Deltek Vision® 6.1

Connect for Microsoft Outlook

General Availability Release Notes

September 1, 2010

Deltek

13880 Dulles Corner Lane

Herndon VA 20171

TEL: 703.734.8606

FAX: 703.734.1146

This edition published September 2010.

Contents

Overview

Welcome to the Deltek Vision 6.1 Connect for Microsoft Outlook General Availability Release Notes. These release notes contain a summary of the following:

- Pre-Installation Information
- Major New Features
- Software Enhancements and Changes to Support Connect for Microsoft Outlook
- Database, Schema, and API Changes

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.

Important Note For Clients Upgrading from Vision 5.x

These release notes contain summaries of the product features and software enhancements that have been implemented to support the new Connect for Microsoft Outlook module. Installing this module requires that you upgrade to Vision 6.1 SP3.

If you are upgrading to Vision 6.1 SP3 from a version prior to Vision 6.0, you should read all the previous release notes documents to ensure that you understand all the technology and software changes that have been implemented in versions 6.0/6.1 and how these changes may affect you.

- Deltek Vision 6.0 Release Notes
- Deltek Vision 6.1 SP1 Release Notes
- Deltek Vision 6.1 SP2 Release Notes
- Deltek Vision 6.1 SP3 Release Notes

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

Pre-Installation Information

You must have Vision version 6.1 SP3 installed before you can install the Vision 6.1 Connect for Microsoft Outlook General Availability release. If you do not have Vision 6.1 SP3 installed, refer to the Deltek Vision 6.1 SP3 release notes, available at the Deltek Customer Care Connect site at https://deltek.custhelp.com/app/answers/detail/a_id/49021.

See the Deltek Vision 6.1 Technical Installation Guide for instructions on how to download and install the Vision software. You can download this guide (in PDF format) from the Deltek Customer Care Connect site at https://deltek.custhelp.com.

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 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.

- **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
- **Supported Microsoft Exchange Server Versions**
  - MS Exchange Server 2003, SP2, Cached Exchange Mode only
  - MS Exchange Server 2007, SP2, 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 SP3

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

> Microsoft Outlook Web Access is **not** supported with Connect for Microsoft Outlook.
>
> When using Connect for Microsoft Outlook, selected subfolders under Contacts that are hidden to users in Microsoft Outlook are not hidden to users in Microsoft Outlook Web Access.
>
> Because users could potentially make changes to the data in these folders or delete the folders entirely, serious data integrity issues could occur. Therefore, you should not use Microsoft Outlook Web Access if you are using the Connect for Microsoft Outlook module.
>
> Microsoft has scheduled a solution for this defect to be in place with rollup 1 for Microsoft Exchange Server 2007 SP3. This will be Exchange Server 2007 SP3 Ru1.

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:

- Skype add-ins
- iTunes add-ins
- Microsoft Outlook Connector

Early Adopters (Beta Testers)

If you are a Connect for Microsoft Outlook early adopter (beta tester), this installation will upgrade the version of Connect for Microsoft Outlook on your Web server with the new General Availability release.

> Before you update your Vision Web server with the General Availability release, you must uninstall any previous versions of Connect for Microsoft Outlook that are installed on end-user workstations.
>
> 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 will be prompted to apply changes from the new update on their workstations. Making these changes will cause problems with a user's mailbox.
>
> 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.

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.

Connect for Microsoft Outlook Installation Guide

Use the instructions in the Deltek Vision 6.1 Connect for Microsoft Outlook Installation Guide to install and configure Connect for Microsoft Outlook on your Vision Web server and on users' workstations. The guide is available at 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 Customer Care Connect site.

Access Customer Care Connect

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

1. Click **Help » Customer Care Connect on the Vision toolbar,** or 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 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.

The following table lists other Deltek documentation available for the complete Vision 6.1 SP3 release, in addition to the Vision 6.1 Connect for Microsoft Outlook release.

Document Name	Description
Deltek Vision Getting Started and Concepts Guides	
Deltek Vision Getting Started Guide	This guide contains information about 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 the Vision application.
Deltek Vision Installation and Implementation Guides	
Deltek Vision Technical Installation Guide	This guide contains detailed instructions for installing all the technical components of Vision, including the servers, the database, and the application itself.
Deploying Deltek Vision at a Hosting Provider	This guide contains instructions for deploying Deltek Vision at a hosting provider.
Deltek Vision Implementation Guide	This guide contains information about configuring and setting up Vision applications and features.
Deltek Vision Migration Guides	
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.
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.

<table>
<tr><th>Document Name</th><th>Description</th></tr>
<tr><td colspan="2">Deltek Vision Quick Reference Cards</td></tr>
<tr><td>Deltek Vision Quick Reference Cards</td><td>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 and Resource Utilization)
▪ Screen Designer
▪ SF330 Proposals
▪ Template Based E-mails
▪ Timesheet
▪ User Options
▪ Visualization</td></tr>
<tr><td colspan="2">Deltek Vision Analysis Cubes Guides</td></tr>
<tr><td>Deltek Vision Configure Vision Analysis Cubes</td><td>This guide details the prerequisites and steps required to configure your database server when using Vision Analysis Cubes.
▪ Vision Analysis Cubes allow you to create custom reports with Microsoft® Excel® 2007 or other report writing software that uses Microsoft Analysis Services 2005, a component of Microsoft® SQL Server™ 2005.
▪ Vision Analysis Cubes and Microsoft SQL Server 2005 use OLAP (Online Analytical Processing) technology to provide you with Vision data cubes—Vision reporting databases that are subsets of the main Vision transactional database.</td></tr>
</table>

Document Name	Description
Deltek Vision Configure Analysis Cubes for Internet Accessibility	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**:** ▪ Configure SQL Server Reporting Services (SSRS) to access the Analysis Services database via Report Builder. ▪ Configure Internet Information Services to allow Microsoft® Excel® to access Analysis Services via HTTP.
Deltek Vision Performance Management Canvases Guides	
Deltek Vision Performance Management Canvases Installation Guide	Performance Management Canvases allow 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 Reporting Guides	
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 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 utilizing 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.
Deltek Vision Document Management Guides	
Deltek Vision Document Management Installation Guide	This guide contains detailed information on the necessary prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.

Document Name	Description
Deltek Vision Mobile Application Suite (MAS) Guides	
Deltek Vision Mobile Application Suite Installation Guide	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 can be used with the Deltek Vision Mobile Application Suite.
Deltek Vision Connect for Microsoft Outlook Guides	
Deltek Vision Connect for Microsoft Outlook Installation Guide	This guide contains an overview of the Vision Connect for Microsoft Outlook module, as well as technical installation, setup, and maintenance information.
Deltek VisionXtend Guides	
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 Web Services and APIs for Deltek Vision ▪ Deltek VisionXtend Test Client Application for Vision Web APIs/Web Services

Connect for Microsoft Outlook Overview

This section includes a summary of Connect for Microsoft Outlook features and functionality.

Connect for Microsoft Outlook

Connect for Microsoft Outlook is new add-in software that allows you to perform important and common Vision tasks directly in Microsoft Outlook®.

> The Connect for Microsoft Outlook module does not replace the Microsoft Office and Desktop Integration tool. You can still use the Microsoft Office and Desktop Integration tool, with or without the Connect for Microsoft Outlook module.

With Connect for Microsoft Outlook, you can manage Vision business appointments, emails, and contacts, as well as Vision clients, vendors, activities, and opportunities, all from Outlook.

Connect for Microsoft Outlook provides you with the following capabilities:

- **Bi-directional Synchronization** — Incremental, bi-directional synchronization ensures that information between Connect for Microsoft Outlook and the Vision application stays up-to-date and consistent.
- **Disconnected Support** — Perform work with Vision data in Outlook even when you are disconnected from the Vision database.
- **Outlook Data Store and Outlook Functionality** — Enter, maintain, and review key Vision data elements in Outlook using your native Outlook data store, with full Outlook drag-and-drop, grouping, and search functionality.
- **Vision Security and User-Defined Labels** — All Vision security controls and user-defined labels are maintained.

After you install and configure the Connect for Microsoft Outlook module, your Outlook screens are updated with the new functionality.

Features and Functionality of Connect for Microsoft Outlook

Connect for Microsoft Outlook offers you the full functionality of Outlook, as well as the following Vision synchronization functionality:

- **Activity and Task Management**
  - Create and update Vision activities automatically from Outlook tasks, calendar appointments, emails, and general activities.
  - Link activities to employees, clients, and contacts through e-mail addresses of appointment attendees or task assignees, or through manual association.
  - Establish filters to bring Vision activities into Outlook.
- **Client, Vendor, and Opportunity Management**
  - Enter and update Vision client, vendor, and opportunity records (including support for clients who are also vendors) using intuitive Outlook forms.
  - Create linked team meetings, activities, and e-mails.
  - Establish filters to bring Vision clients, vendors, and opportunities into Outlook.

- **Contact Management**
  - Maintain Vision contact information using the native Outlook contact form.
  - Convert contacts to add critical Vision data to the contact form, and share Outlook contacts with Vision.
  - Synchronize contacts and share them with other Vision users.
  - Establish filters to bring Vision contacts into Outlook.
- **Email Management**
  - Create e-mails directly from the New Message form in Outlook using the **Send and Create Activity** option.
  - Create permanent activity records in Outlook and link e-mail attachments to the appropriate Info Centers in Vision using the **Process Attachment** option.
  - Select to have all correspondence with a specific set of contacts automatically create activity records.
- **Employee and Project Lists**
  - Establish filters to bring lists of Vision employees and projects into Outlook to support the linking of records to employees and projects.

Features and Functionality Not Included in this Release

The following features and functionality are not included with Connect for Microsoft Outlook for the Vision 6.1 release.

- Mobile devices, including updates of addresses within a mobile device
- Outlook delegates
- Multilingual support
- Outlook/Exchange 2010 support
- Lotus Notes support

Important Notes About Connect for Microsoft Outlook and Duplicate Records

> Your system administrator must complete additional steps for a Connect for Microsoft Outlook implementation to ensure that the Vision contacts in a user's Outlook software (shared by way of Synchronization Server) synchronize correctly and are not duplicated in Connect for Microsoft Outlook.

To prevent duplicate records, your system administrator must complete the following steps before enabling the Connect for Microsoft Outlook module:

1. Run a script on the Vision server, which adds a category to all synchronized contacts.
2. Perform a final Synchronization Server synchronization to update Outlook contacts with the category. During the First Run Assistant, this category will be used to prevent duplicates.

See the "Vision Synchronization Server Migrations: Prevent Duplicate Contacts" section in the Deltek Vision 6.1 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.

The default filter for contacts in Connect for Microsoft Outlook is the same as the default filter for Synchronization Server (contacts with which your employee record is associated). If you have the default filter for Synchronization Server and Outlook, then all of the Synchronization Server contacts in Outlook will exactly match the records in Vision. All of these records will be converted automatically to shared contacts and they will not be duplicated after synchronization.

User-Defined Fields

Deltek does not currently support adding Vision user-defined fields (UDFs) or logic to the forms in Connect for Microsoft Outlook. Support for user-defined fields will be provided in a future Connect for Microsoft Outlook update. You can check for product alerts at the Deltek Customer Care Connect site for new update information.

Microsoft Outlook 2010 and Microsoft Exchange Server 2010

Deltek does not currently support using Microsoft Outlook 2010 or Microsoft Exchange Server 2010 with Connect for Microsoft Outlook. Support for these platforms will be provided in a future Connect for Microsoft Outlook update. You can check for product alerts at the Deltek Customer Care Connect site for new update information.

Software Enhancements

This section includes summaries of the enhancements in the Vision 6.1 software that have been implemented to support the new Connect for Microsoft Outlook module.

Calendar/Activities

Based on the Activity Type, your system administrator can now define whether activities display in the Calendar, as a task in the Calendar, or in the Activity Manager only. Once an activity has been assigned a type and saved, the Activity Type drop-down list only displays activity that contain the same display category.

Several changes have been made to the Recurrence tab of the Activities dialog box. These changes were made to enable the synchronization of recurring activities between Vision and Microsoft Outlook.

- A new **End after XXX occurrences** option has been added to the **Recurrence End** group box. This option is available for all recurrence types.
- Several new options have been added to the **Pattern** group box for activities that recur yearly. These options allow you to specify days and months for the recurrence. For example: **Every February 8** or the **First Monday of every February**.
- Several new options have been added to the **Day of the Week** drop-down list for activities that recur monthly. (These options are also available for activities that recur yearly.)
  - **Day**
  - **Weekend Day**
  - **Weekday**

Configuration

General

Connect for Microsoft Outlook

A new **Connect for Microsoft Outlook** option has been added to the **Configuration » General** Applications menu. Use this Configuration option to select Vision database fields that should be used to identify duplicates (**Duplicate Check Formulas**) during synchronization with Connect for Microsoft Outlook.

The Vision database fields (**Duplicate Check Formulas**) that you specify (for clients, contacts, opportunities, and vendors) will be compared when information between Connect for Microsoft Outlook and Vision is synchronized. This prevents duplicate records from being created. You must specify these database fields (**Duplicate Check Formulas**) before you install and configure Connect for Microsoft Outlook.

Code Tables

The Activity Type code table includes a new column labeled **Display**, which controls where activities of each type will be displayed in Vision and Microsoft Outlook. The drop-down list in this column contains the following values:

- **Calendar**
- **Task**
- **Activity Manager Only**

Module Activation

The Connect for Microsoft Outlook module has been added to the Module Activation dialog box. You must enter a **Password** on this dialog box to activate your license for the Connect for Microsoft Outlook module.

Reporting

The auditing feature in Vision now records the application that is the source of an Info Center record change (for certain record types). The following reports now include a **Source** column that displays a code for the application used to make the audited change:

- Client Audit
- Client Audit Detail
- Contact Audit
- Contact Audit Detail
- Opportunity Audit
- Opportunity Audit Detail
- Vendor Audit
- Vendor Audit Detail

The **Source** codes are:

- **DTK** — Changes made in Vision.
- **SNC** — Changes made through synchronization with other applications such as Connect for Microsoft Outlook.

Utilities

Download Connect for Microsoft Outlook

A new **Download Connect for Microsoft Outlook** option has been added to the Utilities menu. Use this utility to download and install Vision Connect for Microsoft Outlook.

Key Conversions

The Key Conversions utility has been updated for clients, contacts, employees, organizations, projects, and vendors. If you try to convert a primary key in any of these record types—when using the Connect for Microsoft Outlook module—Vision now displays a warning message indicating that the conversion may cause errors in records that have been synchronized with Outlook and/or may result in the creation of duplicate records.

Additional Changes to Support Connect for Microsoft Outlook

To support the new Connect for Microsoft Outlook module, a number of changes have been implemented in Vision (in addition to the changes described in the Software Enhancements section of these release notes).

These changes include the following:

- Database Changes
- Schema Changes
- API Changes

> Updates to the existing Vision APIs in Vision 6.1 should not break existing integrations or API functions.
>
> However, if you are using the existing APIs in a production environment, we strongly recommend that you thoroughly test all of your API functions to ensure that there are no issues that will impact your business.
>
> We've also introduced new methods and features with the APIs included in Vision 6.1.

Database Changes

The following database changes have been implemented to support Connect for Microsoft Outlook.

- Added the following columns to the ClientAlias, VendorAlias, and RecurrActivityException tables:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
- Added the following columns to the Activity and WorkflowActivity tables:
  - **ConversationID**
  - **PMInd**
  - **RecurrYearlyOccurInd**
  - **RecurrYearlyOccur**
  - **RecurrYearlyOccurDay**
  - **RecurrYearlyOccurMonth**
  - **MaxOccurences**
- Added the **CLAddressID** column to the CLAddress table
- Added the **VEAddressID** column to the VEAddress table.
- Added the **OutlookType** column to the CFGActivityTypeData table.

- Added the **OutlookType** column to the CFGActivityType view.
- Added the **Source** column to the AuditTrail table.
- Added the CFGNaturalKeys table.
- Added the CMOCustomPackages table.

See the "Database Changes" section of these release notes and the Deltek Vision 6.1 SP3 Release Notes for additional information about these database changes. You can download the release notes (in PDF format) from the Deltek Customer Care Connect site at https://deltek.custhelp.com.

Schema Changes

The following schema changes have been implemented to support Connect for Microsoft Outlook.

Activities Schema

- Added **minoccurs=0** for Activity table so changes can be saved to child tables without changing the Activity table.
- Added the following columns that are in the Activity table but not in the schema:
  - **AssignmentID**
  - **ConversationID**
  - **PMInd**
  - **RecurrYearlyOccurInd**
  - **RecurrYearlyOccur**
  - **RecurrYearlyOccurDay**
  - **RecurrYearlyOccurMonth**
  - **MaxOccurences**
- Added the RecurrActivityException table.

Clients Schema

- Added **minoccurs=0** for the CL table so changes can be saved to child tables without changing the CL table.
- Added the following columns that are in the CL table but not in the schema:
  - **ParentID**
  - **LinkedVendor**
  - **ParentLevel1**
  - **ParentLevel2**
  - **ParentLevel3**
  - **ParentLevel4**
- Added **minoccurs=0** to the **ClientID** and **Address** columns of the CLAddress table so that the **CLAddressID** field can be used as key if needed.

- Added the following columns that are in the CLAddress table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
  - **PhoneFormat**
  - **FaxFormat**
  - **Addressee**
  - **CLAddressID**
- Added the following columns that are in the ClientAlias table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**

Contacts Schema

- Added **minoccurs=0** for the Contacts table so changes can be saved to child tables without changing the Contacts table.
- Added the following columns that are in the Contacts table but not in the schema:
  - **PhoneFormat**
  - **FaxFormat**
  - **PagerFormat**
  - **CellPhoneFormat**

Employees Schema

- Added **minoccurs=0** for the EM table so changes can be saved to child tables without changing the EM table.
- Added the following columns that are in the EM table but not in the schema:
  - **HomePhoneFormat**
  - **FaxFormat**
  - **WorkPhoneFormat**
  - **MobilePhoneFormat**

Leads Schema

- Added **minoccurs=0** for the Leads table so changes can be saved to child tables without changing the Leads table.
- Added the following columns that are in the Leads table but not in the schema:
  - **BusinessPhoneFormat**
  - **BusinessFaxFormat**
  - **MobileFormat**
  - **HomeFormat**
  - **PagerFormat**
  - **CustomCurrencyCode**
  - **PreferredName**

Opportunities Schema

- Added **minoccurs=0** for the Opportunity table so changes can be saved to child tables without changing the Opportunity table.
- Added the following columns that are in the Opportunity table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
  - **County**
- Added the following columns that are in the MktCampaignOppAssoc table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
- Added the following columns that are in the OpportunityClientAssoc table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
- Added the following columns that are in the OpportunityContactAssoc table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**

  - **ModDate**
- Added the following columns that are in the OpportunityEMAssoc table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
- Added the following columns that are in the OpportunityFileLinks table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
- Added the following columns that are in the OpportunityProjectCodes table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
- Added the following columns that are in the OpportunityProposals table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
- Added the following columns that are in the OpportunityVEAssoc table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**

Projects Schema

- Added **minoccurs=0** for the PR table so changes can be saved to child tables without changing the PR table.

Vendors Schema

- Added **minoccurs=0** for the VE table so changes can be saved to child tables without changing the VE table.
- Added the following columns that are in the VE table but not in the schema:
  - **LinkedClient**

- Added the following columns that are in the VEAddress table but not in the schema:
  - **PhoneFormat**
  - **FaxFormat**
  - **VEAddressID**
- Added the following columns that are in the VendorAlias table but not in the schema:
  - **CreateUser**
  - **CreateDate**
  - **ModUser**
  - **ModDate**
- Added the following columns that are in the VEAccounting table but not in the schema:
  - **ReimbAccount**
  - **MemoPrintOnCheck**

API Changes

The following API changes have been implemented to support Connect for Microsoft Outlook.

- Added three new parameter types for some existing and new methods: **KeysXML**, **QueryXML**, and **InfoCenterXML**. These parameter types can be used in place of the **Keys**, **Query**, and **InfoCenter** parameter types for certain methods. They allow more complex information to be passed to the methods as well as multiple “requests”.
- All methods now return a **sessionid** value. This value can then be passed back in subsequent calls to reuse the same session. This is more efficient and is required to make use of the paging of return results.
- The **ConnInfoXML** now accepts a sessionid parameter and also a source field parameter.

New Methods

- **SendDataToDeltekVisionWithReturn** — This method is just like **SendDataToDeltekVision**, but it returns the results of a **GetRecordsByKey** so that modified records can be retrieved in the same call.
- **DeleteRecords —** For deleting records from an arbitrary **InfoCenter**.
- **GetRecordsByGUID —** For retrieving records based not on their compound key, but by the GUID field for that table. Only for use by Connect for Microsoft Outlook.
- **GetRecordsByQueryDeep** — For certain tables this will return a hierarchical resultset.
- **GetSystemInfo** — This returns a small resultset with certain system-level values.
- **DownloadMetadataFiles** (Connect for Microsoft Outlook only) — Provides customization package to the Connect for Microsoft Outlook client.
- **GetDatabases** — Returns a list of the databases in the servers weblink.
- **GetCurrentUserInfo —** Returns various bits of information about the current user.

Changed Methods

- **GetRecordsByKey** now accepts **KeysXML** and **InfoCenterXML**.
- **GetRecordsByQuery** now accepts **QueryXML** and **InfoCenterXML**.
- **SendDataToDeltekVision** now accepts **InfoCenterXML** and has extra features for saving.

Database Changes

This section includes a list of database changes included in this release.

For a list of database changes in Vision 6.0, Vision 6.1 SP1, Vision 6.1 SP2, and Vision 6.1 SP3 see the following release notes:

- Deltek Vision 6.0 Release Notes
- Deltek Vision 6.1 SP1 Release Notes
- Deltek Vision 6.1 SP2 Release Notes
- Deltek Vision 6.1 SP3 Release Notes

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

Deltek creates the Vision Data Dictionary using a live connection to the Vision development database. Tables and columns related to features in a future release may appear in the data dictionary without descriptions, or with the phrase **reserved for future use**. You may also see tables and columns for features you have not purchased or enabled.

New Table and Columns

Table Name	Column Name	Datatype
CMOCustomPackages	Role	varchar(20) NOT NULL
CMOCustomPackages	PackageID	varchar(36) NOT NULL
CMOCustomPackages	HashValue	varchar(32)