

# Deltek Vision® 7.1

**Project Connect User's Guide for Microsoft®  
Project 2007**

**June 27, 2013**

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## 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.

## If You Need Assistance

If you need assistance installing, implementing, or using 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](#).

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### 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

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## 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
<i>Deltek Vision Project Connect Installation and Administration Guide</i>	This guide contains detailed information on installing and administering Project Connect for integrating Microsoft Project with Deltek Vision.
<i>Deltek Vision Project Connect User's Guide for Microsoft Project 2010</i>	This guide contains information for integrating for integrating Microsoft Project 2010 with Deltek Vision.

## Supported Applications

### **Deltek Vision**

Vision Project Connect supports Deltek Vision 6.x and beyond with the same functionality.

Your system administrator has configured the Vision Project Connect server to interface with your company's Deltek Vision implementation. This is the master system for information such as resources, actual hours, and costs.

### **Microsoft Project**

Vision Project Connect supports Microsoft Project 2007 and 2010 desktop editions. Microsoft Project Server is not supported.

You can use the Project Connect toolbar directly from Microsoft® Project.

### **Web Browser**

Your web browser configuration must support JavaScript and allow cookies.

You can use any of the following browsers:

- Microsoft Internet Explorer 7, 8, 9
- Mozilla/Firefox

## Integrated Projects Best Practices

This section describes practices that users of Microsoft Project and Deltek Vision should adopt when working with integrated projects. Due to differences in the treatment and capabilities for data in each of these systems, it is important to follow these guidelines to achieve good results with the integrated projects.

- Only use one of the Microsoft Project interfaces for any given project. Mixing use of the Server and Desktop interfaces will cause data integrity problems.
- Use only Microsoft Project to create new Tasks and perform scheduling. If you create tasks in Deltek Vision and Microsoft Project, data conflicts can occur.
- Do not assign the same resource to a task in Deltek Vision. Multiple assignments of a resource to a task are not supported in Microsoft Project.

## Verify the Project Connect Data Exchange Rules Configuration on the Server

The information in this section affects 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. This step is performed on the Project Connect Server. This must be performed 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.

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 data-bbox="586 800 1333 821">&lt;property name="uploadTimePhasedData" value="true"/&gt;</pre>
Enable Vision to Microsoft Project: <b>Update Planned Data</b>	<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 data-bbox="586 1066 1333 1087">&lt;property name="downloadPlannedData" value="false" /&gt;</pre>
Enable Vision to Microsoft Project : <b>Update Actual Data</b>	<p>This option determines if actual data (hours worked, amount spent) will be uploaded from Vision to Microsoft Project.</p> <pre data-bbox="586 1192 1333 1213">&lt;property name="downloadActualData" value="false" /&gt;</pre>

## The Vision Project Connect User Interface Options

The Vision Project Connect user interface is accessed depending on the Microsoft Project environment and version used.

This guide provides steps for using Project Connect with two interfaces available. The user interface for Microsoft Project 2007 on a desktop is embedded into Microsoft Project as an Add-In that provides a new toolbar. From here, it is possible to upload and download projects and to retrieve resource information from Vision. Some features, such as managing WBS maps, viewing audits, and administrative functions, require the use of the Vision Project Connect Portal using a Web Browser. Steps for installing and/or upgrading the Toolbar Add-in into the Microsoft Project desktop installation are detailed below.

The user interface for Microsoft Project Connect can be accessed via a browser and is entirely web based. The integration applications are delivered as Portlets, which are self-contained web applications hosted within the Vision Project Connect Portal. Steps for accessing, configuring, and using the Portal applets are detailed below.



For more information about the Vision Project Connect Portal features, setup, and configuration, see the *Deltek Vision Project Connect Installation and Administration Guide*.

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The interactive integration processes can be accessed in multiple ways, including using the Vision Project Connect portal or embedding an integration community (collection of related portlets) within the Vision Dashboard.

## Microsoft Project 2007 Desktop Interface

Using the Microsoft Project 2007 desktop, you can access the majority of the Vision Project Connect features directly from your toolbar.

Follow the steps below to perform a new installation.

### Installing the Project Connect Toolbar Add-in (New Installations)

**To install the toolbar add-in, complete the following steps:**

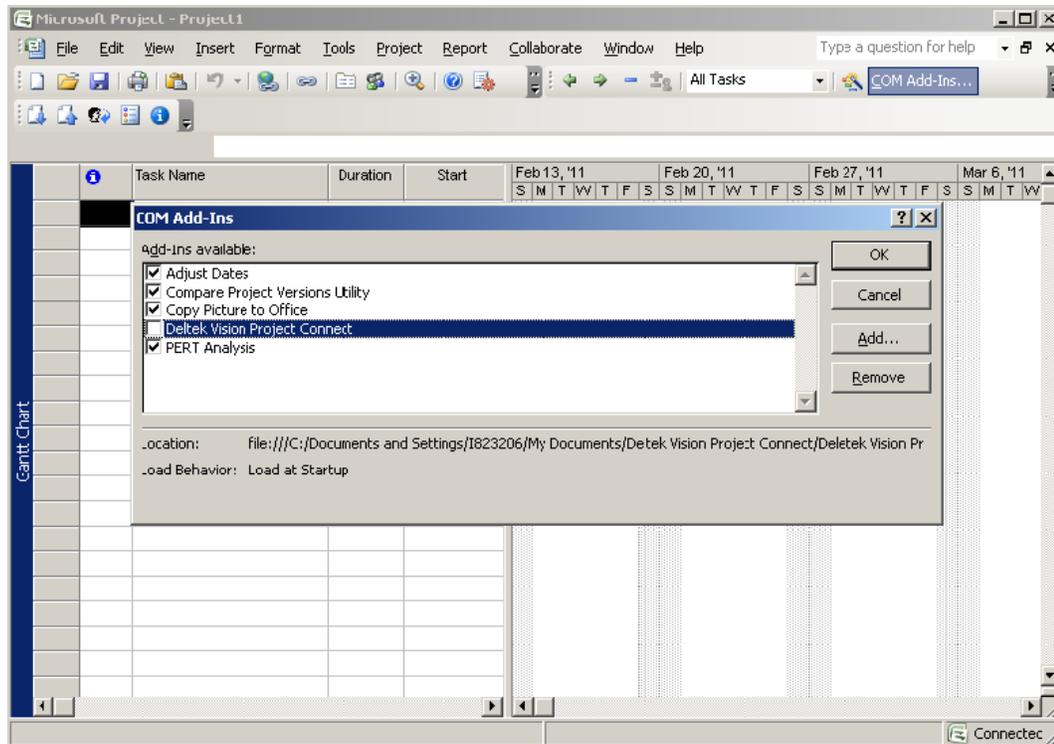
1. Exit Microsoft Project if it is open.
2. Obtain the Project 2007 Client Package files (contained in a zip archive file) from your administrator.
3. Extract the contents of the Office2k7Add-in\_v1.6.0.0.zip file
4. Launch the setup.exe file in the root of the extracted folder.
5. Accept the End User License Agreement to install the Microsoft Visual Studio 2010 Tools for Office Runtime.
6. Click **Install** to launch the Microsoft Office Customization Installer that will install the Add-In.
7. When the Microsoft Office Customization was successfully installed dialog box displays, click **Close** to continue.
8. Launch Microsoft Project.  
The Project Connect Add-in appears as a new EPC tab.
9. Proceed to the section, "Using the Microsoft Project 2010 Desktop Interface," for details on configuring and using the Toolbar add-in.

### Upgrading Vision Project Connect Toolbar to Newer Version

To upgrade to a new version of Vision Project Connect Toolbar (Add-In), you must uninstall the old version before installing the new version.

**To disable and uninstall the previous version, ,complete the following steps:**

1. Open Microsoft Project.
2. Click **File » Options » Add-Ins**.
3. At the bottom, click **Go** (accept the defaults to Manage COM Add-Ins).
4. Clear the check mark beside **Deltek Vision Project Connect**, and click **OK**.



5. In Control Panel, use the Add/Remove Programs (Windows XP) or the Programs and Features (Windows 7) to uninstall the Deltek Vision Project Connect software.



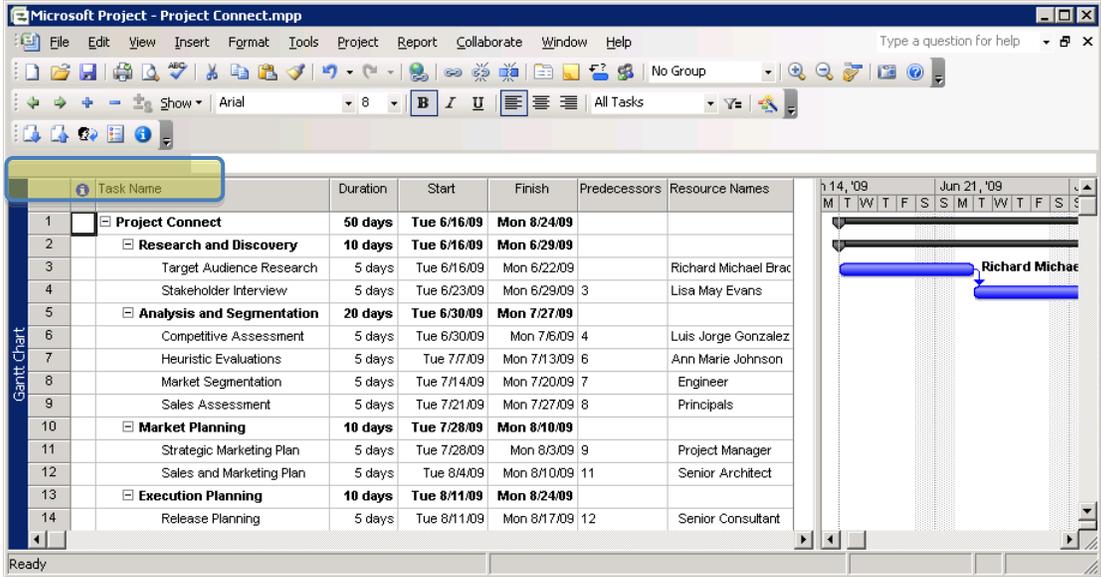
6. Delete the 2.0 folder from the user machine.  
The location of the folder depends on your operating system:
  - Windows XP location — ([SystemDrive]:\Documents and Settings\User\Local Settings\Apps\2.0)
  - Windows 7 location — [SystemDrive]:\Users\[UserProfile]\AppData\Local\Apps\2.0
7. Follow the steps for “Installing the Project Connect Toolbar Add-in (New Installations).”

## Project 2007 Add-In

If you are using Microsoft Project 2007 desktop, you can access the majority of the Vision Project Connect features directly from your toolbar.



For information on how to install the Vision Project Connect Add-In for Microsoft Project 2007 SP2, see the *Vision Project Connect 1.6 Admin/Installation Guide*.



## Using the Microsoft Project 2010 Desktop Interface

If your company uses Project Desktop 2007, then you should be presented with the workflows relevant to integrating with Microsoft Project via the Vision Project Connect Toolbar Add-In.

The Project Connect toolbar provides a user interface that allows you to select the type of integration process simply by clicking the toolbar items from within MS Project.



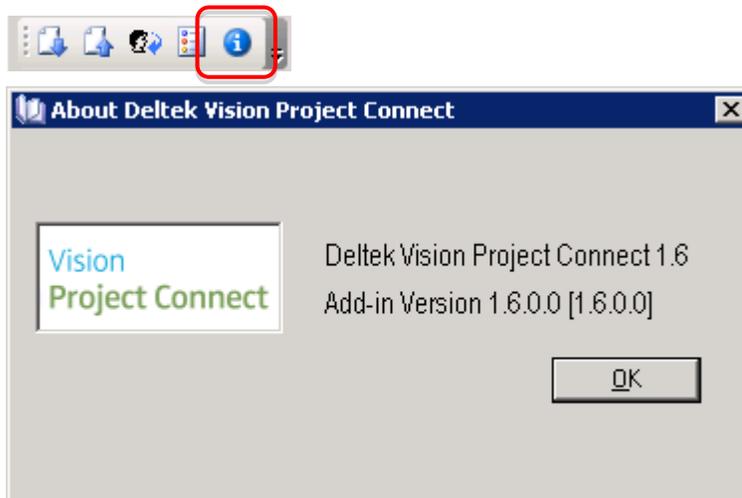
While the bulk of the integration processes for 2007 MS Project Desktop is surfaced via the Add-In, the user will be required to access the Portal interface to manage the WBS Mapping.

## Vision Project Connect Toolbar

The Vision Project Connect Toolbar provides all the functionality you need to keep your resources and projects in sync with your Vision data. The various buttons provide the ability to configure the add-in to communicate with Project Connect, manage certain behaviors during your MS Project sessions or select the type of integration process to execute.

### About Project Connect

Clicking the **About** button to display the About Deltek Vision Project Connect screen, which provides the version information of your Deltek Vision Project Connect Add-In.



## Configuration Settings

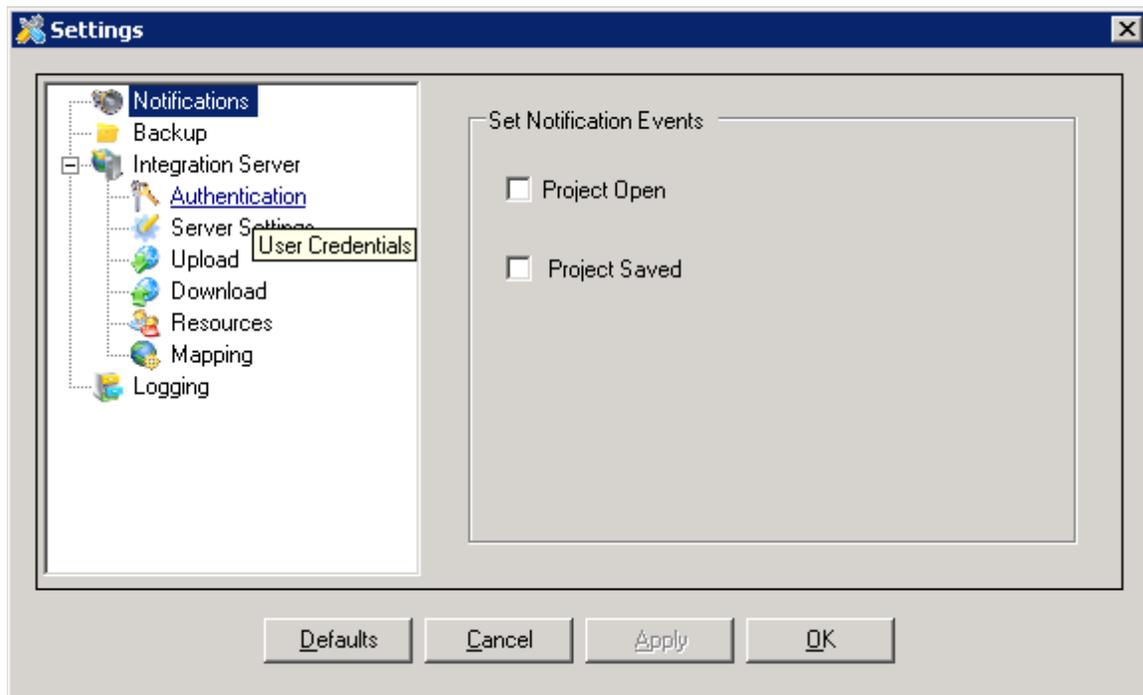
Clicking the **Configuration** button provides setup-functionality to manage the connection to Project Connect as well as user-determined management of your MS Project desktop environment. The descriptions below will guide you in configuring the toolbar add-in to interface with the Project Connect Server.



Click this button to access the Settings dialog box.

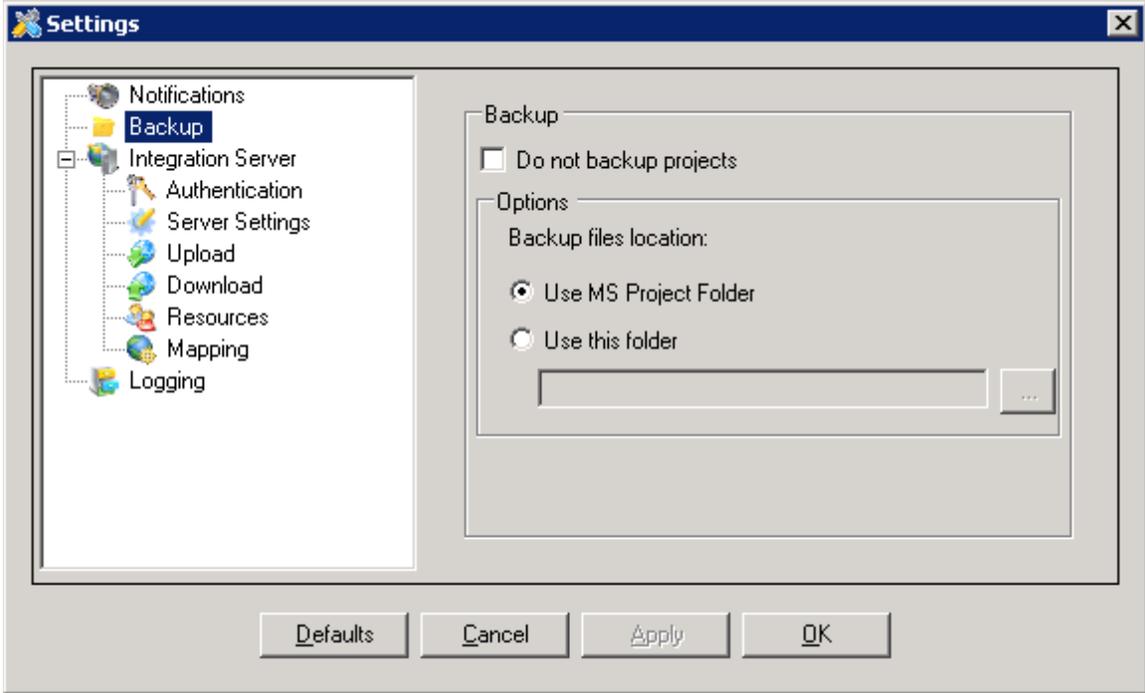
### Notification

The **Notification** option provides the ability to trigger a notification during your MS Project session if you either Open or Save a Project. If you select the option box, a window displays that gives you the ability to update the associated Vision Plan.



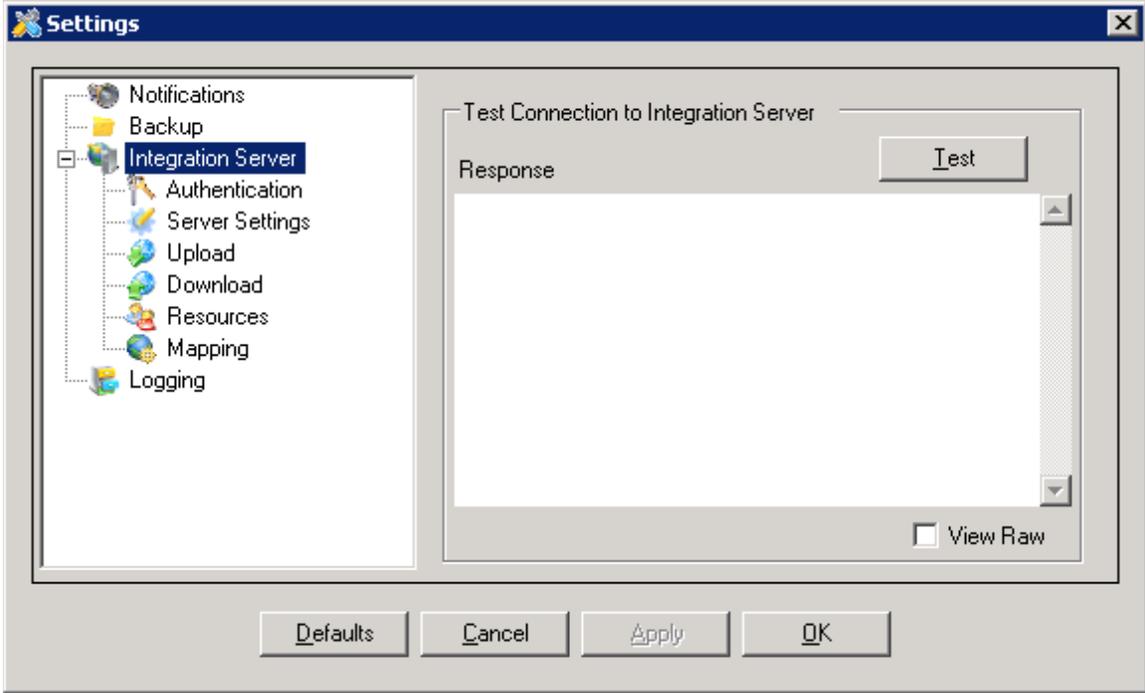
### Backup

The **Backup** option provides the ability to back up your project each time Project Connect performs an update. By default, it will save to a defined MS Project folder or you can direct the system to save to another location.



**Integration Server**

The **Integration Server** option provides the ability to test your connection to Project Connect. Click the **Test** button to see information about your connection. The sub-options within the Integration Server settings are covered below. After you enter the Server Settings, return to this selection to test your connection.

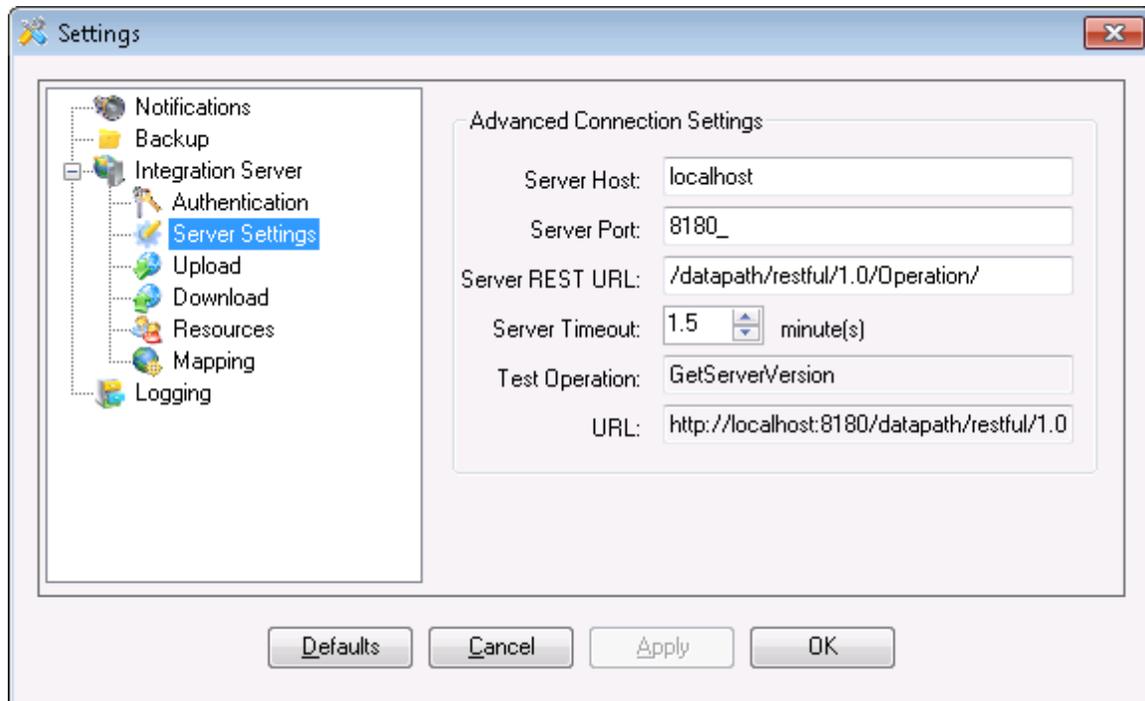


## Server Settings

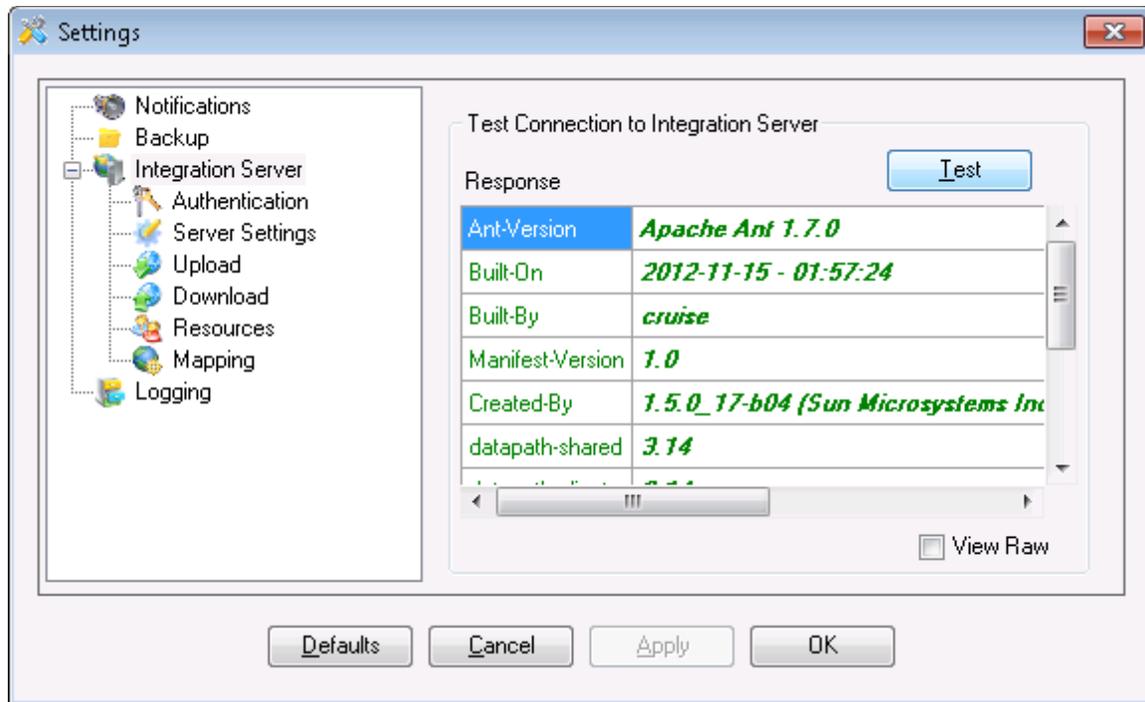
Obtain the name or IP Address of you Project Connect Server from your administrator and enter it in the **Server Host** field. Replace the entry localhost with the server name. All other settings should remain at the defaults. Click **Apply** to immediately accept the changes without closing the window.



- If you click the **OK** button, the dialog box will close before you finish. If you plan to continue configuring, click **Apply** to keep the dialog box open.
- The **Defaults** button restores all the default values for the entire configuration.

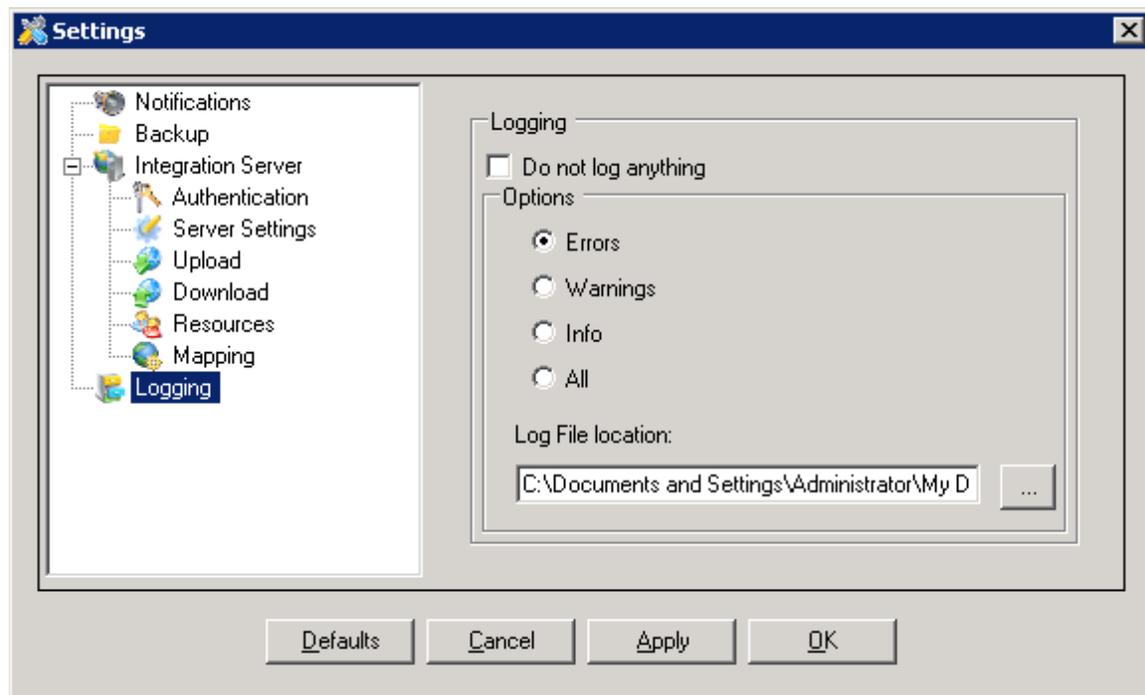


Click the Integration Server selection to test the connection. A successful connection will return results similar to the following example.



### Logging

The **Logging** option gives you the ability to set options, parameters, and location for logging.

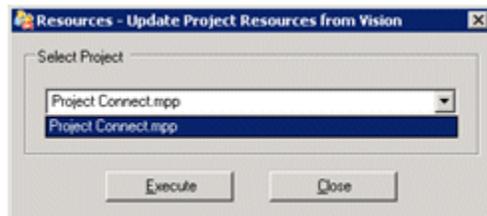


## Integrate Resources

The **Retrieve Resource data from Deltek Vision Plan** add-in button provides the ability to maintain the MS Project resource dictionary based on the current employee data defined within Vision. The integration process performs a set of discrepancy and quality checks on the data and merges new and updated information into the selected project.



Click **Retrieve Resource data from Deltek Vision Plan** to launch the Resource master data management integration process. The workflow prompts you to select an existing project and then click the **Execute** button.



When the integration process finishes, the workflow displays a dialog box indicating the status of the update. After the process completes, you can use the resources in your MS Project. If there are differences or if adjustments occur during the Resource Integration, a warning message displays with the details for the differences.



The resource integration process creates or updates the resource dictionary within the targeted Project. These resources are then available for assignment in the Microsoft project and can be used with the additional Project Connect workflows.

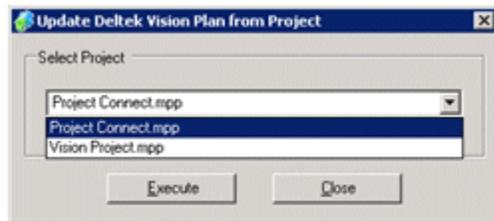
	Inactive	Generic	Resource Name	Type	Initials	Group	Code	Max. Units	Std. Rate	Ovt. Rate	Accrue At
1	No	No	Peter Martin O'Leary	Work	PMO	SF.EN	01416	100%	\$40.00/hr	\$0.00/hr	Prorated
2	Yes	No	Cheryl L. Morgan	Work	CLM	CO.00	SF890	100%	\$0.00/hr	\$0.00/hr	Prorated
3	No	No	Laura Anne Baugh	Work	LAB	BO.AR	00013	80%	\$12.00/hr	\$12.00/hr	Prorated
4	No	No	Tina Marie Barrett	Work	TMB	SF.AR	00014	70%	\$16.00/hr	\$16.00/hr	Prorated
5	No	No	Stephen Wade Wills	Work	SWW	BO.AR	00015	75%	\$15.00/hr	\$15.00/hr	Prorated
6	No	No	Charles Robert Turner	Work	CRT	BO.AR	00016	80%	\$22.00/hr	\$22.00/hr	Prorated
7	No	No	Edward Terrence O'Leary	Work	ETO	SF.EV	00017	80%	\$19.00/hr	\$19.00/hr	Prorated
8	No	Yes	Principals	Work	P		GENERIC1	100%	\$0.00/hr	\$0.00/hr	Prorated
9	No	Yes	Project Manager	Work	P		GENERIC2	100%	\$0.00/hr	\$0.00/hr	Prorated
10	No	Yes	Senior Consultant	Work	S		GENERIC3	100%	\$0.00/hr	\$0.00/hr	Prorated
11	No	Yes	Senior Architect	Work	S		GENERIC4	100%	\$0.00/hr	\$0.00/hr	Prorated
12	No	Yes	Senior Engineer	Work	S		GENERIC5	100%	\$0.00/hr	\$0.00/hr	Prorated
13	No	Yes	Engineer	Work	E		GENERIC6	100%	\$0.00/hr	\$0.00/hr	Prorated
14	No	Yes	Architect	Work	A		GENERIC7	100%	\$0.00/hr	\$0.00/hr	Prorated
15	No	Yes	Partner	Work	P		GENERIC8	100%	\$0.00/hr	\$0.00/hr	Prorated

## Vision Plan Information Management

Click the Send **Project Changes to Deltek Vision Plan** button to initiate the workflow process for managing incoming Project information to Vision.



The next screen of the workflow allows you to select a project from Microsoft Project to create or update in Vision. The projects that you are presented are "open" projects from your Microsoft Project session and reflects the current list of projects available for integration management.

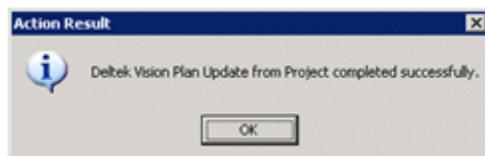


Depending on whether or not the selected project has a corresponding plan in Vision, the integration process will either create a new Vision plan for the project or update the existing one with any qualifying modified data in the project.

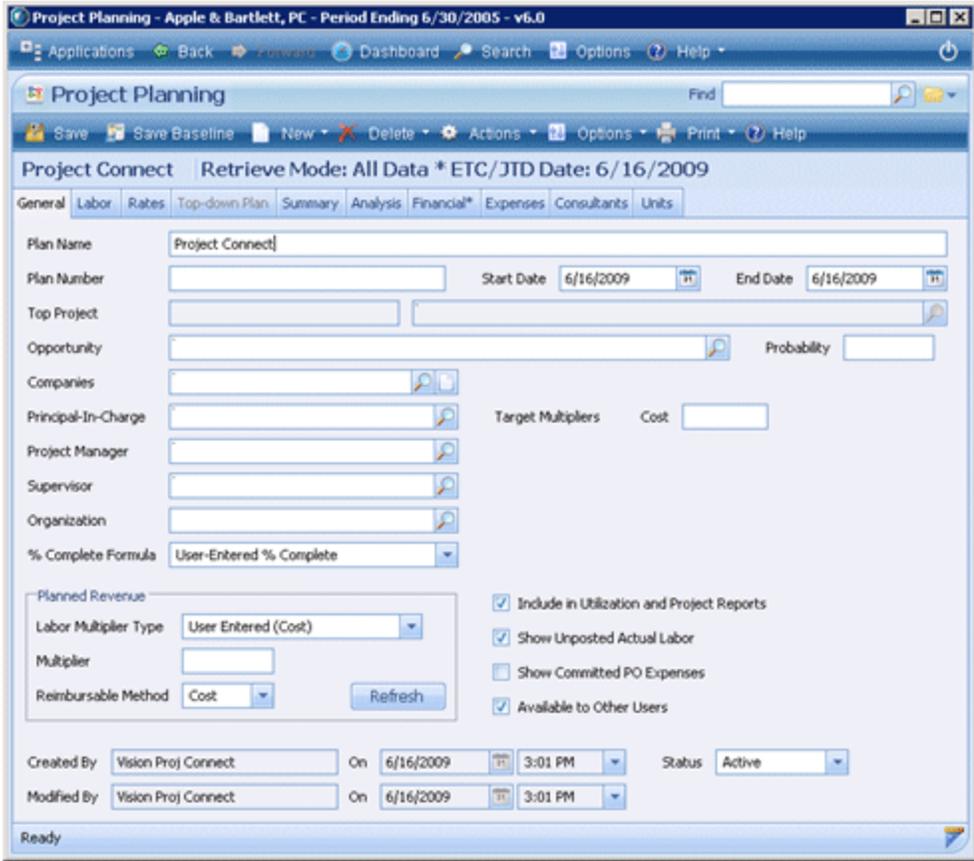


WBS Mapping is managed via the Portal. See the 'WBS Management Interface' section for instructions.

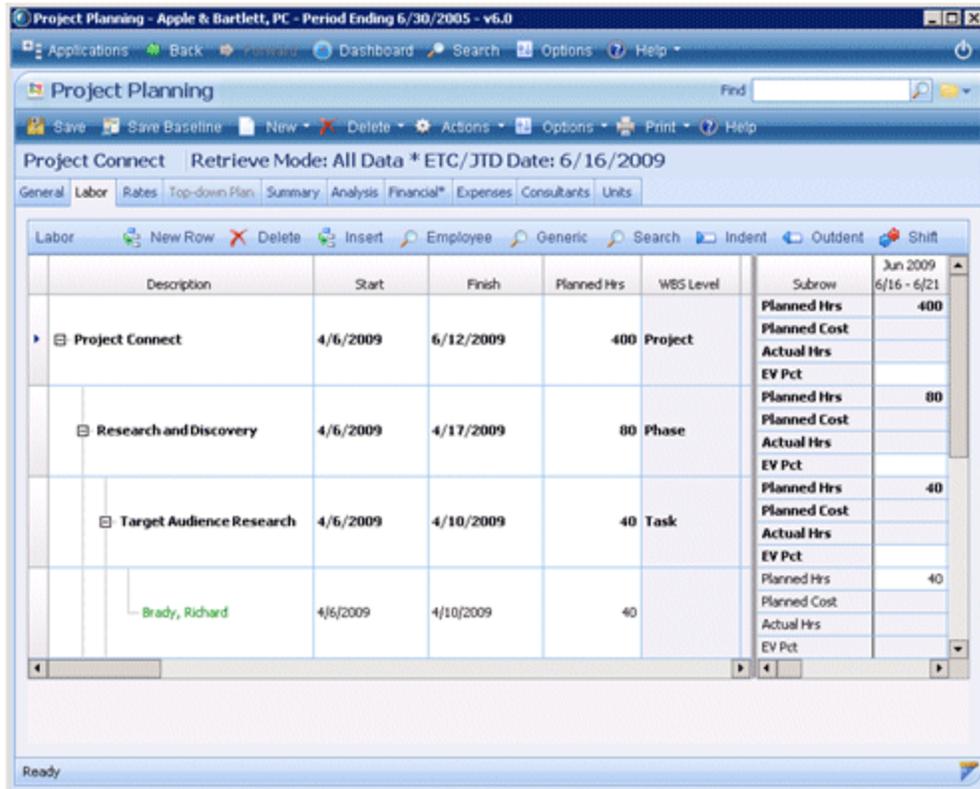
To transfer the Project data to Vision, select the corresponding project row in the drop-down list and click **Execute**. After the integration process completes, the workflow returns a results screen with details of the operation. When the integration process is finished, the workflow displays a dialog box indicating the status of the Vision Plan update or create.



The product creates a Deltek Vision plan of the same name as the Microsoft Project name, as shown on the General tab in the following example.



When you click the Labor tab, the new plan's information displays.

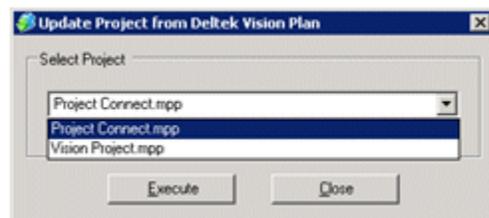


## Microsoft Project Information Management

Click the **Retrieve Project Changes from Vision Plan** add-in button to initiate the workflow process for managing information flow to Microsoft Project from a Vision plan, including resource assignments and labor actual data.



The next screen of the workflow allows you to select a Deltek Vision plan that is being managed with an external project.



The projects that you are presented are "open" projects from your Microsoft Project session and reflects the current list of projects available for integration management.



Only plans that were created using the Vision Project Connect integration process from an external project will be available for selection. Plans that are created manually in Deltek Vision are not eligible for providing updated project data.

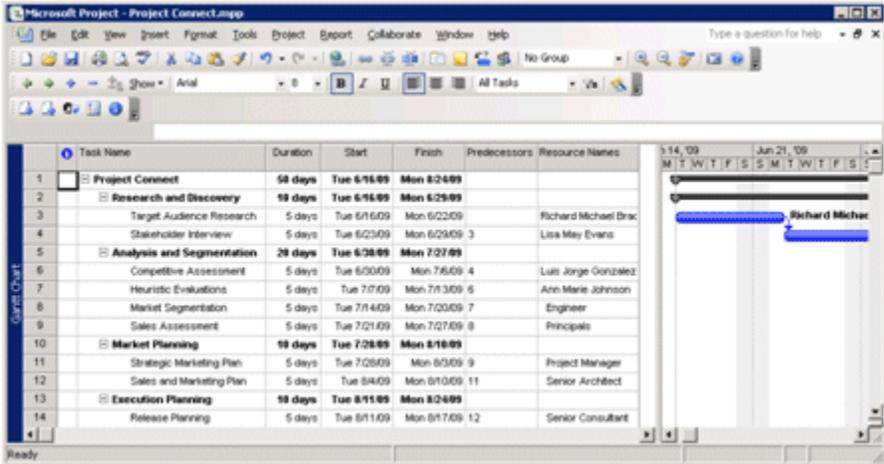
To send the updated information to the external project, select the corresponding project row in the drop down list, and click **Execute**.

After the integration process completes, the workflow returns a results screen with details of the operation.



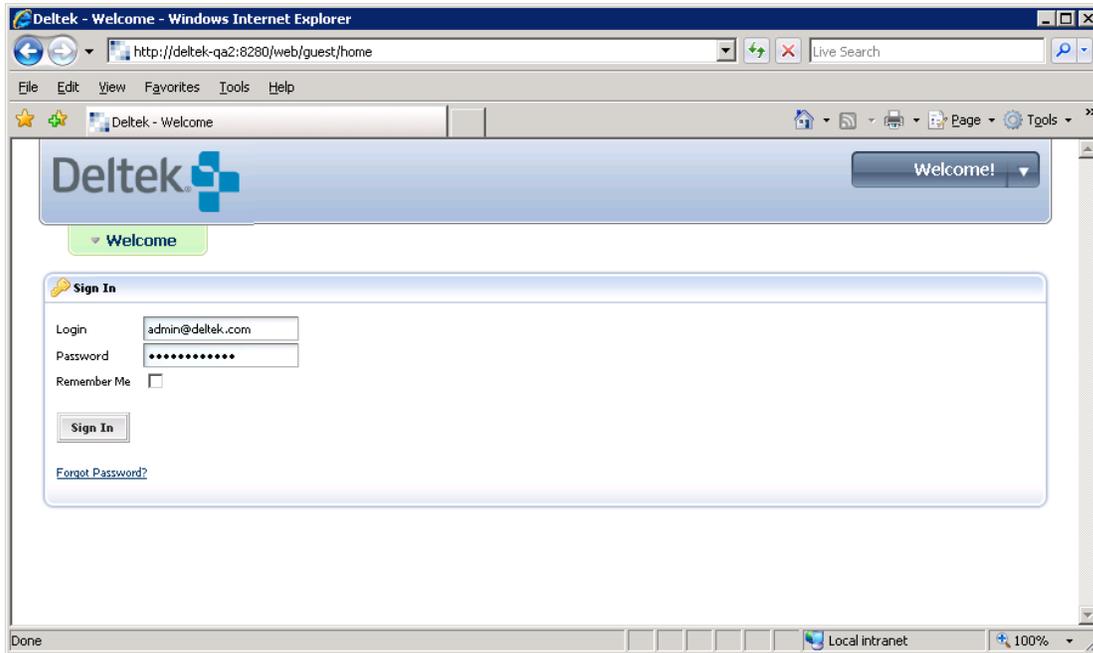
When the integration process finishes, the workflow displays a dialog box indicating the status of the Microsoft Project update.

The updated plan information has now been populated into your Microsoft Project for use in resource assignments, cost estimating, and other project based functions.



## The Vision Project Connect Portal

To use the Vision Project Connect Portal, you must log in to the portal web application.



**To log in to the Portal web application, complete the following steps:**

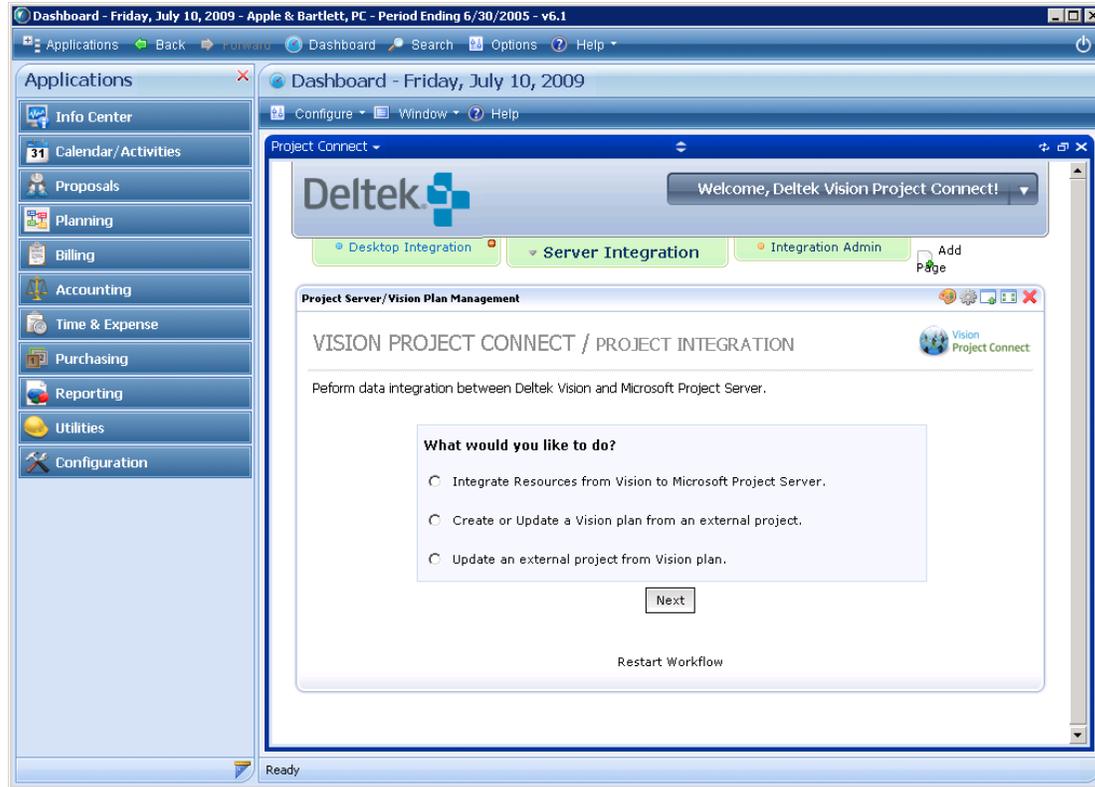
1. Point your browser to the URL provided by your system administrator, and enter your credentials according to the account information you were provided.  
The URL to connect to the portal is in the form of **http://<Project Connect Server Name>:8280**.
2. In the **Login** field, enter the username provided by your administrator.
3. In the **Password** field, enter the password provided by your administrator.
4. Click **Sign In**.

When you log in to Vision Project Connect, the portlets that display and workflows that you can access are based on how your system administrator configures your user account and whether your organization is using the Project Server or Project Desktop interfaces.

If you log in to the Vision Project Connect Portal and do not see the integration portlets, you will need to contact your system administrator to configure your account.

### Using Portlet Communities in Vision

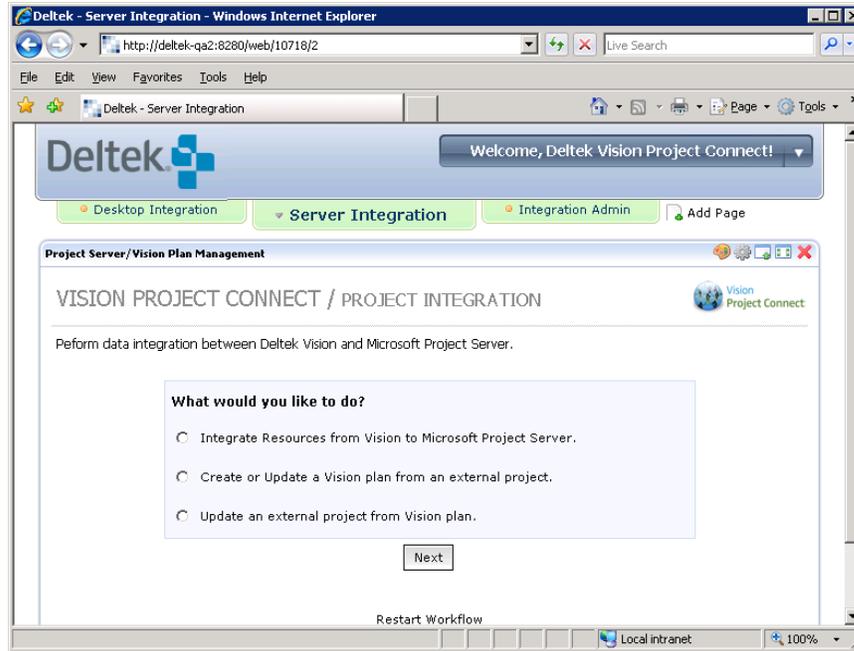
If you are a Deltek Vision user, your system administrator may have configured a Vision Dashboard part with a Vision Project Connect portlet community. This allows you to control and manage the integration processes directly from within Vision.



If you have the privileges required to access and create Vision Dashboard parts, you can create your own portlet community.

**To create your own community, complete the following steps:**

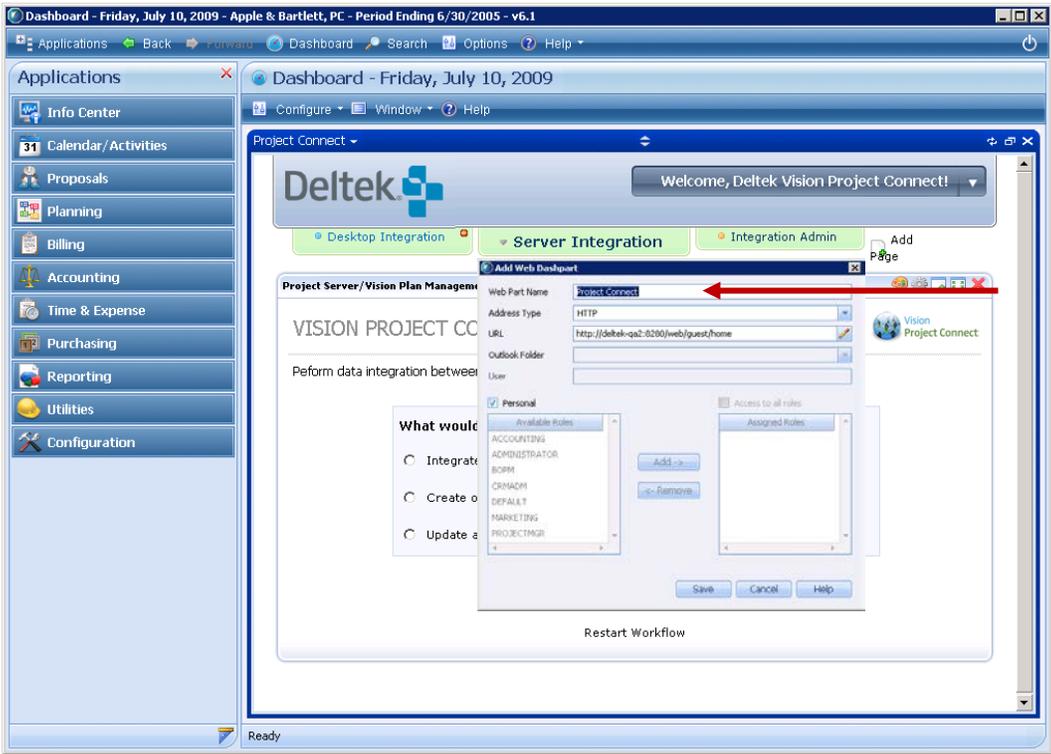
1. Log in to the Vision Project Connect Portal, and navigate to the page that you want as the default page within the Dashboard.
2. Copy the URL from your browser's navigation control; this will be used in the Vision Dashboard as the community URL.



## Copy the URL from the Portal Community Page

To copy the URL, complete the following steps:

1. From the Dashboard in Vision, create a new **HTTP URL** part, and paste the community URL from the Vision Project Connect Portal to the **URL** field in the Dashboard part configuration panel.
2. Complete the rest of the form items and return to the dashboard.
3. Optional. Resize the Dashboard part viewport.



4. Configure the **Vision Web Part Name**.

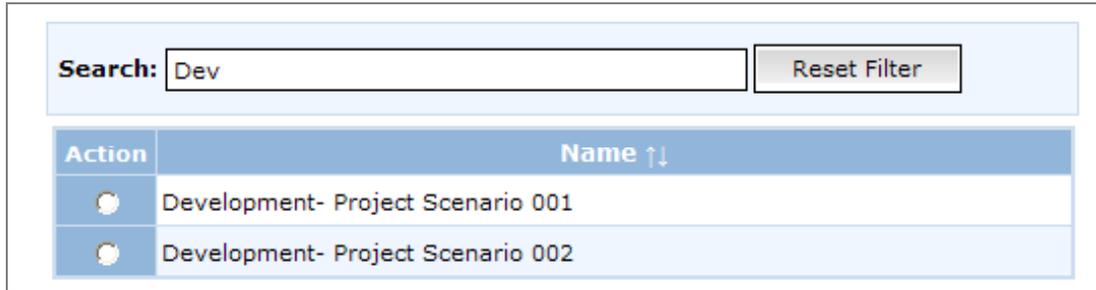
**Vision Project Connect Portlet Features**

**Selection Tables**

Use selection tables to filter on a list of information and select an option for processing in the next step of the workflow.

<b>Search:</b> <input type="text"/>		<input type="button" value="Reset Filter"/>
Action	Name ↑↓	
<input type="radio"/>	Demo- Project Scenario 1	
<input type="radio"/>	Development- Project Scenario 001	
<input type="radio"/>	Development- Project Scenario 002	
<input type="radio"/>	RF1	
<input type="radio"/>	Template- Project Scenario 1	
<input type="radio"/>	Test- Project Case 900	
<input type="radio"/>	Test- Project Scenario 001	

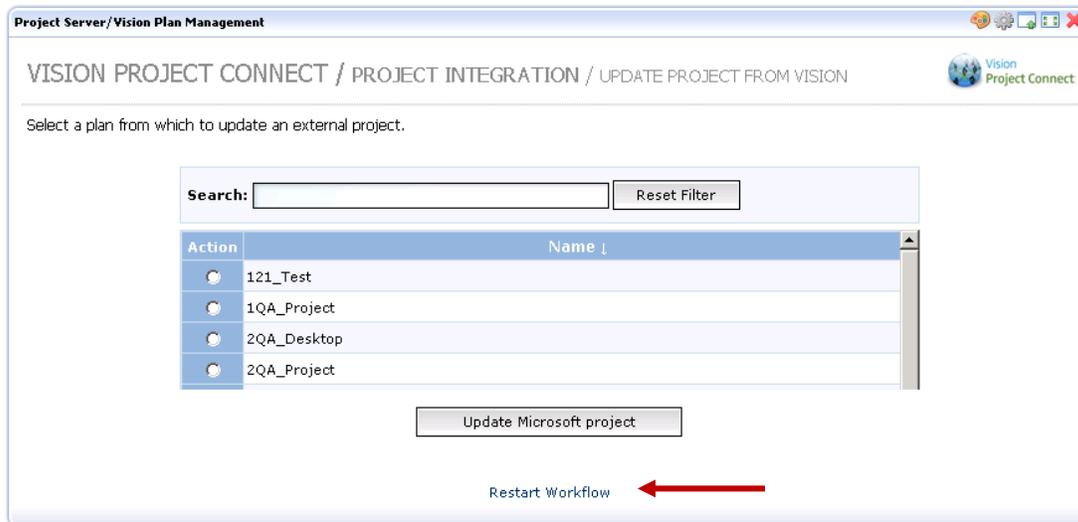
To filter the results to a smaller set of information, enter letters or words of the item that you seek in the **Search** field. For example, to see only Development projects from this list, enter “Dev” in the **Search** field.



To sort a table by a column, click the column header label. Each click on the header changes the direction of the sort (ascending or descending).

## Restart Workflow

To restart any workflow, click the **Restart Workflow** link at the bottom of the portlet window. This will return you to the initial screen of the workflow.



## WBS Management Interface

With Vision Project Connect, you can map the levels of a project in Microsoft Project to the levels of a Vision plan that correspond to WBS elements defined in Vision. You can do this with the Vision Project Connect Portal if you have permissions to access this portlet.

All projects must have a map defined before they can be integrated with Deltek Vision.

The WBS Management user interface is designed as a “wizard” style workflow that you use to align MS Project Outline structures with Deltek Vision Planning WBS Mapping settings. This offers the flexibility to build projects via MS Project as needed to support your scheduling or project management requirements and associate the levels required to support accounting, planning, and resource management functions of Deltek Vision.

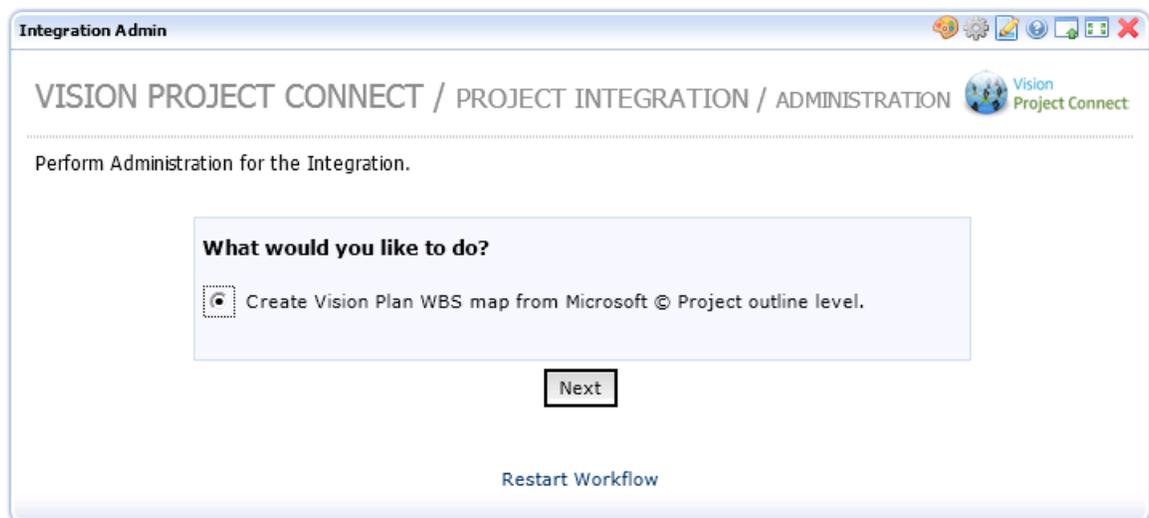


Only plans that were created using the Vision Project Connect integration process from an external project are available for selection. Plans that are created manually in Vision are not eligible for providing updated project data.

## Integration Administration

To initiate the WBS Mapping Integration process, complete the following steps:

1. Access the Vision Project Connect Web Portal page.  
Obtain the name of the Project Connect Server from your Administrator. The URL to connect to the portal is in the form of **http://<Project Connect Server Name>:8280**.
2. Click **Welcome, Deltek Vision Project Connect**.
3. Hover over **My Places**, select **Vision Project Connect**, click **Integration Admin**, and then click **Next**.

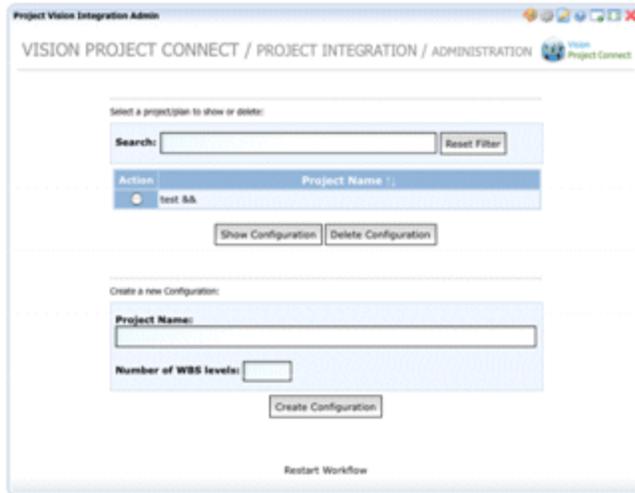


The first step in the workflow allows you to view or delete existing WBS Maps as well as create new maps.

4. To view or delete an existing map, select the map, and click the related map button in the upper section of the screen.
5. To create a new map, enter the Microsoft Project Name in the section provided, and enter the number of WBS levels required for your Vision Connect Project.



**IMPORTANT!** The Microsoft Project Name cannot contain any special characters such as apostrophies, commas, slashes, and so on.

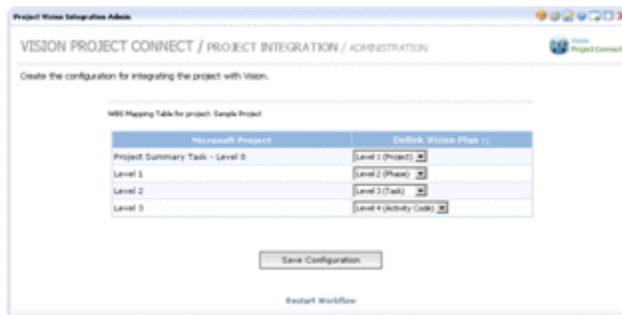


6. Select the company, and click **Save Company Code** to target the project to the Vision company.

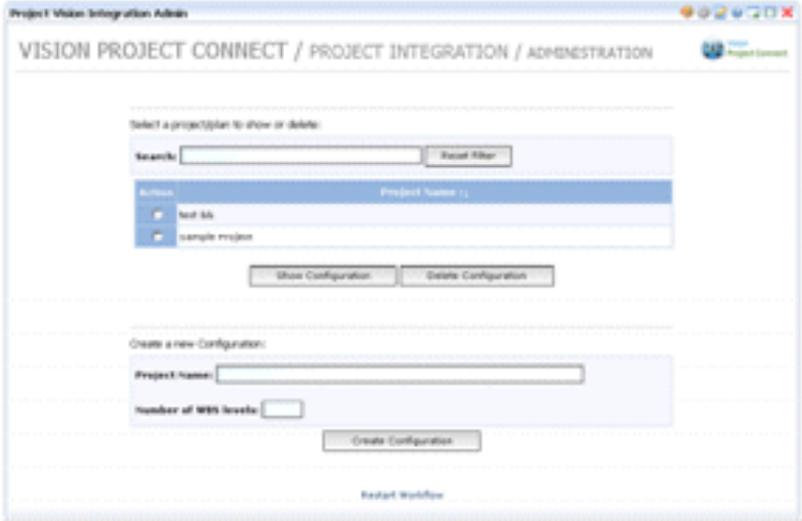


The WBS Mapping screen displays. Based on the defined WBS Levels from Step 1, the screen will display the Outline Levels of your Microsoft Project on the left and Vision Plan levels to associate.

7. After associating the two systems, click the **Save Map** button to establish the WBS Mapping.

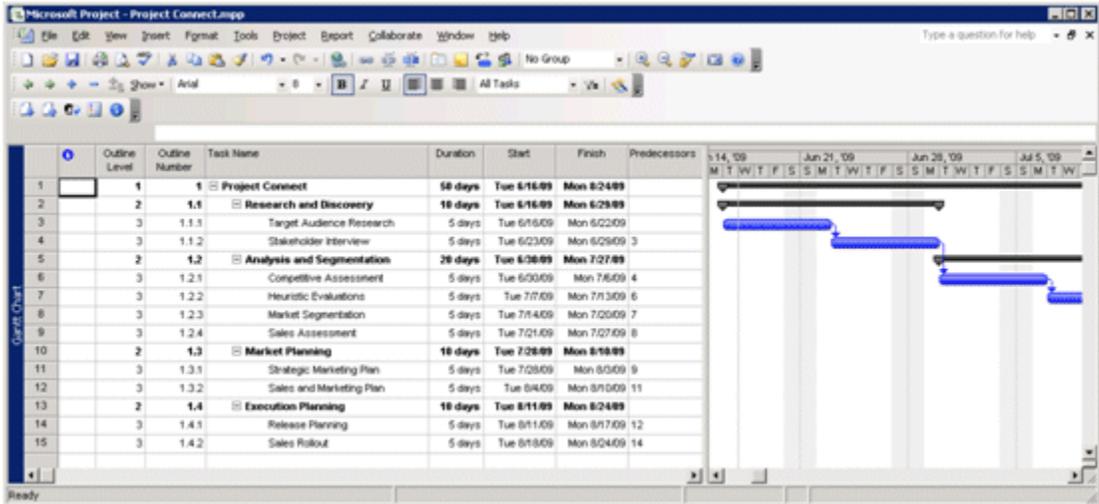


The workflow will then return you to the WBS Mapping page. Your newly created map will display in the **Project Name** field and will be available for integration.



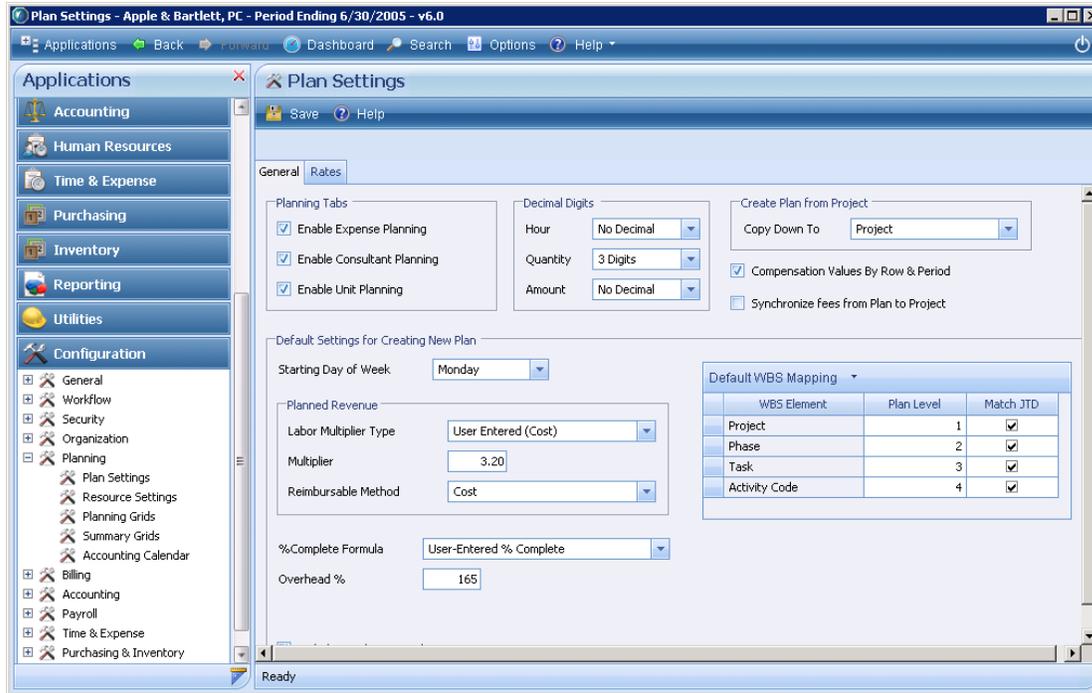
### Microsoft Project Outline Structure

Project Connect associates Microsoft Project Outline Levels with a Deltek Vision WBS to enable the bi-directional integration. The following example shows how Microsoft Project structures the project in outline form and the values in the outline coding.



### Deltek Vision Plan Setting

Deltek Vision Plan Settings determines the structure within the Project Planning module that is applied during the creation and management of a Deltek Vision Plan. The following example illustrates the Default WBS Mapping that Project Connect uses to define the integration.



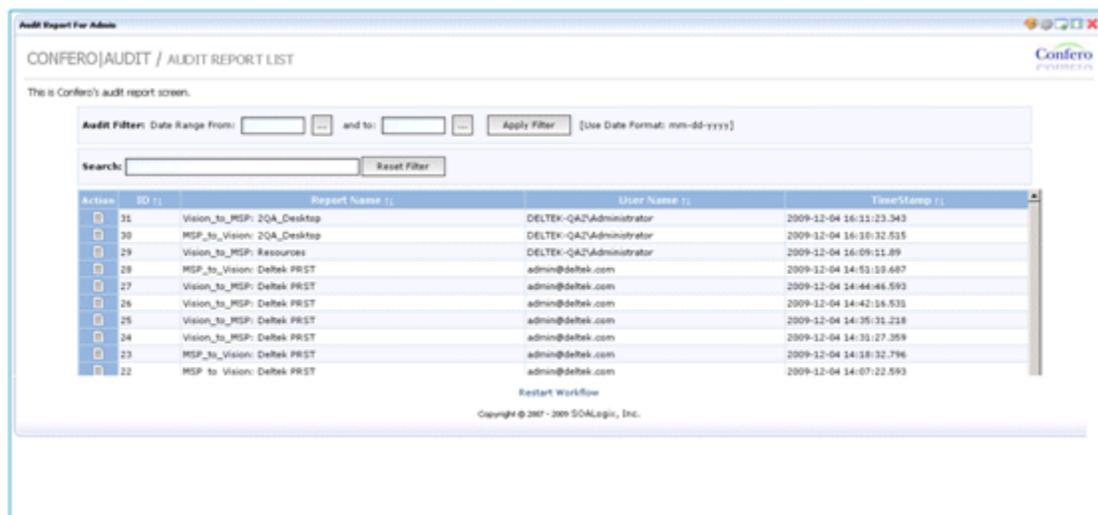
## Audit Interface

Vision Project Connect provides an audit record for all integration processes. As a user, you may browse and view your own audit history and audit details.



Administrators can browse and view audit history across all users. It is also possible to configure additional user roles for global audit history access. For more information, see the *Deltek Vision Project Connect Installation and Administration Guide*.

The portlet displays a list of the integration processes that have been run by your user account and allows drill-down to the audit record details.



Click the document icon in the **Action** column to display the audit detail for the record.

Project Server/Vision Plan Management

VISION PROJECT CONNECT / PROJECT INTEGRATION / TRANSFER COMPLETE

Your request has completed. The results are shown below, and are also available from the **Audit** interface.

Search:

Object	Id	Value	Type	Description
ProjectTeam	6eaa3794-62a6-4d14-94a4-fb8ac09b2c04		Info	ProjectTeam created successfully
ProjectTeam	0bf3694-170e-450c-afab-05c3e467a0ec		Info	ProjectTeam created successfully
Assignment	fbf570d4-9a06-4666-a811-29e5f10a5bb7		Info	Updated value for "Assignment(RES_UID)". New value: "Milestone w/duration w/assignment/Lisa May Evans" Old value: "Milestone w/duration w/assignment/Steve Anderson"
Assignment	3095924a-4d21-4122-b608-af2dd76c7604	SLM OPS Resource Requirements/Richard Michael Brady	Warning	Assignment is missing in Microsoft Project server -- no update to Project server.

[Restart Workflow](#)



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