

Deltek Vision® 7.1

Project Connect 1.7 Server Installation and Administration Guide

June 27, 2013

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Contents

- Overview 1
 - Product Overview 1
 - What is Deltek Vision Project Connect?..... 1
- If You Need Assistance 3
 - Customer Services 3
 - Customer Care Connect Site 3
 - Additional Documentation 4
- Downloading Deltek Products Using Deltek Software Manager 5
 - Accessing DSM Directly 5
 - Accessing DSM from Within the Customer Care Connect Site 6
 - DSM Documentation and Troubleshooting 6
- System Requirements for Vision Project Connect Server..... 7
 - Supported server operating systems 7
 - Account requirements on the server 7
 - Port Requirements on the Server..... 7
 - Client Software Requirements for Project Connect 8
 - Non-Supported Environments..... 8
- New Installation and Configuration Steps 9
 - Summary of New Installation and Configuration Steps..... 9
 - Download the Vision Project Connect Distribution Package..... 10
 - Install Project Connect on your Project Connect Server..... 10
 - Configure the Project Connect Data Exchange Rules 11
 - Install Vision Project Connect Services..... 12
 - Configure the Project Connect Services 12
 - Start the Vision Project Connect Services 13
- Configure Project Connect Integration with Deltek Vision and Microsoft Project..... 15
 - The Vision Project Connect Configurator Utility 15
- Project Connect Portal Administration..... 20
 - Access to Download Project Connect 20
- Upgrading from a Previous Deltek Project Connect Installation 21
 - Summary of Upgrade Steps..... 21
 - Download the Vision Project Connect Distribution Package..... 22
 - Stop the Vision Project Connect Services..... 22
 - Back up the Current Vision Project Connect Configuration 23

- Clear the Vision Project Connect Services Cache and Logs 24
- Uninstall the Vision Project Connect Services 24
- Archive the Folder Containing the Previous Vision Project Connect Files 24
- Install Project Connect on your Project Connect Server 25
- Apply the Saved Configuration to the New Installation 25
- Install Vision Project Connect Services..... 26
- Configure the Project Connect Services 27
- Start the Vision Project Connect Services 27
- Post-installation Activities 29
 - Verify the Vision Project Connect Web Service Interface 29
 - Verify the WOA/RESTful Interface 29
 - Verify the Vision Project Connect Portal Service 30
- Deltek Vision Project Connect Administration 31
 - Getting started with Portal Administration 31
 - Creating Portal User Accounts and User Roles 32
 - Portlet Access and Communities 33

Overview

This document describes how to perform a first-time installation of the Vision Project Connect software, and how to upgrade to a new release of the software on an existing installation.

Product Overview

Vision Project Connect provides packaged integration between Deltek Vision and Microsoft® Project and gives project managers the ability to leverage the resource planning benefits of Deltek Vision while managing the complexities of the schedule in Microsoft Project with relationships, constraints, and critical paths.

Vision Project Connect implements a set of pre-packaged integration processes designed specifically with project management to ERP integration best practices. The data mappings and information flow provided create an out-of-the-box business process integration for managing projects externally to Vision.

This guide provides the information that you need to install Vision Project Connect for Vision 7.0 on your server, and administrative information on how to implement and configure for sharing data between Microsoft Project and Vision.

What is Deltek Vision Project Connect?

Vision Project Connect enables key information to be shared between a Microsoft (MS) Project Plan and Vision. With Vision Project Connect, it doesn't matter which tool your firm uses to manage a specific project. Whether you manage one or all of your plans in Microsoft Project, you can conduct superior firm-wide resource management output and processes with Vision Project Connect and Vision Resource Planning.

The benefits of Vision Project Connect include the following:

- Bi-directional integration between Deltek Vision and Microsoft Project
- Seamless work environment
- Consolidated employee data management
- Choice and flexibility in project management

The data integration functionality that Vision Project Connect supports between Vision Resource Planning and Microsoft Project includes the following:

- Assigned resource, planned hours, start date, and finish date updates for a given assignment initiated from either Vision or MS Project
- WBS mapping between Vision and MS Project
- Employee name and rate data, which are managed in Vision but available for use in MS Project
- Generic Resources, which are managed in Vision but available for use in MS Project plans
- Actual project hours charged to a Vision timesheet are shown against a budget in a MS Project Plan
- Firm-wide resource management output from Vision, even if some or all plans are managed in MS Project.

- Firm-wide project management reporting from Vision, even if some or all plans are managed in MS Project.

If You Need Assistance

If you need assistance installing, implementing, or using Vision Project Connect, 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.
- 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. Go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In**.



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, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

Deltek Vision includes an online help system that contains conceptual, procedural, and tab/field-level documentation. Click **Help » Contents** on the Vision toolbar to access the online help.

In addition to the online help system, Deltek provides user guides and quick reference cards (in PDF format) to help you install and use the Vision application. You can download a complete set of user guides and quick reference cards from either the Product Downloads tab or the Knowledge Center at the [Deltek Customer Care Connect site](#). The Knowledge Center article [62566](#) has a link to all the documents for Vision 7.0.

Document	Description
Deltek Vision Project Connect User's Guide for Microsoft Project 2007	This guide contains information for integrating for integrating Microsoft Project 2007 with Deltek Vision.
Deltek Vision Project Connect User's Guide for Microsoft Project 2010	This guide contains information for integrating for integrating Microsoft Project 2010 with Deltek Vision.

Downloading Deltek Products Using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, and sub-releases. You can access DSM directly or through the Deltek Customer Care Connect site.

When you access DSM directly, you will be prompted to log on before you can access the application. If you access DSM from within the Deltek Customer Care Connect site, you do not have to log on since you are already logged into the Customer Care Connect site.

Accessing DSM Directly

To access Deltek Software Manager directly, complete the following steps:

1. Launch Deltek Software Manager by taking one of the following actions:
 - Click [here](#).
 - On your desktop, click **Start » Programs » Deltek » Vision » Deltek Software Manager**.
2. On the Deltek Software Manager logon dialog box, enter your Deltek Customer Care Connect **User ID** and **Password**, and click **Logon**.
3. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.



When you log on for the first time, Deltek Software Manager asks you to select a default folder where Deltek products are to be downloaded.

4. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.



You can change this folder anytime on the Settings dialog box.

5. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.



If you clicked the link in step 1 to access DSM, the application automatically selects Vision for you.

6. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
7. In the table, select the option that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.



To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

8. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

Accessing DSM from Within the Customer Care Connect Site

To access Deltek Software Manager from within Customer Care Connect site, complete the following steps:

In your Web browser, go to <http://support.deltek.com>.

1. Enter your Customer Care Connect **Username** and **Password**, and click **Log In**.
2. When the Customer Care Connect site displays, click the Product Downloads tab.
You are automatically logged in Deltek Software Manager.
3. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.



When you log on for the first time, Deltek Software Manager asks you to select a default folder where Deltek products are to be downloaded.

4. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.



You can change this folder anytime in the Settings dialog box.

5. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.
6. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
7. In the table, select the option that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.



To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

8. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click [here](#).
- To view a tutorial on how to use Deltek Software Manager, click [here](#).
- To view more information on troubleshooting Deltek Software Manager, click [here](#).



The above troubleshooting link will only work if you are logged into Deltek Customer Care Connect.

System Requirements for Vision Project Connect Server

Refer to the Deltek Product Support Compatibility Matrix for details. You must have the following software installed before you install and use Vision Project Connect Server components:

Supported server operating systems

- Microsoft Windows Server 2008 R2 SP1 (R2 is 64-bit (x64) only platform)
- Microsoft Windows Server 2008 SP2, 32-bit or 64-bit (x64)

Account requirements on the server

- The Account used to run the Vision Project Connect Services must be a member of the Local Administrator group on the server.
- You must create an account that the Vision Project Connect services will run under. Complete the following steps to create an Administrative User account:
 1. Create a user account named **DeltekProjectConnect**.
 2. Add the account to the local Administrator group on the server.

Port Requirements on the Server

Ensure that the following ports are not blocked, that they are not being utilized by another service or application, and that they are available for use by Vision Project Connect.

Port Use	Ports
HTTP	8080, 8180, 8280, 8380, 8480
JNDI	1099, 1199, 1299, 1399, 1499
JDBC	9005
JDBC (Vision)	Port 1433 or the port used for your company's SQL Server configuration
Vision Web Services	80 or your company's configuration of Vision

Client Software Requirements for Project Connect

You must have the following software installed before you install and use Vision Project Connect:

Supported operating systems installed on workstations:

- Microsoft Windows 7 SP1, 32-bit or 64-bit (x64)
- Microsoft Windows Vista SP2, 32-bit or 64-bit (x64)
- Microsoft Windows Professional XP SP3, 32-bit or 64-bit (x64)

Supported Microsoft Project versions installed on workstations:

- Microsoft Project 2010 (32-bit version only)
- Microsoft Project 2007 SP2

Supported browsers installed on workstations:

- Browser configuration must support JavaScript and allow cookies
- Microsoft Internet Explorer
- Firefox/Mozilla



Microsoft Office 2010 products are available in 64-bit versions. However, for the best productivity and user experience, Microsoft recommends 32-bit Office 2010 for both 32-bit and 64-bit operating systems. Office 2010 64-bit is optimized for advanced data analysis scenarios that most users do not require, and existing 32-bit add-ins are not supported on Office 64-bit.

For more information about Office 2010 64-bit, see the following Microsoft Web page:

http://office.microsoft.com/en-us/products/office-2010-frequently-asked-questions-HA101674631.aspx#About_Office_2010_4

Non-Supported Environments

- **Microsoft Project Server** — Deltek does not support the use of Microsoft Project Server (any version) with Deltek Vision Project Connect.

New Installation and Configuration Steps

The information in this section applies if you are installing Project Connect for the first time.



If you have Vision Project Connect installed and you are upgrading to Vision version 7.0, see the [Upgrading from a Previous Deltek Project Connect Installation](#) section on page 21.

Use these instructions to download and install Deltek Project Connect for Vision 7.0 on your Project Connect server. If you have multiple Project Connect servers, you must perform the installation on each server. You must have Vision 7.0 installed on your Vision Web server before you complete the steps in this section.

After you install the required software and added the necessary account privileges identified in the "System Requirements" section on page 7 of this guide, complete the following steps in the order listed to install and configure Vision Project Connect. The specific instructions for each step are included in the remaining sections of this guide. These sections include steps to perform on your Project Connect server.



You may want to print this "Summary of Installation and Configuration Steps" section to use as a check list as you work through the remaining sections of the guide.

Summary of New Installation and Configuration Steps

Steps to Perform on the Project Connect Server

Step	Description	Completed By	Section and Page
1	Download and install Project Connect server components on your Project Connect server.	System administrator	"Download the Vision Project Connect Distribution Package," page 10
2	Configure the Project Connect Data Exchange Rules	System Administrator	"Configure the Project Connect Data Exchange Rules," page 11
3	Install Vision Project Connect Services.	System administrator	"Install Vision Project Connect Services," page 12
4	Configure the Project Connect "DataPath" service.	System administrator	"Configure the Project Connect Services," page 12
5	Start Vision Project Connect Services.	System administrator	"Start the Vision Project Connect Services," page 13
6	Configure Project Connect Integration with Deltek Vision and Microsoft Project	System administrator	"Configure Project Connect Integration with Deltek Vision and Microsoft Project," page 15

Step	Description	Completed By	Section and Page
7	Perform Project Connect Portal Administration.	System administrator	"Project Connect Portal Administration," page 20

Download the Vision Project Connect Distribution Package

You should receive an email from Deltek Support with instructions and credentials that you need to complete this procedure.

To download Project Connect for Vision 7.0 server components on your Project Connect server, complete the following steps:

1. Log on to your Project Connect server.
2. Open the [Deltek Customer Care Connect Web site](#).
3. On the Product Download tab, click **Run Deltek Software Manager**.
4. On the Deltek Software Manager screen, navigate to **Vision 7.0** in the pane on the left side of the screen.
5. Click the plus sign beside **Vision 7.0**, and then click **Sub-Release** from the expanded list.
6. In the expanded grid, click the **Deltek Vision Project Connect (G)** option to add it to the Download Queue.
7. Click the **Download** button in the bottom left corner of the Deltek Software Manager screen.

This downloads the **Deltek Vision Project Connect server and client zip files** (zip files containing the server and client installation packages) and documentation files to C:\Documents and Settings*user name*\Desktop\Deltek Software Downloads.
8. When this finishes, click **Close** on the Download Process dialog box.
9. On your Desktop, click the Deltek Software Downloads folder.
10. Browse to the **Vision folder » 70 folder » GA folder » Deltek Vision Project Connect** folder to access the server and client zip files.

Install Project Connect on your Project Connect Server

To install Project Connect onto your Project Connect server, you must have a ZIP extraction/decompression tool available. This allows the host system to extract the Vision Project Connect software during installation.

The Deltek Vision 7.0 Project Connect Server is not deployed by an automated installer. It is deployed by extracting the zipped archive file containing all the server files to a folder on the server.

To install Project Connect on your Project Connect server, complete the following steps:

1. Extract the Vision Project Connect server components to a location on your file system. Deltek recommends that you extract to a folder on the root of the drive/volume named **DeltekProjectConnect** (for example, D:\DeltekProjectConnect).



If you see the following error, the folder path to which you are extracting the files is too long:

Error 0x80010135: Path too long An unexpected error is keeping you from copying the file. If you continue to receive this error, you can use the error code to search for help with this problem

You need to shorten the path to 75 characters or fewer.

The extraction will create an SOALOGIX directory under the folder you directed your archive tool to perform the extraction that contains the entire server component of Deltek Vision Project Connect.

2. Ensure that the Project Connect administrative account you created earlier has read and write access to the newly created SOALOGIX directory and all children directories and files.

The physical installation for the Vision Project Connect software is now complete.

Configure the Project Connect Data Exchange Rules

When you configure the data exchange rules, you control how end users exchange data using Microsoft Project installed on the workstations.

Before Project Connect is used, the administrator must configure the features that manage how updates flow to Microsoft Project Desktop users based on data changes in Vision. You must complete these steps before the users install the Project Connect Add-in on their workstations. If you are unsure of these settings, discuss them with the Vision Administrator to determine what the appropriate settings should be for your implementation.

To configure the Project Connect data exchange rules, complete the following steps:

1. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\config\datapathrules\
2. Right-click the file named **config_mspxml_to_deltekvision.xml** and edit it with notepad.
3. Modify the data exchange settings as listed in the table that follows this procedure. Acceptable values are **true** or **false**.
4. Save the file.

Data Exchange Settings	Description
Time Phased Data Options	<p>This option determines if you will enable or disable the ability to upload from Microsoft Project to Deltek Vision. Most firms will want to enable this option by entering "true."</p> <pre><property name="uploadTimePhaseData" value="true"/></pre>

Data Exchange Settings	Description
<p>Enable Vision to Microsoft Project: Update Planned Data</p>	<p>This option determines if you will enable or disable the ability to upload planned hours and start dates from Vision to Microsoft Project.</p> <p>Deltek recommends that you set this option to false, to restrict the update to Microsoft Project to only the resource assignments that are made in Vision.</p> <pre><property name="downloadPlannedData" value="false" /></pre>
<p>Enable Vision to Microsoft Project : Update Actual Data</p>	<p>This option determines if actual data (hours worked, amount spent) will be uploaded from Vision to Microsoft Project.</p> <pre><property name="downloadActualData" value="false" /></pre>

Install Vision Project Connect Services

Vision Project Connect server components run as a service on the Windows Operating System. This section provides information on installing Vision Project Connect services.

To install Vision Project Connect server services, complete the following steps:

1. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\setup\services
2. Right-click the file named **install-all-services.bat** and choose the **Run As Administrator** option. This prevents Windows UAC issues with Windows Server 2008 or higher Operating Systems.

If there are no errors, the script installs the following services:

- SOALogix database Service
- SOALogix datapath Service
- SOALogix portal Service



If the services are not created, you can open a DOS/Command Shell window (using Run As Administrator Option) and launch the batch file. The results from the file will display in the Command Shell window.

Configure the Project Connect Services

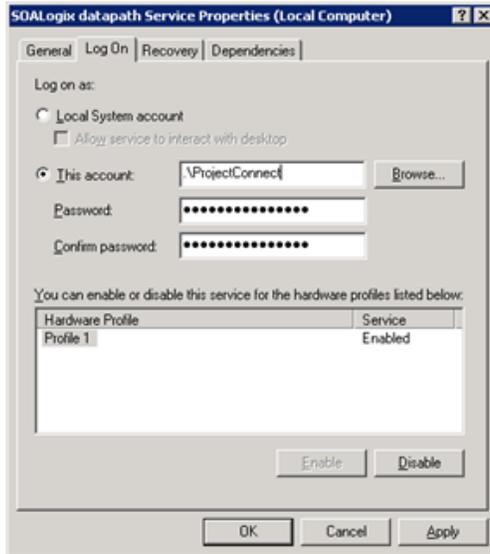
After you create the Project Connect services, you must configure the SOALogix DataPath service to use the account that you created earlier. After the DataPath service is configured, the services can be started.



The DataPath Service must be configured to log on with an account that is a member of the local administrators group; otherwise, the connection will fail.

To configure the Project Connect Services, complete the following steps:

1. Navigate to **Control Panel » Administrative Tools » Services**.
2. Double-click the SOALogix DataPath Service.
3. Click the Log On tab.



4. Select **This account** and enter the Project Connect account credentials that you created earlier.
5. Click **OK**. The account will be given the **Logon as a Service** privilege automatically if it did not already have that right.

Start the Vision Project Connect Services

After the services are properly configured, you can start the Vision Project Connect Services.

To Start the Project Connect Services, complete the following steps:

1. On your file system, navigate to the folder below:
[INSTALL_LOCATION]\SOALOGIX\soappliance\bin
2. Right-click the file named **services-start.bat** and choose the **Run As Administrator** option (to prevent Windows UAC issues with Windows Server 2008 or higher Operating Systems).

If there are no errors, the script runs the SOALogix services in the following order:

- SOALogix database Service
- SOALogix datapath Service
- SOALogix portal Service



You also have the option to start the services manually. If you choose this option, access your computer's Services window, (usually found in **Control Panel » Administrative Tools » Services**) and start the SOALOGIX services. They all have SOALOGIX in their service name. Start them in the following order:

1. SOALogix database Service
 2. SOALogix datapath Service
 3. SOALogix portal Service
-

3. Proceed to “Configure Project Connect Integration with Deltek Vision and Microsoft Project.”

When Vision Project Connect services are running, the console output is redirected to the **service.log** and **service-error.log** files in the following folder:

[INSTALL_LOCATION]\SOALOGIX\soappliance\logs\

You can inspect the files for messages during service startup.

Configure Project Connect Integration with Deltek Vision and Microsoft Project

Vision Project Connect provides a Configurator utility to configure the connections for Deltek Vision to interface with Microsoft Project 2007 and 2010. After you install the Vision Project Connect package on the server, you must launch the Configurator utility to establish the connections.

The Vision Project Connect Configurator Utility

To access the Configurator utility and set up the connections, complete the following steps:

1. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\setup
2. Right-click **setup.bat** and choose the option to **Run As Administrator**. This prevents Windows UAC issues with Windows Server 2008 or higher Operating Systems.

The Configurator utility launches. The Configurator provides common functions across each of the tabs that act on the form of the visible tab.

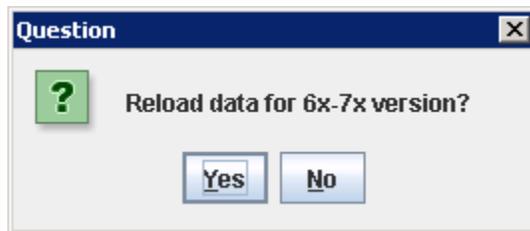


Although the Configurator has two tabs, only the Vision tab is supported for integration with Deltek Vision. The MSProject tab, used for configuring connections to Microsoft Project Server 2007, is not supported.

- Use the information in the following table to populate the fields on the Vision tab, verify the connections, and save the settings.

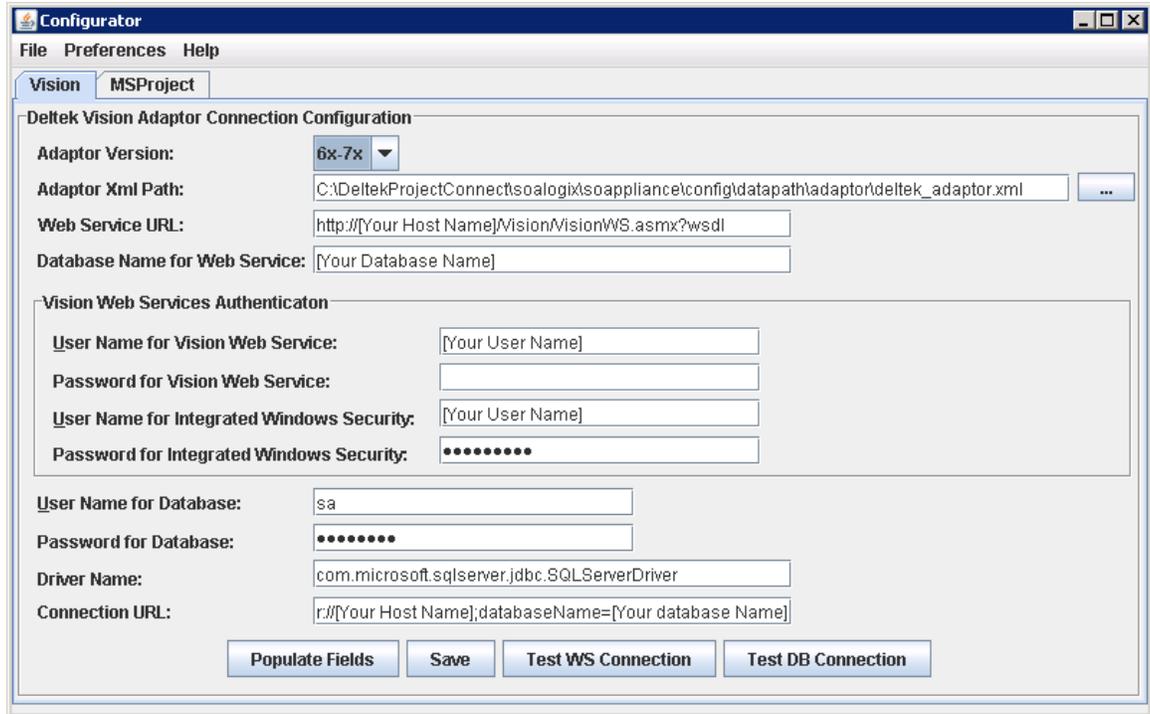
Button	Description
Populate Fields	Click this button to load any existing configuration data from the disk into the form. Configuration data is not loaded by default into the form, so this should be the first action that you perform if you are maintaining an existing configuration of Vision Project Connect.
Save	Click this button to save the content of the form to the configuration data on disk. This should be the last action that you perform before you close the Configurator if you want to keep changed data on the form.
Test WS Connection	Click this button to test the connection to the Vision Web Service page with the currently entered data in the form for to the Vision Web Server and User Account.
Test DB Connection	Click this button to test the connection to the Database Server and Database with the currently entered data in the form for to the Database Server connections.

- Click the **Adaptor Version** field and Select **6x-7x**.
- Click the **Populate Fields** button to load the default values into the form. The default values provide examples of how to enter the information and should only be as references.
- If you accidentally selected **5x** and decide to switch to the **6x-7x** option, the following dialog box displays:



Click **Yes** to continue.

An example of the Vision Project Connect Configuration Utility appears below with the default values.



7. Edit the form using the following table as your guide:

Field Name	Description	Recommended Values / Example
Adaptor Version	Select the Deltek Vision version associated with your Project Connect Installation.	6x-7x
Adaptor XML Path	This is the file path (including the XML file name) to the location of the configuration data for the Vision connector. You must make sure that the path is updated to reflect your install location.	Accept the default path. When the Configurator populates the fields, it correctly identifies its location and the path to the XML file.
Web Service URL	Complete the setting for the Vision Web Service URL. This is how Vision Project Connect will invoke the Vision Web Services. The Vision Web Service file name is visionws.asmx. This file name and the ?wsdl entry (appearing after it) will always be at the end of the URL as listed in the Recommended Values.	Either the fully qualified DNS name, NETBIOS/HOSTNAME, or the IP Address of the Vision web server can be used. The entry is in the format of http://[servername]/[vision]/visionws.asmx?wsdl

Field Name	Description	Recommended Values / Example
Database Name for Web Service	<p>This is the database description that appears in the dropdown list of the Vision Login Window. This value is case-sensitive and must match the name in the drop-down list exactly.</p> <p>The best way to get the description is to click the Database field drop-down list on the Deltek Vision Login dialog box. When the database description is highlighted, click CTRL + C to copy the description into the Clipboard and then paste it into this field.</p>	<p>In most cases, the entry is in the form of Database Name, plus (Server Name).</p> <p>Example: VisionDemo (DBServerName)</p>
Vision Web Services (API) Authentication Settings		
Username for Vision Web Service	The Vision Web Service requires a valid Vision Username and Password for connections to be authenticated. This field needs a valid Vision Username that will be used to authenticate with the Vision Web Service.	Create an account in Vision » Configuration » Security » Users and Passwords and enter that account information in this field.
Password for Vision Web Service	This is the password for the Vision Username created above that is used to authenticate to the Vision Web Service.	Use the Password that you set for the account above. A blank password is not recommended.
User Name for Integrated Windows Security	If you have Integrated Authentication set on the Vision Virtual directory, you must provide a valid Active Directory account that will be used to authenticate with Integrated Windows Security to connect to the Vision Web Server.	Enter the account in the format of: Domain\Username For Example: AppleBartlett\WilliamApple
Password for Integrated Windows Security	This is the password for the Active Directory or Local Windows Account created for the Integrated Windows Security.	Create a secure password for the account.
<p>After populating the fields in this section, click the Test WS Connection button to verify the settings. If a Connection Succeeded dialog box displays, the settings are valid and can be saved for this section. If the settings are not valid, correct the errors that display.</p>		

Field Name	Description	Recommended Values / Example
<p>JDBC Database Server Connection Settings</p> <p>Vision Project Connect uses both Web Services API calls and JDBC to provide the connection to Deltek Vision. To configure the connector, you will need the following information</p>		
Username for Database	This is the Microsoft SQL Server Username that has db_owner role membership in the Vision database in SQL Server. This is used to authenticate with the Vision database. Since Vision does not provide Web Services interfaces for all required integration points, Vision Project Connect performs some integration operations directly with the Vision database.	Deltek recommends that you use the SQL Server Username and password that is used in Weblink. If you are using Integrated Authentication in Weblink, you must configure a SQL Server Username that has db_owner role membership in the Vision database.
Password for Database	This is the password for the SQL Server account used above.	It is recommended to use a secure password.
Driver Name	This is the fully qualified name of the JDBC driver being used to provide connectivity with the Vision database. Under normal circumstances, you will not need to change this default.	Do not change the default values in this field.
Connection URL	Complete the setting for the Connection URL. This is the mechanism by which Project Connect knows which database to connect to. The general form of this URL is: jdbc:sqlserver://<database_host>:<database_port>;databaseName=<vision_database_name>	When updating the individual settings in this form, replace the <> symbols as well that server as pointers for the type of information to enter.
<p>After populating the fields in this section, click the Test DB Connection button to verify the settings. If a Connection Succeeded dialog box displays, the settings are valid and can be saved for this section. If the settings are not valid, correct the errors that display.</p>		

- If both settings test successfully, click the **Save** button.

You successfully installed and configured Deltek Vision Project Connect. Proceed to the next section to verify the Project Connect installation and configure the Portal.

Project Connect Portal Administration

Vision security is applied directly in Project Connect. The Vision security role assigned to Vision users determines:

- If a user can download Project Connect
- Which Vision applications and records are visible
- The actions that users can perform with Vision records in Project Connect

The Vision security role and screen designer settings described in this section allow users to view, create, modify, delete, and associate Vision records in Vision as well as in Project Connect.

- You set up security roles and their access rights in Vision **Configuration » Security » Roles**.
- You assign security roles to individual users in Vision **Configuration » Security » Users and Passwords**.

Access to Download Project Connect

To be able to download Project Connect from Vision Utilities, a user's security role must have appropriate access rights. The setting to allow this access is in Vision **Configuration » Security » Roles**. In the menu items access section on the General tab, select the **Download Project Connect** option under the Utilities menu.

Upgrading from a Previous Deltek Project Connect Installation

The information in this section applies if you currently have Vision Project Connect 1.6 or earlier installed and you have upgraded to Vision 7.0.

Refer to the System requirements to verify that your current server is supported with the Deltek Vision Project Connect Server for Vision 7.0.



The Deltek Vision 7.0 Project Connect Server installation is not deployed by an automated installer. It is deployed by extracting the zipped archive file containing all the server files to a folder on the server. If you have a previous version already installed you will have to manually remove the previous version and perform the steps for a new installation.

Summary of Upgrade Steps

Step	Description	Complete By
1	Download the Vision Project Connect Distribution Package files from DSM unto your Project Connect Server.	System administrator
2	Stop the Vision Project Connect Services.	System Administrator
3	Back up the current Vision Project Connect Configuration.	System administrator
4	Clear the Vision Project Connect Services Cache and Logs.	System administrator
5	Uninstall the Vision Project Connect Services.	System administrator
6	Archive the folder containing the previous Vision Project Connect files.	System administrator
7	Install the new version of Vision Project Connect.	System administrator
8	Apply the Saved Configuration to the new installation.	System administrator
9	Verify Vision Project Connect Installation.	System administrator

Follow the instructions in the next sections of this guide to download, install and configure Vision Project Connect 7.0 on your Project Connect server.



You must install the Vision 7.0 software before you upgrade your Project Connect Server with Project Connect.

Download the Vision Project Connect Distribution Package

You should receive an email from Deltek Support with the instructions and credentials that you need to complete this procedure.

To download Project Connect for Vision 7.0 server components on your Project Connect server, complete the following steps:

1. Log on to your Project Connect server.
2. Open the [Deltek Customer Care Connect Web site](#).
3. On the Product Download tab, click **Run Deltek Software Manager**.
4. On the Deltek Software Manager screen, navigate to **Vision 7.0** in the pane on the left side of the screen.
5. Click the plus sign beside **Vision 7.0**, and then click **Sub-Release** from the expanded list.
6. In the expanded grid, click the **Deltek Vision Project Connect (G** option to add it to the Download Queue.
7. Click the **Download** button in the bottom left corner of the Deltek Software Manager screen. This downloads the **Deltek Vision Project Connect server and client zip files** (zip files containing the server and client installation packages) and documentation files to C:\Documents and Settings*<user name>*\Desktop\Deltek Software Downloads.
8. When this finishes, click **Close** in the Download Process dialog box.
9. On your Desktop, click the Deltek Software Downloads folder.
10. Browse to the **Vision folder » 70 folder » GA folder » Deltek Vision Project Connect folder** to access the server and client zip files.

Stop the Vision Project Connect Services

To stop the Vision Project Connect services, complete the following steps:

1. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\bin
2. Right-click the file named services-stop.bat and choose the option to Run As Administrator (to prevent Windows UAC issues with Windows Server 2008 or higher Operating Systems).

If there are no errors, the script stops the three SOALogix services:

- SOALogix database Service
- SOALogix datapath Service
- SOALogix portal Service



You also have the option to stop the services manually. If you choose this option, access your computer's Services window, (usually found in **Control Panel » Administrative Tools » Services**) and stop the three SOALOGIX services.

Back up the Current Vision Project Connect Configuration

When upgrading Vision Project Connect software, you will want to retain various configuration settings and implementation data in order to apply them into the new release. The settings are saved in a set of files and one folder. There are two sets of settings that should be saved to a location of your choice:

- **Connector Configuration** —The connector configuration provides Vision Project Connect the ability to interact with your integrated systems. To restore your existing connector configuration after an upgrade or other disruptive event, copy the information in your communicator interface to the new Version communicator interface
- **Portal Data** — The other user data, such as Users data, WBS mapping and company setting, from the backup location to the following new release install directory, copy from previous installations:

To back up the Vision Project Connect Connector Configuration, complete the following steps:

1. Confirm that the SOALogix services are stopped.
2. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\config\datapath\adaptor\
3. Copy the **config_mspserver_to_deltekvision.xml** file to a safe location.
4. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\data\hypersonic\
5. Copy the following files:
 - SysDB.properties,
 - Sysdb.sql
 - Sysdb.log (if it exists)
 - SysDB.script

To back up the Vision Project Connect Portal Data, complete the following steps:

1. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\data\
2. Copy the **userdata** folder.



Although the files and folder described above are located within the [INSTALL_LOCATION]\SOALOGIX\soappliance\data folder, only the specified files and folder indicated above should be copied. The whole Data folder **cannot** be copied to the new Vision Project Connect installation location; from previous releases because errors will occur.

Clear the Vision Project Connect Services Cache and Logs

You should clear the Vision Project Connect persistent cache and logs after you perform an upgrade or after a disruptive event.

To clear the Vision Project Connect persistent cache, complete the following steps:

1. Confirm that the SOALogix services are stopped.
2. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\bin
3. Run the script files below in the order listed. To run, right-click the file name and choose the **Run As Administrator** option.
 - delete-jboss-temp-files.bat
 - delete-logs.bat

Uninstall the Vision Project Connect Services

To uninstall the Vision Project Connect Services, complete the following steps:

1. Confirm that the SOALogix services are stopped.
2. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\setup\services
3. Right-click the file named **Uninstall-all-services.bat** and choose the **Run As Administrator** option. This prevents Windows UAC issues with Windows Server 2008 or higher Operating Systems. If there are no errors, the script removes the three SOALogix services:
 - SOALogix database Service
 - SOALogix datapath Service
 - SOALogix portal Service

Archive the Folder Containing the Previous Vision Project Connect Files

Because the entire Project Connect Package is deployed in one folder during the extraction process, Deltek recommends that you make a backup/archive copy of the installation before upgrading to the new release.

To archive the previous Vision Project Connect installation, complete the following steps:

1. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\setup\services
2. Archive using a zip utility or copy the **SOALOGIX** folder and all its children to a different location of your choice.
3. Delete the **SOALOGIX** folder after the archive is complete.
4. You are now ready to install the new Vision Project Connect release.

Install Project Connect on your Project Connect Server

To install Project Connect onto your Project Connect server, you must have a ZIP extraction/decompression tool available. This allows the host system to extract the Vision Project Connect software during installation.

The Deltek Vision 7.0 Project Connect Server is not deployed by an automated installer. It is deployed by extracting the zipped archive file containing all the server files to a folder on the server.

To install Project Connect on your Project Connect server, complete the following steps:

1. Extract the Vision Project Connect server components to a location on your file system.

Deltek recommends extracting to a folder on the root of the drive/volume named **DeltekProjectConnect** (for example, D:\DeltekProjectConnect).



If you get the following error, the folder path to which you are extracting the files is too long:

Error 0x80010135: Path too long An unexpected error is keeping you from copying the file. If you continue to receive this error, you can use the error code to search for help with this problem.

Shorten the path to 75 characters or fewer.

The extraction will create an SOALOGIX directory under the folder you directed your archive tool to perform the extraction that contains the entire server component of Deltek Vision Project Connect.

2. Ensure that the Project Connect administrative account you created earlier has read and write access to the newly created SOALOGIX directory and all children directories and files.

The physical installation for the Vision Project Connect software is now complete.

Apply the Saved Configuration to the New Installation

After you upgrade the Vision Project Connect software, you must apply the previous configuration settings and implementation data to the new release to restore your settings. The settings you will restore are from the same set of files that you saved using the steps from the section “Back up the current Vision Project Connect Configuration.”

- **Connector Configuration** — The connector configuration provides Vision Project Connect the ability to interact with your integrated systems. To restore your existing connector configuration after an upgrade or other disruptive event, copy the information in your communicator interface to the new Version communicator interface.
- **Portal Data** — The other user data, such as Users data, WBS mapping and company setting, from the backup location to the following new release install directory, copy from previous installations.

To restore the Vision Project Connect Connector Configuration, complete the following steps:

1. On your file system, navigate to the following folder:

[INSTALL_LOCATION]\SOALOGIX\soappliance\config\datapath\adaptor\

2. Paste the **config_mspserver_to_deltekvision.xml** file that you copied earlier into the **adaptor** folder.
3. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\data\hypersonic\
4. Paste into the hypersonic folder the following files that you copied earlier:
 - SysDB.properties
 - Sysdb.sql
 - Sysdb.log (if it exists)
 - SysDB.script

To restore the Vision Project Connect Portal Data, complete the following steps:

1. On your file system, navigate to the folder below:
[INSTALL_LOCATION]\SOALOGIX\soappliance\data\
2. Paste the **userdata** folder you copied earlier into the **data** folder..



Although the files and folder described above are located within the [INSTALL_LOCATION]\SOALOGIX\soappliance\data folder, only the specified files and folder indicated above should be copied. The whole Data folder CANNOT be copied to the new Vision Project Connect installation location; from previous releases because errors will occur.

Install Vision Project Connect Services

Vision Project Connect server components run as a service on the Windows Operating System. This section provides information on installing Vision Project Connect services..

To install Vision Project Connect server services, complete the following steps:

1. On your file system, navigate to the following folder:
[INSTALL_LOCATION]\SOALOGIX\soappliance\setup\services
2. Right-click the file named **install-all-services.bat** and choose the option to **Run As Administrator**. This prevents Windows UAC issues with Windows Server 2008 or higher Operating Systems.

If there are no errors, the script installs the following services:

- SOALogix database Service
- SOALogix datapath Service
- SOALogix portal Service



If the services are not created, you can open a DOS/Command Shell window (using Run As Administrator Option) and launch the batch file. The results from the file will display in the Command Shell window.

Configure the Project Connect Services

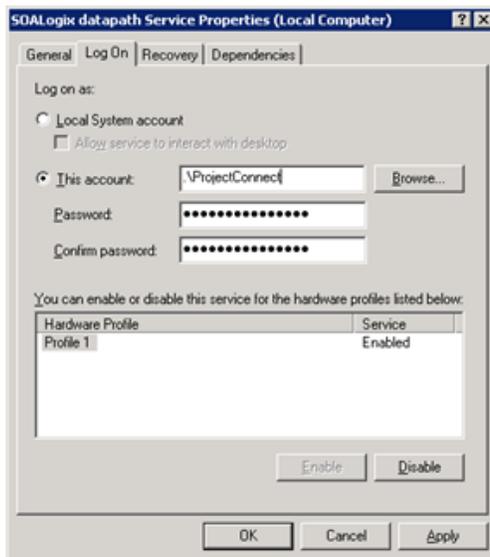
After the Project Connect services are created, the SOALogix DataPath service must be configured to use the account you created earlier. After the DataPath service is configured, the services can be started.



The DataPath Service must be configured to logon with an account that is a member of the local administrators group, otherwise the connection will fail.

To Configure the Project Connect Services, complete the following steps:

1. Navigate to **Control Panel » Administrative Tools » Services**.
2. Double-click the **SOALogix DataPath** service to display the Properties.
3. Click the **Log On** tab.



4. Select **This account** and enter the Project Connect account Credentials you created earlier.
5. Click **OK** to save.

The account will be given the **Logon as a Service** privilege automatically If it did not already have that right already.

Start the Vision Project Connect Services

Once the services are properly configured, the Vision Project Connect Services can be started.

To Start the Project Connect Services, complete the following steps:

1. On your file system, navigate to the folder below:
`[INSTALL_LOCATION]\SOALOGIX\soappliances\bin`

2. Right-click the file named **services-start.bat** and choose the option to Run **As Administrator** (to prevent Windows UAC issues with Windows Server 2008 or higher Operating Systems).

If there are no errors, the script runs the SOALogix services in the following order:

- SOALogix database Service
- SOALogix datapath Service
- SOALogix portal Service



You also have the option to start the services manually. If you choose this option, access your computer's Services window, (usually found in Control Panel | Administrative Tools | Services) and start the SOA LOGIX services. They all have SOA LOGIX in their service name. Start them in the following order:

1. SOALogix database Service
2. SOALogix datapath Service
3. SOALogix portal Service

-
3. Proceed to the section to Configure Project Connect Integration with Deltek Vision and Microsoft Project.

When Vision Project Connect services are running, the console output is redirected to the **service.log** and **service-error.log** files in the following folder:

[INSTALL_LOCATION]\SOA LOGIX\soappliance\logs\

You can inspect the files for messages during service startup.

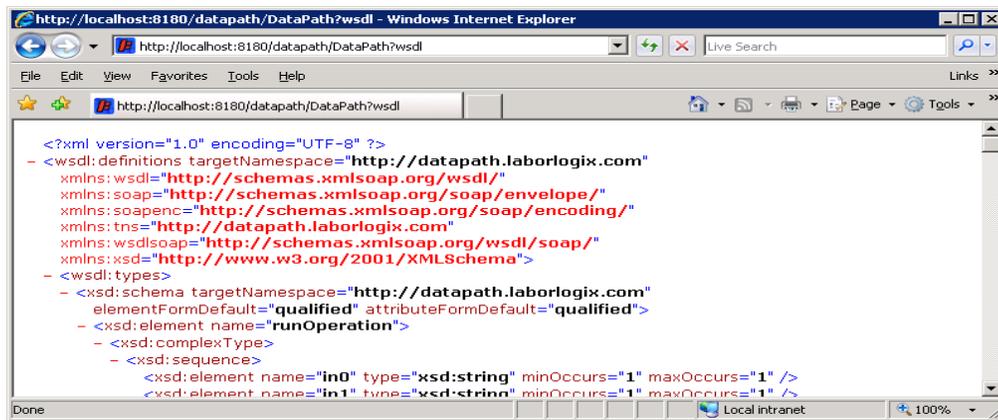
Post-installation Activities

After you install and configure the Vision Project Connect installation, ensure that the web service interface (that end-users will connect to after installing the client-side applications) is running and accessible to end users.

Verify the Vision Project Connect Web Service Interface

To verify the Vision Project Connect web service interface, complete the following steps:

1. Open Internet Explorer and navigate to: **Error! Hyperlink reference not valid.**
2. If the interface is running correctly, an XML response displays in the browser containing the Web Services interface information.

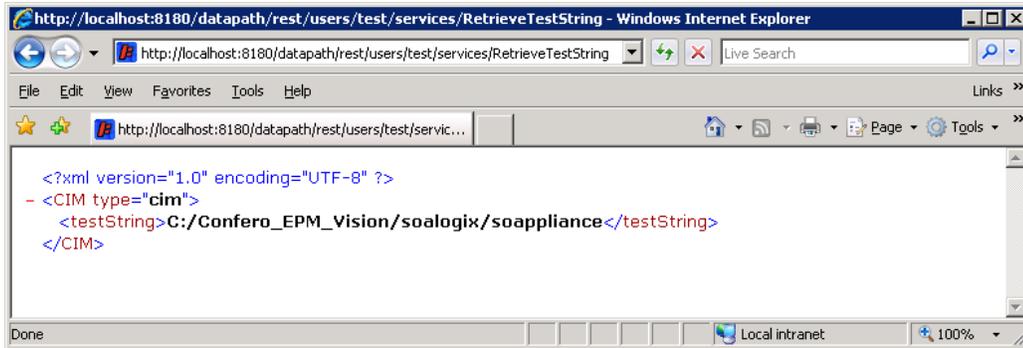


If you do not get a WSDL document or you get an error, review the steps to ensure all steps were performed. If all steps were performed correctly, contact Deltek Customer Care.

Verify the WOA/RESTful Interface

To verify the WOA/RESTful interface, complete the following steps:

1. Open Internet Explorer and navigate to:
Error! Hyperlink reference not valid.
If it is running correctly, a CIM (Canonical Information Model) response displays in XML format with a test message.

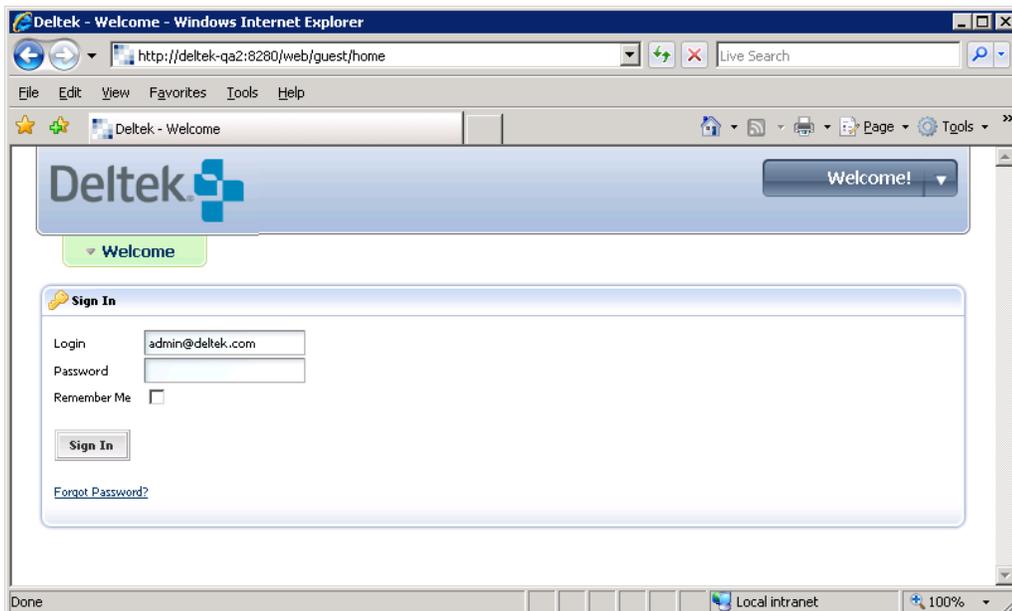


2. If you do not get a CIM XML document or you get an error, then you need to troubleshoot the installation and configuration of Vision Project Connect. Contact Deltek Customer Care for assistance.

Verify the Vision Project Connect Portal Service

To verify the Vision Project Connect portal service, complete the following steps:

1. Open Internet Explorer and navigate to: **Error! Hyperlink reference not valid.**
2. If the Vision Project Connect Portal is running, the **Sign In** portlet displays in a portal window, as in this example:



3. Log in to the portal with the following credentials:

- **Login** — admin@deltek.com
- **Password** — VisionRaptor

You should be successfully logged into the portal as the Vision Project Connect administrator.

Deltek Vision Project Connect Administration

Vision Project Connect administrative activities fall into three categories:

- Portal Administration
- Configuration Management
- Vision User Interface Integration

Vision Project Connect for Vision is comprised of a set of web application parts called “portlets.” Vision Project Connect portlets conform to the JSR-168 standard and are deployed in an enterprise portal. Use the Portal to determine how the portlets are presented and which users can access which portlets. In order to get started with Vision Project Connect, you need to create Portal Communities and Portal Users.

Getting started with Portal Administration

To get started with this process, complete the following steps:

1. Log in to the Portal using one of the default users delivered with Vision Project Connect:

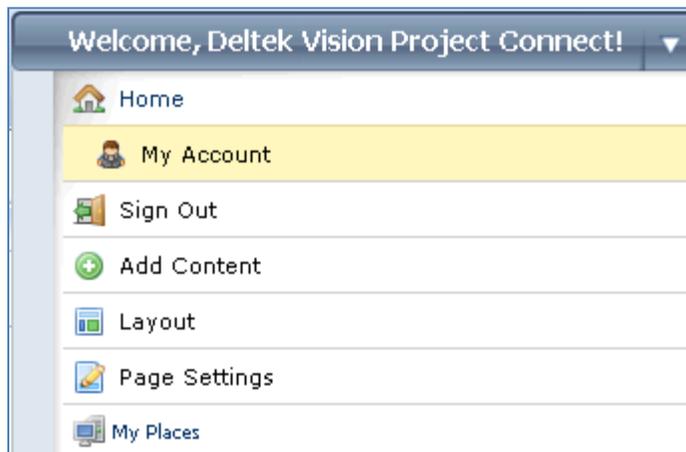
Error! Hyperlink reference not valid.

The password for this user is **VisionRaptor**.

2. Change the password after you log in.
3. Make sure that the **Enterprise Admin** portlet and **Communities** portlet are available to the administrator by adding them to the default administration page.

The steps for adding these portlets are outlined in the Adding Portlets section 2.1 of the *Liferay Portal 4 – Installation Guide* that was included in your download.

4. Click the drop-down list in the **Welcome** section on the right.



5. Select **My Account** to display the My Account dialog box.
6. Click the Password tab to display the password fields where you can enter the new password.

7. Change the password and sign out of the portal.

8. Sign in again, this time with the new password.

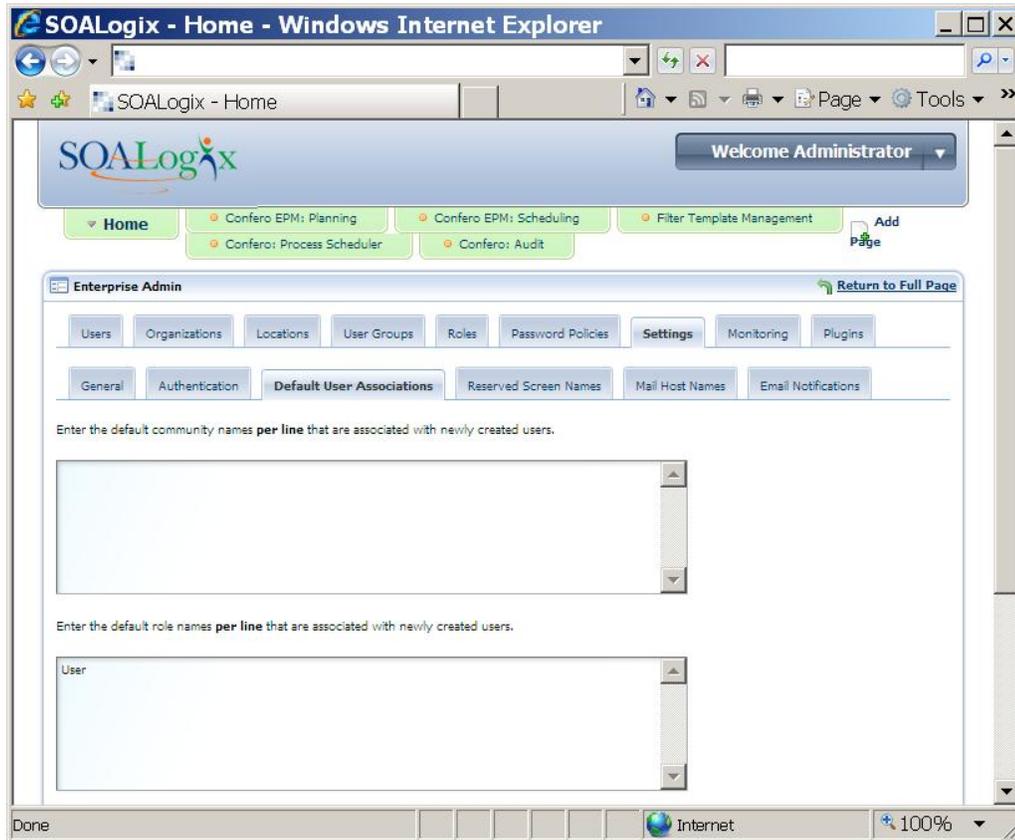
Creating Portal User Accounts and User Roles

You can establish users in Vision Project Connect by importing existing users or by manually creating users. This information is detailed in Chapter 2 of the *Liferay Portal 4 – Portal Administration Guide*. You must establish user roles, to give users access to features and functions in the application.

When you configure users, they are automatically assigned the **User** role. However, you must remove the default **Power** user role before you begin.

To remove the Power user role, complete the following steps:

1. Access the Enterprise Admin portlet.
2. Click the Users tab.
3. Click the Settings tab.
4. Click the Default User Associations tab
5. Confirm that the default user role does not contain the **Power User** role.



Portlet Access and Communities

When a user signs in to Vision Project Connect, the portlets and associated workflows that display are based on the user access settings established by the Vision Project Connect administrator in the user account. See Chapter 2 of the *Liferay Portal 4 – Portal Administration Guide* for more information.

After you set up user accounts, you can associate those user accounts with a community. The communities have pages, and you can configure the portlets that display on the pages. The user's association with a community dictates their access to portlets on a community's page.

Setting Up Communities

As a Vision Project Connect administrator, you allow users to access certain portlets by setting up communities and pages. At a high level, you:

1. Create a community.

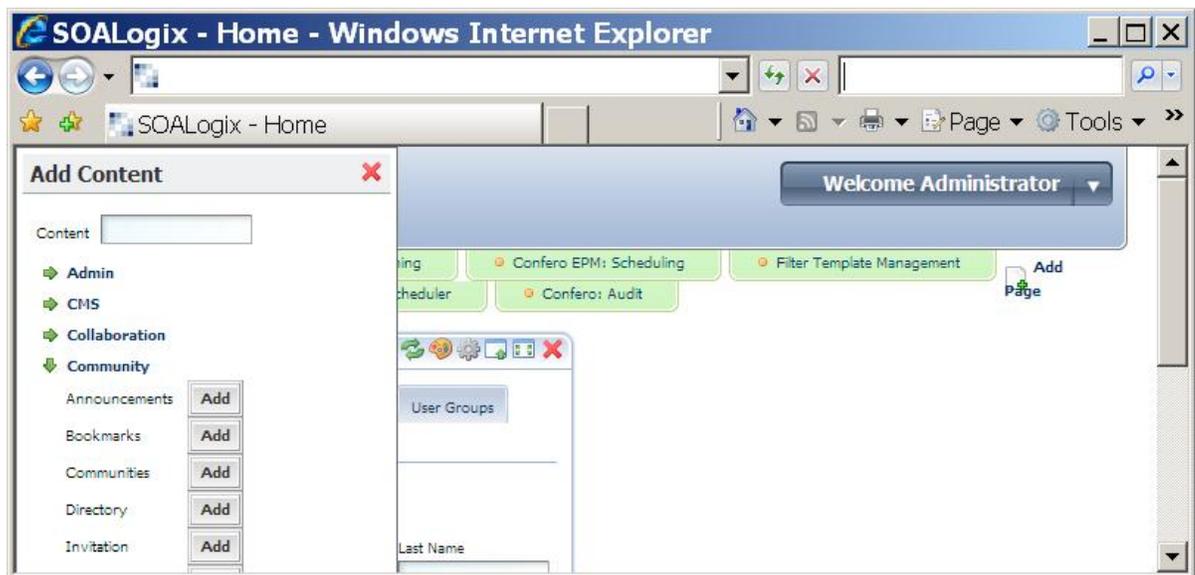
2. Configure community pages.
3. Add a portlet to a page.
4. Grant a user account membership in the community.

Creating a Community

To create a community, you must have access to the Communities portlet.

To establish access to the portlet, complete the following steps:

1. Move your cursor over the **Welcome!** drop-down menu.
2. Select the **Add Content** item.
3. In the Add Content list, expand the **Community** item.
4. Click the **Add** button next to Communities.
5. Close the Add Content list.



Users have access to different portlets based on the types of tasks related to their job. The following table lists the standard Community/Page/Portlet configuration for the Vision Project Connect product. Naming is decided upon by your company's Vision Project Connect administrator.

After the table, a series of screen shots depicts the steps to set up this configuration within the Liferay portal.

Recommended Communities

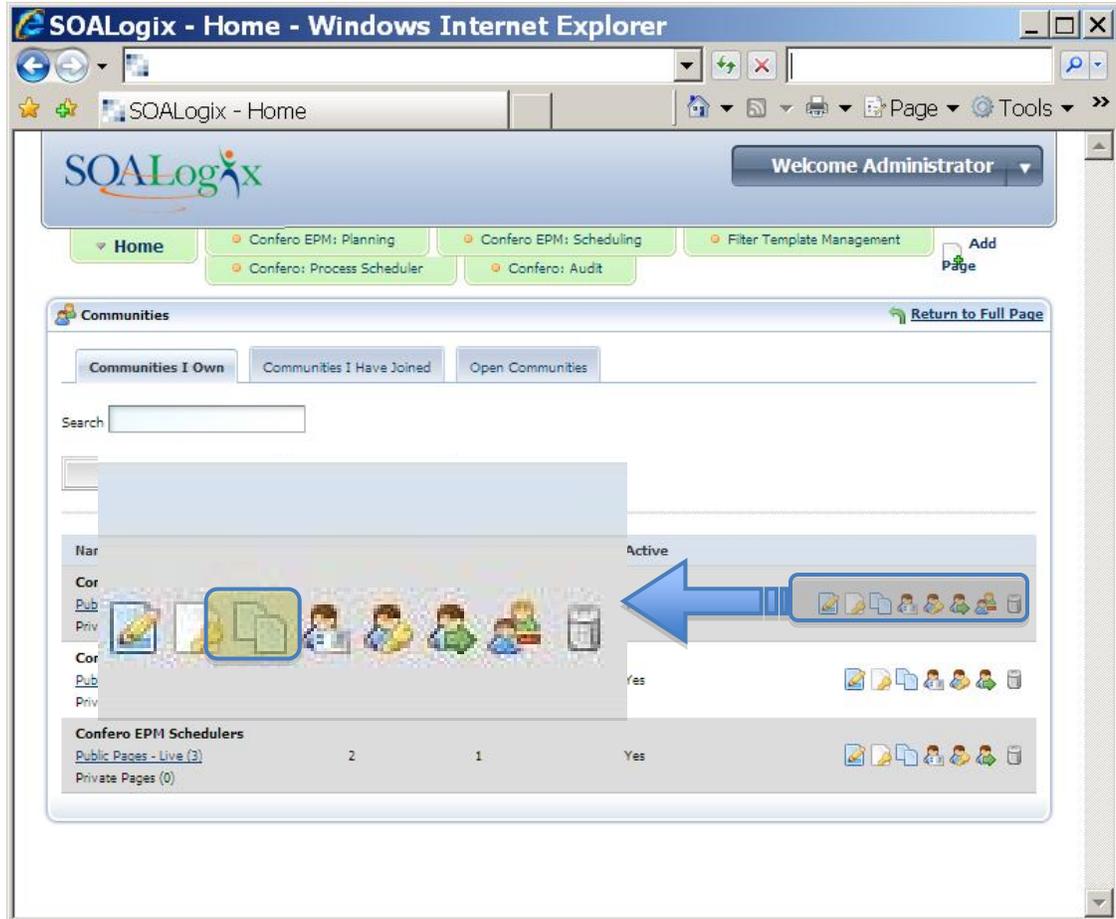
Deltek recommends that you have a **single portlet per page** as a best-practice when configuring the portal.

Community	Page	Portlet	Description
Vision Project Connect Administrators	File	Project XML Interface	Manage information exchange between Vision and Microsoft Project Professional
	WBS Mapping	Project Vision Integration Admin	Manage WBS level mappings between Project and Vision
	Audit	Administrator Audit Report	View results of integration processes.
	File	Project XML Interface	Manage information exchange between Vision and Microsoft Project Professional
File Integration	WBS Mapping	Project Vision Integration Admin	Manage WBS level mappings between Project and Vision
	User Audit	Administrator Audit Report	View results of integration processes.
	WBS Mapping	Project Vision Integration Admin	Manage WBS level mappings between Project and Vision
Server Integration	Audit	Administrator Audit Report	View results of integration processes.

Configuring Community Pages

To create pages for the communities, complete the following steps:

1. On the Communities portlet, click the **Search Communities** button.
2. Click the **Configure Pages** icon to the right of the name of the community that you just created.

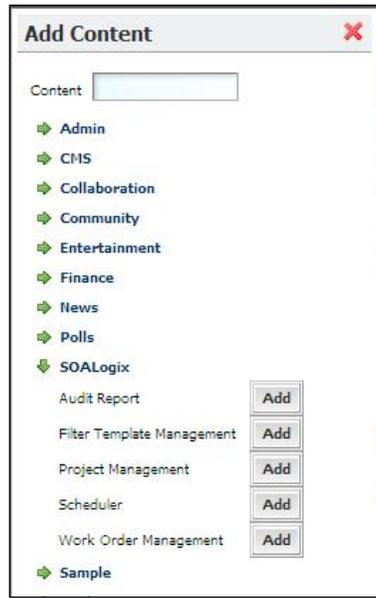


3. Under **Add Child Page**, enter a name for the portlet.
4. Click the **Add Page** button.
5. After you add all of the pages, click the **View Pages** button.
A new page opens and the set of pages for the community displays.

Adding Portlets to Pages

To add the appropriate portlets to each page, complete the following steps:

1. With the page visible, move your cursor over the **Welcome!** drop-down list and select the **Add Content** item.
2. Expand the SOA Logix item. The portlet list displays.



3. Click the **Add** button next to the portlet names to add one portlet per page.

The following table lists the recommended names for the portlets. These names are referred to in the *Vision Project Connect Users Guide*.

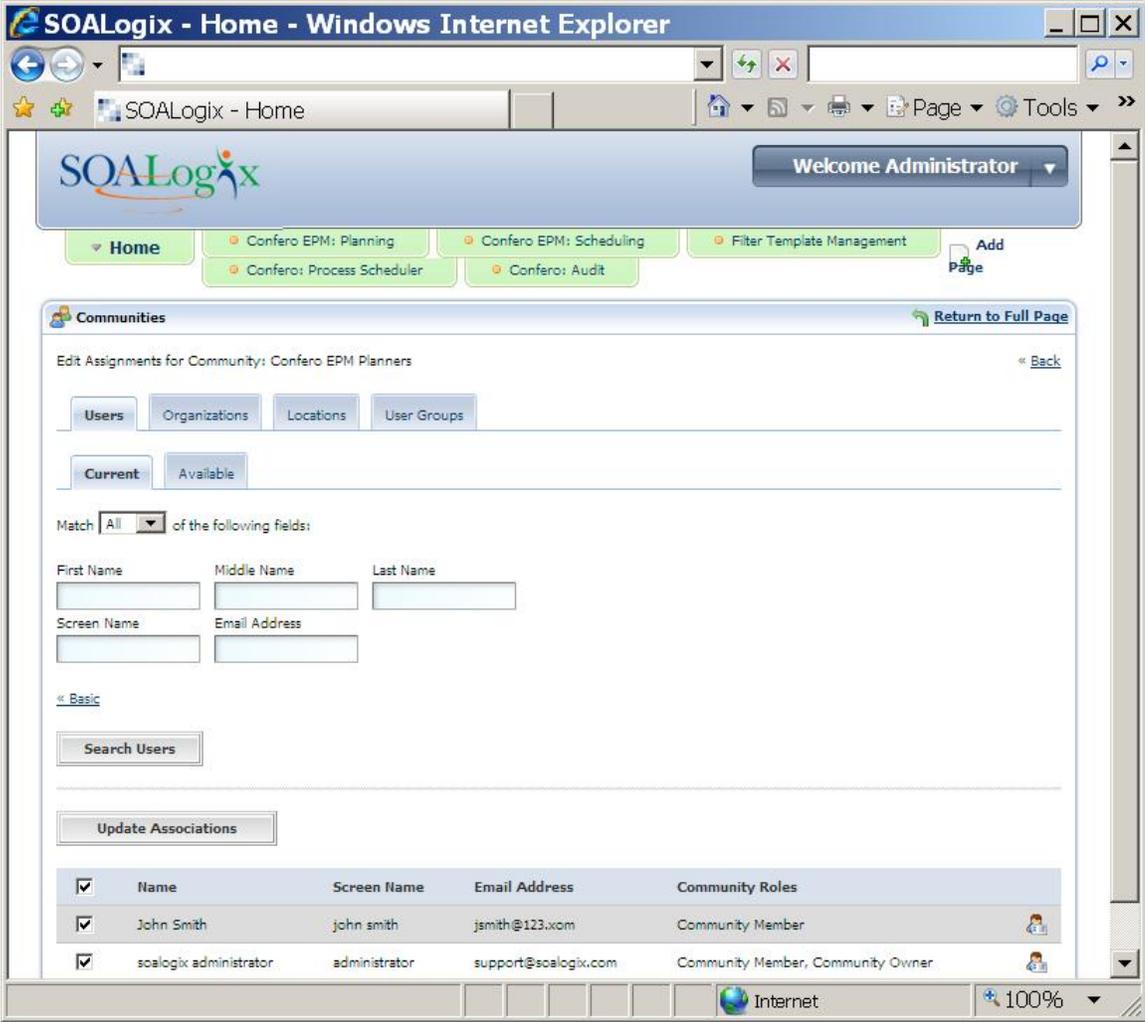
Portlet Name	Name in Add Content List
File	Microsoft Project XML Interface
User Audit	User Audit Portlet
Audit	Administrator Audit

Granting Membership to Communities

To grant membership to communities, complete the following steps:

1. Return to the Communities portlet and click the **Search Communities** button.
2. Click the **Assign Members** icon next to the community.
3. Click the Available tab.
4. Select the users that you want to assign membership to.
A checkmark displays next to each selected user's name.
5. Click the **Update Associations** button.

When this user signs in to Vision Project Connect, the portlets associated with the user's community display.





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