

Deltek Vision® 7.x User Options Quick Reference Card

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User Options Tabs

The screenshot shows the 'User Options' dialog box with the 'General' tab selected. It includes a 'Default Country' dropdown, several checkboxes for system preferences (e.g., 'Automatically hide navigation menu', 'Find words that sound the same when performing searches'), and a 'Display Settings...' button at the bottom.

The screenshot shows the 'User Options' dialog box with the 'Startup' tab selected. It features a 'Startup Application' section with radio buttons for 'Blank Page', 'Dashboard' (selected), and 'Selected Application'. There is also a 'Remember window sizes and positions' checkbox and a 'Default Database' dropdown.

General Tab

Use this tab to determine:

- The default country for your system.
- If you want Vision to hide the navigational menu after you select a menu item.
- If you want Vision to include words that sound alike in search results.
- If you want Vision to automatically search for all records when you open lookups.
- If you want to use flat dashboard style graphics and colors for the header.
- If you want your employee record to automatically load when you open Employee Info Center or Employee Review.
- How you want the settings to display.

Startup Tab

Use this tab to determine:

- What displays when you start up Vision (blank page, dashboard, or selected application).
- Whether or not you want Vision to remember the size and position that you specified for windows and reports.
- Whether or not you want Vision to automatically connect to a particular database.

Use Vision **User Options** to configure personal default settings for reporting, printing, lookups, startup, and more. You set up these options on an individual basis by user name.

To access User Options form, click the **Options** icon on the Vision title bar. You can change these options at any time.



The screenshot shows the 'User Options' dialog box with the 'Reporting' tab selected. It includes settings for 'Default Printer', 'Default Font' (set to Arial), 'Unit of Measure' (set to Inches), and 'Margin' settings (Top, Bottom, Left, Right, all set to 0.50). It also has a 'Page' section with 'Size' (set to Letter) and 'Dimensions' (Width: 11.00, Height: 8.50).

Reporting Tab

Use this tab to set up the following Reporting default settings:

- Default printer
- Default font
- Unit of measure
- Margins
- Page size

You can override any of these default settings when you generate a report if the report has an Options page.

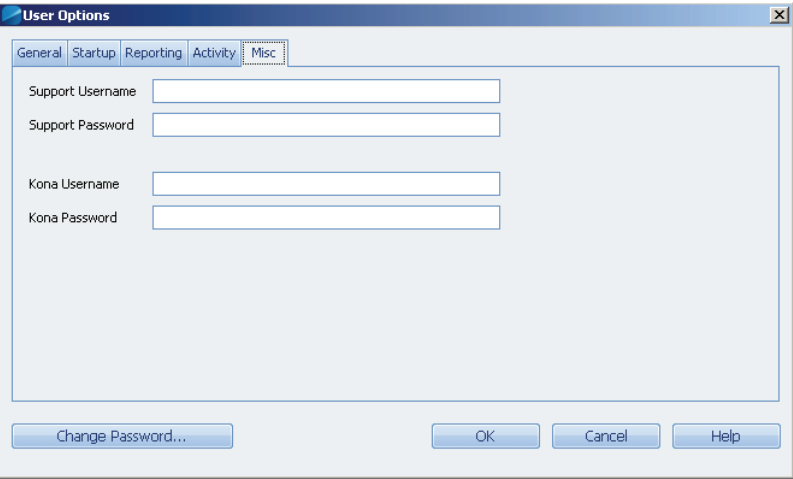
The screenshot shows the 'User Options' dialog box with the 'Activity' tab selected. It contains two checkboxes: 'Enable email reminders' (unchecked) and 'Enable popup reminders' (checked).

Activity Tab

Use this tab to enable:

- Email reminders. Vision sends an email reminder for an activity to the email address specified in your Employee Info Center record at the reminder time that is specified for the activity.
- Popup reminders. A popup for an activity displays on your screen at the reminder time that is specified for the activity.

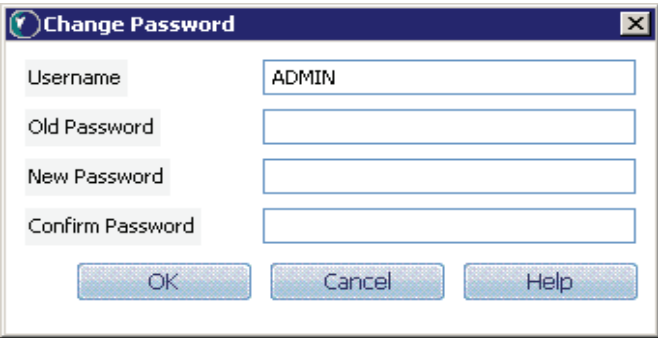
User Options Tabs (continued)

The 'User Options' dialog box is shown with the 'Misc' tab selected. It contains four text input fields: 'Support Username', 'Support Password', 'Kona Username', and 'Kona Password'. At the bottom, there is a 'Change Password...' button and 'OK', 'Cancel', and 'Help' buttons.

Misc Tab

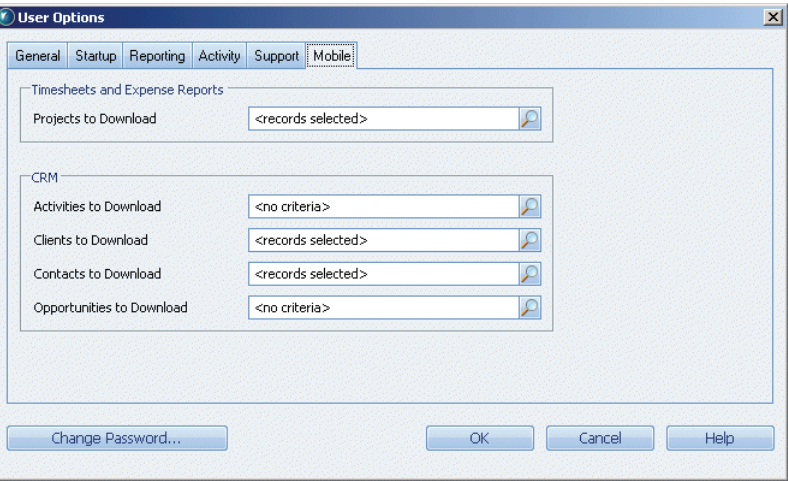
Use this tab to enter or change:

- Your user name that is required to access Deltek’s Customer Care Connect site.
- The password that is assigned to your user name.
- If you are using Kona, enter the username and password that are required for access to Kona.

The 'Change Password' dialog box is shown. It contains four text input fields: 'Username' (pre-filled with 'ADMIN'), 'Old Password', 'New Password', and 'Confirm Password'. At the bottom, there are 'OK', 'Cancel', and 'Help' buttons.

Change Password

- To change your Vision system password, click the **Change Password** button on the User Options form (from any of the tabs). On the Change Password dialog box, enter your old and new password. Then reenter your new password in the **Confirm Password** field.
- You can change your Customer Care Connect username and password on the Support tab of User Options.

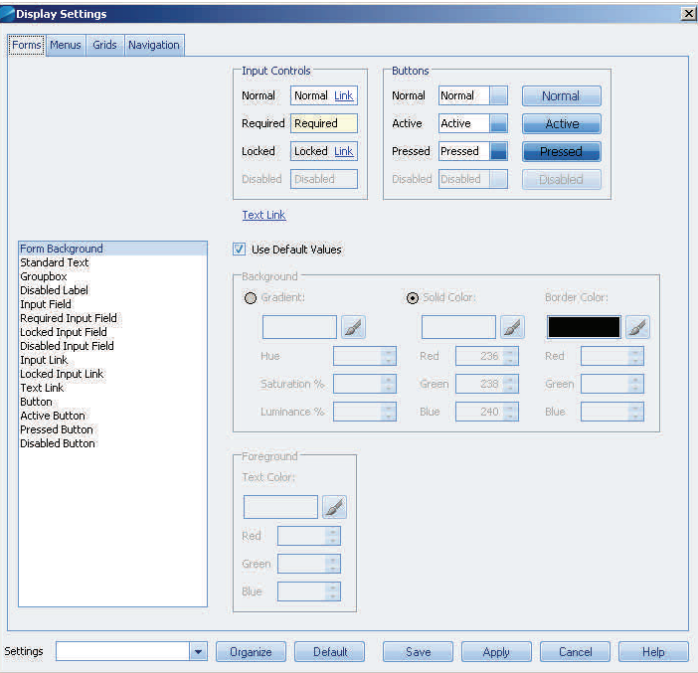
The 'User Options' dialog box is shown with the 'Mobile' tab selected. It contains two sections: 'Timesheets and Expense Reports' with a 'Projects to Download' dropdown (pre-filled with '<records selected>') and a search icon; and 'CRM' with five items: 'Activities to Download', 'Clients to Download', 'Contacts to Download', and 'Opportunities to Download', each with a dropdown (pre-filled with '<no criteria>' or '<records selected>') and a search icon. At the bottom, there is a 'Change Password...' button and 'OK', 'Cancel', and 'Help' buttons.

Mobile Tab

This tab is available only if you are using the Vision Mobile Application Suite.

Use this tab to select the following items to download to your mobile device:

- Projects for timesheets and expense reports if you use these mobile applications.
- Activities, clients, contacts, and opportunities if you use these Mobile Customer Relationship Management (CRM) applications.

The 'Display Settings' dialog box is shown with the 'Forms' tab selected. It contains several sections: 'Input Controls' with buttons for Normal, Required, Locked, and Disabled; 'Buttons' with buttons for Normal, Active, Pressed, and Disabled; 'Form Background' with a list of UI elements; 'Background' with options for Gradient and Solid Color (with Hue, Saturation, and Luminance sliders); and 'Foreground' with Text Color sliders. At the bottom, there are 'Organize', 'Default', 'Save', 'Apply', 'Cancel', and 'Help' buttons.

Display Settings

Use the Display Settings tabs to modify specific areas of the Deltek Vision user interface according to your preferences.

These tabs include:

- Forms — Use this tab to change the general appearance of forms within Vision.
- Menus — Use this tab to change the interface of menus, sub-menus, and tabs.
- Grids — Use this tab to change the appearance of grids.
- Navigation — Use this tab to change the Navigation menu interface.