

GovWin Opportunity Manager to Vision CRM Integration 1.0

User Guide

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Overview

This guide provides information to help you do the following:

- Set up GovWin Opportunity Manager to Vision CRM Integration using the Opportunity Manager Web Service utility in Vision (**Utilities » Advanced Utilities » Opp Manager Web Service**).
- Use the Opportunity Manager Web Service utility to transfer opportunity data to Vision.
- Learn about the grids and fields on the Opp Manager tab in the Opportunity Info Center (**Info Center » Opportunities » Opp Manager**).

The information in this guide applies both to firms that install Vision on their own servers and to firms that instead have a Vision SaaS Subscription.

If You Need Assistance

If you need assistance installing, implementing, or using GovWin Opportunity Manager to Vision CRM Integration, 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 system administrator.

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

Additional Documentation

The following table lists the additional Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Customer Care Connect site.

Document Name	Description
GovWin Opportunity Manager to Vision CRM Integration Installation Guide	This guide provides instructions for downloading and installing GovWin Opportunity Manager to Vision CRM Integration.

GovWin Opportunity Manager to Vision CRM Integration Overview

GovWin Opportunity Manager to Vision CRM Integration enables Vision to collect information from opportunities you select in GovWin Opportunity Manager. If you are using this feature, you already subscribe to Opportunity Manager.

This integration feature provides access to the GovWin database of opportunity data over the Internet. As an Opportunity Manager subscriber, you can select opportunities you want to import into Vision as opportunities for your company to pursue.

A predefined Web service call automatically transfers the selected opportunities from Opportunity Manager into Vision and automatically refreshes them in Vision if they are updated in Opportunity Manager. You run this “connector” or import utility from **Utilities » Advanced Utilities » Opp Manager Web Service** in Vision. For each opportunity record selected from Opportunity Manager, a new opportunity record is created in Vision on the Opp Manager tab of the Opportunity Info Center. The opportunity name, description, and date opened are displayed on the General tab for reference.

You can update information on the Opp Manager tab for an opportunity record based on the current data in Opportunity Manager as long as the **Opp Manager ID** field contains a valid value.



If you decide to delete an opportunity from the Opportunity Info Center that is linked to an opportunity in Opportunity Manager, you must also make sure that it is not still flagged in Opportunity Manager to be imported. If you do not clear that flag, the opportunity will be added to the Info Center again when the Opportunity Manager Web Service utility runs.

Set Up GovWin Opportunity Manager to Vision CRM Integration

Follow the instructions below to set up Vision to run the Opportunity Manager Web Service utility. You only need to complete these steps once. Thereafter, you can run the utility whenever you need to, without updating configuration settings.

To set up GovWin Opportunity Manager to Vision CRM Integration, complete the following steps:

1. If you have not already done so, subscribe to GovWin Enterprise so you can log on as an Opportunity Manager member. Contact your GovWin IQ account manager to obtain the required user name, password, and network ID to access their database.
2. In Vision, click **Utilities » Advanced Utilities » Opp Manager Web Service**.
3. Complete the Configuration tab (see the field descriptions on page 9).
4. Click **Save**.

Run the GovWin Opportunity Manager to Vision CRM Integration Data Transfer

When you run the Opportunity Manager Web Service utility, it makes a request to the Web service for data. This data is then transferred to the appropriate fields in the Opportunity Info Center, including the custom fields on the Opp Manager tab.

To transfer data using the Opportunity Manager Web Service utility, complete the following steps:

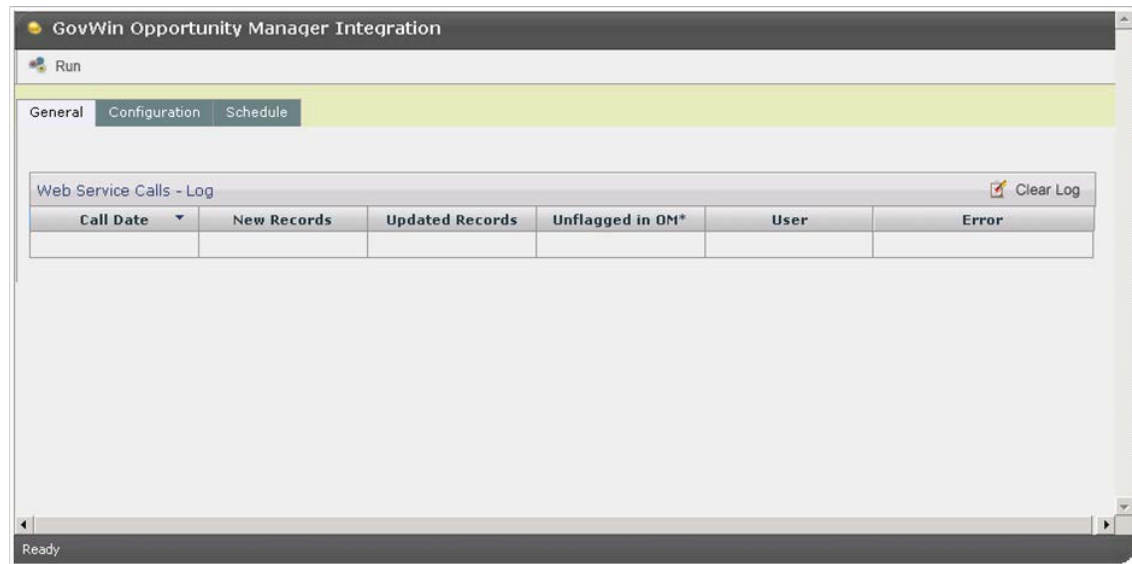
1. Log in to Vision and select opportunities to transfer by clicking the **Add to Deltek CRM** button on the TOOLS menu on any opportunity you wish to export to Vision.
2. Log in to Vision, and click **Utilities » Advanced Utilities » Opp Manager Web Service**.
3. On the GovWin Opportunity Manager Integration form, click **Run**.

Vision displays a "Please Wait..." message until the transfer process has completed. This process can take several minutes.

When the transfer is complete, overall transfer data displays in the Web Service Calls - Log grid on the General tab. Detailed transfer information displays on the Opp Manager tab of the Opportunity Info Center.

General Tab of the Opportunity Manager Web Service Utility

Use the General tab of the Opportunity Manager Web Service utility to view the history of all transfers of data between Opportunity Manager and Vision.



Contents

Field/Option	Description
Clear Log	<p>Click this grid option to clear all entries on the displayed log of the Opportunity Manager Web Service utility runs.</p> <p>When you select this option, Vision displays a message asking you to confirm that you want to delete all of the historical log entries.</p> <p>Click Yes to proceed with the removal of all logs.</p> <p>Click No to cancel the removal of all logs. No logs will be deleted.</p>
Call Date	This field displays the date and time that you ran the data transfer.
New Records	This field displays the number of new records transferred.
Updated Records	This field displays the number of changed/updated records transferred.
Unflagged in OM	This field displays the number of opportunities in Vision that contain an Opportunity Manager opportunity ID reference but for which the Opportunity Manager opportunities are not flagged for download. All Opportunity Manager opportunities to be downloaded must be selected for download in Opportunity Manager, regardless of whether they have an Opportunity Manager opportunity ID reference in Vision or not.

Field/Option	Description
User	This field displays the Vision user who ran the transfer (for example, ADMIN).
Error	This field displays the detail of any errors that occurred during the data transfer.
1 2 3 ...	If the log contains more records than the grid can display at one time, click the numbered links below the grid to page through the log records.

Configuration Tab of the Opportunity Manager Web Service Utility

Use the Configuration tab of the Opportunity Manager Web Service utility to view how the Opportunity Manager Web service and the Vision Web service are set up. Subscription information and preferences are detailed here.

Contents

Field/Option	Description
Vision Settings	
Vision Web Service URL	<p>Enter the URL for the Vision Web Service asmx page on the Vision Web server.</p> <p>The URL always ends in visionws.asmx.</p> <p>Example: http://webserver:80/vision/visionws.asmx</p>
Windows Authentication	To use the Windows integrated login, select this check box.

Field/Option	Description
Vision UserName or Windows UserName	<p>Enter the user name for accessing Vision. This is the Vision login that will be used to update the database.</p> <p>If you selected the Windows Authentication check box to indicate you are using Windows integrated authentication, enter the Windows user name. (This user must also be set up as a user in Vision.)</p>
Vision Password or Windows Password	<p>Enter the password associated with the Vision user name.</p> <p>If you selected the Windows Authentication check box to indicate you are using Windows integrated authentication, enter the Windows password.</p>
Windows Domain	<p>If you selected the Windows Authentication check box to indicate you are using Windows integrated authentication, enter the Windows domain for the account that will be used to connect to Vision.</p> <p>If you do not select Windows Authentication, this field is not available.</p>
Vision Database	<p>Enter the name of the database for Vision.</p> <p>This must be the exact value in the description field of the Vision database that you are updating (as displayed in Weblink or from the login drop-down list).</p> <p>Example: VisionDemo72 (DBSERVER1)</p>
Test	Click this button to test the connection.
GovWin Opportunity Manager Settings	
GovWin Opportunity Manager Webservice URL	<p>This field displays the URL to the Opportunity Manager Web service. This URL is always the following:</p> <p>http://services.govwin.com/neo-ws/services/om/crm/v1?wsdl</p> <p>Do not change this URL. The Opportunity Manager Web Service utility uses this URL to transfer the opportunity data.</p>
GovWin Opportunity Manager Username	Enter the user name for accessing the Opportunity Manager Web service.
GovWin Opportunity Manager Password	Enter the password associated with the Opportunity Manager Web service user name.
GovWin Opportunity Manager Network ID	<p>This field displays the network ID provided by Opportunity Manager.</p> <p>The Opportunity Manager team provides this value. It is customer-specific and encrypted.</p>
Test	Click this button to test the connection.

Field/Option	Description
Preferences	
New Records	To transfer new data from Opportunity Manager to Vision, select this check box. A new opportunity is created in Vision for each new record transferred from Opportunity Manager.
Update Records	To transfer updated data from Opportunity Manager to Vision, select this check box.
Submit	Click Submit to save the configuration settings. Note: If you click on another tab before you click Submit , the entries will not be saved. and you will have to enter them again.
Reset	If you changed the configuration and have not yet submitted those changes, click Reset to discard those changes and reset the tab to its latest submitted version.

Schedule Tab of the Opportunity Manager Web Service Utility

Use the Schedule tab of the Opportunity Manager Web Service utility to schedule the data transfer process to run at a later time. You can set up a schedule that runs the process once (after business hours on the current day, for example) or on a recurring basis (for example, every Monday at 1:00 a.m.).

The scheduler is based on the Windows Task Scheduler. The entries on the Schedule tab are translated into equivalent code that is read by the Windows Task Scheduler.

The screenshot shows the 'GovWin Opportunity Manager Integration' window with the 'Schedule' tab selected. The 'Queue' is set to 'GovWin Opportunity Manager Agent' and the 'Status' is 'Enabled'. The 'Run After' date is '04/17/2014' at '12:21 pm'. The 'Recurring activity' checkbox is checked, and the 'Recurrence type' is set to 'Daily'. Under the 'Pattern' section, 'Every 1 day(s)' is selected. The 'Recurrence End' section has 'No end date' selected. There are 'Save' and 'Reset' buttons at the bottom.

Contents

Field/Option	Description
Queue	This field displays the Windows Task Scheduler name.
Status	<p>This field displays the status of the schedule: Enabled or Disabled.</p> <p>If the status is Enabled, the data transfer occurs automatically based on the schedule. If the status is Disabled, the scheduled processing does not occur.</p>

Field/Option	Description
Enable or Disable	If the status is Disabled , click Enable to make the schedule active. If the status is Enabled , click Disable to make the schedule inactive.
Run After	Select the start date for the schedule and the time to run the data transfer process.
Recurring activity	Select this check box if you want to set up the data transfer to recur automatically.
Recurrence type	Select Daily to set up a process that recurs daily or at an interval defined by a number of days. Select Weekly to set up a process that recurs weekly or at an interval defined by a number of weeks. Select Monthly to set up a process that recurs monthly or in specific months.
Pattern	The fields under Pattern vary depending on your selection in Recurrence type : <ul style="list-style-type: none"> If you selected Daily, you can set up the process to run every specified number of days (for example, every three days). If you selected Weekly, you can set up the process to run every specified number of weeks on specific days of the week (for example, every two weeks on Monday). If you selected Monthly, you can set up the process to run in specified months. You also specify either the calendar days of the month on which the process occurs (for example, on the 15th and the 30th) or the weeks and days (first week of the month, on Friday).
Repeat Task...	Select this check box if, each time the schedule triggers the process, you want it to run more than once. Select the repetition frequency in Repeat Task Every and specify how long you want the repetitions to continue in for a duration of . For example, if you want the process to run every hour for 12 hours, select 1 hour and 12 hours in the two fields.
Stop all running tasks at end of repetition duration	If you specified repetitions in Repeat Task... , select this check box if you want to stop any tasks that are still running at the end of the repetition duration, rather than letting them run to completion.
Recurrence End	If you want the schedule to recur indefinitely, select No end date . If you want the schedule to end on a particular date, select End by and select the ending date.
Save	If you changed the schedule and want to save those changes, click Save .

Field/Option	Description
Reset	If you changed the schedule and have not yet saved those changes, click Reset to discard those changes and reset the schedule to its latest saved version.

Integration Field Mapping

The following tables describe how Opportunity Manager fields are mapped to Vision tables and columns.

Opportunity Table in Vision

Opportunity Manager Field	Vision Column	Column Type	Notes
Auto Generate	OpportunityID	Varchar (32)	PK
Auto Number	Opportunity	Varchar (30)	Based on Vision setting if AutoNumber is enabled
<ProgramName>	Name	Varchar (255)	
	Stage	Varchar (10)	No value set
<OppDescription>	Description	Varchar (max)	
Current Date	Open Date	Datetime	
Current Date	Create Date	Datetime	

OpportunityCustomTabFields Table in Vision

Opportunity Manager Field	Vision Column	Column Type	Notes
<TeamingOppID>	custOMOpportunityID	Varchar (255)	
<ProgramName>	custOMOpportunityTitle	Varchar (255)	
URL	custOMOppURL	Varchar (255)	
Marked By	custOMSelectedBy	Varchar (255)	

Opportunity Manager Field	Vision Column	Column Type	Notes
<CaTOSource>	custOMTeamingOppSource	Varchar (255)	
<OppValue>	custOMValue	Decimal	
<InternalStatus>	custOMOppManagerStatus	Varchar (255)	
<AwardType>	custOMTypeofAward	Varchar (max)	
<Duration>	custOMDuration	Varchar (255)	
<SolicitationNo>	custOMSolicitationNum	Varchar (255)	
<SolicitationDate>	custOMSolicitationDate	Datetime	
Current Date	custOMCRMLastUpdateDate	Datetime	
<LastUpdatedDate>	custOMLastUpdateDate	Datetime	
<GovResponseDate>	custOMGovtResponseDate	Datetime	
<PartnerResponseDate>	custOMPartnerResponseDate	Datetime	
<BuyingOrg>	custOMBuyingOrganization	Varchar (max)	
<NAICS>	custOMNAICSCode	Varchar (max)	
<ContractVehicle>	custOMContractVehicles	Varchar (max)	
<ContractType>	custOMContractType	Varchar (max)	
<Pop>	custOMPlaceofPerformance	Varchar (max)	
<SocioStatus>	custOMSocioEconomicStatus	Varchar (max)	
<PrimaryContact>	custOMPrimaryContact	Varchar (max)	

Opportunity Manager Field	Vision Column	Column Type	Notes
<OppDescription>	custOMDescription	Varchar (max)	

Opportunities_OMRelatedDocuments Table in Vision

Opportunity Manager Field	Vision Column	Column Type	Notes
<RelatedDocumentsName>	custOMDocumentName	Varchar (255)	
<RelatedDocumentsURL>	custOMDocumentURL	Varchar (255)	

Opp Manager Tab of Opportunity Info Center

Use the Opp Manager tab of Opportunity Info Center to view the detailed opportunity information transferred by the Opportunity Manager Web Service utility to Vision. This data is for display only. You cannot make changes on this tab directly, but you can run the Opportunity Manager Web Service utility to update it based on the current information in Opportunity Manager.



The **Opp Manager ID** field is the only field you can edit on this tab. If you create a new opportunity record in Vision and enter a valid opportunity ID from Opportunity Manager in this field, and later you run the Opportunity Manager Web Service utility to import data for that opportunity, the utility will detect that a record already exists for it in the Info Center and load the Opportunity Manager data into that record.

Use this tab to do the following:


- Review the newly created opportunities and the data transferred by the Opportunity Manager Web Service utility to Vision.
- Follow up and pursue transferred opportunities in Vision.
- Obtain additional information to complete other Opportunity Info Center tabs, as needed.

Contents

Field	Description
Title	This field displays the title of the opportunity in Opportunity Manager.
Opp Manager ID	This field displays the ID for the opportunity in Opportunity Manager.

Field	Description
Opp Manager Link	This field displays the URL of the Opportunity Detail page in Opportunity Manager. You can click the link to go to Opportunity and display the opportunity.
Selected By	This field displays the username of the Opportunity Manager user who selected the opportunity for download to Vision.
Source	This field displays the source of the Opportunity Manager opportunity. Opportunity Manager opportunity sources are IQ opportunities, IQ Task Order Opportunity Notification System (IQ TOONS), or manual creation.
Value (\$k)	This field displays the value of the opportunity in thousands of dollars.
Internal Status	This field displays the Opportunity Manager status that defines the qualification stage the opportunity has reached in the pipeline.
Type of Award	This field displays the award type of the contract represented by the opportunity.
Duration	This field displays the duration of the contract represented by the opportunity.
Solicitation Number	This field displays the solicitation number associated with the opportunity.
Solicitation Date	This field displays the date that the solicitation for this opportunity was issued.
Last Update Date & Time: CRM	This field displays the date and time that the opportunity was last downloaded from Opportunity Manager into Vision.
Last Update Date & Time: Opp Manager	This field displays the date and time that the opportunity was last updated in Opportunity Manager.
Response Date & Time: Government	This field displays the date and time by which a response to the government solicitation is required.
Response Date & Time: Partner	This field displays the date and time by which partners should respond with their teaming response for this opportunity.
Buying Organization	This field displays information about the federal, state, or local government entity that is the buyer associated with the opportunity.
NAICS Code	This field displays the Primary North American Industry Classification System (NAICS) Code assigned to the opportunity.
Contract Vehicles & Zones	This field displays the government contract vehicle and sub-category (SIN, Zone, or Class) under which the opportunity was issued.

Field	Description
Contract Type	This field displays the type of contract specified for the opportunity (for example, Fixed Price or Time and Materials).
Place Of Performance	This field displays the locations at which the work specified in the opportunity is to be performed. International places of performance can also be defined.
Socio-economic Status	This field displays the set asides required or desired for the opportunity (for example, 8 (a), Small Business, or Veteran Owned). An opportunity can have multiple socio-economic status values.
Primary Contact	This field displays information about the primary contact for the opportunity. The contact details may be in fielded data or in a text block.
Description	This field displays the description of the Opportunity Manager opportunity.
Related Documents	This grid displays the document name and URL for documents associated with the opportunity in Opportunity Manager. These may be government sourced documents or documents that have been uploaded to the opportunity by Opportunity Manager users.



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