
2.	**Schedule Hardware/Software Consultation** Schedule a teleconference with your Deltek Technical Services consultant regarding hardware and software requirements.	
3.	**Review Vision features** Refer to the following guides, both are available for download from the Deltek e-Support siteon the Deltek e-Support site at https://support.deltek.com: • Deltek Vision Getting Started Guide • Deltek Vision Concepts Guide	
4.	**Review Custom Reports** • Review Award custom reports. • Determine which, if any, are no longer required. • Determine priority for each report.	
5.	**Develop Detailed Schedule** Develop a detailed migration schedule. Make sure that team members understand their responsibilities and have the resources they need.	

Step		
6.	**Install Hardware** • Install required hardware and ensure that hardware (server, workstations, printers, and so on) is functioning properly. • Consult with your Deltek Technical Services representative and refer to the *Deltek Vision Technical Installation Guide* for assistance.	
7.	**Install Software** • Install required Vision software and any other required software (Microsoft SQL Server and so on), and ensure it is functioning properly. • Consult with your Deltek Technical Services representative and refer to the *Deltek Vision Technical Installation Guide* for assistance.	
8.	**Clean Up Data** Review the results of the pre-conversion reports and update your Award data if necessary.	
9.	**Perform Test Conversion** Run a test conversion.	
10.	**Review Conversion Results** Review the error log and check your data in Vision.	
11.	**Create Custom Report Plan** Determine how to replace custom reports which cannot be replaced by standard Vision functionality: • Which are mission critical? • Can they be developed in-house? • What tools will you use? • Do you need consulting assistance?	
12.	**Develop Import/Export Plan** Modify existing integration tools for Vision. Vision includes an import tool to assist with initial and ongoing data imports. Refer to the *Deltek Vision Implementation Guide* for assistance.	

Step		
13.	**Plan Vision System Settings** • Decide which Vision system options you will use and complete configuration screens in Vision. • Refer to the *Deltek Vision Implementation Guide* for instructions.	
14.	**Plan for Post-Conversion Support** Set up provisions for a post-conversion support help desk or other service to field questions or issues that may arise after conversion. Consult with Deltek to tailor a service plan to meet your firm's needs.	
15.	**Provide Operational Training** Provide operations training to the migration team members who will operate Vision, enter data, query data, and produce reports.	
16.	**Configure Security** Configure Vision roles to test that Vision security configuration meets your firm's requirements.	
17.	**Plan and Perform Segment Testing** Most firms want to simulate running the software prior to going live. A segment test is not a full parallel run but allows time to test Vision and familiarize appropriate people, such as the marketing and project management teams, with Vision's operation.	
18.	**Update your Firm's Documentation** If your firm maintains user manuals to help ensure data consistency, you must update this documentation to reflect field changes or new Vision processes.You may also elect to enter some of this information in the field-level tool tips or user-definable screen help. Please see the Info Center Designer Help book, available from the Vision online help, for more information.	
19.	**Provide Application Training** Provide application training to the marketing team, project managers, senior managers, and other staff who will use Vision.	

Step		
20.	**Perform Final Data Conversion** • Perform final data conversion.	
21.	**Go Live** • Begin using Vision as your management information system. • Refer to “Going Live on Deltek Vision” on page 35.	

Preparing to Install Deltek Vision

Before you install Deltek Vision at your firm, you should perform the following steps to ensure the successful migration of data from your existing Award database.

Steps to perform before installing Vision include:

- Understand Vision: technology, user interface, database changes, application changes, reporting tool changes
- Create a migration plan
- Prepare data for migration
- Select hardware and software

The following sections of this chapter discuss each of these steps in greater detail.

Understand Vision

Before you begin to plan your migration strategy, it is helpful to understand the new Vision technology and interface. The following sections provide brief explanations of each technology, and references to more detailed information, where applicable.

User Interface

In addition to Vision's easy-to-use browser-based interface, Vision enhances usability with features such as a dashboard and marketing campaigns. The user-configurable dashboard acts as the one-stop entry point to each user's commonly used records, applications, and reports. Vision's Marketing Campaign Info Center enables you to easily track the goals, budget, and activities of all marketing campaigns. If your firm has the Vision Accounting module installed, you can also monitor the performance of a campaign against its budget.

Application Changes

Vision's integrated design and Web interface mean that in addition to new features that didn't exist in Deltek Award, some familiar functions will be performed in different ways.

For information about using Vision, refer to the following guides, both are available for download from the Deltek e-Support siteon the Deltek e-Support site at https://support.deltek.com:

- Deltek Vision Getting Started Guide
- Deltek Vision Concepts Guide

Reporting Tool Changes

Deltek Vision Reporting offers you a wide range of reports that present information about all aspects of your projects, clients, and employees.

From Vision Reporting you can:

- Generate reports and preview them on your computer monitorn before you print them. You can directly print reports (without previewing) or schedule them to run at a later time.
- Create and save report “options” for a List report, specifying the Info Center, data columns, sorting and grouping criteria, and formatting for each report option. Similarly, you're able to save sets of selection criteria. Both types of named, saved sets are available in any future reporting session, making the reporting process easier and quicker.
- Select data with which to populate reports.
- Create and save “favorite” report formats. Once you have created a favorite, it takes just one click to generate a favorite report with current data—Vision automatically applies all options settings, including formatting options, and retrieves the appropriate records. You can even access any of your favorites from your dashboard.
- Download Vision data only (no formatting) to an Adobe® PDF file, Microsoft Word file, RTF file, or a Microsoft® Excel® spreadsheet through the Data Export reports.
- Download any report (with formatting) to an Adobe PDF file, Microsoft Word file, RTF file, or a Microsoft Excel spreadsheet from the report preview window.
- Drill down to another report to see supporting detail.

As with Award, Vision Reporting utilizes a third-party reporting tool. While Award uses Crystal Reports®, Vision Reporting uses Microsoft SQL Server Reporting Services. Because of this difference in third-party tools, there are several reporting issues to consider when migrating:

Refer to the Reporting portion of the Vision online help for information about Vision reporting features.

- You should review all Vision reporting functionality to determine if standard functionality can replace custom reports.
- If you decide to create custom reports, Deltek recommends that your firm rewrite existing custom reports (or create new ones) with Microsoft SQL Server Reporting Services report writing tools — Report Builder or Report Designer.Any custom reports that you create with these tools can be accessed within the Vision Reporting application.
- If your firm wishes to continue using Crystal Reports, you need to fully understand the differences between the Vision database structure and the Deltek Award database structure. Your firm must thoroughly test, and potentially rewrite, existing custom reports to work with new tables and column names.
- If you decide to write or rewrite custom reports in Crystal Reports for use with Deltek Vision, you will have to deploy your Crystal reports outside of the Vision application.

Create a Migration Plan

Proper planning is at the heart of the migration process. To ensure that your migration runs as smoothly as possible, one of Deltek's experienced consultants can meet with you to help you develop a migration plan.

As you meet with Deltek to develop your plan, there are several key issues to consider. Some of these considerations include:

- Will you implement other Vision applications in addition to CRM and Proposals? If so, you need to address departmental integration.
- Will you deploy Vision CRM and Proposals to more people within the organization than those who currently use the application? If so, you need to consider the training implications, as well as the implications to your current resources. For example, you may need to implement additional processes to support the needs of the additional users.
- Will you use the Microsoft® Outlook® or Lotus® synchronization? If so, you need to consider the processes and guidelines for all those involved in the synchronization process.

Your Deltek consultant works with your firm to develop a successful migration plan based on the answers to these and other questions specific to your firm.

The Planning Process

Putting together a migration plan with Deltek usually takes one or two days. During the planning session, Deltek:

- Helps you gather information from your senior managers, marketing personnel, and project managers to assess each group's Vision requirements or firm-specific requirements.
- Reviews the Vision release schedule.
- Demonstrates the Vision user interface.
- Demonstrates new features and new reporting capabilities available in Vision.
- Discusses how internal procedures might be improved to make the most of the features in Vision.
- Analyzes how differences between Award and Vision may affect your firm.
- Discusses the special responsibilities or roles that your staff must fulfill during the migration process.
- Discusses the most efficient way to convert your Award database.
- Schedules the major phases in the migration process, including data preparation, conversion, and segment testing.
- Discusses the date you want to begin processing "live" on Vision.
- Determines whether your firm needs any custom reports or processes to supplement the standard options available in Vision.

- Determines a schedule for updating your internal documentation to reflect Vision fields, screens, and any new business rules.
- Plans a training program for your employees.

To complete your migration plan, you need to set target dates for the following:

- Initial test conversion
- Internal documentation completion
- Segment testing period
- Pilot program (optional)
- Final conversion when you begin processing “live” in Vision (cut-over date)

Prepare Data for Migration

To get the best results from the conversion, you should clean up your data as much as possible beforehand. The Award to Vision conversion utility includes seven pre-conversion reports that analyze your Award data and identify areas of concern. For more information on the running the pre-conversion reports, see “Prepare Your Data for Conversion Using the Pre-Conversion Reports” later in this chapter.

In addition to running the reports, you may consider doing the following:

- **Reviewing custom fields**. Delete fields that are redundant in Vision, or modify fields as needed.
- **Deleting duplicate records (particularly client/contacts)**. Be careful when deleting fields prior to conversion. If you delete records, the data in all the fields related to those records will also be deleted, and therefore not transferred to Vision. If you are unsure, Vision’s Key Conversion Utility gives you the ability to combine duplicate records after conversion.
- **Deleting outdated or unused records**.

> If you are also an Advantage or Sema4 user, and you plan to migrate data from those systems to Vision as well as your Award data, there are more complex data issues to consider. Please consult with your Deltek Vision representative before continuing.

Select Hardware and Software

As part of the planning process, Deltek Technical Services helps you choose and configure any new hardware or related software that you need to run Vision.

Deltek evaluates your current equipment and determines your needs in the following areas:

- Workstation requirements
- Microsoft SQL Server and/or MSDE database requirements
- Server requirements
- Bandwidth requirements
- Licensing requirements

Refer to the *Deltek Vision Technical Installation Guide* for steps to install Vision-related software. See “Confirm Conversion Results in Deltek Vision” on page 30 for information about the software you must install.

You should have all necessary hardware and software installed prior to your test conversion date, so that you can begin segment testing immediately after conversion.

Installing Deltek Vision

Before you can proceed with the conversion of your Award data, Vision must first be installed. The Vision installation process includes these basic steps:

- Install Microsoft SQL Server or MSDE.
- Install Deltek Vision.
- Perform Advanced Installation Steps (Registry Settings).

For detailed instructions on how to install the above applications, see the *Deltek Vision Technical Installation Guide* sent with your Vision software. The most up-to-date copy is also available from the search-based Deltek Documents web part on the Deltek e-support site.

Log on to Vision

To log on to Vision:

1. Open Internet Explorer and type in the URL to the Deltek Vision application. Contact your System Administrator for the URL.
2. Click **Deltek Vision**, or wait while the application loads. Vision displays the Deltek Vision logon form.
3. Enter your user ID in the **User ID** field.
4. Enter your password in the **Password** field.
5. Use the drop-down list in the **Database** field to select the database you want to log on to.
6. Click **Login**. The Vision application opens displaying the Welcome page.

Configure Vision for Use

When you convert data from Award to Vision, certain system-wide information is not converted, such as user security settings. In addition, there are some key configuration steps you must take before using Vision, such as module activation, server-side e-mail setup, and process server setup.

This section includes general information about and brief instructions for the following processes that you must configure before you begin testing and using Vision:

- Module activation
- Security configuration
- Access to custom proposal merge templates

- Organization configuration
- Proposal Firm setup
- Server-side e-mail configuration
- Process server configuration

You may also need to complete additional configuration steps to use some of Vision's features. See the *Deltek Vision Implementation Guide*, available on your Vision installation CD, for specific configuration information and instructions.

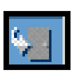
Module Activation

When you log on to Vision for the first time, you must activate the modules you want to use. The modules you activate depend on the applications you have purchased. CRM and Proposals modules include:

- CRM
- Custom Proposals
- SF254/SF255/SF330 Proposals
- Document Management

To activate modules:

1. Click **Configuration, Module Activation** from the Vision main menu.The Module Activation dialog displays.
2. Enter the appropriate password(s) in the **Password** field(s) that correspond with the application(s) you want to activate. For example, in the Custom Proposals **Password** field, enter the Deltek assigned password for this application.
3. Click **OK**.



4. Click the Logoff global icon in the upper right corner of the window to log out of Vision.
5. Log back on to Vision. See instructions in the previous section, "Log on to Vision." Vision opens with the appropriate module(s) activated.

Security Configuration

Before you begin using Vision, you must set up roles for all users (or groups of users) in your firm. You can then use these roles to define each user's security access to all the Vision applications and forms, as well as the lookup and reporting options that each user can access. You can also set up user passwords, if desired.

For detailed information on setting up security for the Vision application, see the Security Setup Help book (Configuration, Security Setup) in the Vision online help, available from the Vision application.

Access to Custom Proposals Merge Templates

All Proposals users have full access to SF254/SF255/SF330 Proposals merge templates, regardless of Role settings. However, to use the Info Center merge functionality or Custom Proposals, users must belong to a role that has access to the particular custom merge template.

To define a role's access to custom merge templates (for those using Vision Proposals):

1. Click **Configuration**, **Security, Roles** from the Vision main menu**.** The Roles form displays.
2. Define a Role for Proposals and/or Info Center Merge users (or open a previously defined role). See the *Deltek Vision Implementation Guide,* Security - Chapter 18 for details.
3. Click the **Access Rights** tab and select **Merge Templates** from the **Functional Area** field:
4. Grant the role access to custom merge templates, in one of the following ways:

To grant full access for this role to all custom merge templates associated with all Info Centers	To grant access to only particular custom merge templates
• Click **Full access to all merge templates**.	• Ensure that **Full access to all merge templates** is not selected. • Select the appropriate info center from the **Info Center** field. • From the **Available Templates** column, click the template(s) you want to make available. To select multiple, consecutive templates, click the first template, hold down the **Shift** key, and select the last template. To select multiple, non-consecutive templates, click the first template, hold down the **Ctrl** key, and select all other templates. • Click **Add**. • Repeat steps A-D for all info centers. To remove selected templates, click the template from the **Templates for this Role** column and click **Remove**.

5. For each employee who will merge Info Center data, or use Custom Proposals, set up his or her user account (from **Configuration, Security, Users and Passwords**) with the Role just defined.

Organization Setup

In place of Award's Company database concept, Vision uses an Organization concept, based on a "business unit" model. You set up an Organization for each of your company's business units, which may be profit centers, office locations, or other organizing principle.

Your Award Company data is encompassed in Vision Organization configuration, but Vision's Organization model includes additional features, such as the ability to have a multi-leveled organization structure.

Much of the company information from Award is converted into Vision as proposal firms (Firm Setup - Proposals). A two-level organization structure is also created and individual offices correspond to the 2nd level of the organization. After organizations are created, they are also associated properly with respective proposal firms. Without this association, Info Centers, such as projects and employees (which are the main entities handled in government proposals at the firm/company level), cannot be effectively linked to government proposals.

For general information information and steps to configure Organizations for use in Vision, see the *Deltek Vision Implementation Guide*.

Proposals Firm Setup

For use with the Proposals applications, Vision uses a "Proposal Firm" concept, based on an "office location" model of your firm. You set up a Proposal Firm for each of your firm's office locations whose personnel and project-related data you plan to use in proposals. Most of your Award company data is converted to the Vision Proposal Firms application.

You should understand the following about Proposals configuration:

- You do not have to activate the SF254/SF255/SF330 Proposals module to set up your firm's Proposal Firms. However, you must set up Proposal Firms, and enter the appropriate data, to use the SF254/SF255/SF330 Proposals. These modules will not work properly without Proposal Firm data. During the conversion process, Company database information is converted to Firm Setup - Proposals.
- If you will be creating SF330 Proposals, during Proposal Firm setup, you select profile and discipline codes to auto-populate in Part II Block 9 and Block 10 of the SF330 form from comprehensive lists of codes stored in the Project Codes and Employee Skill/Discipline code tables. You do this by inserting the default codes you want to use in the grids on the SF330 tab of Firm Setup - Proposals. These are just default lists that Vision will use to populate the SF330 form based on the firm selected on the form. You can add or delete codes from the SF330 form (up to a maximum of 20 disciplines and

22 project codes). For more information about the SF330 tab, see step 5 in the To Setup a Proposal Firm procedure, below.

- In Custom Proposals, if your proposal uses any merge codes that retrieve firm-wide data, you must set up a Proposal Firm and enter that data. For example, your firm's name and address do not exist in any of your Organization records. To make your firm’s name and address retrievable by Custom Proposals, create a Proposal Firm record and enter them there.
- Create a Proposal Firm for each office location, then add its related organization(s) on the **Associated Organizations** tab of the Firm Setup - Proposals form. An Organization can be listed for only one Proposal Firm, but each Proposal firm can list multiple Organizations.
- To maintain each organization's data for use according to the “office location” module, enter the appropriate office location data on all tabs in Firm Setup - Proposals. The SF 330 tab is used for SF330 proposal creation only. SF254/SF255 users do not need to enter information on this tab.
- If the SF254/SF255/SF330 Proposals module is not installed, the **Additional Info** tab omits the Service Fees grid and the SF330 tab.

> If your firm plans to use the Deltek Vision Multicompany feature, this may affect how you use Proposal Firms. Please discuss this with your Deltek Vision representative.

To set up a Proposal Firm:

1. From the Vision main menu, click **Configuration, Organization, Firm Setup-Proposals**.
2. Create a Proposal Firm for each office location that will be used in Proposals. For help filling out the Firms form, click the **Help** button on the toolbar from within in the Vision interface.
3. On the **Associated Organizations** tab, click **Insert** and add the Organizations for that Proposal Firm, if desired. Each proposal firm can be linked to multiple organizations. However two proposal firms cannot share the same organization. For example if you add Organization BO: AD to Proposal Firm Boston, you cannot add the same Organization to Proposal Firm - Atlanta.
4. On the **Additional Info** tab, enter the Proposal Firm's data to be used in proposals.

   If the SF254/SF255/SF330 Proposals module is not installed, neither the **Service Fees** grid nor the SF330 tab appear.
5. On the **SF330** tab, enter information specific to using the SF330 Proposal form, such as annual average revenue information, discipline or skill codes, or project codes. The Discipline codes and Project codes (profile codes) available for insertion are stored in the Employee Skill/Discipline Code table and Project Codes table, respectively. The codes you insert on the SF330 form will autopopulate in Part II Block 9 and Block 10 based on the firm you select to associate with the proposal. If your firm does not planto use the SF330 proposals form, you do not need to enter information on this tab. If the SF254/SF255/SF330 application is not installed, you will not see the SF330 tab.

> For more information about the SF330 Proposal form, see the SF330 Proposals book, available from within Vision.

6. Click **Save** when finished.

Server Side E-mail Setup

You can use Vision's e-mail functionality to e-mail reports to principals, project managers, and other interested personnel at your firm, and to allow user's to send e-mails to a default Help Desk for assistance.

Before you can use Vision's internal e-mail features, you must configure server-side e-mail information.

Vision supports only out-going SMTP e-mail.

To set up server side e-mail:

1. Click **Configuration, General, System Settings**. The General System Setup form displays.
2. Click the **Email** tab.

3. Enter information in the following fields:

Field	Description
Email Server	Enter the name of the e-mail server.
Port	Enter the server port number to use for e-mails. The default SMTP port is 25.
Default Sender	Enter the e-mail address for the default sender of system-wide e-mails.
Use Default Sender for Default Reply To	Select this option if you want the Reply e-mail address (the address that appears when you click **Reply**) to be the same as the e-mail address you entered in the **Default Sender** field. If you want to use a different reply address, do not select this option and enter the address that you want in the **Default Reply To** field.
Default Reply To	Enter a default Reply e-mail address that will automatically appear when you click **Reply**.
Default Help Desk	Enter the address for sending e-mails to a centralized Help Desk mailbox. You can choose to send e-mails directly to Deltek, or you can set up an internal mailbox to receive and respond to questions from your staff. When users click the global **Help** icon in Vision, and then select **Help Desk** from the drop-down menu, Vision displays a Send Email form for users to enter and submit their Vision questions. The e-mail address you enter in this field is automatically entered in the **To** field on the Send Email form.
Username (optional)	Enter a username, if applicable.
Password (optional)	Enter a password, if applicable.
Vision URL	Enter your company's entire URL. For example http://vision.deltek.com. This field is required if you want alert e-mails to work within Vision.
Send Test Email to Default Help Desk	Click this button to test the ability to send e-mails to the e-mail address entered in the **Default Help Desk** field.

4. Click **Save**.

Process Server Setup

The Vision Process Server allows users to submit jobs, such as groups of reports, to a process queue and schedule them for processing. Users can submit reports to a process queue to keep their workstation free for other processes.

Before you can begin using process queues in Vision, you must set up process server options. Once you have set up your process server options, you can use the Process Server utility to manage your process servers and process queues. For more information, see the Process Server help topics under Utilities in the Vision online Help.

To set up process server options:

1. Click **Configuration**, **General**, **System Settings** from the Vision main menu. Vision displays the General System Setup form.
2. Click the **Servers** tab.
3. Complete the fields on this tab, as described in the following table:
   - To add a blank row to a grid, click the **Insert** grid option.
   - To delete a row from a grid, select the row and click the **Delete** grid option.

Field	Description
Retain job history for x days	Select this option if you want Vision to save history for completed processes in the queue. If you are not retaining process history, Vision deletes process entries from the queue after they have run, failed, or been cancelled. If the process entry has an alert pending, Vision deletes the entry after the submitter has been notified. If you are retaining process history, Vision deletes process entries from the queue after the specified number days. If the job has an alert pending, Vision deletes the process only after the submitter has been notified.
Retain Errors for x days	This option allows you to set a limit on the number of days that the server retains error reports for successful runs. If you enter an error retention period of 0 days, Vision saves all error reports indefinitely.
Retain report output for x hours	This option allows you to set a limit on the number of hours each generated report is saved on the server. By default, each report is saved for 24 hours. This is a global setting that can be overridden on the Misc tab of each report's Options dialog.

Field	Description
Enable Report Usage Logging	Select this option to save the information about the generation of the report to the database in the ReportLog table, including username, report type, folder, start time, finish time, time for query to complete, pages, report server. This information allows clients to track which reports are run, how frequently they are run, the time it takes to run them, and who is running them.
Process Queues	
Name	Enter a name by which to identify this process queue, using up to 40 characters of free text.
Dedicated Server	If you want to dedicate a queue to a specific server, select the server from the drop-down list. Only that process server will run jobs on that queue. This is useful if you want a particular machine to run jobs of a particular type. For example, you may want all large jobs to run on the most powerful machine.
Max	Enter the maximum number of jobs that will run *concurrently* in this queue, regardless of how many jobs are actually in the queue. Enter zero for no limit. The value entered here is limited by the **Max Concurrent Jobs** setting set in the WebLink utility.
Priority	Enter the priority for the process queue, zero (0) being the highest priority. The priority level you enter is used to determine user access (by role) to the process queue.
Status	This field displays the status of the queue: Running or Stopped.
Actuate Report Servers	
Server Name	Enter a report server name. These servers are used to generate reports. You need only to enter a server name in this field if you have more than one report server. (Vision supports multiple report servers).
Application Servers	
Server Name	Enter an application server name. These servers run application processes, such as transaction posting and also to act as your process servers. To manage each process server via the Process Server Management utility, all process servers need to be established here as Application Servers.

4. Click **Save** to save your entries.

Converting Your Award System to Deltek Vision

During the time you have been using Award, you have likely accumulated a huge store of information about your firm's projects, clients, and employees. No doubt you'll want to transfer this data from Award into Vision as quickly and efficiently as possible so that you can start using Vision.

This section provides an overview of the conversion process and brief descriptions of the Award Pre-Conversion reports.

Overview of the Conversion Process

To successfully convert your Award database to Vision, the following tasks must be completed:

- Deltek Vision must be installed. Refer to "Installing Deltek Vision" on page 2-17. You may require assistance from a Deltek Technical Services consultant.
- Award 2005.05 or a later version must be installed. To verify your current version, open Award, and on the Help menu, click **About Award**.
- Meet with your Deltek Data consultant to confirm conversion settings and to discuss other requirements for conversion, such as delivering a copy of your data.
- Fix data issues identified by the pre-conversion reports. Your data consultant will provide you with the reports and instructions for proceeding.
- Perform a test conversion to check the results of your changes and to create a database for additional testing and employee training.
- Set a final "go live" date for the conversion.
- Perform the final conversion and begin using Vision instead of Award.

Prepare Your Data for Conversion Using the Pre-Conversion Reports

The Award to Vision conversion Utility provides seven pre-conversion reports that analyze your Award data and identify areas of concern. Your Deltek consultant can help you understand the results and evaluate the changes you should make prior to conversion. When you open the conversion utility, the following pre-conversion reports are immediately available to you:

- Breakdown of Client and Vendor Firms
- Data That Will Be Truncated
- New Code Table Values (Standard Lists)
- Original Field Labels for ReLabeled Fields

- Records Missing Required Data
- SF 254/255 Labels with No Code
- Staff and Contact Names

Depending on the number and type of issues uncovered, it may take a week or longer to correct the problems and prepare your data for conversion. You can run the reports as many times as necessary to fine-tune the results.

A detailed description of each report follows directly below.

Breakdown of Client and Vendor Firms Report

In Award, sub-consultants and clients are combined in a single database, while in Vision, vendors (sub-consultants) and clients are contained in separate databases, Vendor Info Center or Client Info Center, respectively.

This reports shows which Award firms will be converted to the Vendor Info Center and which to the Client Info Center, enabling you to make adjustments prior to the conversion, if desired.

Data That Will Be Truncated Report

When Award field data is converted, it is truncated at the point it exceeds the character length of the corresponding field in Vision, which may produce some awkward or confusing abbreviations to the data.

This report provides a side-by-side comparison of field data before and after truncation, so you can identify which fields you want to modify. Your Deltek consultant can advise you whether it is best to change a field in Award before conversion or in Vision after.

For example, project names should be modified after conversion, because any change made to the **Name** field is automatically reflected in **Alternate Name**. This is potentially undesirable because **Alternate Name** converts to Vision's 255-character **Long Name** field, which is less likely to require truncation.

New Code Table Values Report

Vision Code Tables are the same as Standard Lists in Award. Both are drop-down lists that offer pre-defined options for completing field data (Experience Profile Codes, for example).

During conversion, the Vision Code Tables (drop-down lists) are populated with data from Award's Standard Lists. Additionally, some Award text-field values are converted to various Vision Code Tables.

For example, data in Award's **Referral Info** field converts to the **Source** drop-down list in Vision. Because **Referral Info** is a text field, the user manually enters the field data, rather than selecting it from a drop-down list. The data, therefore, is probably specific to that record, and as such, it may be undesirable to include it on a drop-down list, where it will be available as an option for use with all records.

Use this report to identify which Award text-field values will be converted to Vision. You can then use Award's query and block-edit functions to modify the data prior to conversion, if desired.

The following text fields are converted to Vision:

- Degree (Staff database)
- Prefix (Staff and Contact databases)
- License Tag (Staff and Contact databases)
- Referral Info (Opportunities database)

Original Field Labels for Relabeled Fields Report

This report displays all the Award fields that your firm has renamed and provides a side-by-side comparison of the original and customized labels.

You have the option to convert the majority of Award fields to Vision as custom fields. Once converted to Vision, the fields display their original Award labels, which means you may not immediately recognize labels that were renamed in Award.

Use this report to determine which Award field labels you want to change prior to conversion or to identify fields in Vision after conversion. Note that the report lists only those Award fields that you previously relabeled, not every field converted to Vision.

Records Missing Required Data Report

Vision contains many more required fields than Award does. If these fields remain incomplete, the records containing them cannot be converted. This report lists records that cannot be converted because they contain empty fields.

In some cases, the conversion utility will either complete blank fields with default values from Vision, or it will generate data based on your conversion settings. In cases where the conversion utility cannot complete the data, or where doing so will yield undesirable results, you must manually enter the data in Award prior to conversion.

Your conversion consultant will help you evaluate the results of this report.

SF 254/255 Labels with No Code Report

If any Award SF 254/255 Experience Category or Skill Discipline is missing a code, one is automatically assigned during conversion. Once assigned, the code cannot be changed in Vision.

Use this report to identify and assign missing codes prior to conversion, if desired. The report shows only SF 254/255 codes, because the SF 330 codes can be modified in Vision after the conversion.

Staff and Contact Names Report

In Award, a separate field is provided for first and last name, but not for middle name. When a middle name or initial is included for a staff member or outside contact, most Award users add it to the **First Name** field. Vision, however, provides a separate field for each name, first, middle, and last.

To reconcile this difference, the conversion utility converts any name or initial found to the right of the last space in Award's **First Name** field to Vision's **Middle Name** field. So, for example, if the utility found the name "Mary R" in Award's **First Name** field, in Vision, it would convert "Mary" to First Name and "R" to Middle Name.

This report lists all Award staff and contact names, showing exactly how they will display in Vision and enabling you to make changes prior to the conversion, if desired.

Confirm Conversion Results in Deltek Vision

Verify Records in Vision

Before you move on to your live conversion, you may want to spot-check data to review the results of conversion.

Deltek recommends verifying data in several records in each Vision Info Center to ensure that the data converted properly. You should check data directly on screen in Vision.

The following sections provide instructions for verifying data in a Project Info Center record. The general steps to verify data in any Info Center, as listed below, are the same regardless of the Info Center:

- On each tab, verify that all fields appear.
- In each field, verify that the data is accurate.
- For all fields that contain drop-down lists, be sure all options appear from the list.
- Verify that all fields on the Award Custom tab were properly converted to the Custom Tab in Vision, if applicable.

See the Info Center topics in the Vision online Help system for more information.

Open a Project Info Center Record to Verify Data

To verify that your Award records were successfully converted to Vision, you should open a number of records and verify the data in each field is accurate.

To verify Project Info Center data for one project record:

1. Log on to Deltek Vision. For instructions see page 2-17.
2. Click **Info Center, Projects** from the Vision main menu.
3. Open a project whose data you are familiar with. To open a project, do one of the following:
    - Type the full name or project number in the **Find** field and click **Enter**.
    - Perform a Quick Find by typing any part of the project name or project number in the **Find** field and pressing **Enter** to display a list of possible project matches. Select the project from the list.
    - Click  in the **Find** field to open the Project Lookup. Perform a search from the lookup to find the project. For information about performing searches from a Lookup, refer to the Vision Help by clicking the Help global icon from the Vision user interface.

4. Click each of the following tabs and verify that all the correct fields appear on each tab. Also verify that the data in each field is correct. For information about the fields on each tab, refer to the Vision Help.
   - General
   - Team
   - Clients/Contacts
   - Activities
   - Background
   - Dates & Costs
   - Location
   - Marketing Campaigns
   - Files

> If your firm has also purchased, installed, and activated the Deltek Vision accounting or Time & Expense applications, additional tabs appear in the Project Info Center, but Award does not convert data to these tabs.

5. If your firm had custom fields on the Custom tab in Award, click the Custom tab and verify that all the fields appear and that the data is correct.

> If you had a custom fields in your Company database, this information is not converted because company data is converted to Organization Configuration, and the custom fields cannot be converted.

These steps should be repeated for at least one record in each of the info centers.

6. When you are satisfied that all data has been converted correctly, your testing of this record is complete. Repeat steps 3-6 for any additional projects you want to verify.

Run a Project List to Verify Data

The following steps explain how to run a project list from within the Vision Project Info Center. For more information about running reports, refer to the Reporting or Project Info Center Vision Help.

To run a project list:

1. Log on to Deltek Vision. For instructions see page 2-17.
2. Click **Info Center, Projects** from the Vision main menu.
3. Open a project whose data you are familiar with. To open a project, do one of the following:
   - Type the full name or project number in the **Find** field and click **Enter**.

- Perform a Quick Find by typing any part of the project name or project number in the **Find** field and pressing **Enter** to display a list of possible project matches. Select the project from the list.

- Click  in the **Find** field to open the Project Lookup. Perform a search from the lookup to find the project. For information about performing searches from a Lookup, refer to the Vision Online Help.

4. Click **Print, Print Current Project** from the Project Info Center toolbar. The Reporting dialog displays.
5. Click the record-selector box to the left of the Project List to select this report.
6. Click **Print**.

Train Employees on Vision

A crucial part of the migration process is training your employees to set up, test, and begin using Vision. The training process for Vision should be relatively simple, because your employees are already familiar with the principles behind Award, which are similar to those behind the CRM and Proposals component of Vision.

However, your employees may need to learn how to use Vision's new browser-based interface, set configuration options, and run reports.

While much of Deltek's training is formal, following a particular agenda with particular goals in mind, some of the training is informal, occurring naturally as Deltek works with your employees.

At the outset, training concentrates on:

- Orienting employees to the Vision environment.
- Preparing employees to make system setup changes necessary to perform the final conversion of your data to Vision.
- Preparing employees to test Vision with your converted database.

This initial training allows your employees to begin testing Vision as you prepare to go live.

While your firm continues testing Vision, Deltek provides more in-depth training on specific Vision applications, as well as on specific CRM concepts. After you begin live processing in Vision, you may want to start sending employees to some regularly scheduled Deltek Vision training classes.

Perform Segment Tests

Segment testing involves testing each area of Vision using a subset of your firm's own data from your test database. Ideally, you test using data that you match to similar processes and reports from Award. Typically the segment test period lasts for a period of weeks, but at some large firms it can span several months.

The purpose of segment testing is to:

- Provide a defined method to review the converted data.
- Familiarize your core conversion group with how Vision works.
- Assist in the identification of internal processes that need to be revised based on your new software application.
- Identify any conversion issues that need to be resolved before the final conversion.
- Identify who is going to be responsible for each component of the plan and set target completion dates.

In preparation for segment testing, Deltek helps you create a test plan and works with your firm as you begin to use Vision. In addition to ensuring that Vision does what it is intended to do, the test period gives your firm an opportunity to become comfortable with Vision, and to make decisions about how your data will be converted when you complete your final conversion.

Deltek helps you design a test plan that covers every important area of Vision. At the minimum, you should test the following functionality in each Info Center:

- Perform several standard lookups using varying search criteria. (Lookup is the Vision term for searching for and retrieving records from the Vision database.)
- Perform several advanced lookups.
- Add records.
- Delete records.
- Modify records.
- Merge records in Microsoft Word.
- Verify summary and list report results.
- The following functionality in the Activity Manager:
    - View activities.
    - Modify activities.
    - Add activities.
- The following functionality in the Calendar:
    - View information on each tab.
    - Modify activities through the calendar.
    - Add activities through the calendar.

- The following functionality in Proposals:
  - Add a custom proposal.
  - Merge a custom proposals with a template.
  - Merge a government proposal with a Form SF255 template.
  - Merge a government proposal with a Form SF254 template.
  - Merge a government proposal with a Form SF330 template.

Using Vision should generally yield the same results as using Award. You should investigate and resolve any significant discrepancies before your firm begins processing live in Vision.

What's Next

After you have performed segment tests and are satisfied with the results, you can perform a final conversion of your data.

Going Live on Deltek Vision

As part of planning your migration to Vision, you must choose a “go live” date. This is the date on which you plan to stop processing through Award and begin processing solely through Vision. The date you choose depends on several factors, including:

- Employee availability (for example, holidays, other critical assignments).
- Availability of data needed for cut-over.

When you reach your “go live” date, you must convert your database, install Vision, and configure your application and security settings just as you did when you created your test database.

> You may be able to import some configuration and other settings from your test database into your live database.
>
> Contact a Deltek Support Representative for assistance if you plan to import any settings from your test database.

Because the go live date marks the beginning of “live” processing through Vision, if you perform any processing in Award beyond the go live date, you must perform the same processing again in Vision.

A Deltek Awardto Deltek Vision Field Mapping

In this chapter

Conversion Field Mapping

Overview

When your Award data is converted to Vision, it is either converted as a custom field because there is no Vision equivalent, or it is converted to an equivalent Vision field.

Custom fields retain their original Award field label. When a custom field is converted, the tab it was on is also converted and in most cases, retains the original tab name. After your Award data is converted, you can see what custom tabs were added to Vision by clicking **Configuration**, **General**, **User Defined Tabs** from the Vision Main Menu, and then selecting **Tabs** on the User Defined Tabs form.

The tables below list the Award fields that are converted to an equivalent Vision field.

Award Firm Fields Converted to the Vision Client Info Center

Firm Attachment	File Path
Name	Description
Type	Graphic
Address 1	Address 1
Address 2	Address 2
Business Type	Type
C-C	Phone
City	City
Client	Status
Country	Country
Created By	Created By
Created Date	Created Date
Fax	Fax
Firm ID	Number
Name	Name
Phone	Phone
Postal Code	Zip
Prospect	Status
Remarks	Notes
Revised By	Revised By
Revised Date	Revised Date
State	State
Web Site	Web Site

Award Firm Fields Converted to the Vision Vendor Info Center

Firm Attachment	File Path
Name	Description
Type	Graphic
Address 1	Address 1
Address 2	Address 2
Business Type	Specialty
C-C	Phone
City	City
Country	Country
Created By	Created By
Created Date	Created Date
Fax	Fax
Firm ID	Number
Minority-Owned Business	Minority Business
Name	Name
Phone	Phone
Postal Code	Zip
Revised By	Revised By
Revised Date	Revised Date
Small Business	Small Business
Small Disadvantaged Business	Disadvantaged Business
Specialty	Specialty Description
State	State
Teamed Before	PriorWork
Web Site	Web Site
Woman-Owned Business	Woman Owned
Work OK	Recommend

Award Contact Fields Converted to the Vision Contact Info Center

Address 1	Address 1
Address 2	Address 2
C-C	Bus. Phone
Cell Phone	Mobile
City	City
Country	Country
Created By	Created By

Created Date	Created Date
Current Employee	Status
E-mail	EMail
Familiar Name	Preferred
Fax	Bus. Fax
First Name	First Name
Home Phone	Home
Last Name	Last Name
License Tag	Suffix
Office	Client or Vendor
Pager	Pager
Phone	Bus. Phone
Postal Code	Zip
Prefix	Prefix
Remarks	Memo
Revised By	Revised By
Revised Date	Revised Date
State	State
Title	Title
Name	Description
Staff Attachment	File Path
Type	Graphic

Award Opportunity Fields Converted to the Vision Opportunity Info Center.

Opportunity Attachment	File Path
Type	Graphic
Proposal	Proposal
Sf255	Sf255
Contact No. 1	Contact
Contact No. 2	Contact
Firm	Consultant/Partner
Role	Role Description
Address 1	Address 1
Address 2	Address 2
Award Probability	Probability
City	City
Contact No. 2	Contact

Contact No. 3	Contact
Country	Country
County	County
Created By	Created By
Created Date	Created Date
Description	Description
Expected Fee	
Fee	Revenue
Firm	Primary Client
Name	Name
Office	Organization
Opportunity ID	Number
Postal Code	Zip
Primary Contact	Primary Contact
Prime or JV Partner	Client
Prime Or JV Role	Role Description
Project Posted	Project
Project Probability	Probability
Project Type	Type
Referral Info	Source
Revised By	Revised By
Revised Date	Revised Date
State	State
Status	Stage

Award Staff Fields Converted the Vision Employee Info Center

Address 1	Address 1
Address 2	Address 2
C-C	Work Phone
Cell Phone	Mobile Phone
City	City
Country	Country
Created By	Created By
Created Date	Created Date
Current Employee	Status
E-mail	EMail
Ext	Ext

Familiar Name	Preferred
Fax	Fax
First Name	First Name
Home Phone	Home Phone
Last Hired	Hire Date
Last Name	Last Name
License Tag	Suffix
Office	Organization
Other Firms	Years With Other Firms
Phone	Work Phone
Postal Code	Zip
Prefix	Prefix
Prior Years	Prior Years with this Firm
Remarks	Memo
Revised By	Revised By
Revised Date	Revised Date
Staff ID	Employee
State	State
Title	Title
College	Institution
Degree	Degree
Discipline	Specialty
Specialization	Specialty
Year	Year
Name	Description
Staff Attachment	File Path
Type	Graphic
Discipline	License
Expiration Date	Expires
Registration No.	Number
State	State
Year 1st Registered	Earned
Sequence	Primary
Staff Discipline - SF 330	Skill
Sequence - SF 254/255	Primary
Skill Discipline - SF 254/255	Skill
Resume Text	Resume
Text Version	Category

Award Project Fields Converted to the Vision Project Info Center

Additional Insert	Memo
Address 1	Address 1
Address 2	Address 2
Alternate Name	Long Name
City	City
Construction Completed	Cons. Compl. Dt.
Country	Country
County	County
Created By	Created By
Created Date	Created Date
Experience Earned As	Responsibility
Name	Short Name
Office	Organization
Our Responsibility	Firm Cost
Owner	Client
Postal Code	Zip
Prime Or JV Partner	Client
Prime Or JV Role	Role Description
Project Completed	Actual Completion
Project No.	Project
Project Type	Project Type
Revised By	Revised By
Revised Date	Revised Date
Services Completed	Prof. Services Compl. Dt.
Services Started	Start Date
State	State
Total Cost	Total Proj. Cost
Work Type Designation	Federal Project
Description	Role Description
Role/Assignment	Role
Associated Fee - SF 254/255	Fee
Experience Profile Code - SF 254/255	Code
Associated Fee - SF 330	Fee
Experience Category - SF 330	SF330 Code
Name	Description
Project Attachment	File Path
Type	Graphic

Name	Contact
Project Role	Role Description
Contact No. 1	Contact
Contact No. 2	Contact
Firm	Vendor
Role	Role Description
Comments	Comments
Project Text	Description & Text
Text Version	Category & Text Name

Award Company Converted to Vision

Date Changed	Date Name Changed
Date Established	Date Est.
DUNS No.	DUNS Number
Former Firm Name	Name
Address 1	Address 1
Address 2	Address 2
Country	Country
Created By	Created By
Created Date	Created Date
DUNS No.	DUNS Number
Fax	Fax
Name	Name
Ownership Type	Ownership Type
Parent Name	Parent Firm
Phone	Phone
Postal Code	Zip
Revised By	Revised By
Revised Date	Revised Date
Small Business	Small Business
Small Disadvantaged Business	Small Disadvantaged
Total Staff	Total Personnel
Woman-Owned BusinessWoman Owned	
Year Established	Date Established

Award Activity Fields Converted to the Vision Activity Manager

Activity Date	Start Time
Activity Time	Start Time
Activity Type	Type
Compl. Date	End Time
Compl. Time	End Time
Completed	Completed
Contact	Primary Contact
Firm Name	Client
Notes	Notes
Opportunity	Opp
Priority	Priority
Project	Project
Responsibility	Activity Owner
Subject	Subject