Deltek Vision® 6.1 SP4

Connect for Microsoft Outlook Release Notes

April 18, 2011

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Overview

Welcome to Deltek Vision 6.1 SP4 Connect for Microsoft Outlook (Version 1.0.32.8) Release Notes.

	The information in these release notes may be beneficial to other members of your company.
	After you have reviewed the content of these release notes, please share this document with other members of your staff, as appropriate.

What's New in this Release of Connect for Microsoft Outlook?

For more details on the specific fixes and updates that have been added in this release since the previous release, see the Deltek Vision 6.1 SP4 Connect for Microsoft Outlook 1.0.32.8 (Vision Hot Fix # 028) Readme file at the Product Downloads page of the Customer Care Connect site.

You can download the readme file from the Deltek Software Manager screen. In the Sub-Release section of Vision 6.1 (SP4), after you select the Deltek Connect for Microsoft Outlook software to download, the readme file displays on the Documents tab on the right side of the Deltek Software Manager screen.

Support for Microsoft Outlook 2010 and Microsoft Exchange Server 2010

Deltek now supports using Microsoft Outlook 2010 and Microsoft Exchange Server 2010 with Connect for Microsoft Outlook.

Support for User-Defined Fields

Deltek now supports adding Vision user-defined fields (UDFs) and logic to the forms in Connect for Microsoft Outlook.

Additional Notes

If you are installing Connect for Microsoft Outlook for the first time, you should read the Deltek Vision 6.1 SP4 Connect for Microsoft Outlook Installation Guide to ensure that you understand all the technology and software changes that have been implemented in Vision to support Connect for Microsoft Outlook.

You can download the release notes (in PDF format) from the Deltek Customer Care Connect site at https://deltek.custhelp.com.

Pre-Installation Information

Important Notes

- You must have Vision 6.1 SP4 with Hot Fix 028 installed before you can install this release of Connect for Microsoft Outlook (Version 1.0.32.8). If you do not have Vision 6.1 SP4 installed, see the Deltek Vision 6.1 SP4 Release Notes. You can download the release notes (in PDF format) from the Deltek Customer Care Connect site at https://deltek.custhelp.com.

- You must uninstall existing Connect for Microsoft Outlook client installations prior to upgrading the Vision web server with this release of Connect for Microsoft Outlook (Version 1.0.32.8).

Vision Synchronization Server Migration Instructions

The information in this section applies only if you currently use the Deltek Vision Synchronization Server software and you are migrating to Connect for Microsoft Outlook.

The Vision Synchronization Server module is disabled automatically when you activate the Connect for Microsoft Outlook module in Vision **Configuration » Module Activation**. You do not need to uninstall the Synchronization Server software.

Your system administrator must complete some additional steps when installing Connect for Microsoft Outlook so that the Vision contacts in a user's Microsoft Outlook software (synchronized using the Vision Synchronization Server) synchronize correctly and do not get duplicated within Connect for Microsoft Outlook.

Additional Steps Required for a Synchronization Server Migration

Your system administrator must complete the following steps *before* enabling Connect for Microsoft Outlook in Vision:

1. Run a script on the Vision database to add a **DLTKSYNC** category to contacts synchronized by Vision Synchronization Server users.

2. Run a final Synchronization Server synchronization to add the **DLTKSYNC** category to all Vision contacts in each user's Microsoft Outlook software. This category will be used to identify the contacts for each user that are synchronized with Vision through the Synchronization Server.

3. If your Vision Synchronization Server was configured for one-way synchronization *only*— from Microsoft Outlook into Vision—or if you do not use Synchronization Server but you manually imported your Outlook contact records into Vision during a data migration from another software or via another third-party product, you must add the **DLTKSYNC** category manually to your list of contacts in Microsoft Outlook. You need to do this because in these scenarios, Vision is unable to send the **DLTKSYNC** category to Microsoft Outlook.

> ⚠ You **must** manually assign the DLTKSYNC category to **only** contacts that already exist in Vision. Any contact that has a DLTKSYNC category in Outlook that does not exist in Vision will be deleted from Outlook.

> 📖 See the "Synchronization Server Migrations: Prevent Duplicate Contacts" section in the Deltek Vision 6.1 SP4 Connect for Microsoft Outlook Installation Guide for instructions on how to complete these steps. You can download this guide (in PDF format) from the Deltek Customer Care Connect site at https://deltek.custhelp.com.

Connect for Microsoft Outlook Prerequisites

The following list contains operating system, server, and software prerequisites for using the new Connect for Microsoft Outlook module (Version 1.0.32.8).

- **Supported Operating Systems**
  - MS Windows XP SP3, 32-bit or 64-bit (x64)
  - MS Windows Vista SP2, 32-bit or 64-bit (x64)
  - MS Windows 7, 32-bit or 64-bit (x64)
- **Supported Microsoft Office Versions**
  - MS Office 2003 ,SP3
  - MS Office 2007, SP2
- **Supported Microsoft Outlook Versions**
  - MS Outlook 2003, SP3
  - MS Outlook 2007, SP2
  - MS Outlook 2010 (32-bit version only)
- **Supported Microsoft Exchange Server Versions**
  - MS Exchange Server 2003, SP2, Cached Exchange Mode only
  - MS Exchange Server 2007, SP2, Cached Exchange Mode only
  - MS Exchange Server 2010, Cached Exchange Mode only
- **Supported Microsoft Outlook Configurations**
  - MS Exchange Server account is configured in Cached Exchange Mode only
  - Outlook .pst file is used as data storage
    - POP3, SMTP (IMAP not supported)
- **Supported Deltek Vision Configurations**
  - Deltek Vision 6.1 SP4 with cumulative Hot Fix 028 or higher

Important Note About Connect for Microsoft Outlook and Microsoft Outlook Web Access

> ⚠️ **Warning**
>
> When you use Connect for Microsoft Outlook, the OWA for Exchange Server 2007 displays the hidden MAPI attributes of Contact folders and other Connect for Microsoft Outlook objects. This is a Microsoft software defect; these hidden fields are not displayed in the full Microsoft Outlook client. In OWA for Exchange Server 2007, users could accidentally delete or modify the custom configurations made by the Connect for Microsoft Outlook installation in the mailbox.
>
> This defect potentially affects all Connect for Microsoft Outlook users who use OWA in Exchange Server 2007. This problem does not occur in OWA for Microsoft Exchange Server 2003 or Exchange Server 2010.
>
> Microsoft has resolved this issue with rollup 2 for Microsoft Exchange Server 2007 SP3 (Microsoft Exchange Server 2007 SP3, Ru2).

Existing Connect for Microsoft Outlook Users

If you already have Connect for Microsoft Outlook installed, this installation will upgrade the version of Connect for Microsoft Outlook on your Web server with the new release—Connect for Microsoft Outlook 1.0.32.8 for Vision 6.1 SP4.

> Before you update your Vision Web server with the updated hot fix for the Vision 6.1 SP4 release, you must uninstall any previous versions of Connect for Microsoft Outlook that are installed on end-user workstations. Previous versions are Connect for Microsoft Outlook build 1.0.27.0 and earlier.
>
> If you update the server before uninstalling Connect for Microsoft Outlook on users' workstations, when users with the older version of Connect for Microsoft Outlook open Connect for Microsoft Outlook, they may be prompted with an Internal Error message. If you review the application logs in the **%AppData%\Deltek\Connect For Microsoft Outlook** folder on the workstation, the log will indicate that the version on the server is newer than the current version being run on the workstation. The user must uninstall the existing older version.
>
> Connect for Microsoft Outlook does not support in-place upgrades on end-user workstations. To upgrade the Connect for Microsoft Outlook application on a workstation, you must first uninstall the current version from end-user workstations, install the upgrade to your Web server, and then re-install Connect for Microsoft Outlook on end-user workstations.

See the "Upgrading Connect for Microsoft Outlook for Existing Users" section on page 23 of the for additional information.

Known Issues Installing Connect for Microsoft Outlook

To install Connect for Microsoft Outlook on a single workstation, you **must** be logged into that machine as the user account whose mailbox is being used. That user **must** be a member of the local administrator group on that machine during the installation. Local administrator rights are not needed after the installation.

Connect for Microsoft Outlook **cannot** be installed on multiple machines using Outlook profiles configured to the same mailbox. To install it on a single workstation, you **must** be logged into that machine as the user account whose mailbox is being used. That user **must** be a member of the local administrator group on that machine during the installation. Local administrator rights are not needed after the installation.

If you install Connect for Microsoft Outlook on multiple machines using Outlook profiles configured to the same mailbox, you can damage the mailbox customizations, which may be time consuming to fix.

Known Issues with Connect for Microsoft Outlook and Microsoft Outlook Third Party Add-ins

Deltek recommends not having any additional Microsoft Outlook add-ins installed together with Connect for Microsoft Outlook. Known issues with the following add-ins have been identified:

- **Adobe PDF** — You receive an "Outlook experienced a serious problem with the 'pdfmoutlook' add-in…" error message.

- **Colligo** — Outlook crashes.

- **iTunes** — Outlook crashes.

- **Kaspersky Outlook Anti-Spam Addin** and **Kaspersky Outlook Anti-Virus Addin** — You receive an application error when you synchronize Connect for Microsoft Outlook.

- **Microsoft Outlook Connector** — Outlook hangs when you switch the language.

- **Skype** — Outlook remains in memory after closing.

Known Issue with Microsoft Exchange ActiveSync® within Exchange 2003

The use of Connect for Microsoft Outlook with ActiveSync in an Exchange 2003 environment has a significant technical limitation. The sync engine within ActiveSync in Exchange 2003 does not properly recognize Connect for Microsoft Outlook-related data and objects. As a result, when contact data is updated on a mobile device and then synchronized back to Outlook via ActiveSync, it is no longer recognized by Connect for Microsoft Outlook. This can result in data loss. This limitation applies only when you use ActivSync within Exchange 2003. It does not apply when you use ActiveSync within Exchange 2007 or Exchange 2010.

Connect for Microsoft Outlook Installation Guide

Use the instructions in the Deltek Vision 6.1 SP4 Connect for Microsoft Outlook Installation Guide to install and configure Connect for Microsoft Outlook on your Vision Web server and on users' workstations.

You can download the guide from the Product Downloads tab or the Knowledge Center tab at the Deltek Customer Care Connect site.

For Additional Information

Customer Care Connect Site

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

The following are some of the many options that the Customer Care Connect site provides:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- 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
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes

> For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

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

1. Go to https://deltek.custhelp.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In.**

> If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Available Documentation for this Release

Deltek Vision Connect for Microsoft Outlook includes an online help system that contains conceptual, procedural, and tab/field-level documentation. On the Outlook menu bar in Connect for Microsoft Outlook, click **Help » Connect for Microsoft Outlook** to access the Connect for Microsoft Outlook online help**.**

In addition to the online help system, Deltek provides a Deltek Vision 6.1 SP4 Connect for Microsoft Outlook Installation Guide that you can download from the Product Downloads tab or the Knowledge Center tab at the Deltek Customer Care Connect site**.**

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