



Vision Project Connect

Release 1.5

Administrator Guide

Vision Project Connect provides seamless integration of Deltek Vision's resource and project planning functionality with Microsoft Project.

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Introduction

This document provides information relevant to managing and maintaining a Vision Project Connect implementation. Any person who is reading this document should also familiarize themselves with these Vision Project Connect documents.



Vision Project Connect for Vision 1.5 User Guide



Vision Project Connect for Vision 1.5 Administrator Guide



Vision Project Connect for Vision 1.5 Install Guide

Intended Audience

The intended audience for this document includes IT system and application administrators, support technicians and helpdesk who will have the responsibility to manage the Vision Project Connect implementations and/or provide user and technical support for the product.

Using This Guide

Throughout the guide, you will see call out boxes with different symbols. These provide important information that is being highlighted so that it is not missed. Here is each of the callout types:



This will cause an error or introduce data integrity issues. Don't do it!



Vision Project Connect documentation is delivered in a set of purpose-scoped documents. This refers to another document within the set.



This is a recommendation or best practice that will help make the Vision Project Connect software easier to use and maintain. Do these!

Product Overview

Vision Project Connect provides packaged integration between Deltek Vision and Microsoft Project. This creates the capability for project managers 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 and the advanced resource planning features of Deltek Vision in mind. The data mappings and information flow provided create an out-of-the-box business process integration for managing projects externally to Deltek Vision.

The integration processes use an information management approach to data transfer as opposed to ETL (Extract, Transform and Load) style data synchronization. This allows data to be managed in context of the project lifecycle, as information. The product provides information management processing for projects, plans, actual labor, resources, and cost.

The product provides packaged composite applications for interactive and on-demand integration processes.

Understanding Vision Project Connect Administration

Vision Project Connect administrative activities fall into three categories:

1. Portal Administration
2. Configuration Management
3. Vision User Interface Integration

Portal Administration

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.

The Portal allows the administrator to determine how the portlets are presented and which users can access which portlets

In order to get started with Vision Project Connect, the administrator needs to create Portal Communities and Portal Users.

Getting started with Portal Administration

To get started with this process, you should first login to the Portal using one of the default users delivered with Vision Project Connect:

http://<ip_address>:8280

The password for this user is “VisionRaptor”. Please change the password once you login.

Next, you should 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 section 2.1 of the Liferay Portal 4 – Installation Guide, entitled “Adding Portlets”.

Creating Portal User Accounts

To establish users in Vision Project Connect, you can import existing users by using a LDAP/AD service or you can manually create users.

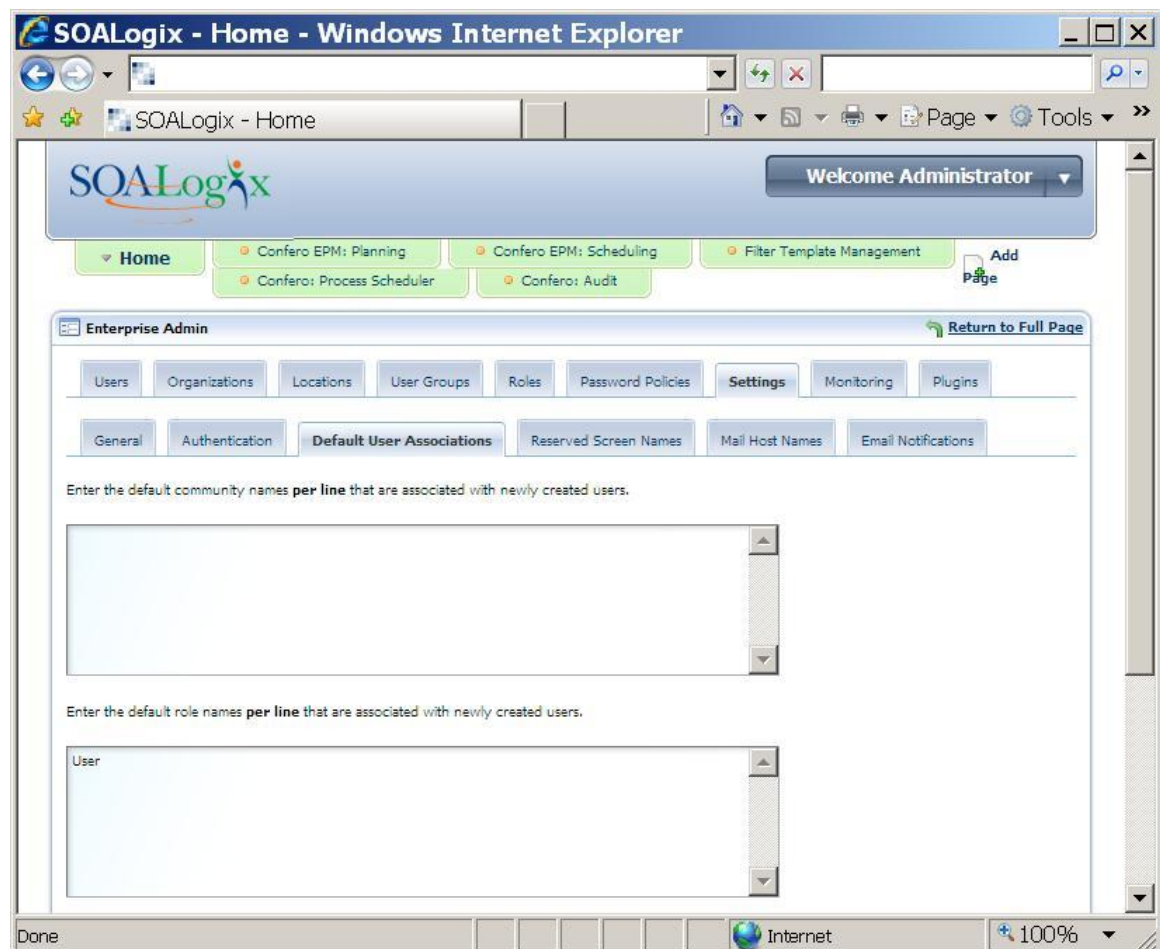
To set up Vision Project Connect to import users with LDAP/AD, please refer to Chapter 2 of the Liferay Portal 4 – Installation Guide.

To set up Vision Project Connect by adding users manually, please refer to Chapter 2 of the Liferay Portal 4 – Portal Administration Guide.

Default User Roles

When configuring users, you may want to establish user roles or change the default user roles. The user role helps to determine the look and feel of the interface for each user. By default, new users are given the User and Power User roles. It is recommended to remove the Power User role from the default user roles before importing or creating any new users. To do that, follow these 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 roles do not contain the Power User role. It should display as in Figure 1 below.



Portlet Access and Communities

When a user signs in to Vision Project Connect, the portlets that display, and thus the workflows the user can access, are based on how you as the Vision Project Connect administrator have configured the user account. You create user accounts (or they are created automatically for you using LDAP/AD). You then associate those user accounts with a community.

These communities have pages. You then configure which portlets display on a community's pages. So, a user's association with a community allows that user to access the portlets on that community's pages. Thus, there is a common look and feel to the Vision Project Connect interface that is controllable and customizable by the administrator.

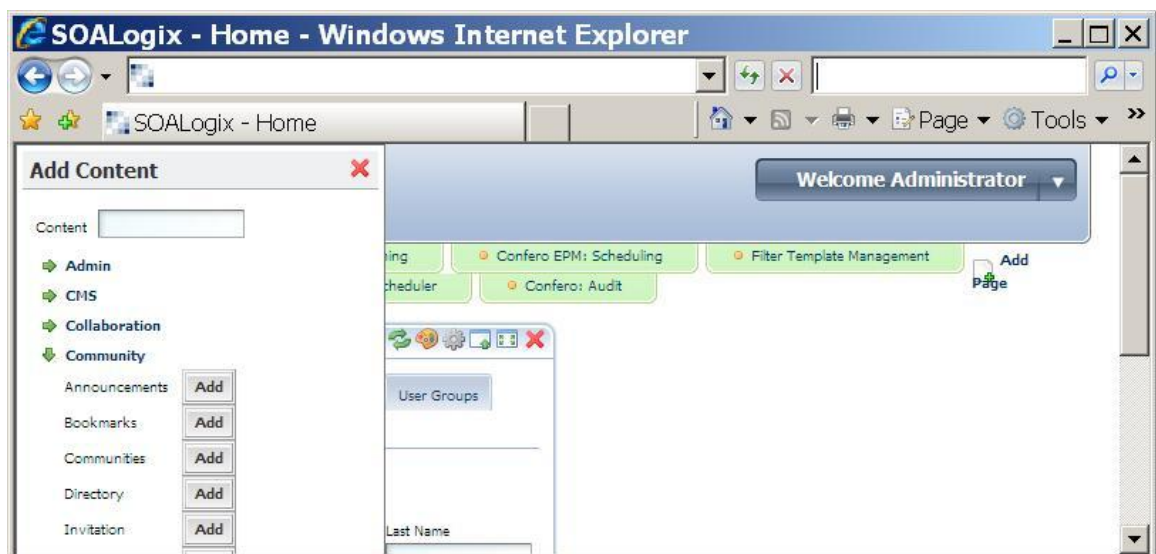
Setting up Communities

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

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

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 taken to set up this configuration within the Liferay portal.

Recommended Communities

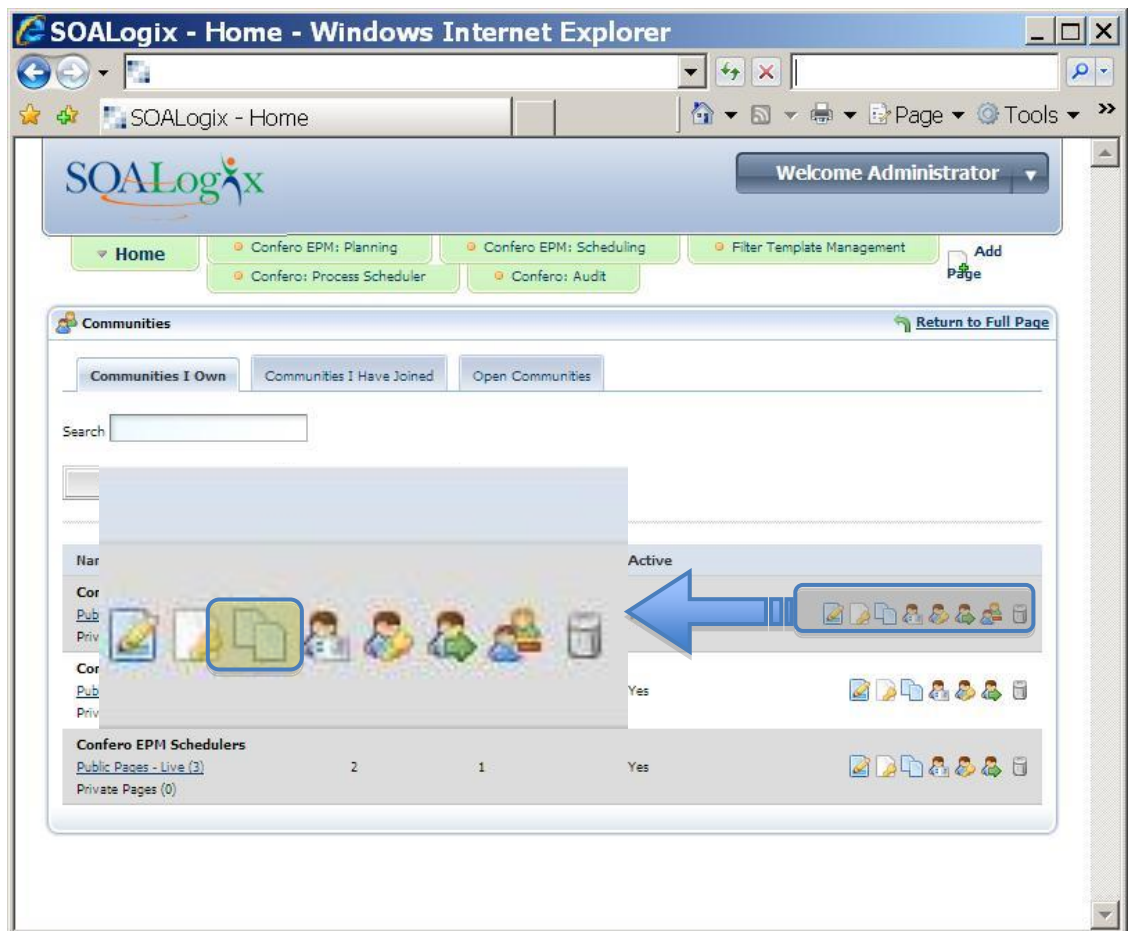
It is recommended to have a **single portlet per page** as a best-practice when configuring the portal.

Community	Page	Portlet	Description
Vision Project Connect Administrators	Server	Project Server Interface	Manage information flow between Vision and Microsoft Project Server 2007
	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 Integration	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
	User Audit	Administrator Audit Report	View results of integration processes.
Server Integration	WBS Mapping	Project Vision Integration Admin	Manage WBS level mappings between Project and Vision
	Server	Project Server Interfaces	Manage information flow between Vision and Microsoft Project Server 2007
	Audit	Administrator Audit Report	View results of integration processes.

Configuring Community Pages

To create pages for the communities, access the communities and add the pages.

1. On the Communities portlet, click the **Search Communities** button.
2. To the right of the name of the community you just created are icons. Click the “Configure Pages” icon.



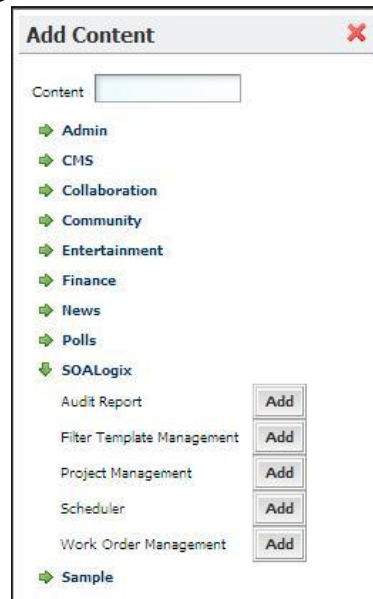
3. Under “Add Child Page,” enter a name for the portlet.
4. Click the **Add Page** button.
5. After adding all of the pages, click the **View Pages** button.
A new page will open, and the set of pages for the community displays.

Adding Portlets to Pages

Now that you’ve added pages to the community, add the appropriate portlet to each page.

1. With the page visible, move your cursor over the **Welcome!** Drop-down list and select the **Add Content** item.

2. Expand the SOALogix item



3. Add one portlet per page by clicking the **Add** button to the right of the portlet names.

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
Server	Microsoft Project Server Interface
File	Microsoft Project XML Interface
User Audit	User Audit Portlet
Audit	Administrator Audit

The final step in setting up communities is to grant users membership in them.

1. Return to the Communities portlet and click the **Search Communities** button.
2. To the right of the name of the community you just created are icons. Click the **Assign Members** icon.
3. Click the Available tab.
4. To assign membership to a user, click the check box to the left of the user name so that a check mark displays.
5. Click the **Update Associations** button.

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

