

Deltek Vision[®] 6.1

Connect for Microsoft Outlook

Installation Guide

September 3, 2010



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This edition published September 2010.

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Overview

This guide provides the information that you need to install Deltek Vision Connect for Microsoft Outlook onto your Vision Web server and install, implement, and configure it on users' workstations.

This guide includes the following information:

- Software requirements necessary to use Connect for Microsoft Outlook.
- Security considerations.
- Information for users who are migrating from Deltek Vision Synchronization Server to Connect for Microsoft Outlook.
- Instructions to download and install Connect for Microsoft Outlook on your Vision Web server.
- Global configuration steps that a Vision system administrator must complete before installing Connect for Microsoft Outlook on users' workstations.
- Instructions to install and configure Connect for Microsoft Outlook on users' workstations.
- Instructions to uninstall and upgrade Connect for Microsoft Outlook on users' workstations.



The "Summary of Installation and Configuration Steps" section on page 21 provides a list of steps in the order that is required to implement Connect for Microsoft Outlook.

What Is Deltek Vision Connect for Microsoft Outlook?

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

You can manage Vision business appointments, email messages, and contacts, as well as Vision clients, activities, and opportunities, all from Outlook.

After you install and configure Connect for Microsoft Outlook, when you open Outlook, Connect for Microsoft Outlook functionality is included in Outlook.

When you use Connect for Microsoft Outlook, you have the full functionality of Outlook as well as the following Vision functionality:

- **Activity management** — You can create and manage Vision activities, calendar items, and tasks and link them to Vision client, contact, employee, opportunity, or project records.
- **Contact, client, and vendor management** — You can add or modify Vision contacts, clients, and vendors and link them to other Vision records.
- **Email message management** — You can create and manage email messages related to Vision and link them to Vision records.
- **Opportunity management** — You can manage Vision opportunities and related information.
- **Employee and Project reference** — You can associate Vision employees and projects to other Vision records.

Connect for Microsoft Outlook provides you with the following capabilities:

- **Bi-directional synchronization** — The incremental and bi-directional synchronization process ensures that information between Connect for Microsoft Outlook and the Vision application stays up-to-date and consistent. You can set up a schedule for synchronization to occur at a regular time interval. You also have the option to perform a synchronization manually at any time.
- **Disconnected support** — You can work with Vision data in Outlook even when you are disconnected from the Vision database.



Connect for Microsoft Outlook is a Vision application that you purchase separately from the core Vision software. Contact your Deltek representative for more information about purchasing Connect for Microsoft Outlook if you do not already own it.

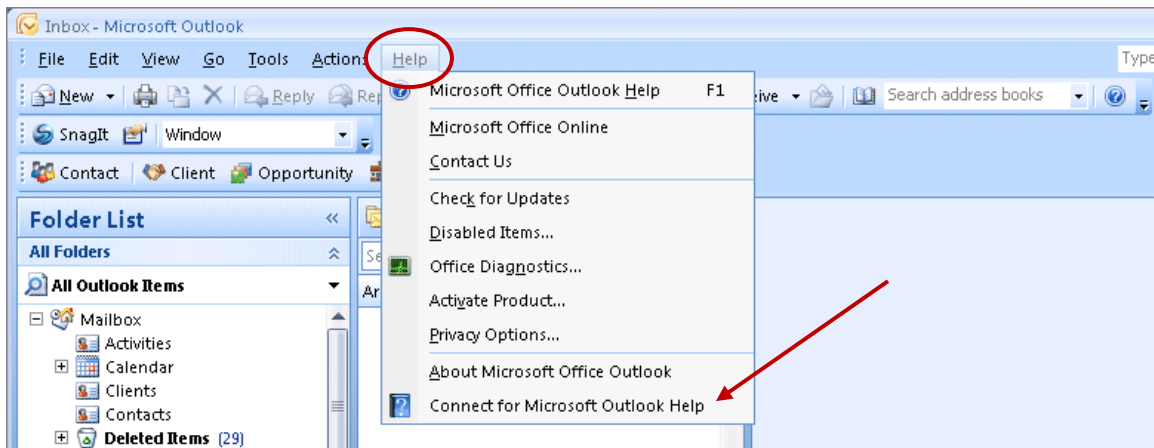
Connect for Microsoft Outlook Documentation

Terminology

In the Connect for Microsoft Outlook documentation, when we refer to Connect for Microsoft Outlook, we are referring to opening Outlook with the Vision Connect for Microsoft Outlook add-in software installed.

Online Help

After you install and configure Connect for Microsoft Outlook on a workstation, you can access the Connect for Microsoft Outlook online help by clicking **Help » Connect for Microsoft Outlook** on the Outlook menu bar in Connect for Microsoft Outlook.



The Connect for Microsoft Outlook online help:

- Provides information on how to use Connect for Microsoft Outlook and how to modify Connect for Microsoft Outlook configuration settings after you initially set them up.
- Is accessible when you have Connect for Microsoft Outlook either online or offline.

If You Need Assistance

If you need assistance installing, implementing, or using Connect for Microsoft Outlook, Deltek has 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 at <https://support.deltek.com>.

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 <https://support.delttek.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.

Software Requirements

You must have the following software installed before you install and use Vision Connect for Microsoft Outlook:

Supported operating systems installed on workstations:

- Microsoft Windows Professional XP SP3, 32-bit or 64-bit (x64)
- Microsoft Windows Vista SP2, 32-bit or 64-bit (x64)
- Microsoft Windows 7, 32-bit or 64-bit (x64)

Supported Microsoft Office versions installed on workstations:

- Microsoft Office 2003 SP3
- Microsoft Office 2007 SP2

Supported Microsoft Outlook versions installed on workstations:

- Microsoft Outlook 2003 SP3
- Microsoft Outlook 2007 SP2

Supported Microsoft Exchange Server versions installed on your email server:

- Microsoft Exchange Server 2003 SP2, Cached Exchange Mode only
- Microsoft Exchange Server 2007 SP2, Cached Exchange Mode only

Supported Microsoft Outlook Configurations

Outlook Profiles and Default Email Delivery Location

You can install Connect for Microsoft Outlook only once for each user's Windows profile.

You can install Connect for Microsoft Outlook to only one Outlook profile. Connect for Microsoft Outlook uses one specified Outlook profile as the default email delivery location to store Vision data in Outlook on a user's workstation.

Connect for Microsoft Outlook supports either of the following for the default email delivery location:

- **A Microsoft Exchange mailbox** — Connect for Microsoft Outlook data is stored on the Exchange server and in the corresponding offline storage table (.OST) file on a user's workstation.
- **SMTP or POP3 email service** — The default email delivery location is an Outlook personal storage table (.PST) file on a user's workstation.



IMAP storage is not supported. You cannot install Connect for Microsoft Outlook in the IMAP storage in Outlook.



You can install Connect for Microsoft Outlook only once per mailbox. You cannot install it to the same user mailbox on multiple workstations or profiles. For example, you cannot install Connect for Microsoft Outlook on both your laptop and desktop machines. If you do, you receive a data structure collision error when you install Connect for Microsoft Outlook on the other workstations.

Cached Mode Only

For Microsoft Exchange Server 2003 or 2007 mailboxes, Connect for Microsoft Outlook must be installed on workstations running in cached mode. Cached mode utilizes local OST files that have a similar file structure to PST files to store the cached Microsoft Exchange mailbox data.

Unsupported Third-Party Outlook Add-Ins

Deltek does not support other third-party Outlook add-in software when you use Connect for Microsoft Outlook. Other add-ins may slow performance or cause application crashes.

Known Incompatible Third-Party Add-Ins

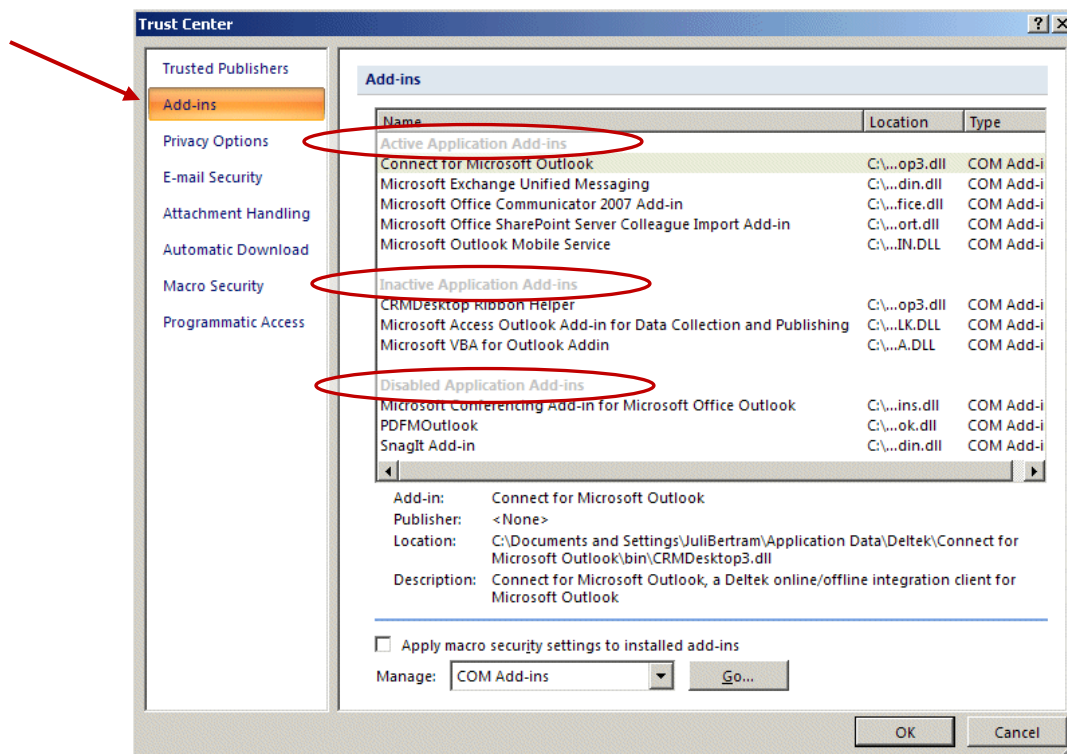
Known third-party Outlook add-ins that are incompatible with Connect for Microsoft Outlook are:

- **Skype** — Outlook remains in memory after closing.
- **iTunes** — Outlook crashes.
- **Microsoft Outlook Connector** — Outlook hangs when you switch the language.
- **Colligo** — Outlook crashes.
- **Adobe PDF** — You receive an "Outlook experienced a serious problem with the 'pdfmoutlook' add-in..." error message.

Check for Third-Party Add-Ins Installed in Outlook

To check for third-party Outlook add-ins before you install Connect for Microsoft Outlook, complete the following steps:

1. Open Outlook, and on the Outlook menu bar, click **Tools » Trust Center**.
2. On the Trust Center dialog box, click **Add-ins**. Active, inactive, and disabled application add-ins are identified on the Add-ins screen.



Connect for Microsoft Outlook Add-Ins

The two add-ins that are installed when you install Connect for Microsoft Outlook are:

- Connect for Microsoft Outlook
- CRMDesktop Ribbon Helper

Microsoft Office 2007 Add-Ins

Microsoft Office 2007 installs the following COM (Component Object Model) add-ins by default:

- Microsoft Access Outlook Add-in for Data Collection and Publishing
- Microsoft Exchange Unified Messaging
- Microsoft Office Groove Proxy for Outlook Add-in
- Microsoft Office SharePoint Server Colleague Import Add-in
- Microsoft Office Outlook Mobile Service
- Microsoft VBA for Outlook Add-in
- OneNote Notes about Outlook Items
- Windows Search E-mail Indexer

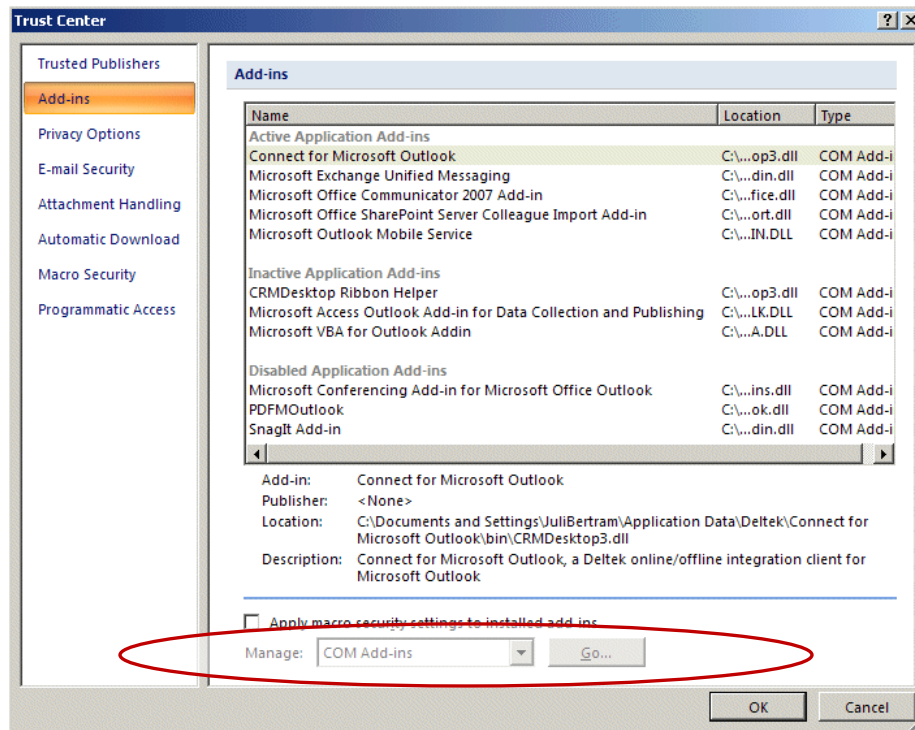
Any COM add-ins listed in the Trust Center other than the Microsoft Office 2007 add-ins and Connect for Microsoft Outlook add-ins are third-party software add-ins.

You must disable all of the add-ins from the above list of known incompatible third-party add-ins that display in the **Active Applications Add-ins** section of the Trust Center Add-ins screen. After that, if you still experience any crashes in Connect for Microsoft Outlook, disable the other third-party add-ins.

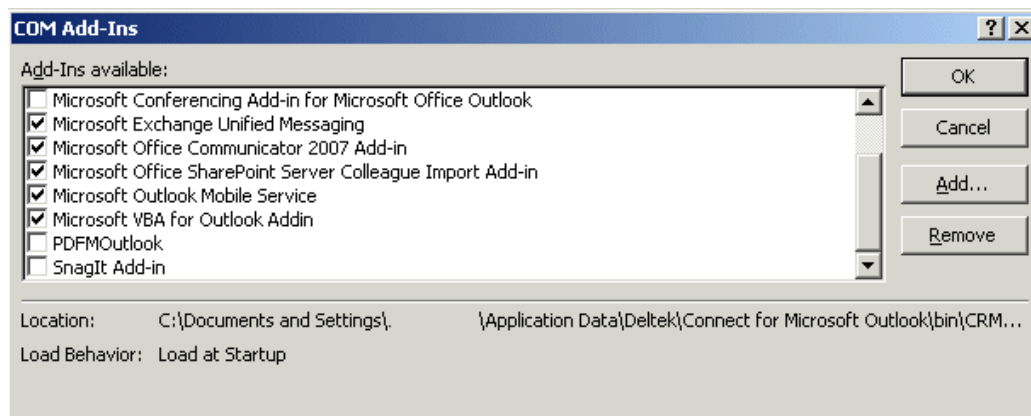
Disable Third-Party Add-Ins Installed in Outlook

To disable any third-party add-in listed in the **Active Applications Add-ins** section of the **Trust Center**, complete the following steps:

1. Open Outlook, and on the Outlook menu bar, click **Tools » Trust Center**.
2. On the Trust Center dialog box, click **Add-ins**.
3. On the Trust Center Add-ins screen, be sure that **COM Add-ins** is selected in the **Manage** field, and click **Go** beside this field.



4. On the COM Add-Ins dialog box, clear the check box for any non-Microsoft add-ins, and click **OK** to save your changes. The Trust Center closes automatically.



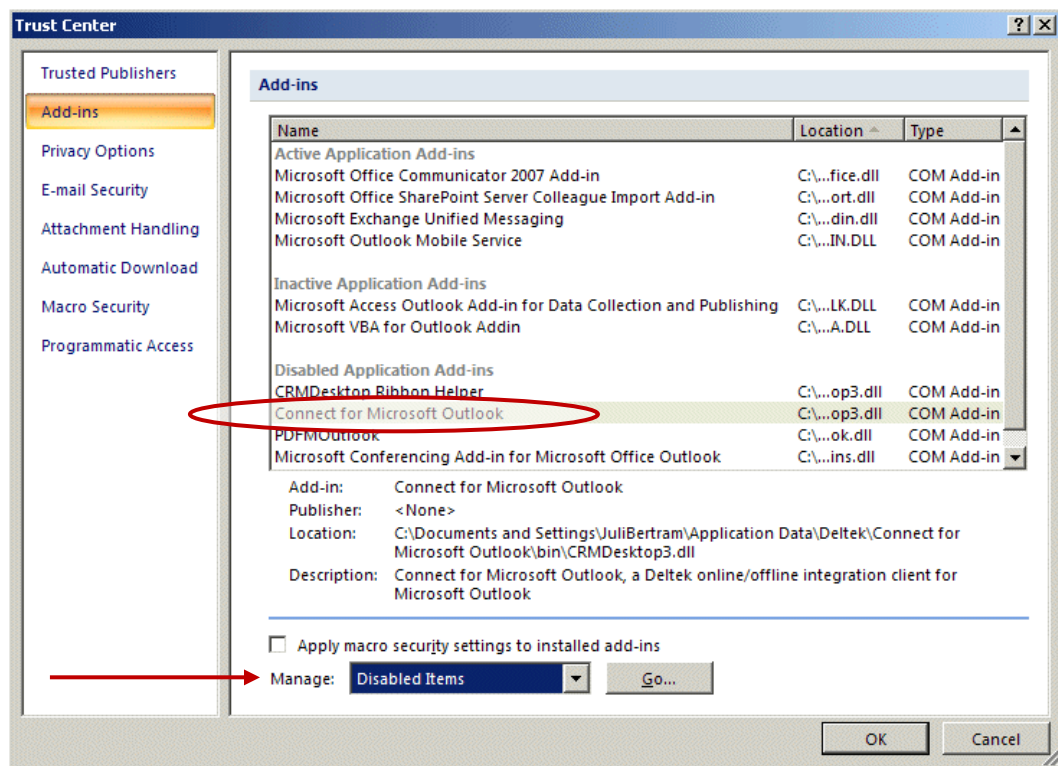
When you click **Tools » Trust Center » Add-ins** again, you should now see any add-ins that you disabled listed in the **Disabled Application Add-ins** section.

Re-enable Connect for Microsoft Outlook Add-Ins

If the Connect for Microsoft Outlook add-ins become disabled, which can happen if a third-party add-in causes Connect for Microsoft Outlook to crash, you must re-enable them.

To re-enable the Connect for Microsoft Outlook add-ins, complete the following steps:

1. Open Outlook.
2. On the Outlook menu bar, click **Tools » Trust Center**.
3. On the Trust Center dialog box, click **Add-ins**.
4. On the Add-in screen, click **Connect for Microsoft Outlook** in the **Disabled Applications Add-in** section of the box that lists all the add-ins.
5. From the drop-down list in the **Manage** field at the bottom of the screen, select **Disabled Add-ins** and click **Go**.



6. On the Disabled Items dialog box, click the **Enable** button.
7. On the Add-ins screen, click **OK**.
8. Repeat steps 4–7 for the **CRMDesktop Ribbon Helper** add-in.
9. Close and reopen Outlook.



If the Connect for Microsoft Outlook add-in does not display at all in any of the add-in lists or Add-in screens, use the following steps to add it:

1. On the Trust Center Add-ins screen, select **Com Add-ins** in the **Manage** field and click **Go**.
2. On the Com Add-ins dialog box, click the **Add** button, and then navigate to **C:\Documents and Settings\<your user name>\Application Data\Deltek\Connect for Microsoft Outlook\bin**.
3. Select the **CRMDesktop3.dll** file and click **OK**.
4. Close and reopen Outlook.

Connect for Microsoft Outlook should now display on the Trust Center Add-in screen as an active add-in.

Supported Deltek Configurations

Vision Version

You can use Connect for Microsoft Outlook with Vision 6.1 SP3. You cannot use it with earlier versions of Vision.

Multiple Users Who Use the Same Workstation

The Connect for Microsoft Outlook application can be installed on one workstation for multiple Vision users who use the same workstation.

The Connect for Microsoft Outlook application is installed within each user's profile and is visible only to the user who performed the installation.

Each user on the workstation must have his or her own Windows profile and have Microsoft Outlook configured before the installation is performed. Installation to only one mail profile is supported.



Warning: 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.

Languages

Currently, only the ENU (US English) language is supported.

Unsupported 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.

Customization

Deltek Global Services can perform the following types of customization for Connect for Microsoft Outlook:

- Add presets for synchronization filters. Presets allow you to select a pre-defined filter configuration on the Synchronization Control Panel dialog box in Connect for Microsoft Outlook. Thus, you avoid the complex task of building the correct filters from scratch.
- Limit synchronization frequency for users.
- Apply hidden synchronization filters. You can create a filter in the XML file that determines the maximum set of records that users can synchronize. Any filter set by individual users

would be a subset of the hidden filter. For example, in the XML file you could set it up so that users can synchronize opportunities only in their own organization. If a user sets up a filter based on opportunity probability without including organizations, then the user could synchronize only the opportunities in his or her own organization that match the probability filter.

If you have questions about the presets and other customization, contact Deltek Global Services.

Microsoft Office Desktop Integration (MODI)

The Outlook portion of MODI is disabled when you install Connect for Microsoft Outlook, but you can use other parts of MODI.

Licensing

Connect for Microsoft Outlook is a Vision application that you purchase separately from the core Vision software. Contact your Deltek representative for more information about purchasing Connect for Microsoft Outlook.

Non-Supported Environments

Mobile Devices

DelteK does not support the use of mobile devices with Connect for Microsoft Outlook.

If you use a mobile device and you synchronize it with Connect for Microsoft Outlook, Vision contacts, calendar items, and tasks synchronize to your mobile device. However, only the native (standard) Outlook data fields for those Vision records are synchronized. The Vision-only data fields from Connect for Microsoft Outlook are **not** available on mobile devices.

The following fields do not synchronize from a mobile device to Connect for Microsoft Outlook:

- Business Address
- Home Address
- The Contact's Client/Vendor Name (Outlook Company)
- Job Title

The following native Outlook contact fields synchronize both to and from mobile devices:

| Native Outlook Field that Synchronizes Both To and From Mobile Devices | What Happens to this Field in Vision when You Synchronize Connect for Microsoft Outlook and Vision |
|---|--|
| Phone fields | <p>Of the many phone fields in which you can enter data, only five phones are brought into Vision: Business, Business Fax, Mobile, Home, and Pager.</p> <p>If you remove a contact from your synchronization filter and thus it is automatically removed from Connect for Microsoft Outlook, then you lose the data in any other phone field in Vision.</p> |
| Full Name All subcomponents of the name synchronize both ways. | <p>The Title and Suffix fields (part of the full name) are not brought into Vision.</p> <p>The native Outlook suffix values (Jr., Sr., III, and so on) are different than the Vision values (AIA, CPE, CPA, and so on).</p> |
| Job Title In Connect for Microsoft Outlook, the native Outlook field, Job Title , has been replaced with Title , a Vision custom control, in order to provide a drop-down list with job titles. The Job Title field is hidden, so the mobile device synchronizes with that hidden field. | |

| Native Outlook Field that Synchronizes Both To and From Mobile Devices | What Happens to this Field in Vision when You Synchronize Connect for Microsoft Outlook and Vision |
|---|---|
| Web page address and IM address fields If the record is removed from Connect for Microsoft Outlook because it no longer matches your synchronization filter, the data in these fields is removed from your mobile device. | These fields exist in native Outlook, but not in Vision, so they are not brought into Vision. |
| Email addresses | Only E-mail is brought into Vision. E-mail 2 and E-mail 3 are not brought into Vision. |

On a mobile device, you can edit a read-only native Outlook record. When you synchronize your mobile device with Connect for Microsoft Outlook, the record that you edited will be updated in Connect for Microsoft Outlook. But, when you synchronize Connect for Microsoft Outlook with Vision, the update fails and a synchronization issue occurs.

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.

Outlook Web Access

Deltek does not support the use of Outlook Web Access (OWA) with Connect for Microsoft Outlook. OWA is part of Microsoft Exchange Server 2007.

When you use Connect for Microsoft Outlook, OWA displays the hidden MAPI attributes of Contact folders and other Connect for Microsoft Outlook objects. This is a software defect; these do not displayed in the full Microsoft Outlook client. In OWA, users could accidentally delete or modify the custom configurations made by the Connect for Microsoft Outlook installation in the mailbox.

This defect potentially affects all Connect for Microsoft Outlook users who use OWA in Exchange Server 2007. This problem does not occur in OWA for Microsoft Exchange Server 2003 or Exchange Server 2010. (Deltek will support Exchange Server 2010 in a future Connect for Microsoft Outlook release.)

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.

Outlook Contact Folders Without the "Contact" Name

Contacts stored in Outlook contact folders that have a name other than "Contacts" do not synchronize in Connect for Microsoft Outlook.

Lotus Notes

Deltek does not support the use of Lotus Notes with Connect for Microsoft Outlook.

Microsoft Outlook Delegates

DelteK does not support the use of the Outlook Delegates feature with Connect for Microsoft Outlook.

Delegates (other Outlook users) send Outlook items, such as meeting requests, on your behalf. For an explanation of how the Outlook Delegates feature works with Connect for Microsoft Outlook, see the Outlook Delegate Access help topic in the Connect for Microsoft Outlook help.

Vision Synchronization Server Migrations

The information in this section applies only if you currently use Vision Synchronization Server and are migrating to Connect for Microsoft Outlook.

When you activate the Connect for Microsoft Outlook module in Vision **Configuration » Module Activation**, the Vision Synchronization Server module is automatically disabled, preventing future IntelliSynch Mobile Suite (IMS) synchronizations. You do not need to uninstall the Synchronization Server software.

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



You must complete the additional steps to prevent duplicate contacts **before** you activate the Connect for Microsoft Outlook module in Vision.

Required Steps to Prevent Duplicate Contact Records

A system administrator must complete the following steps **before** activating the Connect for Microsoft Outlook module in Vision:

1. Run a script on the Vision server 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 Vision contacts in each user's Outlook Contact folder. This category will be used to identify the contacts for each user that are synchronized with Vision through the Synchronization Server.



If you configured Vision Synchronization Server for one-way synchronization **only**—from Microsoft Outlook into Vision—or 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 in Microsoft Outlook to the contacts that have already been synchronized with Vision. You need to do this because in this scenario, Vision is unable to send the category to Microsoft Outlook.

The "Summary of Installation and Configuration Steps" section on page 21 identifies the order of the Connect for Microsoft Outlook installation and configuration steps, including the additional steps for Synchronization Server migrations.

The specific instructions for performing the additional steps to prevent duplicate contacts are in the "Synchronization Server and Other Migrations: Prevent Duplicate Contacts" section on page 31 of this guide.

Synchronize Connect for Microsoft Outlook for the First Time

This section describes what to expect when you synchronize Connect for Microsoft Outlook for the first time if you are migrating from Synchronization Server.

Contacts

During the first Connect for Microsoft Outlook synchronization, contacts that match your synchronization filter criteria become shared contacts in Connect for Microsoft Outlook.

Shared with Vision

When you synchronize Connect for Microsoft Outlook for the first time, contacts are deleted from Outlook and recreated in Connect for Microsoft Outlook as shared-with-Vision contacts if they match your synchronization filters.

Shared contacts:

- Contain Vision-specific data fields not found in Outlook (for example the **Client/Vendor** field on the Connect for Microsoft Outlook Contact form).
- Synchronize with Vision.
- Display in both Connect for Microsoft Outlook and Vision.



Data that Does Not Synchronize with Connect for Microsoft Outlook

Any data in a contact field that was not synchronized with Vision through the Synchronization Server is deleted.

For example, if a phone number is entered in the **Car Phone** field for a contact and this field was not synchronized with Vision using Synchronization Server, then the phone number is permanently deleted from the contact record.

Unshared with Vision

Contacts that were not synchronized previously with Vision through Synchronization Server remain in Connect for Microsoft Outlook as unshared contacts.

Unshared contacts:

- Contain Vision-specific data fields that are not available in Outlook (for example the **Client/Vendor** field on the Connect for Microsoft Outlook Contact form).
- Are not synchronized with Vision. They display in Connect for Microsoft Outlook only.
- Can be shared with Vision on a contact-by-contact basis at any time by clicking the **Shared with Deltek** bar for the contact on the Contact form in Connect for Microsoft Outlook.

Tasks and Calendar Items

During the first Connect for Microsoft Outlook synchronization, tasks and calendar items are converted to be shared or unshared with Vision.

Shared with Vision

A shared task or calendar item can be associated with a Vision record, and it is synchronized with Vision.

Task and calendar items are converted to shared-with-Vision records in Connect for Microsoft Outlook if the task or calendar items meet the user's synchronization filter requirements during the first Connect for Microsoft Outlook synchronization.

Unshared with Vision

Tasks and calendar items are converted to unshared-with-Vision records if no corresponding activity for them is brought over to Connect for Microsoft Outlook when you synchronize for the first time.

Example:


By default, the filter for the initial Connect for Microsoft Outlook synchronization includes all activities from today's date into the future. There were two meetings synchronized previously with Synchronization Server—one occurring today and one that occurred yesterday. Today's meeting will be shared, but yesterday's meeting will be unshared because there is no corresponding activity for it in Connect for Microsoft Outlook.



Summary of Installation and Configuration Steps



After you install the required software identified in the "System Requirements" section on page 5 of this guide, complete the following steps in the order listed to install and configure Vision Connect for Microsoft Outlook. The specific instructions for each step are included in the remaining sections of this guide. These sections include steps to perform on your Vision Web server and steps to perform on end users' workstations.



You may want to print this "Summary of Installation and Configuration Steps" section to use as a handy check list as you work through the remaining sections of the guide.

| Step | Description | Complete By | Guide Section and Page |
|---|---|----------------------|--|
| Steps to Perform on the Vision Web Server: | | | |
| 1 | Download and install Connect for Microsoft Outlook onto your Vision Web server. If you have multiple Web servers, complete this step for each server. | System administrator | "Download and Install Connect for Microsoft Outlook onto Your Vision Web Server" on page 24. |
| 2 | For Synchronization Server and other Migrations only: Perform steps to prevent duplicate contact records. | System administrator | "Synchronization Server and Other Migrations: Prevent Duplicate Contacts" on page 31. |
| |  You must complete the steps to prevent duplicate contact records before you activate the Connect for Microsoft Outlook module in Vision. | | |
| 3 | Activate the Connect for Microsoft Outlook module. | System administrator | "Activate the Connect for Microsoft Outlook Module" on page 33. |
| 4 | Select Vision fields (natural keys) that determine duplicate records during synchronization. | System administrator | "Select Vision Fields that Determine Duplicate Records (Duplicate Check Formulas)" on page 34. |
| 5 | Specify where you want Vision activities to display in Connect for Microsoft Outlook. | System administrator | "Specify Where You Want Vision Activities to Display" on page 39. |
| 6 | Provide Connect for Microsoft Outlook users with security access to download Connect for Microsoft Outlook and access appropriate applications and records. | System administrator | "Provide Security Access to Connect for Microsoft Outlook Users" on page 42. |

| Step | Description | Complete By | Guide Section and Page |
|---|---|---|--|
| 7 | Vision configuration settings are updated to Connect for Microsoft Outlook users' workstations when an automatic or manual synchronization is performed on a workstation. | This occurs automatically during the synchronization process. | "Configuration Settings Passed from Vision to Connect for Microsoft Outlook" on page 46. |
| Steps to Perform on End Users' Workstations: | | | |
| 8 | Back up your Outlook data. | Connect for Microsoft Outlook user | "Back Up Your Outlook Data" on page 47. |
| 9 | <p>Download and install Connect for Microsoft Outlook on a single workstation with Vision Utilities.</p> <p>or</p> <p>Download and install Connect for Microsoft Outlook for multiple users via Microsoft Systems Management Server (SMS) or Group Policy with optional pre-configuration parameters.</p> <p>or</p> <p>Download and Install Connect for Microsoft Outlook on multiple workstations using Microsoft SMS or Group Policy. (Sample deployment Steps are provided.)</p> | <p>Connect for Microsoft Outlook user</p> <p>System administrator</p> <p>System administrator</p> | <p>"Download and Install Connect for Microsoft Outlook on a Workstation Using Vision Utilities" on page 48.</p> <p>"Use Command Line Parameters To Deploy Connect for Microsoft Outlook on Multiple Workstations" on page 53.</p> <p>"Download and Install Connect for Microsoft Outlook on Multiple Workstations Using Microsoft SMS or Group Policy" on page 56.</p> |
| |  <p>Warning: 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.</p> <p>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.</p> | | |
| 10 | Perform steps to avoid duplicate contact records. | Connect for Microsoft Outlook user | "Avoid Duplicate Contact Records" on page 57. |
| |  <p>DelteK recommends that end users review this section before deploying Connect for Microsoft Outlook for the first time on their workstation.</p> | | |

| Step | Description | Complete By | Guide Section and Page |
|------|---|---|---|
| 11 | Deploy the Connect for Microsoft Outlook software for the first time on a workstation and use the Connect for Microsoft Outlook Assistant to configure it. | Connect for Microsoft Outlook user | "Deploy and Configure Microsoft Outlook for the First Time" on page 58. |
| |  <p>Deltek recommends that you stagger the initial Connect for Microsoft Outlook implementation so that a significant number of users are not performing the initial synchronization all at the same time. This will help prevent overloading your system (Vision and email) with potentially large numbers of records and data being synchronized during the first synchronization. Users perform the initial synchronization when they complete the Connect for Microsoft Outlook Assistant, as described in the "Deploy and Configure Connect for Microsoft Outlook for the First Time" section of the guide.</p> <p>For more information about synchronization schedules and automatic synchronization after the initial synchronization, see "Appendix C: Synchronization Schedules" on page 118.</p> | | |
| 12 | Check for and resolve duplicate contact records. | Connect for Microsoft Outlook user | "Check and Resolve Duplicate Contact Records" on page 73. |
| 13 | Upgrade Connect for Microsoft Outlook when a new version (service packs, hot fixes, and so on) is released. | System administrator and Connect for Microsoft Outlook user | "Upgrade Connect for Microsoft Outlook" on page 89. |
| |  <p>Connect for Microsoft Outlook does not support in-place upgrades. To upgrade the Connect for Microsoft Outlook application on end-users' machines, you must first uninstall it, and then install the upgrade. You must follow the steps in the order listed in the "Upgrade Connect for Microsoft Outlook" section on page 89 of this guide.</p> | | |



The "Access and Use Connect for Microsoft Outlook" section on page 76 of this guide will help you get started using Connect for Microsoft Outlook. It tells you where to find the Vision Connect for Microsoft functionality within Outlook.

For more specific instructions on how to use the Connect for Microsoft Outlook software, see the online help in Connect for Microsoft Outlook. To access the help, click **Help » Connect for Microsoft Outlook** on the Outlook menu bar in Connect for Microsoft Outlook.

The online help also provides instructions on how to modify your Connect for Microsoft Outlook configuration settings. The help is accessible when Connect for Microsoft Outlook is either online or offline.

Download and Install Connect for Microsoft Outlook onto Your Vision Web Server

The instructions in this section apply for new Connect for Microsoft Outlook users as well as Connect for Microsoft Outlook Beta users.

Use these instructions to download and install the Deltek Vision 6.1 Connect for Microsoft Outlook onto your Vision Web server.

Because Internet Information Services (IIS) will be stopped and all users will be disconnected when you install Connect for Microsoft Outlook on your Vision Web server, Deltek recommends that you install this after your usual work hours when users are not logged on to Vision. If you do the installation during normal work hours, let users know about the system down time.

New Connect for Microsoft Outlook Users

You must have Vision 6.1 SP3 installed before you download and install the Vision 6.1 Connect for Microsoft Outlook onto your Vision Web server. You can download Vision 6.1 SP3 from the Product Download tab at the [Deltek Customer Care Connect site](#).

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.

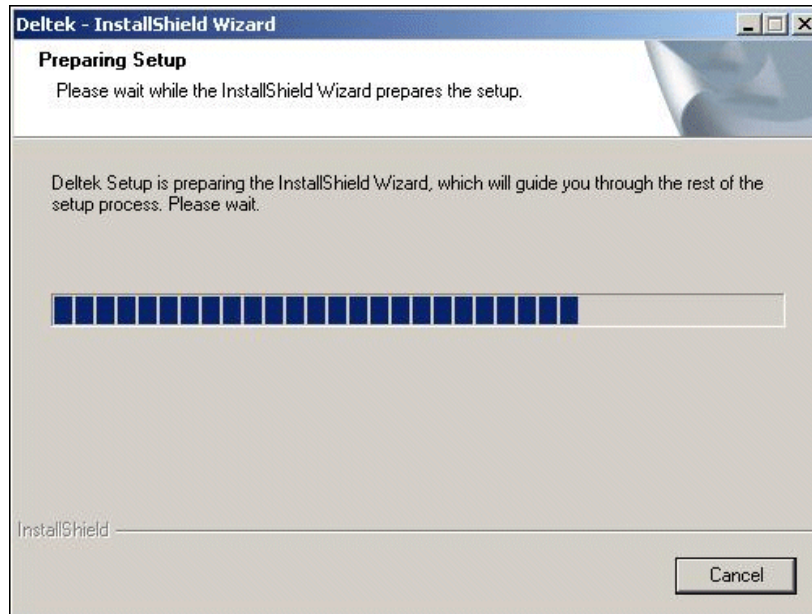
See the "Upgrade Connect for Microsoft Outlook" section on page 89 of this guide for additional information.

Steps to Download and Install

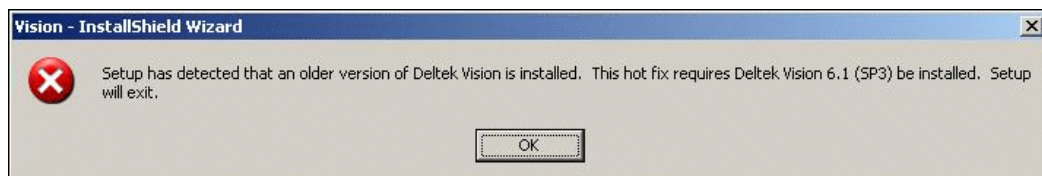
To download and install the **Connect for Microsoft Outlook 6.1** software (installation package) on your Vision Web server, complete the following steps:

1. From the Deltek Distribution site, download the **DeltekConnectForMicrosoftOutlookGA.exe** file (a self-extracting utility).
2. Double-click the **DeltekConnectForMicrosoftOutlookGA.exe** file to run it.

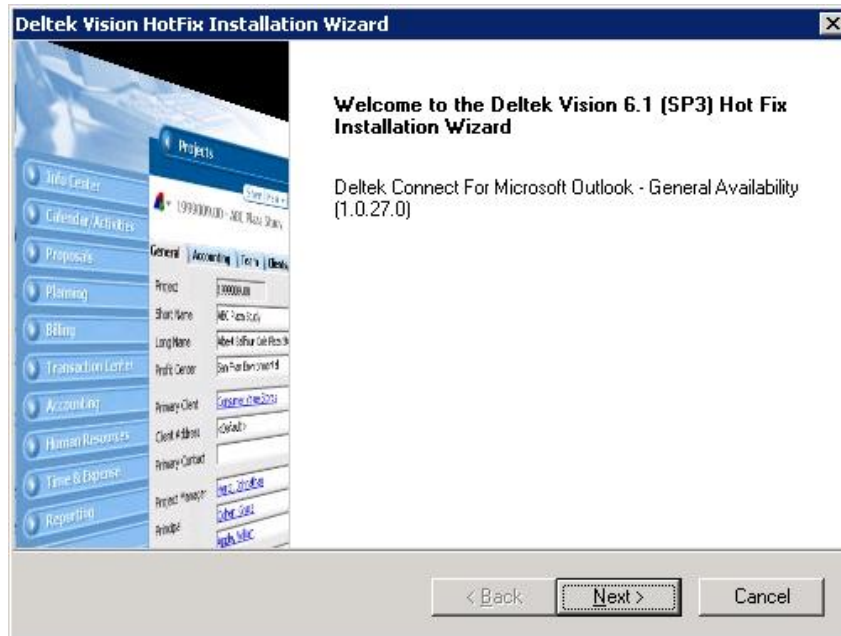
A setup wizard that extracts the installation package is launched.



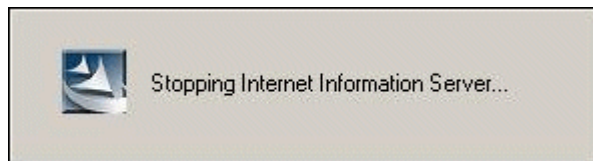
The setup process verifies that you have at least Vision 6.1 SP3 installed before it continues. If you do not, the following message displays:



3. On the Welcome page, click **Next** to continue.



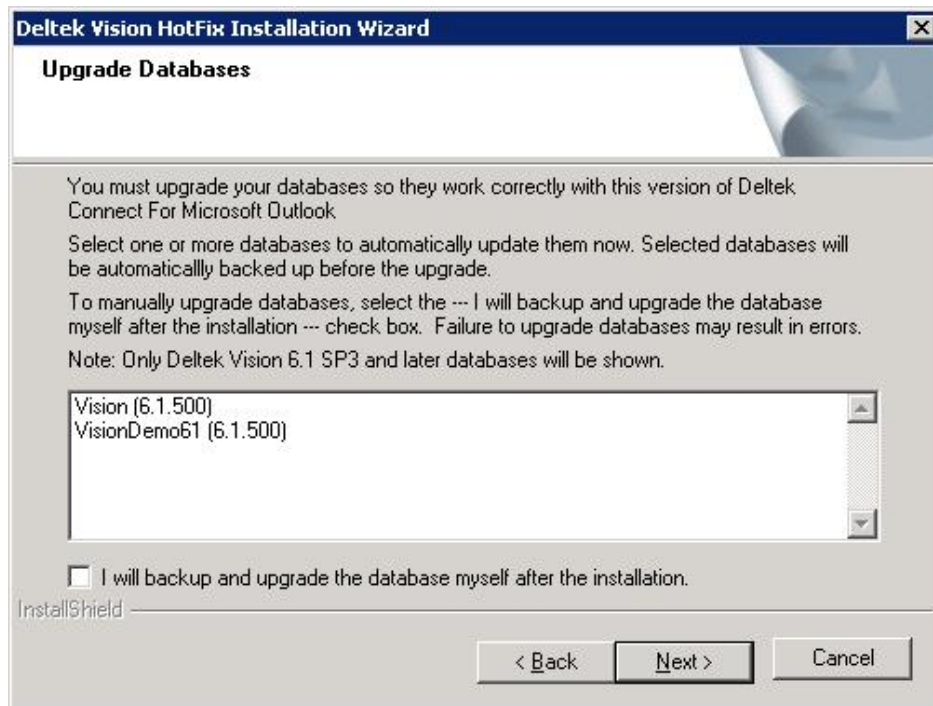
Internet Information Services (IIS) stops and all users are disconnected.



4. On the Database Server (MSSQL) Setup Connection Information page, enter your database server and authentication information to connect to the Vision database server, and click **Next**.



5. On the Database to Upgrade page, select the database to upgrade, and click **Next**.



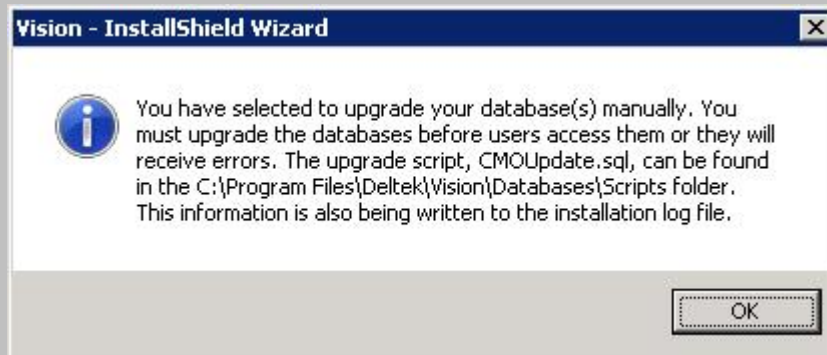
When you click **Next**, the following things happen:

- Your database is backed up automatically to the default backup location on your server.
- Your database is upgraded. A script applies changes to prepare for the installation. It cleans the Vision database for inconsistent data (for example, it removes trailing spaces from key fields in the database that are used by Connect for Microsoft Outlook). It adds two stored procedures that can be used by Synchronization Server users to migrate their Synchronization data to Connect for Microsoft Outlook.
- The Connect for Microsoft Outlook 6.1 software is installed on your Vision Web server.



The upgrade wizard automatically backs up your database before applying any database update scripts. If you prefer not to have the installation wizard back up your database to your server, you can select the **I will backup and upgrade the database myself after the installation** check box on this page.

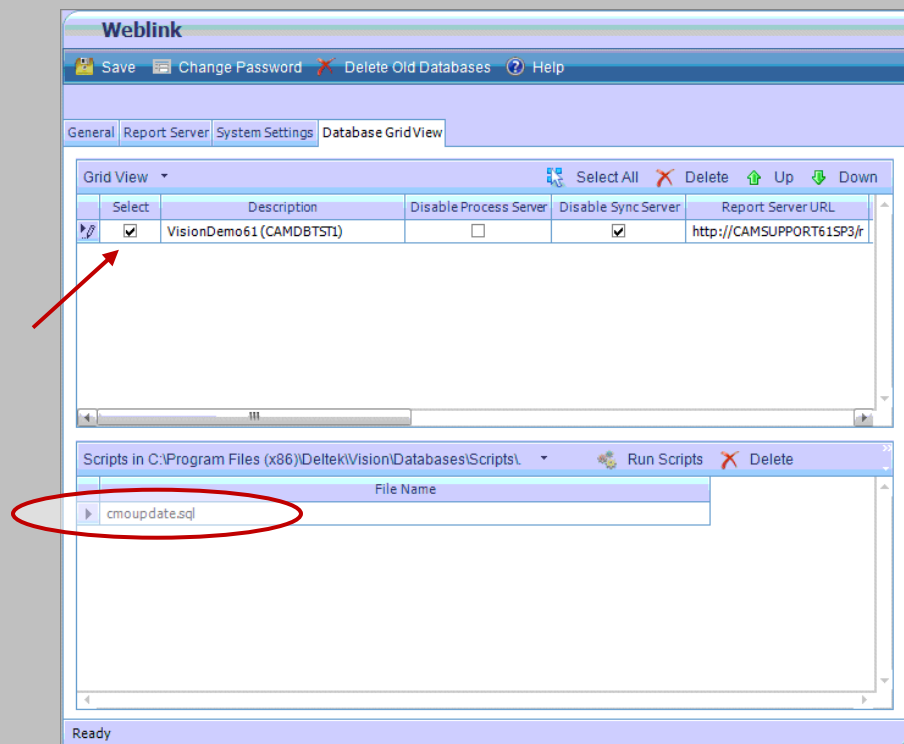
You receive the following dialog box when you select the **I will backup and upgrade the database myself after the installation** check box and click **Next**:



When the installation wizard continues, the Connect for Microsoft Outlook 6.1 software is installed, but your database is not backed up or upgraded.

After the software is installed, complete the following:

1. Make a manual backup of your database.
2. Launch Weblink, and enter the Weblink password.
3. Click the Database Grid View tab.
4. Select the check box in the **Select** column for the database you are applying the script against.



5. In the **Scripts in ...** grid at the bottom of the tab, enter **CMOUpdate.sql**, and then click the **Run Scripts** icon to execute the script.

Weblink will detect whether or not your database is Unicode. It will automatically execute the CMOUpdate.sql script as Unicode against a Unicode database.

If you do not apply the script:

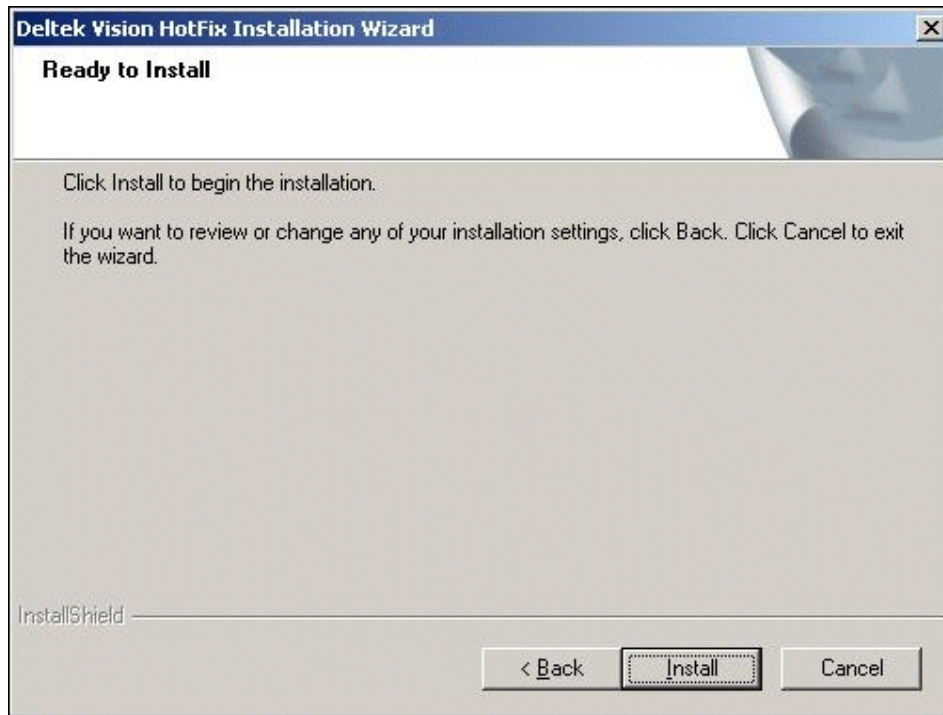
- Connect for Microsoft Outlook users may encounter various "Internal Error" messages during synchronization.
- If you migrate from Deltek Vision Synchronization Server to Connect for Microsoft Outlook, the stored procedures that are required for users to update their Outlook contacts to prevent duplication will be missing.

If you do not select a database and do not select the **I will backup and upgrade the database myself after the installation** check box on the Update Databases page, when you click **Next**, you receive the following dialog box:

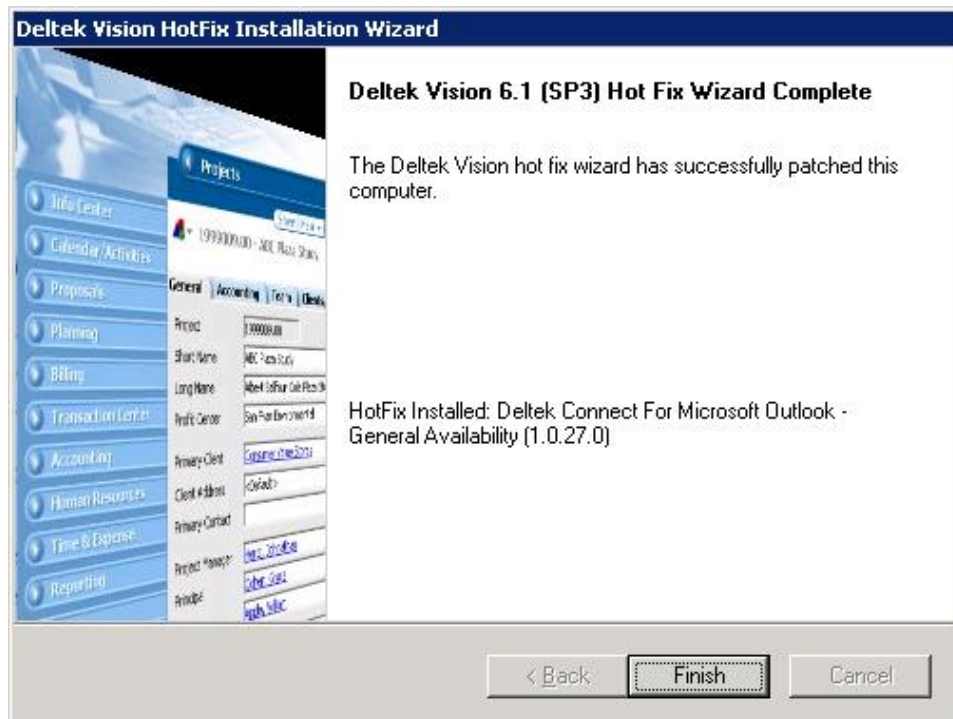


Click **OK** on the dialog box, and on the Database to Upgrade page select a database or select the **I will backup and upgrade the database myself after the installation** check box. Then, click **Next**.

6. On the Ready to Install page, click **Install** to update your database, and install the software on your Vision Web server.



7. On the Deltek Vision 6.1 (SP3) Hot Fix Wizard Complete page, click **Finish**.



Synchronization Server and Other Migrations: Prevent Duplicate Contacts

Follow the instructions in this section if either of the following apply:

- You currently use Vision Synchronization Server with two-way or one-way data synchronization, and you are migrating to Connect for Microsoft Outlook.
- You do not use Synchronization Server but you manually imported Microsoft Outlook contact records into Vision during a data migration from another software or via another third-party product.

If these do not apply, you can skip the instructions in this section.



- You must complete these steps to prevent duplicate contacts from being created.
- A system administrator must complete these steps **before** activating the Connect for Microsoft Outlook module in Vision.
- Back up your Microsoft Outlook data before you complete the steps in this section. Backup instructions are on page 47 of this guide. If you have entered data in Microsoft Outlook contact fields that do not exist in Vision (such as the **Birthday** and **Spouse/Partner** field), when you perform the initial Connect for Microsoft Outlook synchronization, the content in these fields in Connect for Microsoft Outlook is removed. For this reason, we urge you to back up your Outlook data so you can view any missing data if needed.



A summary of Synchronization Server migrations is provided on page 18 of this guide.

To prevent duplicate contacts from being created, complete the following steps:

1. Run a script on the Vision server to add a DLTKSYNC category to contacts in Vision.

To run the script, complete the following steps:

- a. Log in to SQL Server Management Studio, and open a query window on the Vision database.
 - b. Enter the script name **getAllSyncContactsForAllEmployees**.
 - c. Press the F5 key on your keyboard to execute the script.
 - d. The DLTKSYNC contact category is assigned to all contacts in the Vision database.
2. Complete one of the following options that matches your situation:
 - If you currently use Synchronization Server with two-way data synchronization or one-way synchronization **from Vision to Outlook**:
Run a final Synchronization Server synchronization so that the DLTKSYNC category is added to Vision contacts in each user's Outlook software. The category will be used to identify the contacts for each user that are synchronized with Vision through Synchronization Server.

- If you currently use Synchronization Server with one-way synchronization **from Outlook to Vision** or you manually imported Outlook contact records into Vision during a data migration from another software or via another third-party product:

Vision is unable to send the DLTKSYNC category automatically to Outlook. To avoid the duplication of contacts that were previously synchronized into Vision, you must manually apply the DLTKSYNC category to the contact records in Outlook that you know were previously synchronized to Vision.

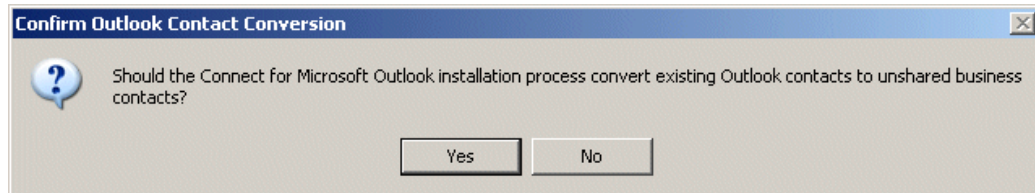
Most users who perform one-way synchronization into Vision use a category filter to allow only certain records to be synchronized into Vision. If that is the case, you can group the contacts in Outlook by those categories and add an additional category named DLTKSYNC to the category list.

The category will be used to identify the contacts for each user that are synchronized with Vision through Synchronization Server.



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.

For either of the situations in step 2, when you follow step 16 in the "Deploy and Configure Connect for Microsoft Outlook for the First Time" section on page 58, you **must** select **Yes** in the following Confirm Outlook Contact Conversion dialog box:



Activate Connect for Microsoft Outlook

After you download the Connect for Microsoft Outlook software to your Vision Web server, you activate the Connect for Microsoft Outlook module.



- When you activate Connect for Microsoft Outlook, if you have Vision Synchronization Server installed, it is automatically inactivated.
- For Synchronization Server migrations, you must perform the steps in the Synchronization Server and Other Migrations: Prevent Duplicate Contacts section on page 31 before activating the Connect for Microsoft Outlook module.

To activate the Connect for Microsoft Outlook module, a system administrator completes the following steps:

- On the Vision Applications menu, click **Configuration » Module Activation**.
- On the Module Activation form, enter the password that Deltek assigned to your firm for the Connect for Microsoft Outlook module.
- Click **OK** to save.

Module Activation

Please enter the client number assigned to your firm by Deltek. In addition, when you purchased your software, you should have received passwords for each licensed module. Please enter these passwords below to gain access to the system.

Client Number:

| Module | Password | License |
|-------------------------------|----------|------------------|
| Project Control | ***** | Enterprise: 3000 |
| Accounting | ***** | Enterprise: 3000 |
| Billing | ***** | Enterprise: 3000 |
| Time | ***** | Enterprise: 3000 |
| Expense | ***** | Enterprise: 3000 |
| Payroll | ***** | Enterprise: 3000 |
| Resource Planning | ***** | Enterprise: 3000 |
| CRM | ***** | Enterprise: 3000 |
| Custom Proposals | ***** | Enterprise: 3000 |
| SF330/SF255/SF254 Proposals | ***** | Enterprise: 3000 |
| Payroll Interface | ***** | Enterprise: 3000 |
| Abra HR Interface | ***** | Enterprise: 3000 |
| Synchronization Server | | Invalid |
| Multicurrency | ***** | Enterprise: 3000 |
| Purchasing | ***** | Enterprise: 3000 |
| Document Management | ***** | Enterprise: 3000 |
| Mobile Application Suite | ***** | Enterprise: 3000 |
| Performance Management | ***** | Enterprise: 3000 |
| Multilingual | ***** | Languages: 5 |
| Connect for Microsoft Outlook | ***** | Enterprise: 3000 |

OK Cancel Help

Select Vision Fields that Determine Duplicate Records (Duplicate Check Formulas)

To prevent duplicate records from being created, you must select Vision database fields (natural keys) that will be compared when information between Connect for Microsoft Outlook and Vision is synchronized.

These database fields identify unique individual Vision client, contact, opportunity, and vendor records so that the specific records are updated correctly as intended. This prevents data for two different records from being merged together unintentionally when each record has the same entry in one or more of its fields.

For example, for Vision contacts, if you choose the first name field and the last name field as the fields to determine duplicate contacts, any contacts with the same first name and last name would be considered as duplicate contacts (the same contact).

When Connect for Microsoft Outlook and Vision are synchronized, if duplicate records are found, you have the following options:

- Select one record to keep; the other record is deleted.
- Merge the two records into one record.



You select the fields for determining duplicate clients, contacts, opportunity, and vendors. However, the fields for determining duplicate activities are preset with the following fields:

- **ConversationID** — This is an internal Vision field (not visible to users) that tracks the Outlook internal ID for the record (or thread, if it is an email). It prevents duplicate activities from being created if multiple people choose to share the same event or email.
- **Subject AND Start Date/Time AND Owner**

These fields are checked against all other activities in Connect for Microsoft Outlook when you save an activity. If another activity has the same content in these fields as the new activity that you created, you receive a message telling you that the activity already exists. You cannot save duplicate activities.

When you synchronize an activity, these fields are checked against all Vision records for a duplicate.

To select the Vision fields that determine duplicate records, a Vision system administrator completes the following steps:

1. On the Vision Applications menu, click **Configuration » General » Connect for Microsoft Outlook**.

On the Connect for Microsoft Outlook Configuration form, you see a separate grid for Clients, Contacts, Opportunities, and Vendors. Complete the remaining steps for each grid/record type. In these instructions, the Contact record is used as an example.

The screenshot shows the 'Connect for Microsoft Outlook Configuration' window. It contains four grids for different record types: Clients, Contacts, Opportunities, and Vendors. Each grid has a toolbar with 'Insert', 'Edit', and 'Delete' buttons. The 'Contacts' grid is highlighted with a red box, and a red arrow points from it to the next screenshot.

| Clients | |
|--------------------------|------|
| Duplicate Check Formulas | Cond |
| [Name] | OR |

| Contacts | |
|----------------------------|------|
| Duplicate Check Formulas | Cond |
| [First Name] + [Last Name] | OR |
| [Contacts.Email] | OR |

| Opportunities | |
|--------------------------|------|
| Duplicate Check Formulas | Cond |
| [Name] | OR |

| Vendors | |
|--------------------------|------|
| Duplicate Check Formulas | Cond |
| [Name] | OR |

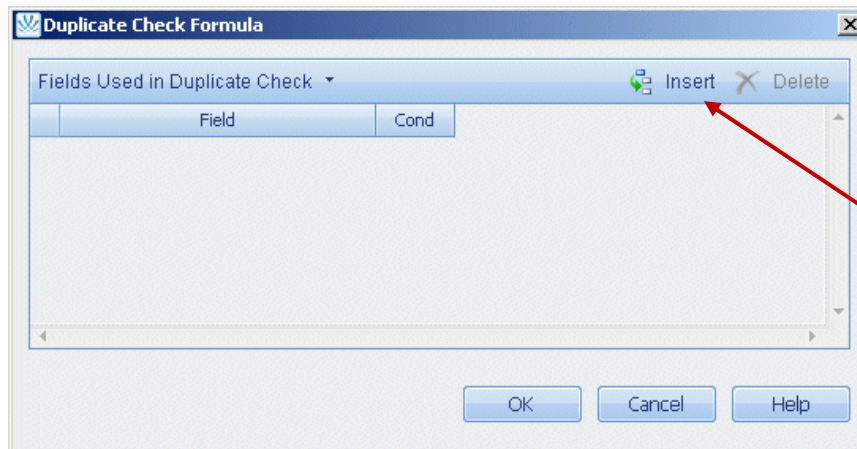
2. On a grid's toolbar, click **Insert** to open the Duplicate Check Formula dialog box and select the fields for a duplicate check formula.


In the following example, duplicate check fields are being selected for contacts.

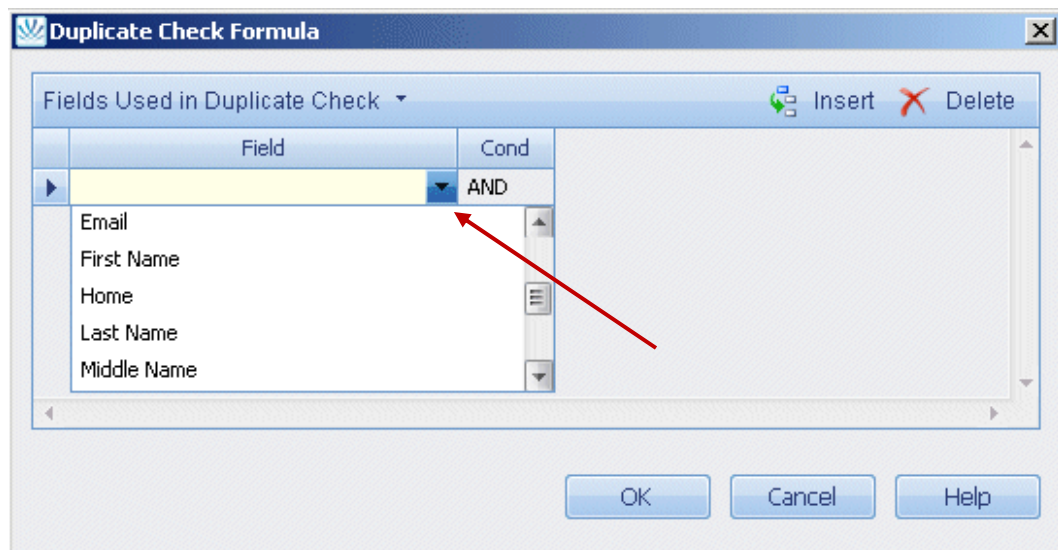
This is a close-up of the 'Contacts' grid toolbar. The 'Insert' button, which has a green plus icon, is circled in red. A red arrow points from the right towards the 'Insert' button.

| Contacts | |
|--------------------------|------|
| Duplicate Check Formulas | Cond |

- On the Duplicate Check Formula dialog box, click **Insert** on the toolbar to insert a new row in the grid.



- In the new row, click  in the **Field** column, and from the drop-down list, select a field to add to the duplicate check formula.

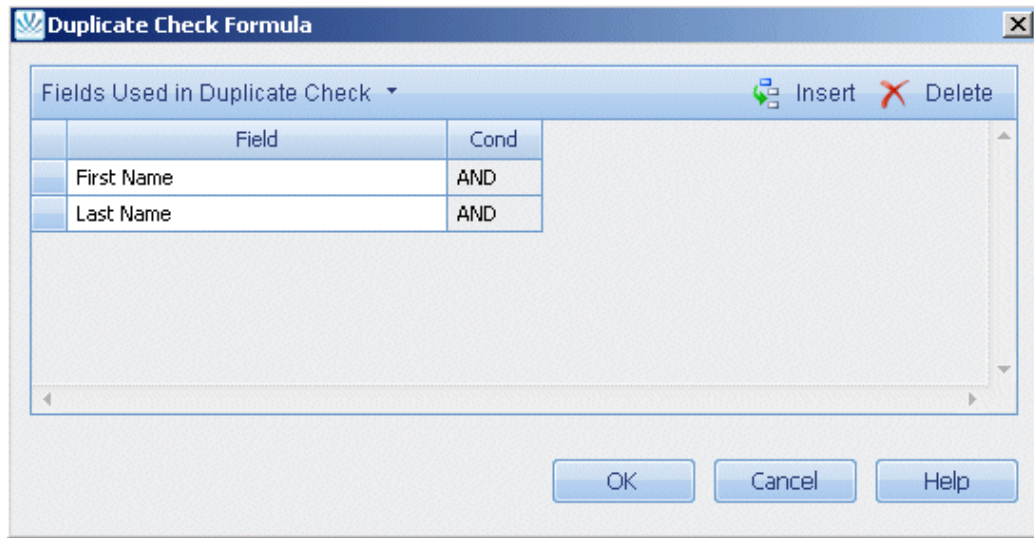


- To add more fields to the formula, click **Insert** on the Duplicate Check Formula toolbar and repeat step 4.



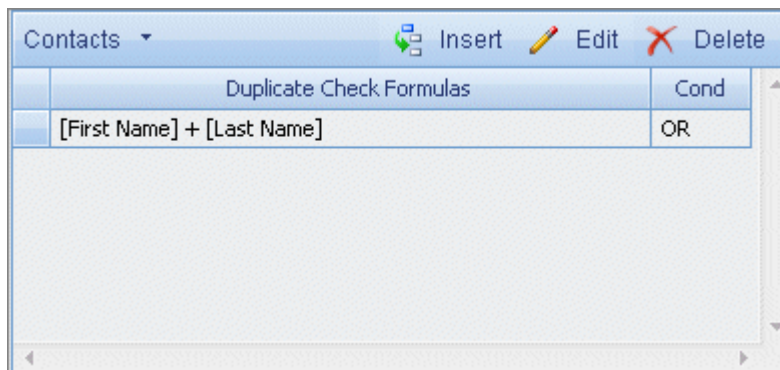
- You must select at least one field for a duplicate check formula.
- There is no limit to the number of fields that you can add to a duplicate check formula.
- The **Cond** column in the grid on the Duplicate Check Formula dialog box always displays **AND** to indicate that an AND operator is used between the each field that you add to the duplicate check formula.

In the following example, we selected **First Name** from the **Field** drop-down list. Then, we clicked **Insert** again, and selected **Last Name** from the **Field** drop-down list.



6. When you finish adding fields to a formula, click **OK** to return to the Connect for Microsoft Outlook Configuration form.

The fields that comprise the duplicate check formula display in a row in the record grid.



7. Repeat steps 2 through 6 to add another duplicate check formula.



- Each formula displays in a separate row in the record grid on the Connect for Microsoft Outlook Configuration form.
- When you create multiple duplicate check formulas for a record, the **Cond** column in the grid on the Connect for Microsoft Outlook Configuration form always displays **OR** to indicate that an OR operator is used between the each duplicate check formula.

In the following example, we added another duplicate check formula that is comprised of the **Email** field.

During synchronization, a duplicate contact is detected when multiple contacts have the same first and last names **or** when their email address is the same.


Separate formulas in each row

With the **OR** operator, duplicate records are identified when records match any one of the formulas in the grid; matching all the formulas in the grid is not required.




| Duplicate Check Formulas | | Cond |
|----------------------------|----|------|
| [First Name] + [Last Name] | OR | |
| [Email] | OR | |

- When you finish creating duplicate check formulas, click **Save** on the Connect for Microsoft Outlook Configuration form toolbar.


To edit a duplicate check formula, complete the following steps:

- Click anywhere in the duplicate check formula's row in the grid on the Connect for Microsoft Outlook Configuration form. The row selector  icon displays in the first column to indicate that the row is selected.



Contacts ▾

 Insert  Edit  Delete

| | Duplicate Check Formulas | Cond |
|---|----------------------------|------|
| | [First Name] + [Last Name] | OR |
| ▶ | [Email] | OR |

- Click  **Edit** to open the Duplicate Check Formula dialog box and modify the formula.

To delete a duplicate check formula, complete the following steps:

- Click anywhere in the duplicate check formula's row in the grid on the Connect for Microsoft Outlook Configuration form. The row selector  icon displays in the first column to indicate that the row is selected.
- Click  **Delete** on the grid toolbar. The formula/row is immediately deleted.

Specify Where You Want Vision Activities to Display

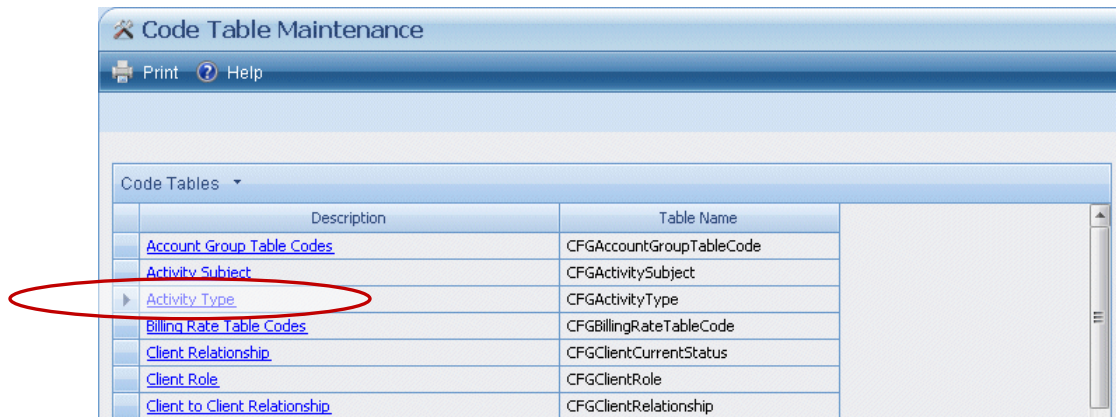
A Vision system administrator specifies where different types of Vision activities display in Connect for Microsoft Outlook. Vision activity types include appointments, mailings, meetings, tasks, and so on. You choose whether these display as calendar items, tasks, and/or items in the Activity Manager only.

The Activities display setting:

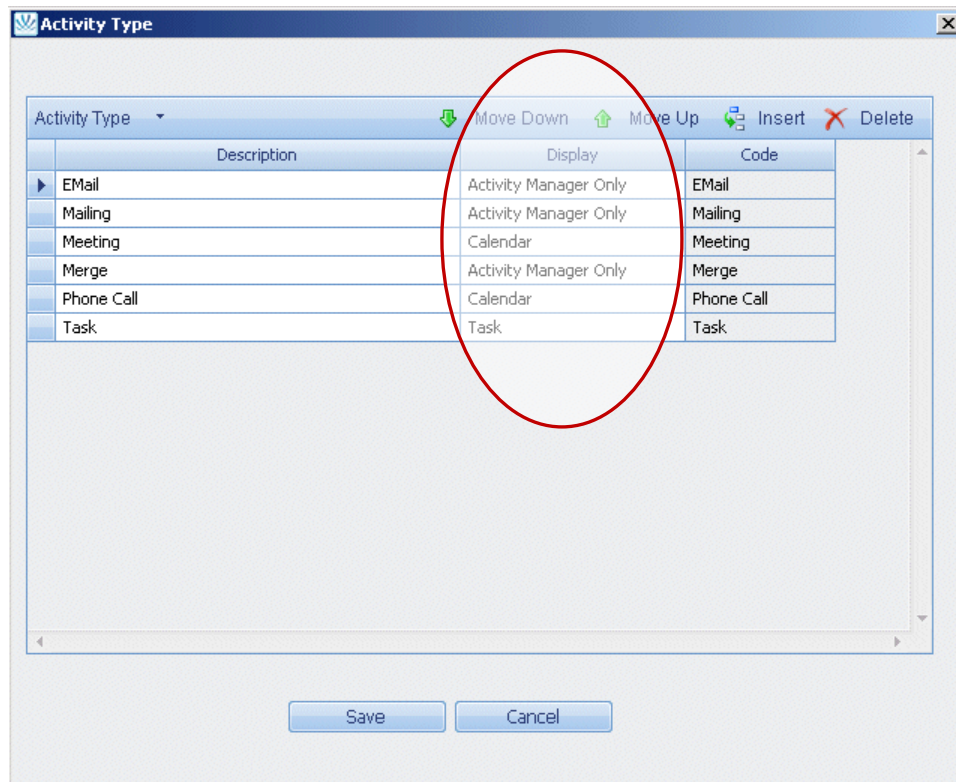
- Applies for all Vision users.
- Determines where the activities display in the Vision software as well as in Connect for Microsoft Outlook.

To determine where Vision activities display in Connect for Microsoft Outlook and Vision, complete the following steps:

1. Open Vision, and on the Applications menu click **Configuration » General » Code Tables**.
2. On the Code Table Maintenance form, click **Activity Type** in the **Description** column of the Code table.



3. In the **Display** column on the Activity Type dialog box, select the location in which you want each activity type to display.



The display locations are:

- **Calendar**

The calendar activity type displays in the following locations:

- Vision Calendar
- Connect for Microsoft Outlook Calendar
- Vision Activity Manager
- Connect for Microsoft Outlook Activities folder
- Activity grids on the associated records in Vision
- Activity grids on the associated records in Connect for Microsoft Outlook

- **Task**

The task activity type displays in the following locations:

- Vision Calendar, when a user selects to view tasks
- Connect for Microsoft Outlook Task Folder
- Vision Activity Manager
- Connect for Microsoft Outlook Activities folder
- Activity grids on the associated records in Vision
- Activity grids on the associated records in Connect for Microsoft Outlook

- **Activity Manager Only**

The activity-manager-only activity type displays in the following locations:

- Vision Activity Manager
- Connect for Microsoft Outlook Activities folder
- Activity grids on the associated records in Vision
- Activity grids on the associated records in Connect for Microsoft Outlook

4. When you finish, click **Save**.

Provide Security Access to Connect for Microsoft Outlook Users

Vision security is applied directly in Connect for Microsoft Outlook.

The Vision security role assigned to Vision users determines:

- Whether or not a user can download Connect for Microsoft Outlook.
- Which Vision applications and records are visible.
- The actions that users can perform with Vision records in Connect for Microsoft Outlook.

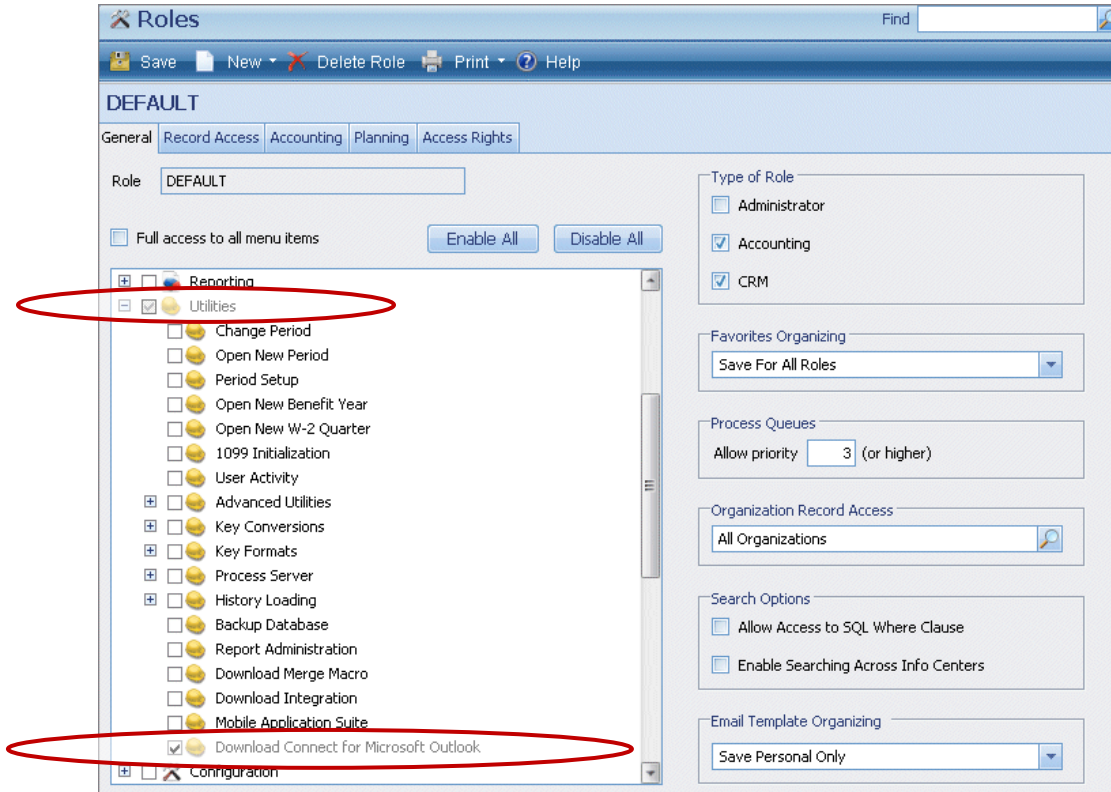
The Vision security role and screen designer settings described in this section allow users to view, create, modify, delete, and associate Vision records in Vision as well as in Connect for Microsoft Outlook.

A system administrator sets up security roles and their access rights in Vision **Configuration » Security » Roles**. A system administrator assigns security roles to individual users in Vision **Configuration » Security » Users and Passwords**.

Access to Download Connect for Microsoft Outlook

To be able to download Connect for Microsoft Outlook from Vision Utilities, a user's security role must have rights to access the Download Connect for Microsoft Outlook utility.

The setting to allow this access is in Vision **Configuration » Security » Roles**. In the menu items access section on the General tab, select the **Download Connect for Microsoft Outlook** check box under the Utilities menu.



Access to Vision Applications

On the General tab in Vision **Configuration » Security » Roles**, you choose the applications that a security role can access. This setting applies for access to applications to both Vision and Connect for Microsoft Outlook.

For access to all possible Vision applications in Connect for Microsoft Outlook, on the General tab, select the check box beside the following Vision applications to give full access to these areas and their submenus:

- Info Centers
 - Clients
 - Contacts
 - Opportunities
 - Vendors
- Calendar/Activities

If you do not have access to an entire application, the corresponding folder for it does not display in the Connect for Microsoft Outlook Folder List view of the Navigation pane. For example, if you do not have access to Vision Vendors, a Vendor folder does not display in the Connect for Microsoft Outlook Folder List view of the Navigation pane.

Access to Individual Records within Vision Applications

Vision security roles determine a user's access to individual records within Vision Clients, Contacts, Opportunities, Vendors, and Activities. The settings that affect access to individual records apply to both Vision and Connect for Microsoft Outlook.

A security role can have full rights, view-only, modify, or add/modify rights that allow users to view, create, modify, delete, and associate Vision records.

The Vision security settings in **Configuration » Security » Roles » Record Access** tab that affect individual record access are:

- Application Record Access grid:
 - The **Record Level View** column
 - The **Access** column, which applies to the **Record Level Update** column in the grid
 - The **Record Level Update** column
- Activity Access section:
 - The **Record Level View** field
 - The **Record Level Update** field

Rights to update "Accounting Only" client and vendor addresses are controlled by the **Accounting** check box in the **Type of Role** section of the General tab in **Configuration » Security » Roles**.



See the security section of the Vision online help for more information about these security settings.

Deleting Records

You can delete a Vision record in Connect for Microsoft Outlook only if you have full rights to that record (in **Configuration » Security » Roles » Record Access** tab).

Associations

In Vision, you can associate records with each other. For example, you associate an activity record with a client record by entering the activity in the **Activities** grid on the Activities tab of the Clients form in the Client Info Center. In Connect for Microsoft Outlook, you associate an activity record with a client by entering an activity in the **Activities** grid on the Client form.

The same rules and security rights that apply when you associate records with each other in Vision also apply in Connect for Microsoft Outlook.

When you use a lookup dialog box in Connect for Microsoft Outlook to create an association with other Vision records, the lookup dialog box will contain only records that have been synchronized with Connect for Microsoft Outlook. This includes any records that matched your synchronization filter (complete records) and records that were synchronized because they are associated with a record that match your filter (incomplete records). See Appendix A on page 99 for more information about complete and incomplete records.


The following security rules affect the records available in lookup dialog boxes:

- When you use a lookup dialog box to select an employee or project record to associate with another record, if you do not have access rights to the Employee or Project Info Center, then you can see and associate only the employee or project records for which you have view rights.
- When you use a lookup dialog box to select a client, contact, vendor, opportunity, or activity record to associate with another record, you must have both access rights to the Client, Contact, Vendor, or Opportunity Info Center or the Calendar/Activities application and view rights to the specific record to be able to make an association. You cannot make associations with these records if you have view rights only; you must have both access and view rights.
- If your security role has rights to access an application and update records in that application, in addition to making an association with record from that application, you can edit the associated record if needed.

Access to Fields within Vision Applications

The Screen Designer in Vision allows you to specify access to specific fields in Vision by security roles. This access applies in Vision as well as in Connect for Microsoft Outlook.

To access Screen Designer in Vision, open an application, for example the Contacts Info Center.

Click the Screen Designer icon  in the bottom right corner of the Contacts form.

The Screen Designer settings that apply when you access Vision data in Outlook are:

- **Hidden fields** — Select a field on the Designer form. In the Properties panel on the right side of the form, click the **Hidden** field, and select the security roles for which you want to hide the field.
- **Locked fields** — Select a field on the Designer form. In the Properties panel on the right side of the form, click the **Locked** field, and select the security roles for which you want the field read-only. The field can be viewed but not modified.

- **Required fields** — Select a field on the Designer form. In the Properties panel on the right side of the form, click the **Required** field, and select the security roles for which you want to make entry in the field required.

Employees and Projects

Vision employees and projects are synchronized one way only—from Vision to Connect for Microsoft Outlook.

You cannot create, edit, add, or delete Vision projects or employees in Connect for Microsoft Outlook. However, you can associate Vision projects and employees with activities, contacts, clients, opportunities, and vendors in Connect for Microsoft Outlook.

Vision Workflows

Security can sometimes be enforced by Vision workflow. For example, a workflow can make a field required or read-only and display an error message when a user leaves the field empty or changes the field. These workflow rules are applied during synchronization.

If you initially have rights to a field, and then a workflow process changes your rights, that change is enforced during the first synchronization.

Workflows Example

Scenario:

- You have add/modify access to records in the Client Info Center per your Vision security role.
- You add a new client with a relationship of "Existing."
- A workflow is set up for whenever you update a client.

Results:

Vision first checks your security role.

If you are in a non-administrative role, a validate error action in the workflow prevents you from making any changes to the fields on the General tab for clients with an existing relationship (as opposed to prospective clients).

You can make changes to these fields for existing clients in Connect for Microsoft Outlook. However, at synchronization, the client is not updated in Vision. You receive a synchronization issue with the workflow error message.

Configuration Settings Passed from Vision to Connect for Microsoft Outlook

A set of default files on the Vision Web server contain Vision configuration information and the basic Vision schema that is used to configure Connect for Microsoft Outlook users' mailboxes. Passing the information in these files to Connect for Microsoft Outlook on users' workstations allows the Vision data to display in Outlook. This information is passed during the synchronization process (manual or automatic synchronization).

The following Vision configuration settings are updated to Connect for Microsoft Outlook users' mailboxes during the initial synchronization when users deploy Connect for Microsoft Outlook for the first time and any time thereafter when users synchronize after a change is made to the configuration settings:

- System-wide labels
- Code table values
- Role security
- Field labels and Required, Locked and Hidden attributes from the Screen Designer



Configuration changes made after the initial synchronization

New code table and role security changes are enforced in Connect for Microsoft Outlook after a user performs the first synchronization after the changes are made.

Changes made in Screen Designer are enforced in Connect for Microsoft Outlook after a user performs the second synchronization after the changes are made. For example, in Screen Designer, a system administrator changes a contact field so that an entry in the field is now required when, previously, you could leave the field blank. After the user synchronizes, the newly required field is not yet enforced for new records. The new requirement is enforced after the user synchronizes a second time.

Vision workflow and auto-numbering for clients, opportunities, and vendors are also updated on Connect for Microsoft Outlook users' workstations when users synchronize.

The following configuration changes are not passed to Connect for Microsoft Outlook users' workstations:

- Placement of fields in the Screen Designer
- User-defined fields

Back Up Your Outlook Data

Before you download and install Connect for Microsoft Outlook to a user's workstation, we recommend that you back up your current Microsoft Outlook data using one of the following methods.

Export Data to a PST File

To back up data in Outlook, export data to a PST file as follows:

1. Open Outlook, and from the Outlook application-level menu bar, click **File » Import and Export**.
2. On the Import and Export Wizard page, select **Export to a file** from the list and click **Next**.
3. On the Export to a File page, select **Personal Folder File (.pst)** from the list, and click **Next**.
4. On the Export Personal Folders page, select the appropriate folders that contain personal data and click **Next**.
5. On the next Export Personal Folders page, click **Finish**.

Copy Your Outlook Contacts Folder

Create a copy of your Outlook Contacts folder, or copy the contacts in your Outlook Contacts folder into another contacts folder that does not have the folder named "Contacts." Connect for Microsoft Outlook synchronizes only the contacts in the contact folder named "Contacts."

Download and Install Connect for Microsoft Outlook on a Workstation Using Vision Utilities

Users can download and install Connect for Microsoft Outlook on their workstations, or a system administrator can use Microsoft Systems Management Server (SMS) to download and install the software for multiple users at the same time.

This section describes how individual Connect for Microsoft Outlook users can download and install Connect for Microsoft Outlook on their workstations with Vision Utilities.



Warning: 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.

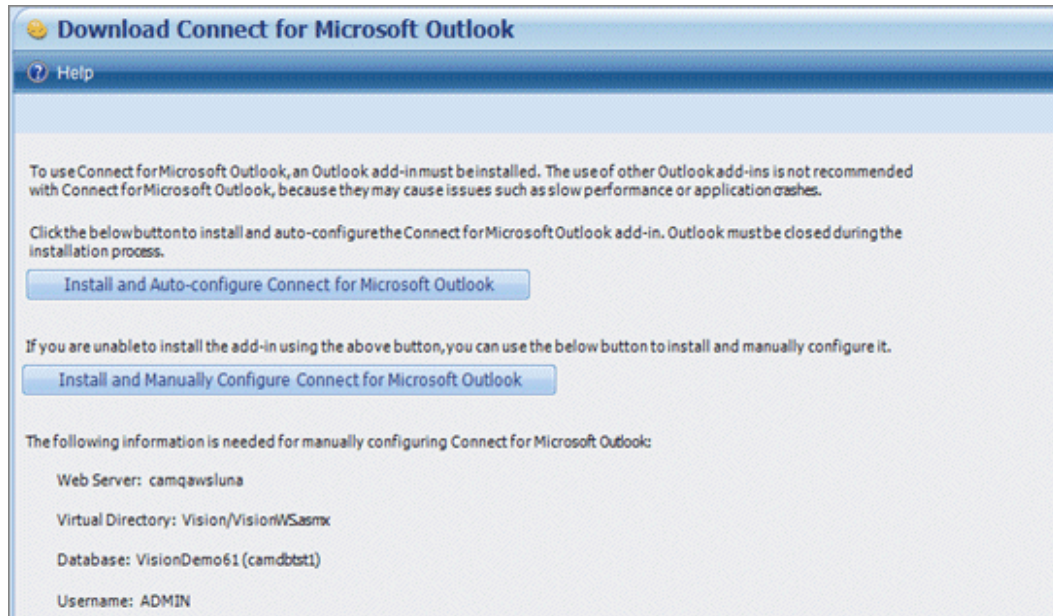


Before you download and install Connect for Microsoft Outlook on a workstation, the following tasks must be completed:

- You must have installed all the required software, and a Vision system administrator must have completed the Connect for Microsoft Outlook global configuration, as outlined in the previous sections of this guide.
- Microsoft Outlook must be installed on your workstation.
- An Outlook profile must be created for you.
- You must have opened Outlook and configured it.
- Your Vision security role must have access rights to the Download Connect for Microsoft Outlook utility. See the "Access to Download Connect for Microsoft Outlook" section on page 42 of this guide for more information.

To download and install the Connect for Microsoft Outlook software on your workstation, complete the following steps:

1. Close Outlook on your workstation.
2. On the Applications menu in Vision, click **Utilities » Download Connect for Microsoft Outlook**.
3. On the Download Connect for Microsoft Outlook form, read the information on the screen, and click **Install and Auto-configure Connect for Microsoft Outlook** to start the software download and complete the installation wizard.



When you click the **Install and Auto-configure Connect for Microsoft Outlook** button, the Vision credentials that you used to log on to Vision prefill in the Deltek - Login dialog box when you complete the Connect for Microsoft Outlook Assistant as described in the "Deploy and Configure Connect for Microsoft Outlook for the First Time" section on page 58.

When you click the **Install and Manually Configure Connect for Microsoft Outlook** button on the Download Connect for Microsoft Outlook form, you must supply the Vision connection information when you run the Connect for Microsoft Outlook Assistant.

4. On the Welcome to the InstallShield Wizard for Connect for Microsoft Outlook wizard page, click **Next**.

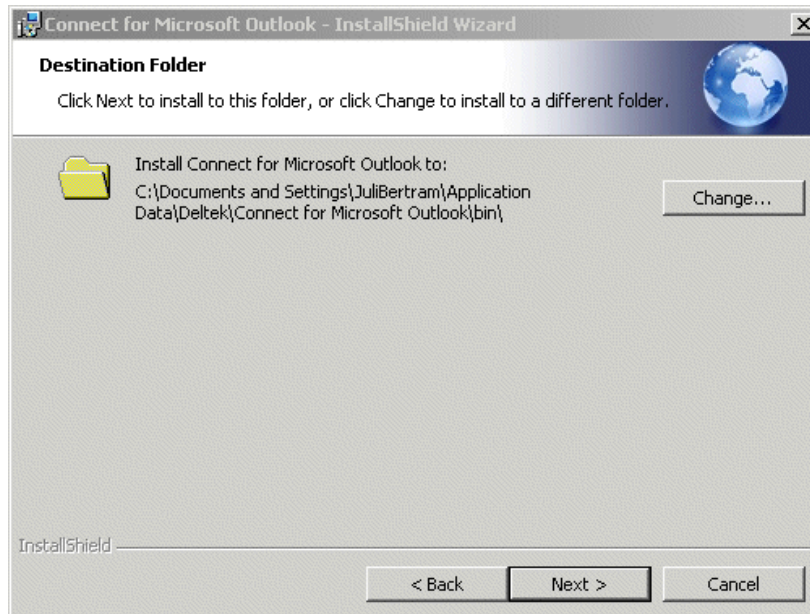


5. On the Destination Folder page, select the folder on your workstation in which to install Connect for Microsoft Outlook.

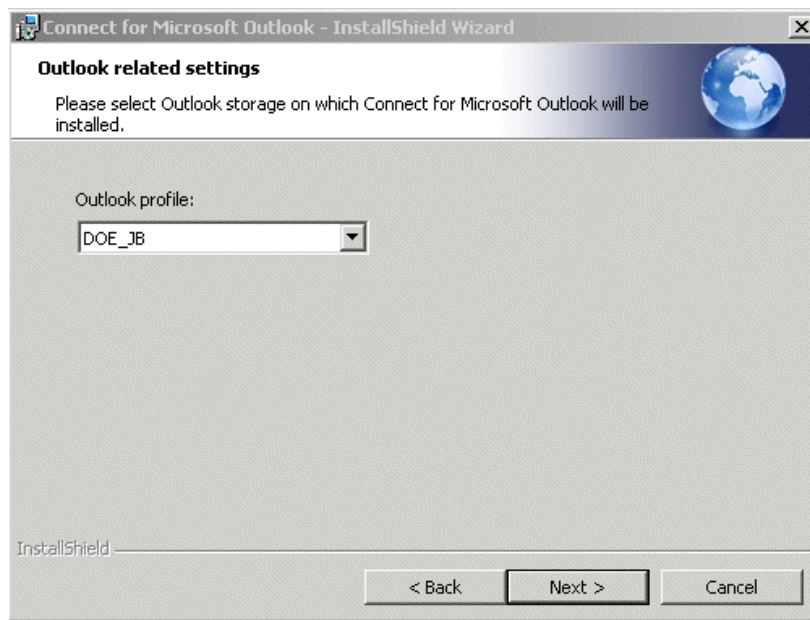


The default location is **C:\Documents and Settings\<your user name>\Application Data\Deltek\Connect for Microsoft Outlook\bin**.

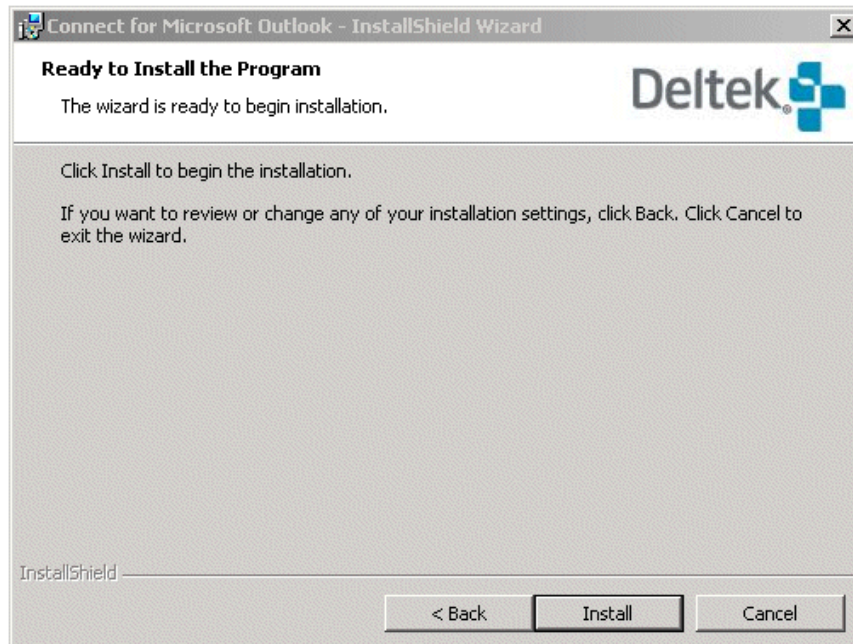
Deltek recommends that you keep the default location because the installation is done for each user's profile. If you choose to change the installation path, click **Change** to navigate to and select a different folder on your workstation.



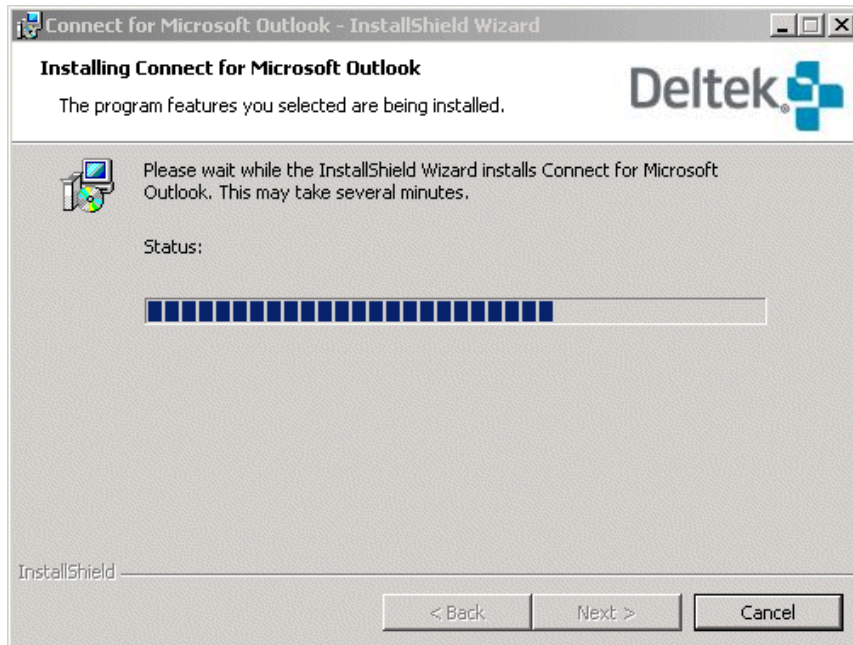
6. On the Outlook related settings page, select the Outlook profile to which to install Connect for Microsoft Outlook. The **Outlook profile** drop-down list displays all the profiles available on this workstation.



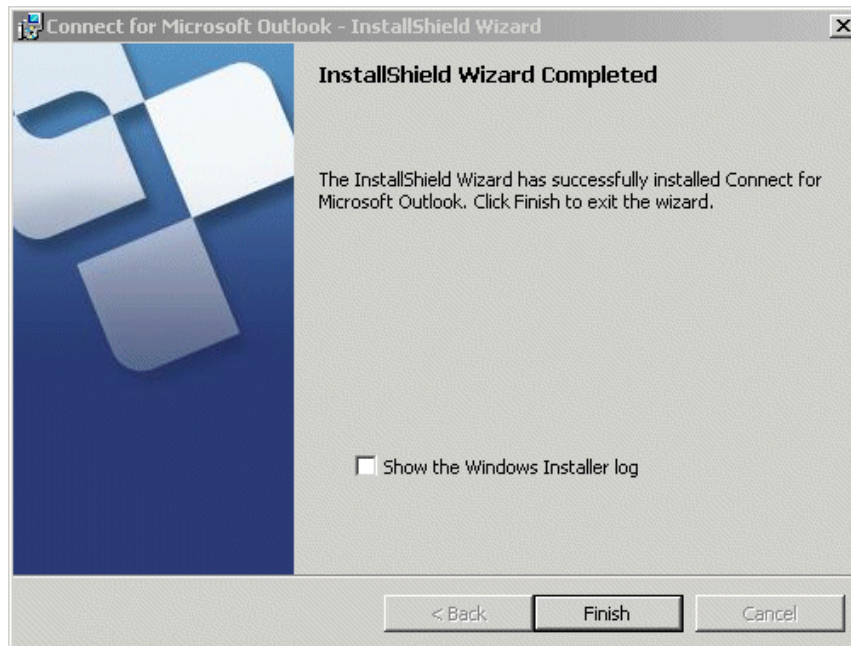
7. On the Ready to Install the Program page, click **Install** to start the installation.



On the Installing Connect for Microsoft Outlook page, you see the status as the installation proceeds to completion.



8. On the InstallShield Wizard Completed page, click **Finish**. The InstallShield wizard closes.



Continue with the "Avoid Duplicate Contact Records" instructions on page 57 of this guide.

Use Command Line Parameters To Deploy Connect for Microsoft Outlook on Multiple Workstations

A system administrator can deploy Connect for Microsoft Outlook on multiple workstations and for multiple users via several options such as Microsoft Systems Management Server (SMS), Group Policy, or batch files. This section lists the parameters and provides examples of how to use command line parameters to deploy Connect for Microsoft Outlook silently with different configuration settings.



Before you download and install Connect for Microsoft Outlook on workstations using SMS, the following tasks must be completed:

- You must have installed all the required software and completed the Connect for Microsoft Outlook global configuration as outlined in the previous sections of this guide.
- Microsoft Outlook must be installed on users' workstations.
- An Outlook profile must be created for each user.
- You must have opened Outlook and configured it.

Connect for Microsoft Outlook is a Microsoft Installer MSI package file that supports most of the command line parameters for deploying MSI for multiple users.



You can use the command line to set optional parameters that impact installation. You run the installer program from a Windows DOS command line on a Connect for Microsoft Outlook user's workstation or from a command line on the SMS server.

Connect for Microsoft Outlook supports most parameters that can be set in the `msiexec` command line. For a list of the MSI optional parameters, launch a command prompt and enter:

`msiexec.exe /?`

For detailed information, see the documentation about Msiexec command-line options at the following Microsoft TechNet Website:

<http://msdn.microsoft.com/en-us/library/aa367988%28VS.85%29.aspx>

Set Optional Parameters During Installation

To use the command line to set optional parameters during installation, complete the following steps:

1. Open a DOS command line.
2. Navigate to the directory that contains the **Connect for Microsoft Outlook.msi** file, such as `C:\WINDOWS\system32`.
3. Enter the `msiexec` command. Use the following syntax:

```
msiexec.exe /i Connect for Microsoft Outlook.msi <optional_parameter_1>
<optional_parameter_n>
```

Where *optional_parameter* is a parameter that you can enter that is executed when the installer runs.



- You must specify each optional parameter in the same command line after the name of the **Connect for Microsoft Outlook.msi** file.
- You must enter a space without a slash to separate each optional parameter.
- You can arrange optional parameters in any order.

4. Click **Enter**.

The Welcome page of the Connect for Microsoft Outlook Setup wizard displays.

You can use the optional QR parameter to automatically execute the windows that normally require user action. When you use the QR parameter, the installer does not display dialog boxes that require user action.

Parameters that Are Available for Silent Installation

The following special values are supported for the OL_PROFILE parameter:

- **\$DEFAULT** — When you specify this value, the default profile and default storage in this profile is used. The default profile is the profile specified in **Control Panel » Mail » Profiles » Always use this profile**. Default storage is the mail delivery location specified for the profile in OL_PROFILE.
- **\$PREFERRED** — When you specify this value, the profile is detected using the same algorithm as described for the \$DEFAULT value. However, if a default profile is not found or is invalid, the installation chooses any other suitable profile. If no value is specified for the OL_PROFILE parameter, \$PREFERRED value is used.

If the installation parameters values contain spaces, the parameters must be enclosed within quotation marks.

The following Deltek parameters that correspond to the initial Connect For Microsoft Outlook login and configuration form can be passed to the installer to preconfigure the application. Parameter values must be enclosed in quotation marks (" ").

| Deltek Parameters | Value Description |
|---------------------------|--|
| OL_PROFILE= | Optional. This is the Microsoft Outlook mail profile name that is found in the Windows Control Panel » Mail » Show Profiles section. If you are unsure what the mail profile name will be, do not enter this value. After installation, the default mail profile will be used when Connect for Microsoft Outlook is launched. Example: OL_PROFILE="Outlook" |
| DELTEK_SERVER_URL= | URL (with optional port number) to the Vision Web service ASMX page on the Vision Web server. The URL always ends in visionws.asmx . Example: DELTEK_SERVER_URL= http://webserver:80/vision/visionws.asmx |

| Deltek Parameters | Value Description |
|-------------------------|--|
| DELTEK_DATABASE= | This is the description field of the Vision database that you are connecting (as displayed in Weblink or from the login drop-down list). Example: DELTEK_DATABASE="VisionDemo61 (DBSERVER1)" |
| DELTEK_USERNAME= | This is the Vision Login/Username. Use this parameter if you are not using Integrated Authentication to log in to Windows. This cannot be used with the DELTEK_NT_AUTH parameter. Example: DELTEK_USERNAME="ADMIN" |
| DELTEK_NT_AUTH= | Enter this parameter if you are using Windows Integrated Authentication to log in to Vision. Example: DELTEK_NT_AUTH="1" |

| Examples | Value |
|--|--|
| Example 1 The Outlook profile named "Outlook" is specified, and Deltek Security is used. Optional Windows Installer /qr switches are used to display installation status with no user interaction required. | msiexec /i "\\fileservers1\Deltek\ConnectForMicrosoftOutlook.msi" /qr OL_PROFILE="Outlook" DELTEK_SERVER_URL="http://webserver/Vision/VisionWS.asmx" DELTEK_DATABASE="VisionDemo (DBSERVER1)" DELTEK_USERNAME="ADMIN" |
| Example 2 No Outlook profiles are specified and Windows Authentication is used. Optional Windows Installer /qr switches are used to display the installation status with no user interaction required. | msiexec /i "\\fileservers1\Deltek\ConnectForMicrosoftOutlook.msi" /qr DELTEK_SERVER_URL="http://webserver:80/Vision/VisionWS.asmx" DELTEK_DATABASE="VisionDemo61 (DBSERVER1)" DELTEK_NT_AUTH="1" |
| Example 3 Uninstalling with a command line parameter | msiexec /uninstall "\\fileservers1\Deltek\ConnectForMicrosoftOutlook.msi" /qr |

Download and Install Connect for Microsoft Outlook on Multiple Workstations Using Microsoft SMS or Group Policy

A system administrator can use Microsoft Systems Management Server (SMS), Group Policy, or batch files to deploy Connect for Microsoft Outlook for multiple users. This section contains a summary of the installation steps using Microsoft SMS 2003 Server and Group Policy.



For detailed information, see the following Microsoft article:

<http://technet.microsoft.com/en-us/updatesmanagement/bb245825.aspx>.



Before you download and install Connect for Microsoft Outlook on workstations using SMS, the following tasks must be completed:

- You must have installed all the required software and completed the Connect for Microsoft Outlook global configuration outlined in the previous sections of this guide.
- Microsoft Outlook must be installed on users' workstations.
- An Outlook profile must be created for each user.
- You must have opened Outlook and configured it.

Summary Of Steps

The following is a summary of the installation steps when you use SMS to install Connect for Microsoft Outlook on multiple workstations:

1. Create a collection that contains the users, computers, workgroups, or domains to which you want to distribute the Connect for Microsoft Outlook software.
2. Create a distribution package.
3. Specify a collection to which the installation belongs.
4. Create an advertisement of this distribution package for the collection.
5. Notify Connect for Microsoft Outlook users that Connect for Microsoft Outlook is ready for them to configure on their workstations.
6. Create a membership rule.
7. Use the command line to set optional parameters during installation.

See the "Use Command Line Parameters To Deploy Connect for Microsoft Outlook on Multiple Workstations" section on page 53.



The following link contains the steps to install an MSI package using Group Policy for Windows Server Group policy: <http://support.microsoft.com/kb/816102>.

Avoid Duplicate Contact Records



If you are migrating from Vision Synchronization Server or other software to Connect for Microsoft Outlook, the instructions in this section do not apply. Instead, see the "Synchronization Server and Other Migrations: Prevent Duplicate Contacts" section on page 18 for steps to take to prevent duplicate contacts.

To avoid duplicate contact records from being created in Connect for Microsoft Outlook after you synchronize for the first time, we recommend that each Connect for Microsoft Outlook user complete the following:

1. You should have a backup copy of your Outlook data per the instructions in the "Back Up Your Outlook Data" section on page 47 before you install Connect for Microsoft Outlook on a workstation.

If you did not make a backup before you downloaded and installed Connect for Microsoft Outlook, complete the following: When you open Outlook for the first time, the Connect for Microsoft Outlook Assistant displays in Outlook. Cancel the assistant by clicking anywhere outside the Connect for Microsoft Outlook Assistant page. Then complete the backup instructions on page 47. To restart the Connect for Microsoft Outlook Assistant, close and reopen Outlook.

2. In the next section "Deploy and Configure Connect for Microsoft Outlook for the First Time" that starts on page 58, be sure to select the most appropriate unshared status for your situation in the Confirm Outlook Contact Conversion dialog box.

On the Confirm Outlook Contact Conversion dialog box, you have the option to convert your contacts as unshared contacts.

- We recommend that you select **Yes** to convert existing Outlook contacts to unshared contacts if most of your Outlook contacts should be added to Vision.
- If most of your Outlook contacts are private contacts, then you should not convert existing Outlook contacts to unshared contacts. This ensures that the Outlook **Company** field remains for private contacts. It also ensures that Vision business logic is not enforced for your private contacts (for example, required fields).



Native contacts are contacts that you create in standard Outlook. Native Outlook contacts must be converted to unshared contacts before you can share them with Vision. You can convert native contacts to unshared contacts when you deploy and configure Connect for Microsoft Outlook for the first time. Thereafter, you can convert native contacts in Connect for Microsoft Outlook using the **Convert to Unshared** command on the Actions menu. After native contacts become unshared, use the **Shared with Deltek** bar on a contact-by-contact basis on the Contact form to share native Outlook contacts with Vision.

3. After you complete the "Deploy and Configure Connect for Microsoft Outlook for the First Time" instructions in the next section of this guide, follow the instructions in the "Check and Resolve Duplicate Contact Records" section on page 73.

Deploy and Configure Connect for Microsoft Outlook for the First Time

When you start Outlook the first time after you install Connect for Microsoft Outlook, the Connect for Microsoft Outlook Assistant starts automatically. It guides you through the steps to configure Connect for Microsoft Outlook.

After you enter configuration settings with the Connect for Microsoft Outlook Assistant and the initial synchronization finishes, you can start to use the Connect for Microsoft Outlook software.



DelteK recommends that you stagger the initial Connect for Microsoft Outlook implementation so that a significant number of users are not performing the initial synchronization all at the same time. This will help prevent overloading your system. Users perform the initial synchronization when they complete the Connect for Microsoft Outlook Assistant, as described in this section of the guide.

For more information about synchronization schedules and automatic synchronization after the initial synchronization, see "Appendix C: Synchronization Schedules" on page 118.

Summary of Configuration Information

The following is a summary of the configuration information that you enter using the Connect for Microsoft Outlook Assistant:

- **Connection settings** — You set up an Internet connection to your Vision database. If the connection cannot be established automatically, you enter it manually.
- **Vision credentials** — Enter either your Vision user name and password or select Windows authentication. These credentials enable Connect for Microsoft Outlook to access and synchronize the Vision data. With these saved credentials, you do not have to log in to Vision each time that you start Outlook.
- **Obtain package** — Vision information, based on your Vision employee record and security role, is downloaded automatically to Connect for Microsoft Outlook. After the package information is downloaded, the Vision Activities, Clients, Opportunities, and Vendors folders display in the Connect for Microsoft Outlook Folder List view of the Navigation pane.
- **Filter settings** — You set up data filters to limit the Vision records that are synchronized to Connect for Microsoft Outlook. For optimal synchronization performance, Deltek recommends that you apply filters to allow no more than 5,000 records to be synchronized.
- **Synchronization schedule** — You select the time interval for automatic synchronization between Vision and Connect for Microsoft Outlook to occur.
- **Advanced settings** — You specify whether or not new appointments, contacts, and tasks that you create in Connect for Microsoft Outlook will be shared and available in Vision by default. You can change the sharing/unshared status when you create a new item, or later on an item-by-item basis as you work in Connect for Microsoft Outlook.
- **Convert items** — You choose whether or not you want Vision-specific fields added to existing contacts in Connect for Microsoft Outlook.
- **First synchronization** — You perform the first synchronization. Vision data is downloaded to Connect for Microsoft Outlook based on your filter settings and the business rules of synchronization.

Steps to Deploy and Configure

To enter Connect for Microsoft Outlook configuration settings with the Connect for Microsoft Outlook Assistant, complete the following steps:

1. After you install Connect for Microsoft Outlook, open Outlook.

If you have more than one Outlook profile, you must enter the profile to which you installed Connect for Microsoft Outlook when prompted.

The Connect for Microsoft Outlook Assistant Welcome page displays in Outlook.



You can cancel the Connect for Microsoft Outlook Assistant at any time by clicking outside the Connect for Microsoft Outlook Assistant page. If you cancel and do not complete all the configuration settings, the Connect for Microsoft Outlook Assistant continues to display when you start Outlook until you complete all the settings.

2. Click anywhere on the Connect for Microsoft Outlook Welcome page to start the Connect for Microsoft Outlook Assistant.

The process begins automatically and proceeds in the order listed on the Welcome page, regardless of which step you click.

3. Connection settings are checked to find an Internet connection to access your Vision database. If the connection cannot be made automatically, the Connections tab of the Options dialog box opens, and you can manually enter the connection settings.

Your Vision system administrator can provide you with Internet connection information if the connection is not made automatically.



Default settings are appropriate in most cases. However, if your system administrator configured a proxy server or requires additional configuration settings to connect to the Internet, you must get that information from the system administrator. If necessary, you can find answers for the proxy server settings on the Local Area Network (LAN) Settings dialog box in Microsoft Internet Explorer in **Tools » Internet Options » Connections tab » LAN Settings** button.

On the Connection tab of the Connect for Microsoft Outlook - Options dialog box, select one of the following:

- **Direct connection to the Internet (no proxy-server)** — Select this option if you do not need to enter any proxy server or additional configuration settings to connect to the Internet.
- **Use Internet Explorer settings for proxy server** — Select this option if your system administrator has preconfigured your Microsoft Internet Explorer Connections settings with a proxy server.
- **Manual proxy-server configuration** — Contact your system administrator for the proxy-server configuration information if your firm uses a proxy server for Internet access.
 - **Server** — Enter your Vision database server name.
 - **User Name** — Enter your Windows user name.
 - **Password** — Enter your Windows password.



4. When you finish entering connection information, click **OK** to save the settings and continue.
 - If you clicked the **Install and Auto-configure Connect for Microsoft Outlook** button on the Download Connect for Microsoft Outlook form in Vision **Utilities » Download Connect for Microsoft Outlook**, the Vision credentials that you used to log on to Vision are used to prefill the information on the Deltek - Login dialog box.
 - If you clicked the **Install and Manually Configure Connect for Microsoft Outlook** button on the Download Connect for Microsoft Outlook form, you must supply the Vision connection information in the Deltek – Login dialog box.

5. Enter the following information on the Deltek Login dialog box:

Server section:

- **Deltek Location** — This section is the path to your Vision Web server.
- **Web Server** — This is your Vision database server name. It should contain only the server name IP address (not the remainder of the URL). You enter the URL in the virtual directory section.
- **Port** — Leave this blank unless you are using a port other than default port 80.
- **Virtual Directory** — This is a combination of your Vision virtual directory and the visionws.asmx file. The visionws.asmx is always required. In the screen shot example, the virtual directory is named Vision.

Login section:

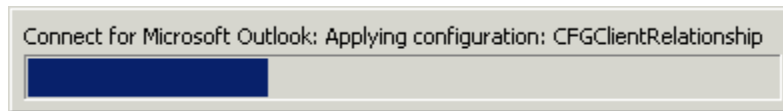
In this section, you select whether to use Windows authentication or your Vision username and password for Connect for Microsoft Outlook to access Vision data.

- **Database** — After you enter the server information and connections are made, a list of available Vision databases display in the drop-down list. Select the appropriate Vision database.
- **Use Windows Authentication** — Select this check box to use your Windows user name and password.
- **User Name** — If you do not select Windows authentication, enter your Vision username.
- **Password** — If you do not select Windows authentication, enter your Vision password.

6. When you finish entering Vision login information, click **Save**.

The configuration settings that are based on your Vision employee information are automatically downloaded from Vision and applied to Connect for Microsoft Outlook

during the "Obtain Package" process. This can take a few minutes. A box displays the progress of this download.

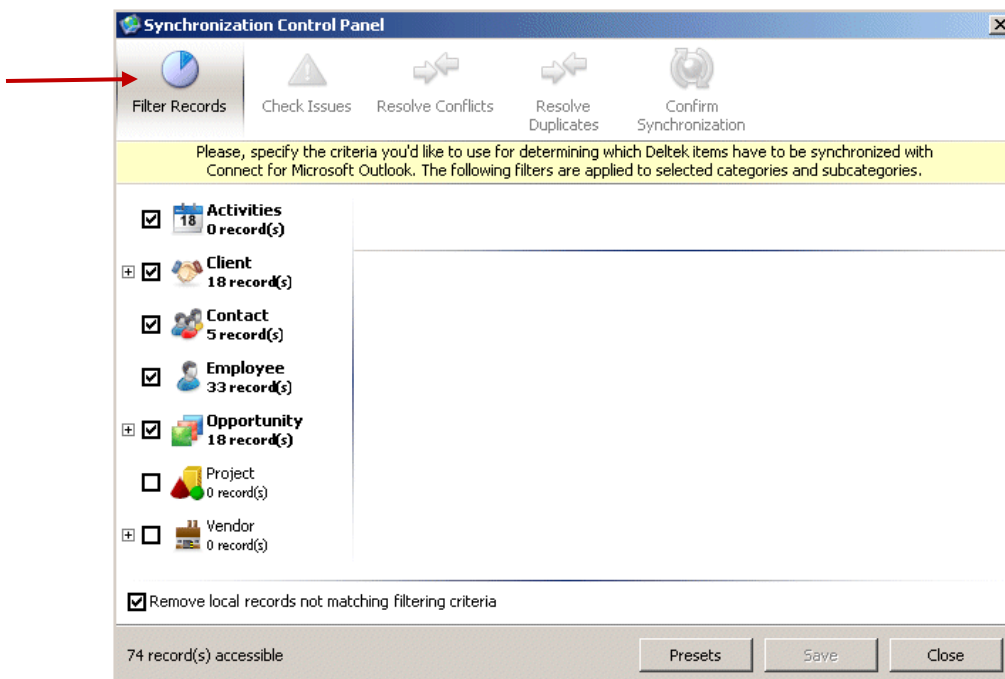


When this process finishes, the following Connect for Microsoft Outlook Assistant Welcome page displays.



7. Click anywhere on the Connect for Microsoft Outlook Assistant Welcome page to open the Filter Records screen of the Synchronization Control Panel dialog box.

On the Filter Records screen, you enter filter conditions to determine the Vision records that will synchronize with Connect for Microsoft Outlook.



- Set the filters to select only the records that you normally work with. Filtering records limits the amount of records that synchronize from Vision to Connect for Microsoft Outlook. This reduces the time it takes to synchronize.
- For optimal synchronization performance, Deltek recommends that you apply filters to allow no more than 5,000 records to be synchronized.

- In the pane on the left side of the Filter Records screen, select the check box for the type of Vision record that you want to synchronize with Connect for Microsoft Outlook. Then click the check box name to display **Match criteria: All** and **Any** and the default filter condition in the filter criteria pane.

In the example below, the **Client** check box is selected and the check box name is highlighted in gray.

Select a check box for the type of Vision record to synchronize. Then click the check box name.


Filter Criteria Pane

Add a condition icon


Add group of conditions icon

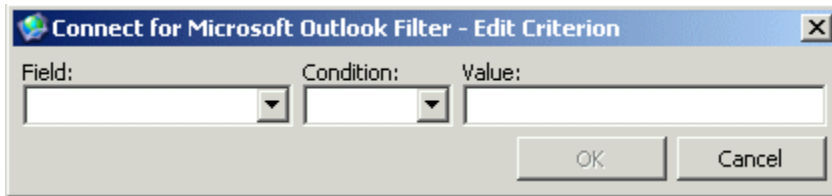
In the filter criteria pane, you see the default filter — **LinkedToMe = true**.

- See "Appendix B: Synchronization Filters" on page 101 for more information about the default filters for Vision record types.

You can delete a default filter (or any filter) by clicking the trash can  icon to the right of the filter in the filter criteria pane. To reset the default filters, click the **Presets** button at the bottom of the Filter Records screen, and then select **Default Filters**. This resets the default filters for all records types.

- Check box names (**Activities**, **Customer**, **Contact**, and so on) on the Filter Records screen are bolded when filter conditions have been entered for them.

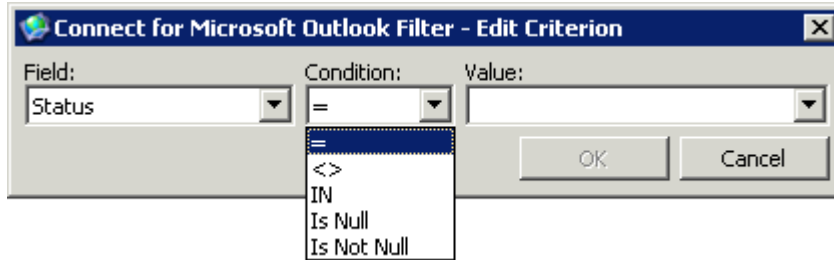
9. At the bottom of the filter criteria pane, click the **Add a condition**  icon to open the Connect for Microsoft Outlook Filter – Edit Criterion dialog box. Create a filter by selecting a field, condition, and value, and click **OK**.



The dialog box titled "Connect for Microsoft Outlook Filter - Edit Criterion" has three input fields: "Field:", "Condition:", and "Value:". Each field has a dropdown arrow. At the bottom right are "OK" and "Cancel" buttons.

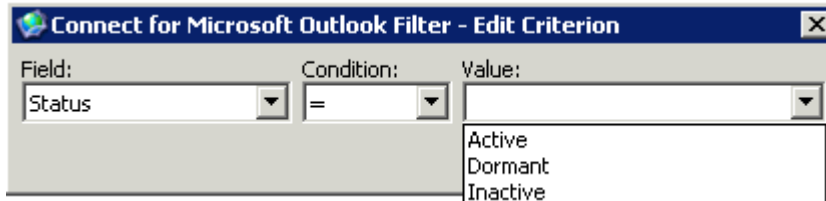
Filter condition example: To create a condition that retrieves all clients with an active status, select **Status** in the **Field** field, **=** in the **Condition** field, and **Active** in the **Value** field.

- The fields that display in the **Field** drop-down list are determined by the record (Activities, Client, Contact, and so on) that you choose on the Filter Record screen.
- The **Condition** drop-down list contains options, such as **=** (equal to), **<>** (except), **Is Null** (empty), and so on, that are appropriate for the type of field that you selected in the **Field** field.



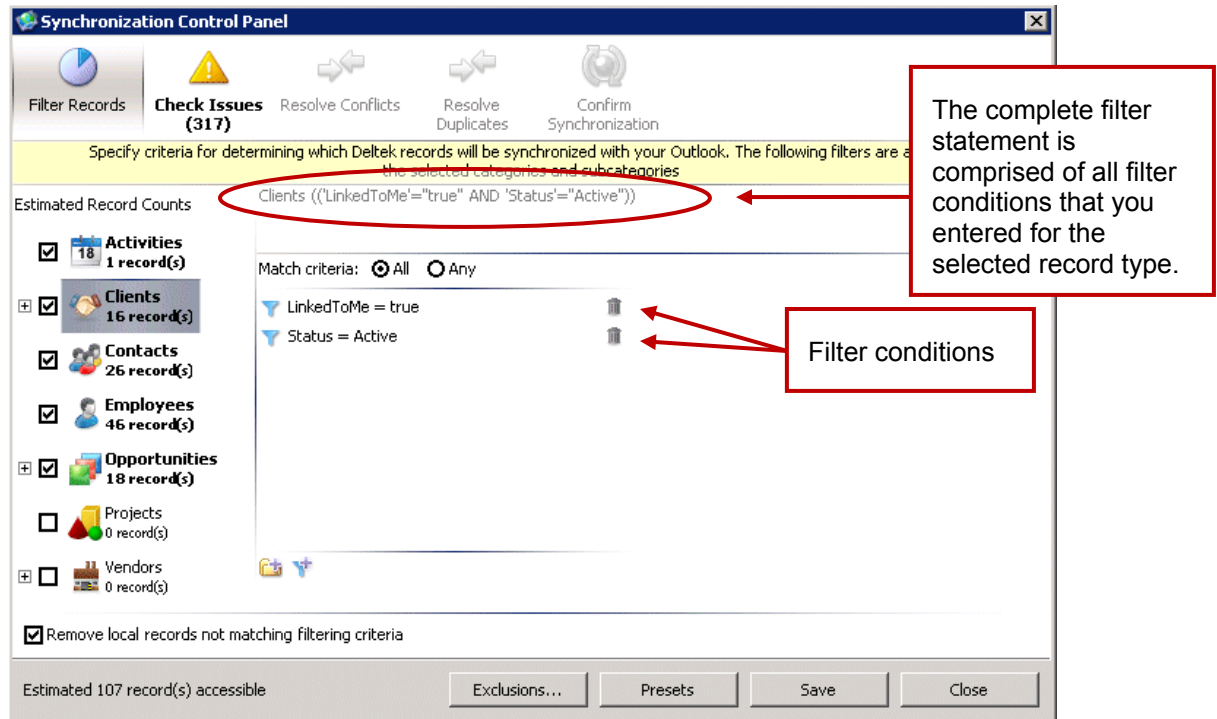
The dialog box shows the "Field:" dropdown set to "Status". The "Condition:" dropdown is open, showing a list of options: "=", "<>", "IN", "Is Null", and "Is Not Null". The "Value:" field is empty.

- **Value** — The **Value** field is either blank and you enter text, or you select an item from a drop-down list, based on what you entered in the **Field** field.



The dialog box shows the "Field:" dropdown set to "Status" and the "Condition:" dropdown set to "=". The "Value:" dropdown is open, showing a list of options: "Active", "Dormant", and "Inactive".

After you click **OK** on the Connect for Microsoft Outlook Filter – Edit Criterion dialog box to save a condition, the complete condition statement displays at the top of the filter criteria pane.



10. To enter additional filter conditions, repeat step 9.

You can add:

- An unlimited number of single conditions.
- Conditions for the records that are associated with top-level records.
- A group of conditions (nested conditions) using the **Add group of conditions** icon.



See "Appendix B: Synchronization Filters" on page 101 for more information about creating filter conditions. This includes instructions on how to create conditions for associated records and group conditions.

11. In the filter criteria pane, select the **Match criteria** setting as follows:

- If you enter more than one filter, select **All** (AND-based) to synchronize records that match all of the conditions that you enter for a record.
- If you enter more than one filter, select **Any** (OR-based) to synchronize records that match any one of the filter conditions; records do not have to meet all the filter conditions.

To create filters that mix AND and OR conditions, you must use a group (nested) condition.



See "Appendix B: Synchronization Filters" on page 101 for more information on group conditions.

- Records that match your filter conditions are synchronized and brought into Connect for Microsoft Outlook as "complete" records. This means all their information appears on the record form in Connect for Microsoft Outlook.
- Records that do not match your filter criteria are synchronized and brought into Connect for Microsoft Outlook if they are associated with records that match your filter conditions. However, these records are brought in to Connect for Microsoft Outlook as "incomplete" records. This means that the records are read-only in Connect for Microsoft Outlook, regardless of your access rights. Associations to the associated records are not brought into Connect for Microsoft Outlook at all. This prevents all records from coming into Connect for Microsoft Outlook through associations.



See Appendix A on page 99 for more information and an example of complete and incomplete records.



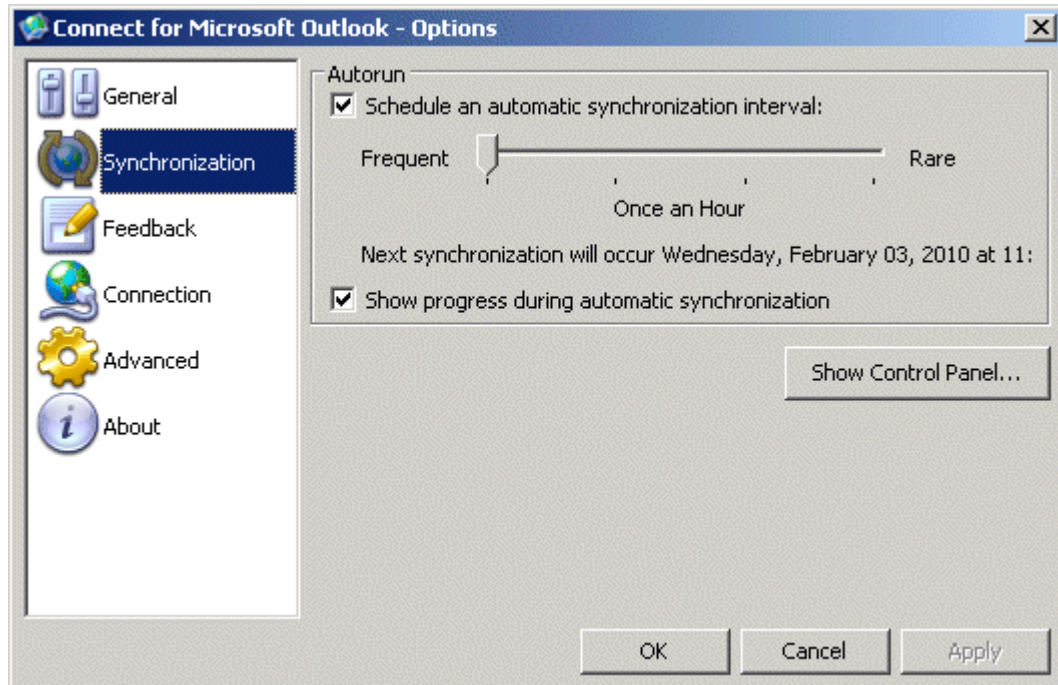
If you clear the **Remove local records not matching filtering criteria** check box on the Synchronization Control Panel dialog box, Vision records that synchronized previously, but do not match your current filter requirements, remain in Connect for Microsoft Outlook. Be aware that when you make any changes to these records in Vision, the changes are not updated to Connect for Microsoft Outlook when you synchronize.

12. When you finish creating filters, click **Save** and then click **Close**.



To edit a single filter condition, double-click it in the filter criteria pane to open the Connect for Microsoft Outlook Filter– Edit Criterion dialog box.

13. On the Synchronization tab of the Options dialog box that displays automatically, complete the following settings:



- **Schedule an automatic synchronization interval** — Select this check box to have synchronization occur automatically at regular intervals.
- **Frequency slider bar** — If you selected the **Schedule an automatic synchronization interval** check box, use this slider to select the automatic synchronization frequency.

The options are:

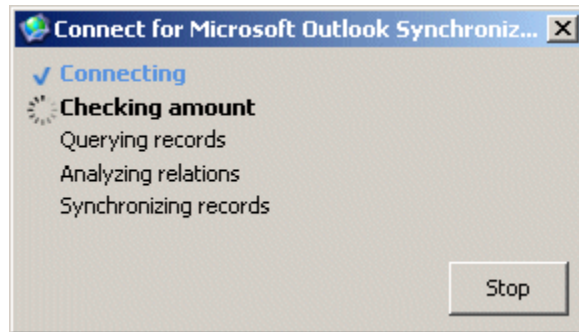
- **Once an Hour** (default)
- **Twice a Day**
- **Once a Day**
- **Once a Week**

The time of the next synchronization displays below the **Frequency** slider bar.




See "Appendix C: Synchronization Schedules" on page 118 for more information about automatic synchronization scheduling.

- **Show progress during automatic synchronization** — Select this check box if you want the following synchronization progress dialog box to display during automatic synchronization.





The **Stop** button on the synchronization dialog box stops the synchronization. When you click this button, the synchronization stops after it finishes the current operation in process (it does not stop immediately).

When you click the  button in the upper right corner of the screen, it minimizes the dialog box, and it does **not** stop the synchronization process.



Regardless of the synchronization settings that you select on the Connect for Microsoft Outlook Options dialog box, you can synchronize at any time. Select one of the following actions:


- Left-click the **Connect for Microsoft Outlook**  icon in the taskbar that displays by default at the bottom of the Windows desktop.
- Right-click the **Connect for Microsoft Outlook**  icon, and then select **Synchronize Now** from the menu. This allows you to display the Filtering Control Panel and the Configuration Options.

- **Show Control Panel** — Click this button to open the Synchronization Control Panel dialog box. On this dialog box, you can select filter options for synchronization. The screen shot in step 7 displays the Synchronization Control Panel dialog box.

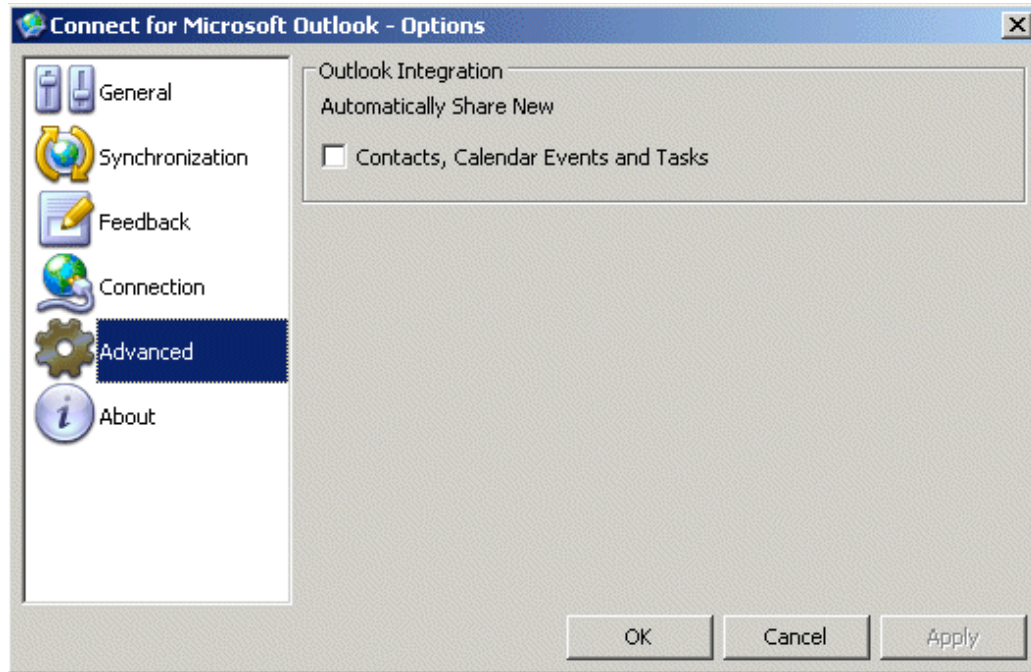
14. When you finish entering settings on the Synchronization tab of the Options dialog box, click **OK** to save your settings.



To change synchronization settings at any time after you use the Connect for Microsoft Outlook Assistant during the initial installation, complete the following steps:

1. On the Windows taskbar, right-click the Connect for Microsoft Outlook  icon and click **Options**.
2. On the Connect for Microsoft Outlook – Options dialog box, click the Synchronization tab.

15. On the Advanced tab of the Connect for Microsoft Outlook Options dialog box that displays automatically, select the default setting for sharing **new** contacts, calendar items, and tasks that you create in Connect for Microsoft Outlook with Vision.



- Select the **Automatically Share New Contacts, Calendar Events and Tasks** check box if you want to share new records automatically with Vision by default.

Shared contacts, calendar items, and tasks:


- Contain Vision-specific data fields not found in Outlook (for example the **Client/Vendor** field on the Connect for Microsoft Outlook Contact form).
 - Synchronize with Vision and display in Vision and Connect for Microsoft Outlook.
- Clear the **Automatically Share New Contacts, Calendar Events and Tasks** check box if you do not want to share new records with Vision by default.

The contacts, calendar items, and tasks that you do not share with Vision are considered to be native Outlook.

Native Outlook items:

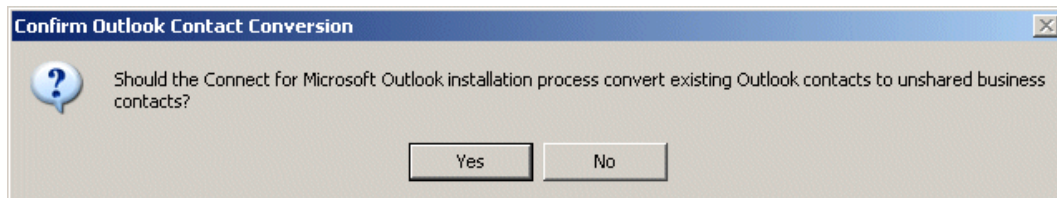
- Display in Connect for Microsoft Outlook only and do not synchronize with Vision.
- Do not contain Vision-specific data fields.



- After you complete the Connect for Microsoft Outlook Assistant, you can change the default setting for sharing new contacts, calendar events, and tasks at any time by right-clicking the Connect for Microsoft  icon on the Windows taskbar and selecting the Options menu. Then select the Advanced tab on the Connect for Microsoft Outlook – Options dialog box.
- You can override the prefilled default setting when you create individual records in Connect for Microsoft Outlook.
- You can switch records from shared to unshared and vice versa at any time on a record-by-record basis by clicking the **Shared with Deltek** bar on the record's form in Connect for Microsoft Outlook.

16. After you make your selection, click **OK**. The Advanced Options dialog box closes and the Convert Items process begins automatically.

The following Confirm Outlook Contact Conversion dialog box displays, asking whether or not you want to convert existing Outlook contacts to unshared business contacts.



- Click **Yes** if you want existing Outlook contacts that were originally created in native (standard) Outlook to be converted to unshared contacts in Connect for Microsoft Outlook.

If most of your Outlook contacts should be added to Vision, we recommend that you click **Yes**.



Vision Synchronization Server Migrations

If you are migrating from Vision Synchronization Server to Connect for Microsoft Outlook, you must click **Yes** to avoid duplicate contacts in Outlook. When you choose **Yes**, Connect for Microsoft Outlook looks in Outlook for any contact records that have a category of DLTKSYNC. If they do, it automatically converts them to the shared status.

Any contact that has a DLTKSYNC category in Outlook that does not exist in Vision will be deleted from Outlook.

See the "Synchronization Server and Other Migrations: Prevent Duplicate Contacts" section on page 31 for more information about Synchronization Server migrations.

Unshared Contacts in Connect for Microsoft Outlook

Before you can share native (standard) Outlook contacts with Vision, you must convert them from native to unshared. Then you can change unshared contacts to shared contacts. Unshared contacts:

- Are **not** synchronized with Vision. They display in Connect for Microsoft Outlook only.

- Contain Vision-specific data fields that are not available in Outlook (for example the **Client/Vendor** field on the Connect for Microsoft Outlook Contact form).
- Can be shared with Vision on a contact-by-contact basis at any time by clicking the **Shared with Deltek** bar for the contact on the Contact form in Connect for Microsoft Outlook.
- Include the Vision business logic. For example, fields that are required in Vision are required for unshared contacts.
- Click **No** on the Confirm Outlook Contact Conversion dialog box if you want existing native Outlook contacts to remain as native Outlook contacts.

If most of your Outlook contacts are private contacts, we recommend that you click **No**. This ensures that the Outlook **Company** field remains for private contacts.

Native Outlook contacts:

- Display in Connect for Microsoft Outlook only and do not synchronize with Vision.
- Do not contain Vision-specific data fields.
- Do not contain Vision business logic.

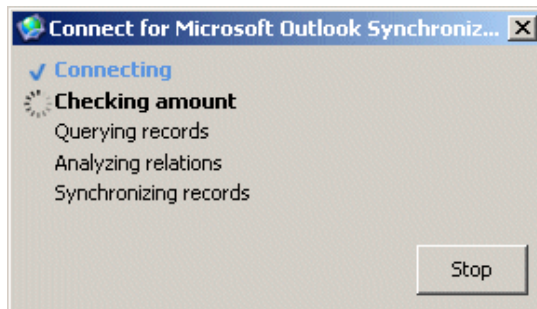
If you click **No** on the Confirm Outlook Contact Conversion dialog box, you can use the **Convert to Deltek Form** command on the Actions menu in Connect for Microsoft Outlook to convert native contacts to unshared contacts on a contact-by-contact basis. Then, you can click the **Shared with Deltek** bar on the Contact form to share contacts with Vision. See the Sharing Records topic in the Connect for Microsoft Outlook help for specific instructions.



Calendar Items and Tasks

The converting process converts all existing calendar items and tasks to unshared if they do not match the filter criteria. If they match the filter criteria, they are automatically shared with Deltek. Then, you can share any calendar item or task on an item-by-item basis by clicking the **Shared with Deltek** bar on the record form.

When the Convert Items process finishes, the Connect for Microsoft Outlook Synchronization dialog box displays automatically. Synchronization takes place to upload Vision data into Connect for Microsoft Outlook for the first time.





Vision data is downloaded into Connect for Microsoft Outlook based on the following:


- The filter criteria that you entered in the Connect for Microsoft Outlook Assistant.
- Your Vision security access.
- Whether or not a Vision record is associated with another Vision record that is downloaded to Connect for Microsoft Outlook.

Records that match your filter criteria are synchronized and brought into Connect for Microsoft Outlook as "complete" records. You see all their information displayed on the record form in Connect for Microsoft Outlook.

Records that do not match your filter criteria, but which are synchronized because they are associated to records that match your criteria, are also brought into Connect for Microsoft Outlook. However, these records are brought in as "incomplete" records. This means they are read-only in Connect for Microsoft Outlook, regardless of your access rights. Associations to the associated records are not brought into Connect for Microsoft Outlook at all. This prevents all records from coming into Connect for Microsoft Outlook through associations.

See Appendix A on page 99 for more information and an example of complete and incomplete records.


The **Stop** button on the Connect for Microsoft Outlook Synchronization dialog box stops the synchronization. When you click this button, the synchronization stops after it finishes the current operation in process (it does not stop immediately).

The  button at the top right of the dialog box minimizes the dialog box, and does **not** stop the synchronization process.

When the Synchronization dialog box closes, you can use Connect for Microsoft Outlook.



You can view or modify the Connect for Microsoft Outlook configuration settings after the initial set up by completing the following steps:

1. Right-click the **Connect for Microsoft Outlook**  icon on the taskbar that displays by default at the bottom of your Windows desktop.
2. Select one of the following:
 - **Show Control Panel** — Opens the Synchronization Control Panel where you select Filter Records criteria.
 - **Options** — Opens the Options dialog box where you access the other Connect for Microsoft Outlook configuration settings.

Check and Resolve Duplicate Contact Records

With the following instructions, you can check and resolve any duplicate contact records that were created after you synchronized Connect for Microsoft Outlook for the first time.

Duplicates are not detected during the first synchronization because there are no shared records in your Outlook. After the first synchronization, duplicate records will exist in your Outlook if you had any Vision contacts already in your Outlook and those contacts matched your synchronization filter. In this scenario, one contact is in a unshared or native state and the same contact in a shared state. If you decide to share the pre-existing contact, then a duplicate will be caught during your next synchronization.






If you are migrating from Vision Synchronization Server to Connect for Microsoft Outlook, you can skip these instructions. Instead, see the "Vision Synchronization Server Migrations" section on page 18 for information about preventing duplicate contacts.

To check and resolve duplicate contact records, complete the following steps:

1. After you synchronize Connect for Microsoft Outlook for the first time (as described in the previous section), sort the list of contacts in Connect for Microsoft Outlook by name.
2. Scan the contact list for any potential duplicates. If a Vision contact existed in Outlook before you installed Connect for Microsoft Outlook and that contact matched your synchronization filter, then there will be two occurrences of the contact in Connect for Microsoft Outlook. One contact is in a shared state. The other is in a native or unshared state depending on the state you select for the contact conversion when you deployed and configured Connect for Microsoft Outlook for the first time.

You can tell whether a contact is native, unshared, or shared by the icon located beside the contact name in the contact list:

-  — Native Outlook contact
 -  — Unshared contact
 -  — Shared contact
3. When you find a duplicate contact, open the two records and compare them.
On the Contact form, update the shared contact with any additional information from your native or unshared contact.
 4. After ensuring that the shared contact has all the information from your native or unshared contact, delete the native or unshared contact from Connect for Microsoft Outlook. Alternatively, you can temporarily move it to another contact subfolder as a backup.

5. Review the list of contacts again, and complete one of the following options:

| Options | Instructions |
|--|---|
| <p>Option 1:</p> <p>If you selected to convert existing native Outlook contacts to unshared:</p> | <ol style="list-style-type: none"> 1. You may want to convert your private contacts back to the native Outlook form. This adds the Company field back to the Contact form and removes any Vision business logic. 2. Open any unshared contacts that should be shared with Vision, and complete the following: <ol style="list-style-type: none"> a. On the Contact form, if there was a value in the Outlook Company field, another dialog box opens and you can choose a Vision client or vendor from the list. If the appropriate client or vendor is not in the list, use the Client/Vendor lookup to find it. b. Complete the other Vision fields, such as the Business Address, on the Contact form as appropriate. (The value that was previously in the Business Address field will be in the Notes field.) c. Click the Shared with Deltek bar to share it with Vision. d. Save your changes to the contact record. If the record exists in Vision, it will be detected as a duplicate when you synchronize. |
| <p>Option 2:</p> <p>If you selected to not convert existing native Outlook contacts and there are native contacts that you want to share with Vision:</p> | <ol style="list-style-type: none"> 1. Convert the contacts to unshared. To do this, select the contacts, and click Tools » Convert to Deltek Form. 2. Open the contact. 3. On the Contact form, if there was a value in the Outlook Company field, another dialog box opens, and you can choose a Vision client or vendor from the list. If the appropriate client or vendor is not in the list, use the Client/Vendor lookup to find it. 4. Complete the other Vision fields, such as the Business Address, on the Contact form as appropriate. (The value that was previously in the Business Address field will be in the Notes field.) 5. Click the Shared with Deltek bar to share it with Vision. |

| Options | Instructions |
|---------|--|
| | 6. Save your changes to the contact record. If the record exists in Vision, it will be detected as a duplicate when you synchronize. |

Access and Use Connect for Microsoft Outlook

After you install and configure Connect for Microsoft Outlook, when you open Outlook (with the Connect for Microsoft Outlook profile), you access Connect for Microsoft Outlook directly. This section describes the basic components of the main Connect for Microsoft Outlook window.



See the Connect for Microsoft Outlook online help for more detailed information on how to work in Connect for Microsoft Outlook. On the Outlook menu bar in Connect for Microsoft Outlook, click **Help » Connect for Microsoft Outlook**.

Vision and Outlook Options and Functionality

Outlook Menu Bar

Outlook Toolbar

Vision Toolbar

Folder List


Navigation Pane

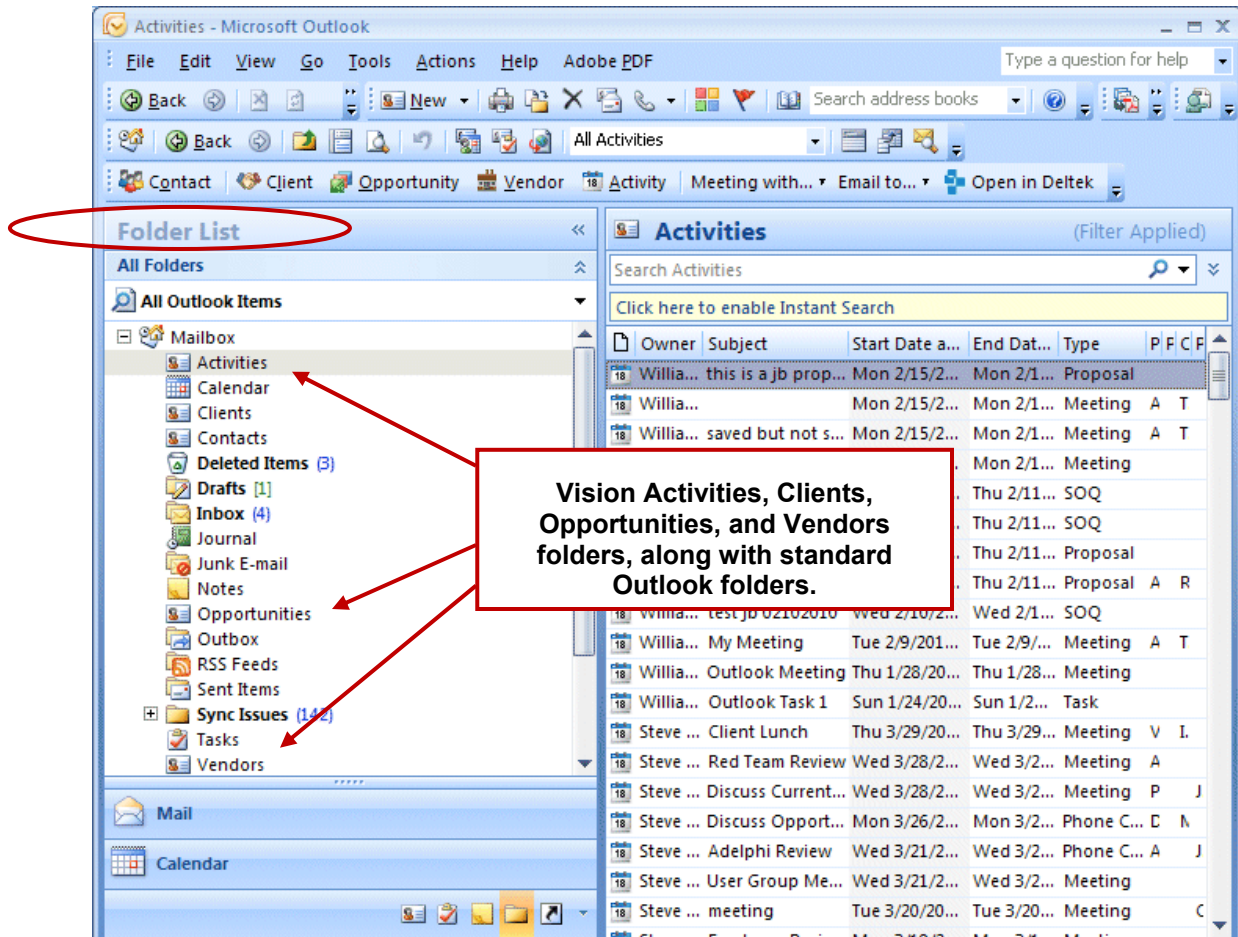
Folder List Icon:
Click it to display Vision and standard Outlook folders in the Folder List view in the Navigation pane.

Explorer View:
Displays the records for the folder that you selected in the Folder List view.

| Owner | Subject | Start Date a... | End Date ... | Type | P | F | C | F |
|-----------|----------------------|-----------------|---------------|-------------|---|---|---|---|
| Willia... | Appointment | Thu 2/24/20... | Thu 2/24/2... | Phone Call | A | A | | |
| Willia... | Client Lunch | Tue 2/22/20... | Tue 2/22/2... | Meeting | A | A | | |
| Willia... | Client Visit | Sat 2/12/200... | Sat 2/12/2... | Meeting | A | A | | |
| Steve ... | Internal Marketin... | Wed 1/12/2... | Wed 1/12/... | Meeting | | | | |
| Willia... | Anderson & Asso... | Tue 1/11/20... | Tue 1/11/2... | Phone Call | A | | | |
| Willia... | Management Me... | Fri 7/30/200... | Fri 7/30/2... | Meeting | | | | |
| Willia... | Seminar | Thu 7/29/20... | Thu 7/29/2... | Continui... | | | | |
| Willia... | Internal Staff Me... | Fri 7/23/200... | Fri 7/23/2... | Meeting | | | | |
| Willia... | SAME Convention | Fri 7/23/200... | Fri 7/23/2... | Meeting | | | | |
| Willia... | SAME Convention | Thu 7/22/20... | Thu 7/22/2... | Meeting | | | | |
| Willia... | Seminar | Fri 7/16/200... | Fri 7/16/2... | Continui... | | | | |
| Willia... | AIA Convention | Wed 7/14/2... | Wed 7/14/... | Meeting | | | | |
| Willia... | AIA Convention | Tue 7/13/20... | Tue 7/13/2... | Meeting | | | | |
| Willia... | AIA Convention | Mon 7/12/2... | Mon 7/12/... | Meeting | | | | |
| Willia... | CRM Call | Tue 7/6/200... | Tue 7/6/20... | Phone Call | C | C | | |
| Willia... | Seminar | Mon 7/5/20... | Mon 7/5/2... | Meeting | | | | |
| Willia... | Design Review | Thu 7/1/200... | Thu 7/1/20... | Meeting | | | | |
| Willia... | CRM Call | Thu 7/1/200... | Thu 7/1/20... | Phone Call | A | A | | |
| Willia... | Internal Marketin... | Mon 5/31/2... | Mon 5/31/... | Meeting | | | | |

Vision Folders and Records

Click the **Folder List**  icon at the bottom of the Navigation pane to display the Vision Activities, Clients, Opportunities, and Vendors folders and the standard Outlook folders in the Folder List view.



Folder List Icon

Explorer View:

This displays the records for the folder that you selected in the Folder List view (in this example, Activities).



You can add new subfolders within the Deltek folders. However, records that you add in these subfolders do not synchronize with the Vision software. Synchronization occurs with the top-level folders only.

Explorer View

When you click a folder in the Folder List view, the folder's records display in the Explorer view on the right side of the window. For example, when you click the Clients folder in the Folder List view, a list of Vision clients displays in the Explorer view.

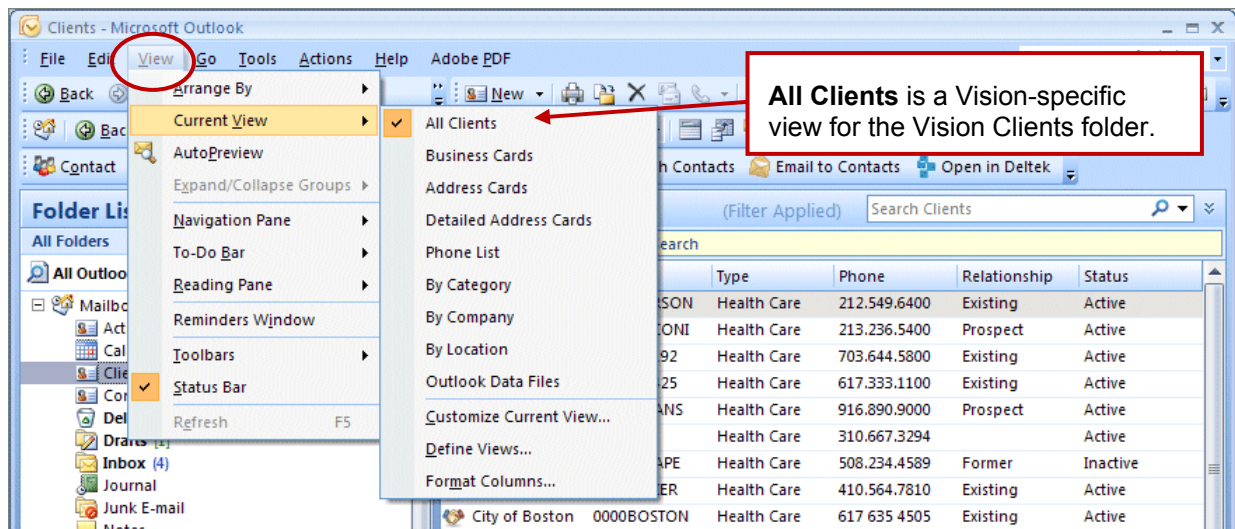
Views: Current, Vision-Specific, Customized, and New

Current View

How the records display in the Explorer view is determined by the current view that you select for the folder.

To change the current view for a folder, select the folder in the Folder List view, and then from the Outlook menu bar, click **View » Current View**.

The Current View menu includes standard Outlook views and Vision-specific views.



Vision-Specific Explorer Views

The following are Vision-specific views that you can select from **View » Current View**.

| Vision Folder in Folder List View | Vision-Specific View in View » Current View |
|-----------------------------------|---|
| Activities | All Activities |
| Clients | All Clients |
| Contacts | All Contacts |
| Opportunities | All Opportunities |
| Vendors | All Vendors |

Customized and New Views

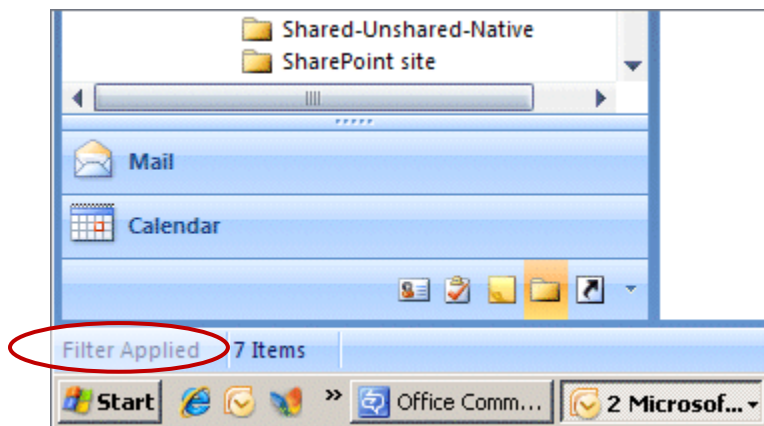
From the Current View menu, you can also select **Customize Current View** or **Define Views** to customize the current view further or to create a new view.



See the Outlook online help to learn how to create new views or customize current views. On the Outlook menu bar in Connect for Microsoft Outlook, click **Help » Microsoft Office Outlook Help**.

Filters and Views

When you work in Connect for Microsoft Outlook, **Filter Applied** displays in the Connect for Microsoft Outlook taskbar at the bottom of the screen. An applied filter is part of the Connect for Microsoft Outlook's normal, internal functionality that you cannot change. These filters are not the synchronization filters that you create in the Filter Records screen on the Synchronization Control Panel dialog box.

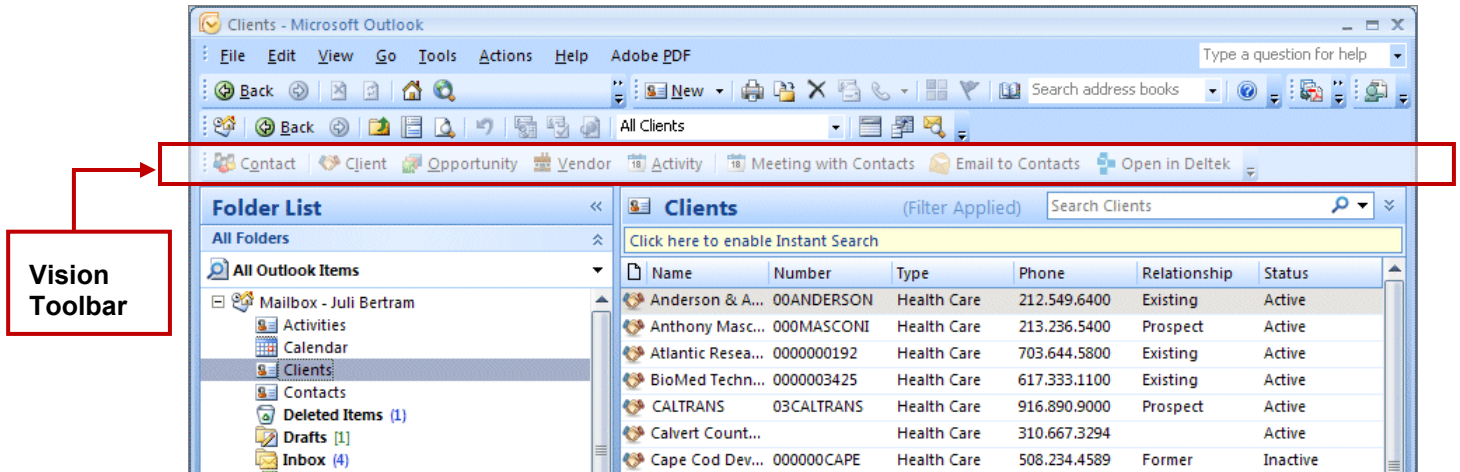


Vision Toolbar

The Vision toolbar in the Explorer view contains buttons that you use to create new Vision records. The **Contact**, **Client**, **Opportunity**, **Vendor**, and **Activity** buttons always display. Other buttons are context-sensitive and display only when a certain type of record is selected.

The **Open in Deltek** button displays based on the type of record you select in Explorer view and the state of the record. Click this button to open the Vision software.

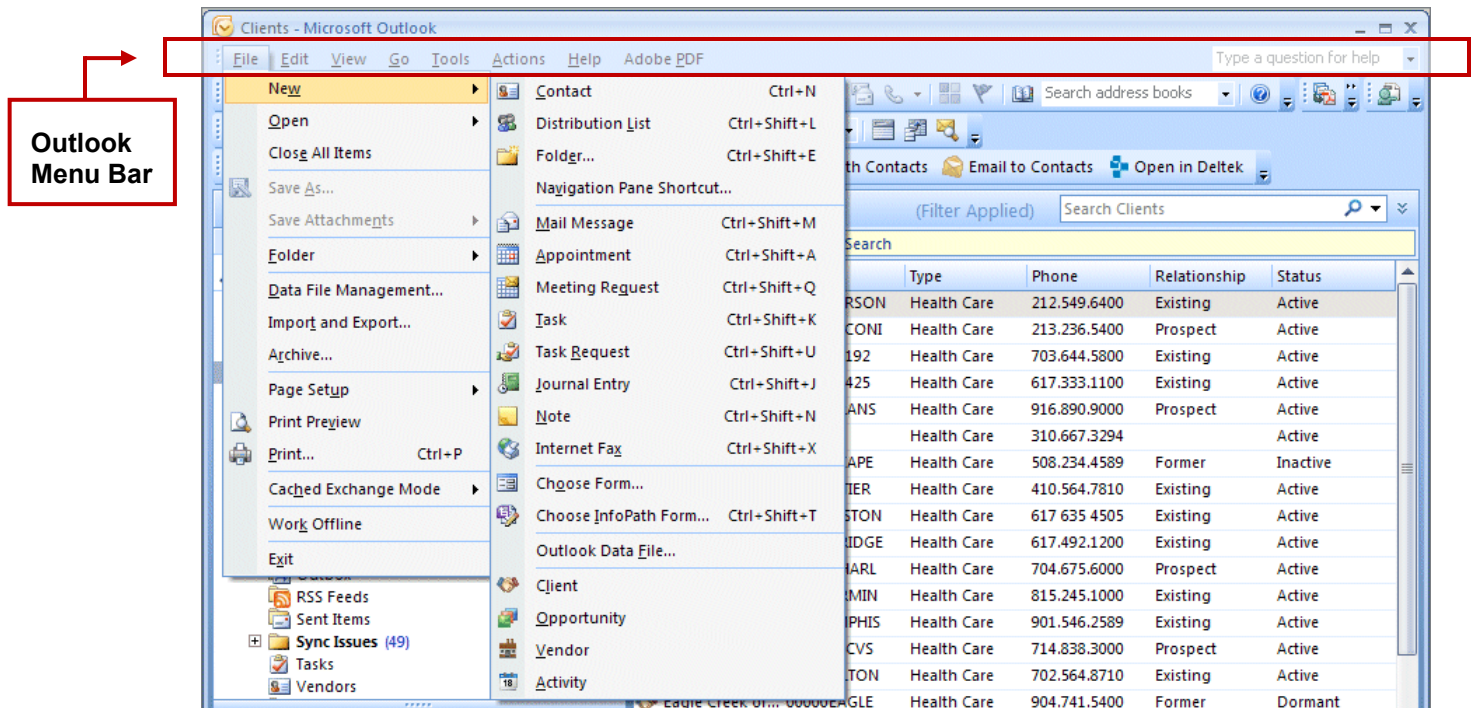
The following screen shot shows the Vision toolbar buttons that display when you select the Clients folder in the Folder List. These buttons include **Contact**, **Client**, **Vendor**, and so on.



Outlook Menu Bar

You can also select Vision and standard Outlook commands from the Outlook menu bar.

The following screen shot shows the submenus and commands when you click the File menu.



The following table identifies Vision commands on the menu bar:

| Vision Commands in the Outlook Menu Bar | Description |
|---|---|
| File » New » <ul style="list-style-type: none"> New Client New Activity New Opportunity New Vendor | Use these commands to create a new Vision client, activity, opportunity, or vendor. |
| File » New » Contacts | Use the Contacts command to create Vision and/or Outlook contacts. |
| Go » <ul style="list-style-type: none"> Clients Activities Opportunities Vendors | Use these commands to open the Clients, Activities, Opportunities, or Vendors. |


| Vision Commands in the Outlook Menu Bar | Description |
|--|--|
| Actions » Convert to Native Outlook Form | <p>This command displays when you select a contact record in Explorer View.</p> <p>Use this command to convert an unshared contact to the native (standard) Outlook form. This removes the Vision-specific fields and all the data contained in them.</p> <p>You can convert one or more contacts at a time.</p> |
| Actions » Convert to Vision Form | <p>This command displays when you select a contact record in Explorer View.</p> <p>Use this command to convert a standard (native) Outlook contact to a unshared contact.</p> <p>Unshared contacts:</p> <ul style="list-style-type: none"> ▪ Contain Vision-specific data fields that are not available in Outlook (for example, the Client/Vendor field on the Connect for Microsoft Outlook Contact form). ▪ Are not synchronized with Vision, so they do not display in Vision. They display in Connect for Microsoft Outlook only. ▪ Can be shared with Vision on a contact-by-contact basis at any time by clicking the Share bar for the contact on the Contact tab in Connect for Microsoft Outlook. <p>You can convert one or more contacts at a time.</p> |
| Help » Connect for Microsoft Outlook Help | <p>Opens the Connect for Microsoft Outlook help system, where you find topics on how to use Connect for Microsoft Outlook.</p> <p>This help system is accessible when Connect for Microsoft Outlook is either online or offline.</p> |



Connect for Microsoft Outlook Application States



The following table identifies the various Connect for Microsoft Outlook icons that you see on your Windows desktop taskbar that indicate the current state of the Connect for Microsoft Outlook application.



**Connect for Microsoft Outlook icon
on your Windows taskbar**

| Connect for Microsoft Outlook Application State | Icon | Description | Menu Items Available When You Click the Icon |
|---|---|---|--|
| Not Configured |  | Connect for Microsoft Outlook is not configured to be used in the selected Outlook profile. | <p>Right-click the icon, and select one of the following options:</p> <ul style="list-style-type: none"> ▪ Obtain package — Select this option to apply the application configuration. This menu is available during initial application confirmation. It starts the customization package download and applies the application configuration. It can also open the Login dialog box if the user's credentials are not supplied. ▪ Options — Select this option to edit the proxy settings on the Connection tab of the Options dialog box. ▪ Change credentials — Select this option to specify the Vision user credentials on the Login dialog box. |

| Connect for Microsoft Outlook Application State | Icon | Description | Menu Items Available When You Click the Icon |
|---|---|---|--|
| Online |  | Connect for Microsoft Outlook is running, and the connection with the Vision server is available. | <p>Right-click the icon, and select one of the following options:</p> <ul style="list-style-type: none"> ▪ Synchronize Now — This starts a synchronization session. ▪ Show Progress — This opens or hides the Connect for Microsoft Outlook synchronization progress screen. This option is available during a synchronization session. ▪ Show Control Panel — This opens the Synchronization Control Panel dialog box. ▪ Open Connect for Microsoft Outlook — This opens Connect for Microsoft Outlook in the foreground if it is not your active application. ▪ Options — This opens the Connect for Microsoft Outlook Options dialog box. |
| Offline |  | <p>The connection with the Vision server is unavailable.</p> <p>If a connection to the computer running the Vision server is not available, Connect for Microsoft Outlook switches to offline mode. In offline mode, you cannot synchronize, change credentials, or open the Connect for Microsoft Outlook Control Panel.</p> <p>When the connection is restored, Connect for Microsoft Outlook automatically switches to online mode. Any changes that you made while a connection to the server was not available are synchronized when you run</p> | <p>Right-click the icon, and select one of the following options:</p> <ul style="list-style-type: none"> ▪ Open Connect for Microsoft Outlook — This opens Connect for Microsoft Outlook in the foreground if it is not your active application. ▪ Options — This opens the Connect for Microsoft Outlook Options dialog box. <p>The Change button on the General tab is disabled, and you cannot change the user credentials.</p> |

| Connect for Microsoft Outlook Application State | Icon | Description | Menu Items Available When You Click the Icon |
|--|---|---|--|
| | | a synchronization session. | |
| Collisions Detected/ Duplication Detected/ Deletion Detected/ Synchronization Issue |  | <p>A synchronization conflict or issue has occurred. The application is connected to the Vision server.</p> <p>See the Resolve Duplicates and Resolve Conflicts topics in the Connect for Microsoft online help for more information.</p> | <p>Right-click the icon, and select one of the following options:</p> <ul style="list-style-type: none"> ▪ Synchronize Now — This starts a synchronization session. If the collision is not resolved, the session ends with the same collision indicator. ▪ Show Progress — This opens or hides the Connect for Microsoft Outlook synchronization progress screen. This option is available during a synchronization session. ▪ Show Control Panel — This opens the Synchronization Control Panel dialog box. ▪ Open Connect for Microsoft Outlook — This opens Connect for Microsoft Outlook in the foreground if it is not your active application. ▪ Options — This opens the Connect for Microsoft Outlook Options dialog box. |
| Broken Data Structure |  | One of the custom folders installed by Connect for Microsoft Outlook has been removed. | <p>Right-click the application icon and select Fix integrity to re-install the data structure.</p> <p>This removes the current Connect for Microsoft Outlook data and reinstalls the data structure.</p> <p>Run synchronization to download the data from the server again.</p> |

Uninstall Connect for Microsoft Outlook for a Single User

This section provides information and instructions on how to uninstall Connect for Microsoft Outlook. When you uninstall Connect for Microsoft Outlook, all shared-with-Vision data is removed from your Outlook mailbox.

You uninstall the software:

- If you no longer want Connect for Microsoft Outlook installed on a workstation.
- Before you install a Connect for Microsoft Outlook software upgrade.
- Before you reinstall Connect for Microsoft Outlook.



You **must** uninstall Connect for Microsoft Outlook **before** you install a Connect for Microsoft Outlook software upgrade or **before** you reinstall Connect for Microsoft Outlook.

If You Use Microsoft Office Desktop Integration (MODI)

If you have Connect for Microsoft Outlook and the Deltek Microsoft Office Desktop Integration (MODI) modules installed on a workstation and you uninstall Connect for Microsoft Outlook, MODI may experience errors.


If this occurs, you must log on to Vision and relaunch the MODI installation routine and choose the option to repair the installation. After the repair is performed, reconfigure the MODI options to continue using it.

Uninstall Procedure



To prevent loss of data, Deltek recommends that you synchronize Connect for Microsoft Outlook and Vision and back up all personal data in Outlook before you remove the Connect for Microsoft Outlook software from a workstation. These are steps one and two in the below instructions.

To uninstall Connect for Microsoft Outlook from a workstation, complete the following steps:

1. On the workstation, perform synchronization between Connect for Microsoft Outlook and Vision. Open Connect for Microsoft Outlook, and click the Synchronization  icon in the taskbar menu that displays by default at the bottom of the Windows desktop.
2. To back up personal data in Outlook, export data to a PST file as follows:
 - a. From the Outlook application-level menu bar, click **File » Import and Export**.
 - b. On the Import and Export Wizard page, select **Export to a file** from the list and click **Next**.
 - c. On the Export to a File page, select **Personal Folder File (.pst)** from the list, and click **Next**.

- d. On the Export Personal Folders page, select the appropriate folders that contain personal data and click **Next**.
- e. On the next Export Personal Folders page, click **Finish**.
3. Close Outlook.
4. From the Windows Start menu, open the Control Panel, and select **Add or Remove Programs**.
5. In the Currently installed programs window, click **Connect for Microsoft Outlook** in the list of programs, and then click **Remove**.
6. The Windows prompt allow you to confirm whether or not you really want to remove Connect for Microsoft Outlook. Click **Yes** to proceed with the removal.
7. A dialog box displays with the following message:

To avoid data loss, prior to removing the application, make sure to synchronize all changes to Vision and back up all personal data by exporting to a Personal Folders file (**File » Import and Export » Export to a file » Personal Folder File (.pst)**). If you have done a final synchronization and backed up your data, click **Yes** to proceed, otherwise click **No** and complete those steps first.

After you click **Yes** to proceed, Connect for Microsoft Outlook is removed from the Add or Remove Programs window after the software removal is complete.

The following table describes where records reside after you uninstall Connect for Microsoft Outlook. (Shared means that the record in Connect with Microsoft Outlook is shared with Vision when you synchronize.)

| Records in Connect for Microsoft Outlook | Where They Reside After You Uninstall Connect for Microsoft Outlook |
|---|---|
| Contacts, appointments, and tasks originally created in Vision | They remain in Vision. They do not appear in standard (native) Outlook. |
| Shared calendar items and tasks originally created in Outlook | They remain in their corresponding folders in standard (native) Outlook. They also appear in Vision. |
| Contacts, appointments, or tasks originally created in standard (native) Outlook that were either native or unshared in Connect for Microsoft Outlook (a native Outlook contact never acquired Vision-specific data fields in Connect for Microsoft Outlook) | They remain in their corresponding folders in standard (native) Outlook. They do not appear in Vision. |
| Contacts that were shared with Vision | They are removed from Outlook. |


Uninstall Connect for Microsoft Outlook Using Microsoft SMS

You can use Microsoft Systems Management Server (SMS) to remove Connect for Microsoft Outlook for multiple users.



To prevent loss of data, Deltek recommends that you synchronize Connect for Microsoft Outlook and Vision and back up all personal data in Outlook on each workstation before you remove the Connect for Microsoft Outlook software from workstations. These are steps one and two in the below instructions.

To uninstall Connect for Microsoft Outlook on multiple workstations with SMS, complete the following steps:

1. On each workstation for which you are uninstalling Connect for Microsoft Outlook, perform synchronization between Connect for Microsoft Outlook and Vision. Open Connect for Microsoft Outlook, and click the Synchronization  icon in the taskbar menu that displays by default at the bottom of the Windows desktop.
2. To back up personal data in Outlook on each workstation, export data to a .PST file:
 - a. From the Outlook application-level menu bar, click **File » Import and Export**.
 - b. On the Import and Export Wizard page, select **Export to a file** and click **Next**.
 - c. On the Export to a File page, select **Personal Folder File (.pst)**, and click **Next**.
 - d. On the Export Personal Folders page, select the appropriate folders that contain personal data and click **Next**.
 - e. On the next export Personal Folders page, click **Finish**.
3. Close Outlook on each workstation.
4. Open the SMS management console.
5. Open the distribution package that you created for Connect for Microsoft Outlook and select **Programs**.
6. In the programs list, double-click **Connect for Microsoft Outlook**.
7. Edit the command line with the uninstall syntax.

Example:

```
msiexec /uninstall "\\filesrv1\Deltek\ConnectForMicrosoftOutlook.msi" /qr
```

This is the same as Example 3 on page 55.
8. Save the distribution package.
9. Run the advertisement for Connect for Microsoft Outlook.



For more information, see the topic on how to uninstall a product in the Msiexec command-line options section of the Microsoft Technet Web site — <http://technet.microsoft.com/en-us/library/bb490936.aspx>.

Upgrade Connect for Microsoft Outlook



Connect for Microsoft Outlook does not support in-place upgrades on end-user workstations. To upgrade the Connect for Microsoft Outlook application when upgrades are available, **you must complete the following steps in the order listed:**

1. Uninstall the current Connect for Microsoft Outlook version from end-user workstations.
2. Install the Connect for Microsoft Outlook upgrade on your Web server.
3. Re-install Connect for Microsoft Outlook on end-user workstations.

Upgrades to the Connect for Microsoft Outlook will be in the form of Deltek hot fix installations. The release notes for those installations will also provide installation steps for the Vision Web server.

The following steps provide the required sequence for upgrading Connect for Microsoft Outlook deployments on your Web server and end-user workstations when upgrades are available.



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.

To upgrade your Connect for Microsoft Outlook software, complete the following steps:

1. Uninstall the current version of Connect for Microsoft Outlook on each user's workstation.

We recommend that this be performed first because Connect for Microsoft Outlook client connects to the Web server whenever Outlook opens, and it will detect that there is an updated version.



If you have Outlook open and you receive a message that a new Connect for Microsoft Outlook build is available, select **No**, and **do not** download it. Instead, close Outlook, uninstall the old software, and install the new upgrade.

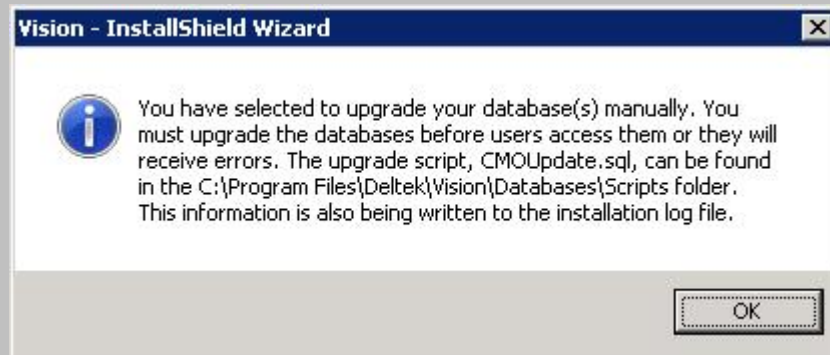
See the previous sections of this guide on how to uninstall Connect for Microsoft Outlook:

- Uninstall Connect for Microsoft Outlook for a Single User on page 86.
 - Uninstall Connect for Microsoft Outlook Using Microsoft SMS on page 88.
2. Complete the following steps on your Vision Web server:
 - a. Log on to the Vision Web server.
 - b. Log on to the Deltek Vision download site, and download the Connect for Microsoft Outlook hot fix .EXE installation file.
 - c. Run the hot fix .EXE file to launch the latest hot fix installer.
 - d. Follow the instructions using the hot fix installation wizard.
 - e. If the hot fix installation must run a database script on your Vision database, enter connection information for connecting to the Vision Web server when prompted.



The upgrade wizard automatically backs up your database before applying any database update scripts. If you prefer not to have the installation wizard back up your database to your server, you can select the **I will backup and upgrade the database myself after the installation** check box on this page.

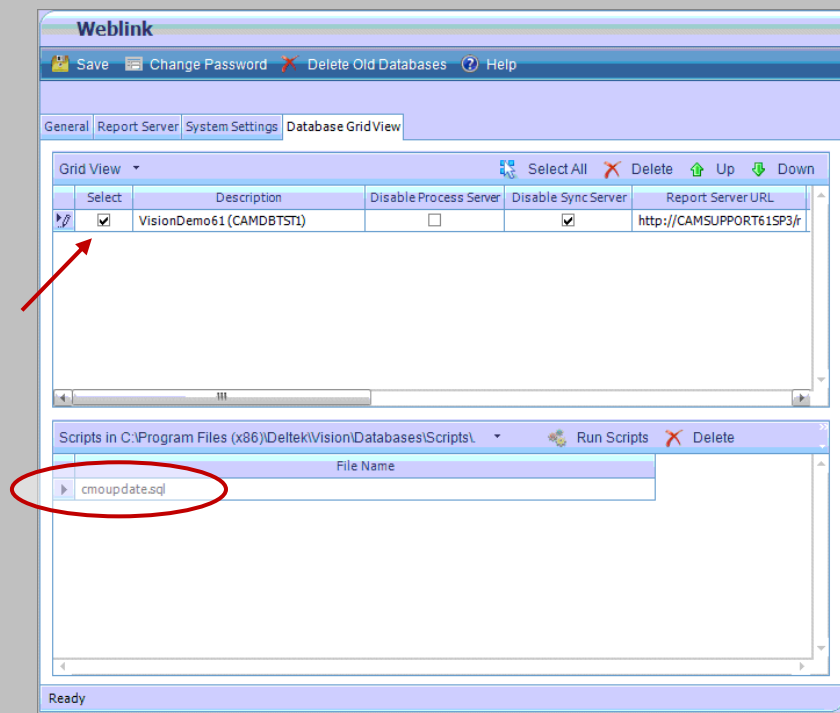
You receive the following dialog box when you select the **I will backup and upgrade the database myself after the installation** check box and click **Next**:



When the installation wizard continues, the Connect for Microsoft Outlook 6.1 software is installed, but your database is not backed up or upgraded.

After the software is installed, complete the following:

1. Make a manual backup of your database.
2. Launch Weblink, and enter the Weblink password.
3. Click the Database Grid View tab.
4. Click the check box in the **Select** column for the database you are applying the script against.



5. In the **Scripts in ...** grid at the bottom of the tab, enter **CMOUpdate.sql**, and then click the **Run Scripts** icon to execute the script.

Weblink will detect whether or not your database is Unicode. It will automatically execute the CMOUpdate.sql script as Unicode against a Unicode database.

If you do not apply the script:

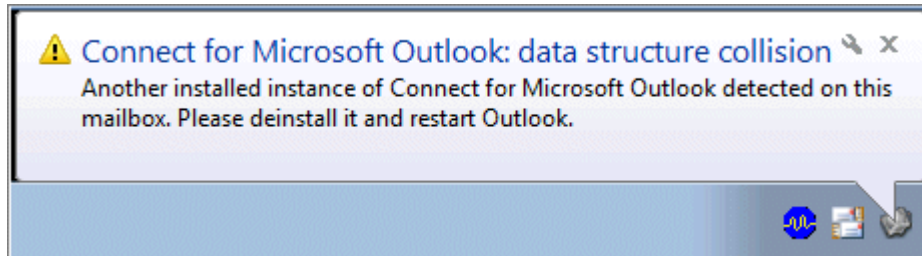
- Connect for Microsoft Outlook users may encounter various "Internal Error" messages during synchronization.
- If you migrate from Deltek Vision Synchronization Server to Connect for Microsoft Outlook, the stored procedures that are required for users to update their Outlook contacts to prevent duplication will be missing.

The installation stops the Vision IIS Web Services process and replaces the old Packages folder with a new Packages folder that contains the latest Connect for Microsoft Outlook files.

3. Follow the steps in the previous installation sections (on pages 48, 53, or 56) of this guide to re-install and configure Connect for Microsoft Outlook on users' workstations.

Connect for Microsoft Outlook Cleanup Utility

Installing Connect for Microsoft Outlook on multiple workstations and connecting to the same user mailbox on these multiple workstations is not supported. If you attempt to do this, you will receive the following data structure collision error when you install Connect for Microsoft Outlook to the same user mailbox on a second workstation and run the Connect for Microsoft Outlook Assistant.



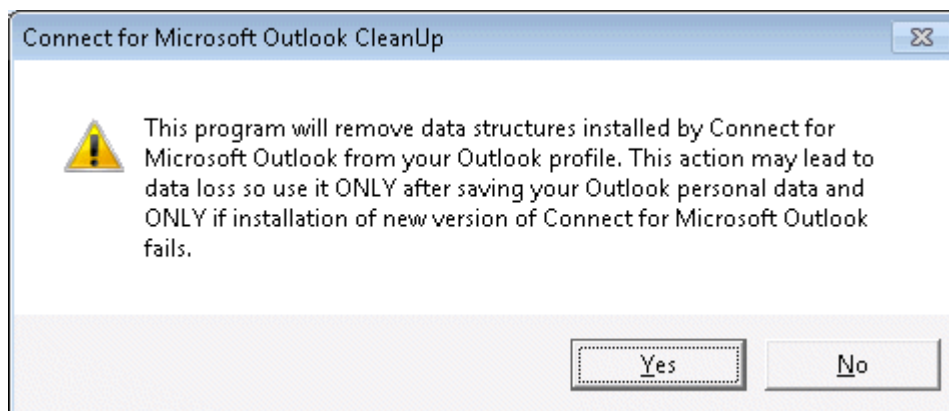
To resolve the issue and permanently use Connect for Microsoft Outlook on one workstation only, complete the following steps:

1. On the workstation that will not be using the Connect for Microsoft Outlook, uninstall Connect for Microsoft Outlook. This will remove the installation of Connect for Microsoft Outlook from the mailbox.
2. On the workstation that you plan to use Connect for Microsoft Outlook permanently, run the Cleanup Utility.

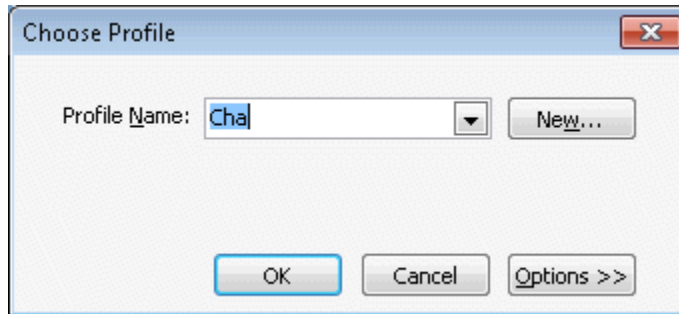
To use the Cleanup Utility, complete the following steps:

1. On the workstation that will permanently use Connect for Microsoft Outlook, close Connect for Microsoft Outlook.
2. From the Windows taskbar that displays at the bottom of your screen by default, click **Start » All Programs » Deltek » Cleanup Utility**.
3. On the Connect for Microsoft Outlook Cleanup dialog box that says this program will remove data structures installed by Connect for Microsoft Outlook from your Outlook profile, click **Yes**.

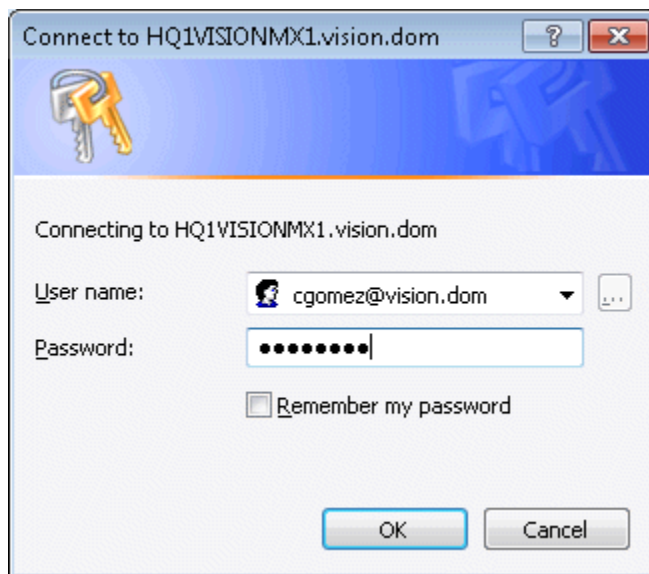
This removes all data structures installed by a previous installation of Connect for Microsoft Outlook from your Outlook profile.



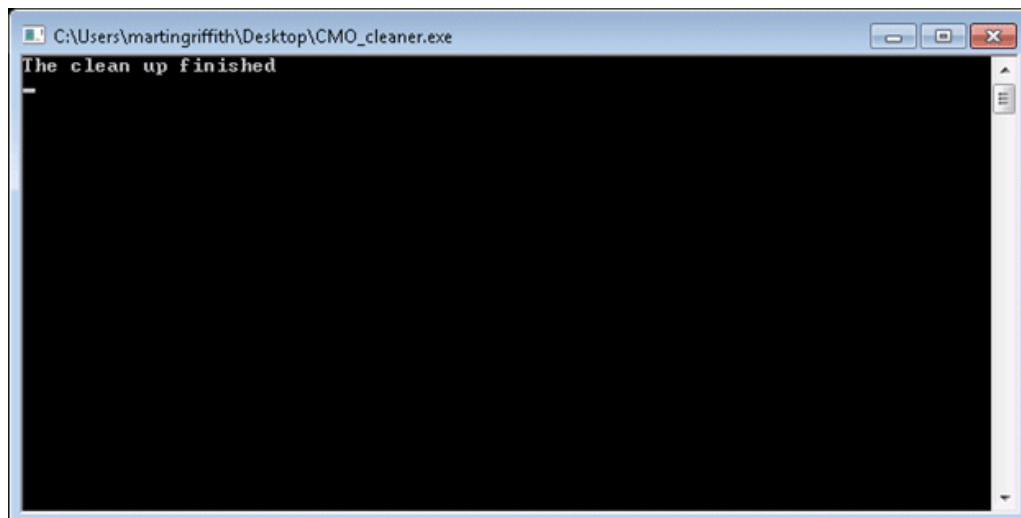
- On the Choose Profile dialog box, from the drop-down list in the **Profile Name** field, select the profile that you used when you installed Connect for Microsoft Outlook.



- If you are prompted for your Outlook/Exchange credentials, enter them and click **OK**.



- When the command prompt screen displays "The clean up finished" to indicate that the process completed successfully, press **Enter** on your keyboard.



7. Launch Outlook, and enter your credentials if prompted for them.

After a short delay, Connect for Microsoft Outlook begins the process of checking the structure of the mailbox and applying the Vision data structure into the mailbox. Then it launches the Connect for Microsoft Outlook Assistant to configure the Connect for Microsoft Outlook software.

Troubleshooting

Audit Reports

The following Vision reports have a **Source** column that displays a code to indicate whether changes were made in Vision or Connect for Microsoft Outlook:

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

The possible source codes are:

- **DTK** — Changes were made in Vision.
- **SNC** — Changes were made through synchronization with Connect for Microsoft Outlook.

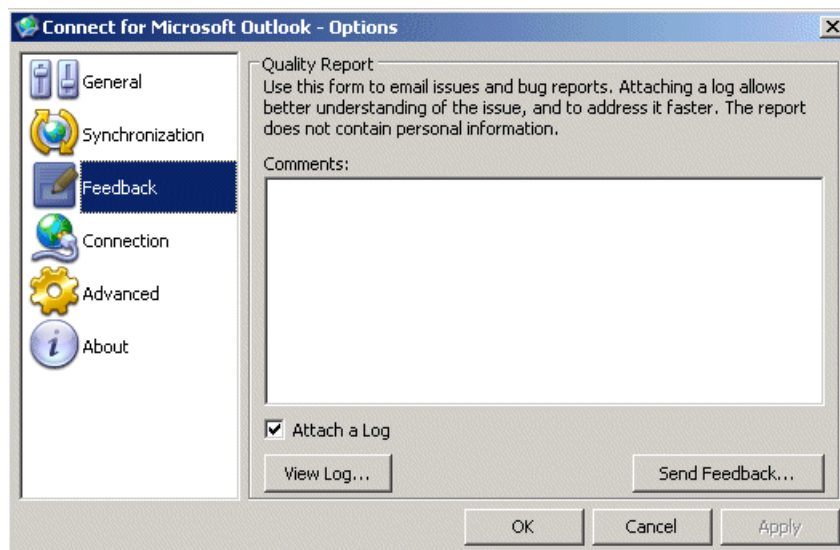
These reports are located in the Vision software in Reporting.

General Log

View the Log

Use the Feedback tab of the Connect for Microsoft Outlook - Options dialog box to view a general log that may help with any type of error.

Click the **View Log** button to open the **Connect4Outlook.log** file in Microsoft® Notepad.



Email the Log

To attach the log to an email and send the email to Deltek Customer Care Support (or to whomever you want), complete the following on the Feedback tab:

1. Click the **Attach a Log** check box.
2. In the **Comments** text box, enter the text for the body of an email.
3. Click the **Send Feedback...** button to open the Message form, enter the email recipients in the **To** and **Cc** fields, and modify the email message.
4. Click the **Send** button to send the email message.

Synchronization Logs

Sync Dump and Soap Dump Logs for Synchronization Errors

If you encounter a synchronization problem or error that you cannot resolve, you can send the Sync Dump and Soap Dump logs to Deltek Customer Care. These advanced logs are enabled by default.

Send the Sync Dump and Soap Dump Logs to Deltek

After you encounter a synchronization problem, complete the following steps on a workstation:

1. Capture screen shots of the Connect for Microsoft Outlook Synchronization Control Panel dialog box and the Filter Settings screen, and/or document the settings information and any other details.
2. Zip the following items from the Connect for Microsoft Outlook Profile directory. This will include the logs for troubleshooting.
 - Connect4Outlook.log (the general log)
 - Files with a prefix of "sync_dump_" and ending in .xml
 - The soap_dump subfolder (this contains the soap dump files)
 - The DATA subfolder (this contains the configuration package used for configuring the synchronization between Connect for Microsoft Outlook and Vision)

Path to the Connect for Microsoft Outlook Profile directory:

- **Windows XP:**

C:\Documents and Settings\%username%\Application Data\Deltek\Connect for Microsoft Outlook\Profile

(where %username% in the path is a system variable that is the login user's Windows profile name)

- **Windows 7 and Windows Vista:**

C:\Users\user_name\AppData\Roaming\Deltek\Connect for Microsoft Outlook\Profile

3. Send the following to Deltek Customer Care:
 - The zipped items from the Outlook Profile directory
 - The database name
 - The username
 - Any screen shots or other detailed information

Delete the sync_dump and soap_dump files

You can delete the sync-dump and soap-dump files when they get large. Before you delete them, you must exit Outlook. After you delete them, the logs are automatically recreated, and they start recording again.

Vision Data Structure is Inconsistent

Symptoms

When you start Outlook using your Connect for Microsoft Outlook profile, a pop-up message displays at the application icon informing you that Connect for Microsoft Outlook data structure is inconsistent and needs to be reinstalled. The application icon is gray, and the only menu available is **Fix integrity**.

Cause

Connect for Microsoft Outlook is in the Broken Data Structure state. This situation may occur if you have completely deleted one of the folders that Connect for Microsoft Outlook uses to store Vision records from Outlook. Alternatively, Outlook may have exited incorrectly and the data storage is corrupt.

Solution

To fix the inconsistent structure, complete the following steps:

1. Click the pop-up message to reinstall the Connect for Microsoft Outlook data structure. Alternatively, right-click the application icon, and select **Fix integrity** from the contextual menu.
2. Connect for Microsoft Outlook reinstalls the data structure. You can see all the Vision folders in the folders list.
3. If needed, modify the synchronization filters.
4. Run synchronization to download the data from the Vision server.

Connect for Microsoft Outlook Does Not Start When You Launching Outlook

Symptoms

When you start Outlook, Connect for Microsoft Outlook does not start. The Connect for Microsoft Outlook icon does not display in the notification area on your Windows taskbar.

Cause

Outlook has soft disabled the Connect for Microsoft Outlook add-in. Soft disabling occurs when an add-in throws an unhandled exception in the constructor or the Startup event handler, but the application does not unexpectedly close.

Solution

Check to see whether or not the Connect for Microsoft Outlook add-in is enabled.

Outlook 2007:

1. On the Tools menu, click **Trust Center » Add-ins**.
2. On the Add-ins screen, ensure that **COM Add-ins** is selected in the **Manage** field, and then click **Go**.
3. On the COM Add-Ins dialog box, select the **Connect for Microsoft Outlook** check box if it is not already selected.
4. Click **OK**.

Outlook 2003:

1. On the Tools menu, click **Options**.
2. In the Options dialog box, click the Other tab.
3. Under General, click **Advanced Options**.
4. In the Advanced Options dialog box, click **COM Add-Ins**.
5. On the COM Add-Ins dialog box, select the **Connect to Microsoft Outlook** check box if it is not already selected.
6. Click **OK**.

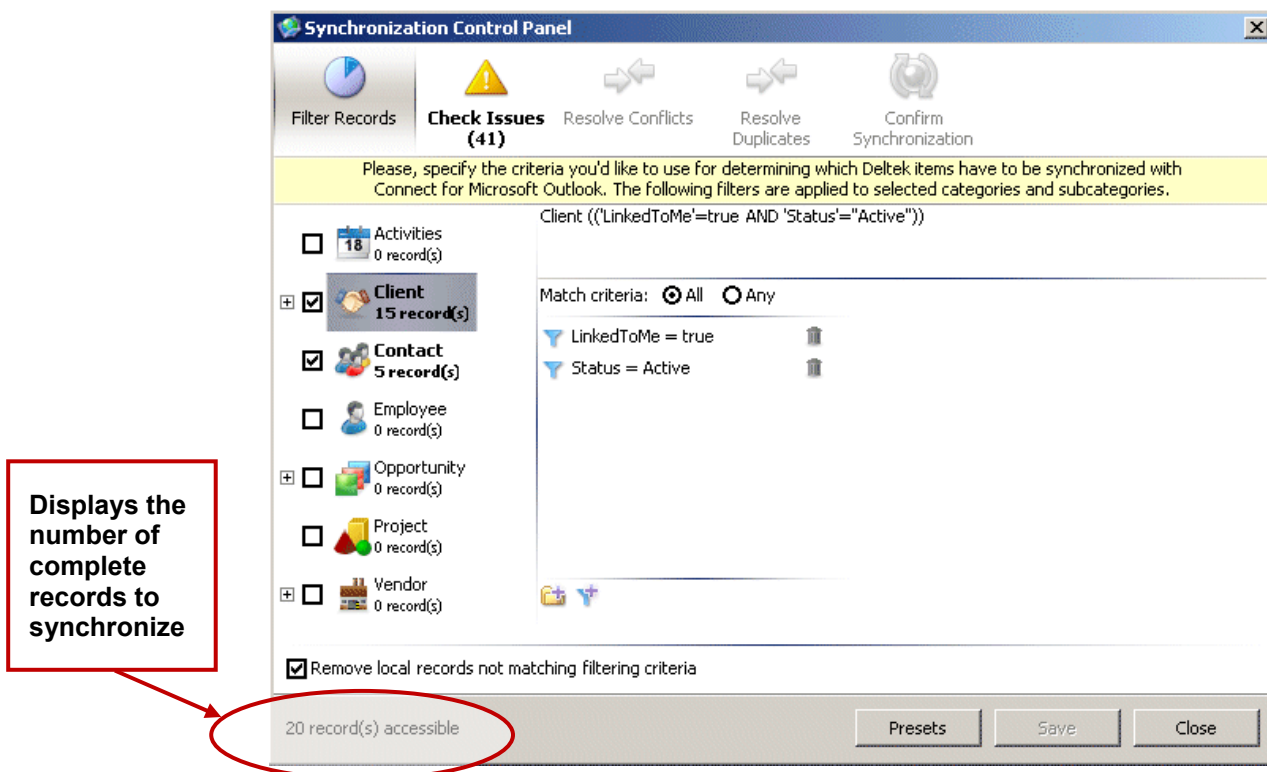
Appendix A: Complete and Incomplete Records After Synchronization

When you synchronize Connect for Microsoft Outlook and Vision, Vision records are brought into Connect for Microsoft Outlook as complete or incomplete records.

Complete Records

Complete records match your synchronization filter and are brought completely into Connect for Microsoft Outlook. All their information displays on the record form.

When you create synchronization filters on the Filter Records screen of the Synchronization Control Panel, the number of complete Vision records that will synchronize displays in the lower left corner of the Filter Records screen as the number of record(s) accessible.



Incomplete Records

Incomplete records:

- Do not match your filter, but they synchronize because they are associated with a complete record that matches your filter.
- Are records that you have security rights to at least view.
- Are read-only in Connect for Microsoft Outlook, regardless of your security rights.

The associations for incomplete records are not brought into Connect for Microsoft Outlook during synchronization (to avoid bringing down the entire Vision database into Connect for Microsoft Outlook).

In Connect for Microsoft Outlook, incomplete records are identified with **“This record is incomplete because it did not match your filter.”** at the top of their record form.

Example:

Scenario:

- You have your synchronization filter set to bring a contact, John Miller, into Connect for Microsoft Outlook.
- The opportunity, Bayfield Remodel, is associated with John, but your filter is not set to bring this opportunity into Connect for Microsoft Outlook.
- You have security rights to modify both John Miller and Bayfield Remodel.

When you synchronize:

- John Miller is brought into Connect for Microsoft Outlook as a complete contact record. All associations, including Bayfield Remodel display for John on the Contact form. You can modify John's information on the Contact form.
- Bayfield Remodel is brought into Connect for Microsoft Outlook as an incomplete record. This means:
 - On the Contact form for John Miller, Bayfield Remodel displays in the Opportunity grid.
 - In the Connect for Microsoft Outlook Opportunities folder, Bayfield Remodel displays. On the Opportunity form for Bayfield Remodel, you cannot modify any of Bayfield Remodel's information; it is read-only, despite your modify rights.
 - On the Opportunity form for Bayfield Remodel, in the Contacts association grid, you see John Miller because his record synchronized as a complete record.

The association grids (Contacts, Clients, Vendors, Activities, Files, and Employees grids) on the Opportunity form display only the associations for Bayfield Remodel that have been synchronized as complete records. Any other associations that Bayfield Remodel has that are incomplete or that were not brought into Connect for Microsoft Outlook at all (because they did not match your synchronization filter) do not display in the association grids on the Opportunity form.

Appendix B: Synchronization Filters

The "Deploy and Configure Connect for Microsoft for the First Time" section of this guide describes how to enter single filter conditions for determining the records that synchronize between Vision and Connect for Microsoft Outlook. This appendix provides the following additional information about filter conditions:

- Default filters (presets)
- Filter conditions for associated records
- Group filter conditions
- Wildcards (asterisks) for conditions
- IN condition
- Exclusions
- Filters for client hierarchies

Default Filters (Presets)


The following table identifies the default filters that are automatically set up for Vision records.

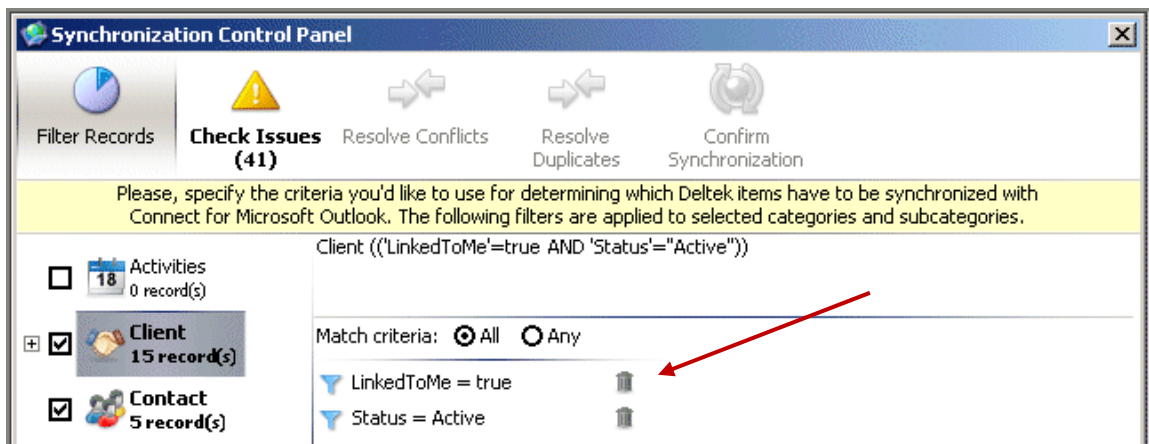
The **LinkedToMe = true** condition allows you to synchronize all records that are associated with you.

| Vision Top-Level Record Type | Default Filter Condition |
|------------------------------|---|
| Contacts | LinkedToMe = true You are linked (associated) with contact records when your Vision employee name is entered in the Employees grid on a Contact record form. |
| Clients | LinkedToMe = true You are linked (associated) with client records when your Vision employee name is entered in the Employees grid on a Client record form. |
| Opportunities | LinkedToMe = true You are linked (associated) with opportunity records when your Vision employee name is entered in the Employees grid on an Opportunity record form. |
| Activities | Two conditions make up an activity record's default condition: <ul style="list-style-type: none"> ▪ LinkedToMe=true — Your Vision employee name is entered as the activity's owner or as an attendee. ▪ Start Date >= <today's date> — The activity start date is greater or equal to today's date. Today's date is not dynamic. It is always the date that you installed Connect for Microsoft Outlook. |
| Employees | Status = Active — All Vision employees with an active status in the |

| Vision Top-Level Record Type | Default Filter Condition |
|------------------------------|--|
| | Employee Info Center. |
| Projects | None. Only projects that are associated with other synchronized records are brought into Connect for Microsoft Outlook. |
| Vendors | None. Vendors that are associated with complete records are brought into Connect for Microsoft Outlook as incomplete records. See Appendix A on page 99 for more information about complete and incomplete records. |

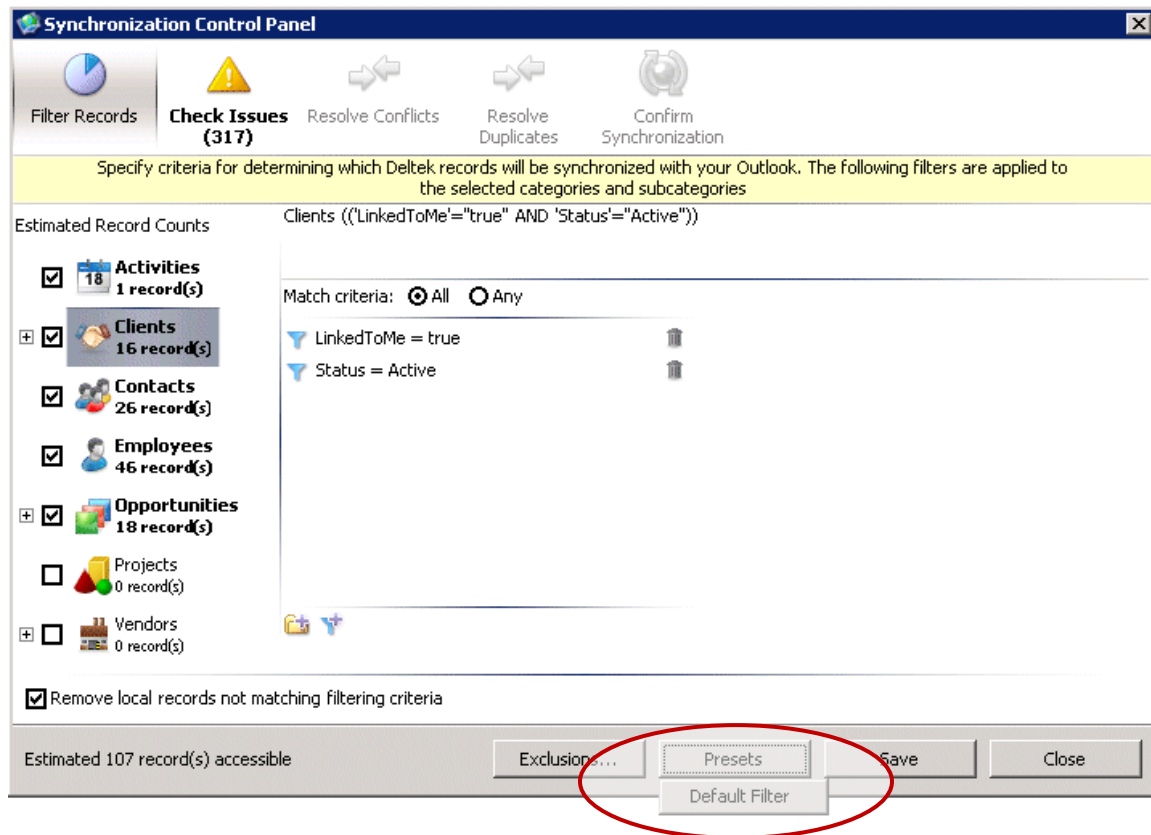
Delete Default Filters

To delete default filters and any other filters that you create, click the trash can  icon beside the condition.



Restore Default Filters

To restore default filters, click the **Presets** button on the Filter Records screen. Then select **Default Filter** from the shortcut menu. This resets the default filters for all record types.



If you customized Connect for Microsoft Outlook through Deltek Global Services, you may see other options listed in the **Presets** shortcut menu.

Filter Conditions for Associated Records

You can create filter conditions for records that are associated with top-level records. These are also known as nested conditions.

You can create conditions for the following associated records:

| Top-Level Record | Associated Record |
|------------------|--|
| Clients | <ul style="list-style-type: none"> Activities Contacts |
| Opportunities | Activities |
| Vendors | Contacts |

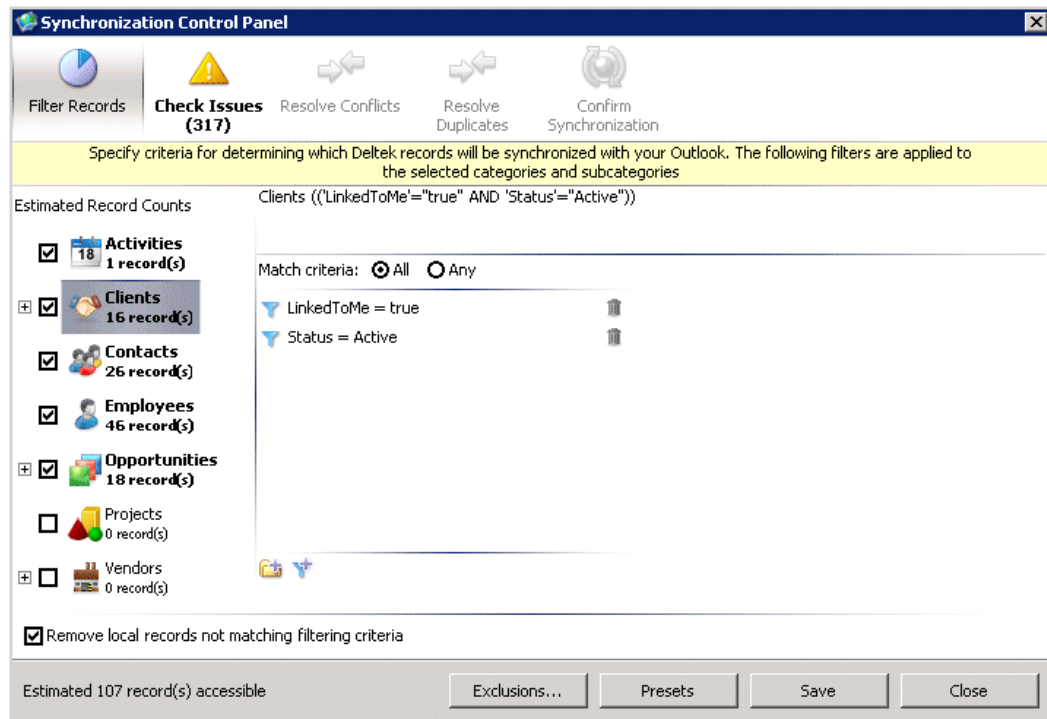
Example


First, you create a filter for clients (a top-level filter) to retrieve all clients who are associated with you. Then, you create a filter to retrieve only the activities associated with those clients that start after a certain date.

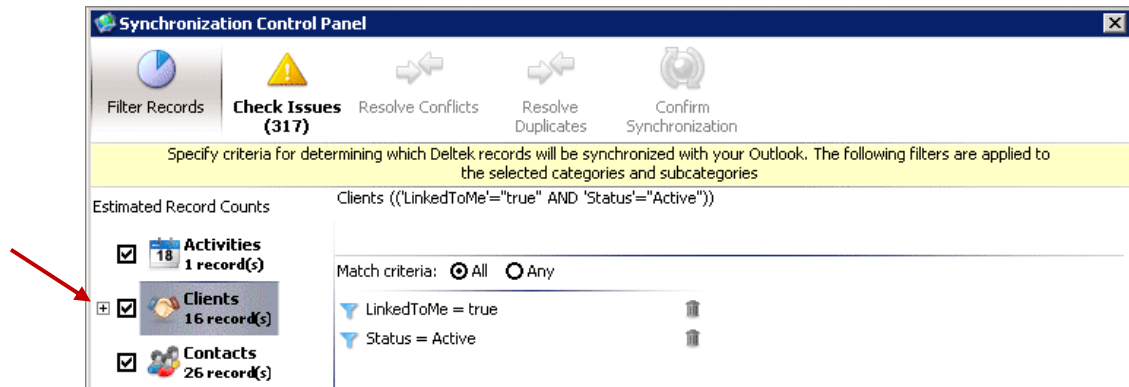
To create a filter condition for an associated record, complete the following steps:

1. Before you can create a filter condition for an associated record type, you must create a filter condition for its top-level record (Clients, Opportunities, or Vendors). See steps 8 and 9 in the "Deploy and Configure Connect for Microsoft for the First Time" section on page 58 of this guide for specific instructions.

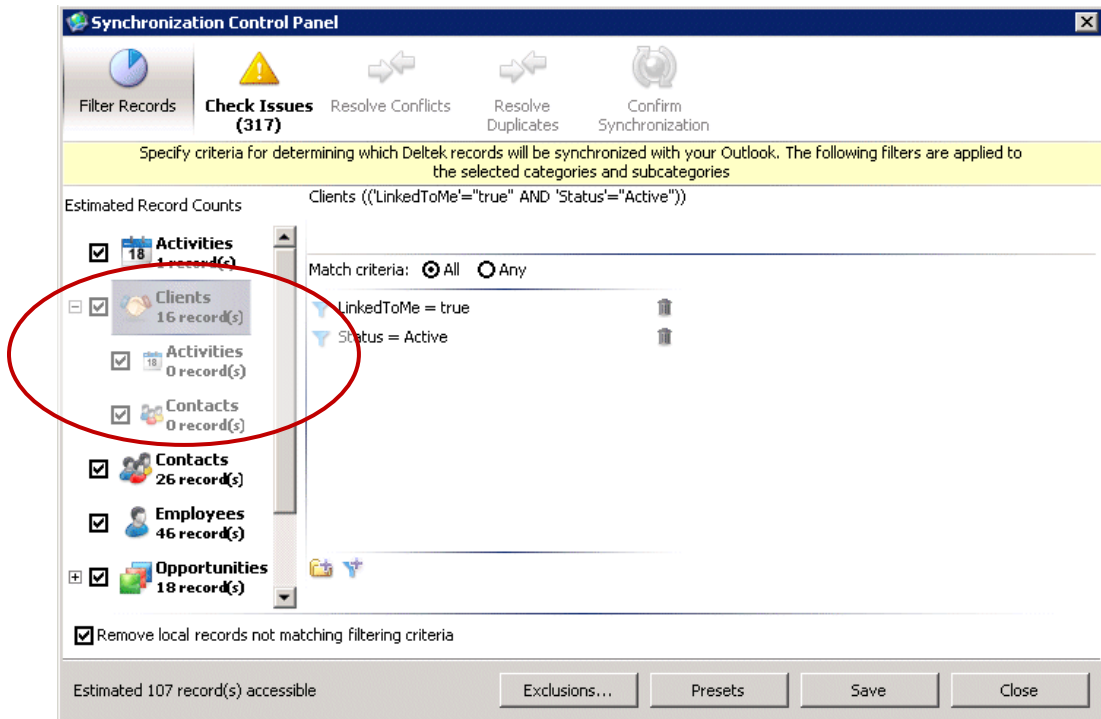
The following screenshot displays the **LinkedToMe = true** and the **Status = Active** conditions that were created for Clients (top-level record).



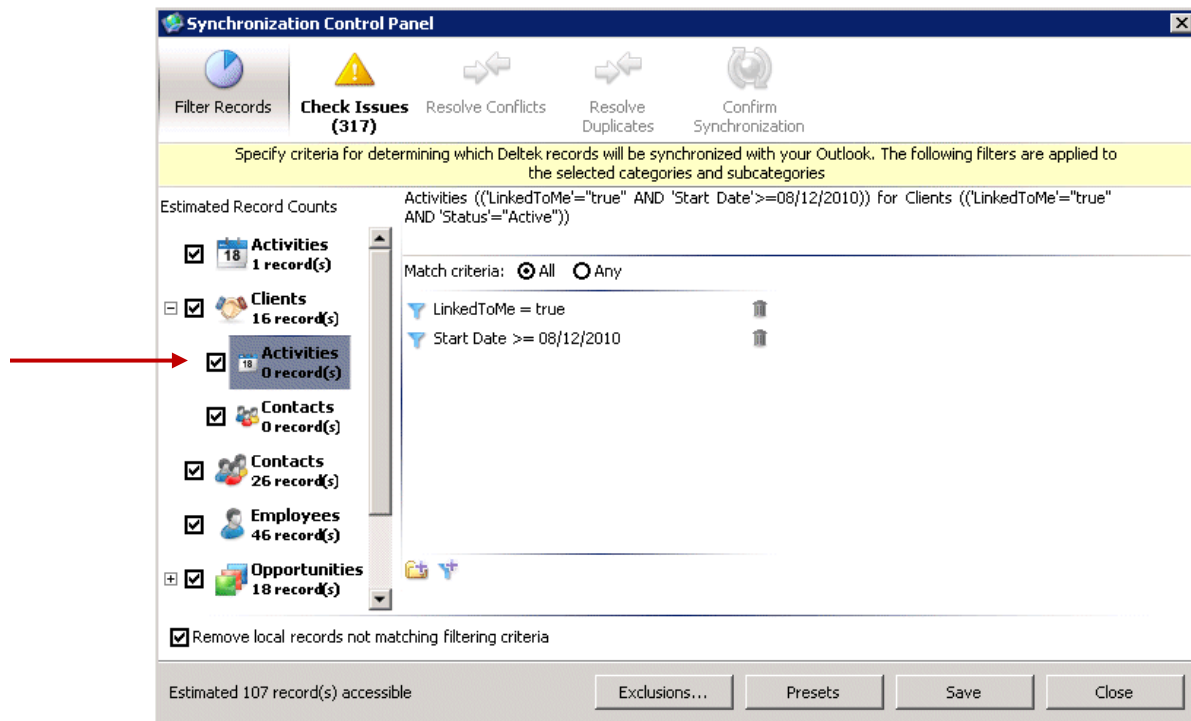
2. After you create a condition for the top-level record, click the plus sign  icon beside the top-level record to expand the record list and display the possible associated records.




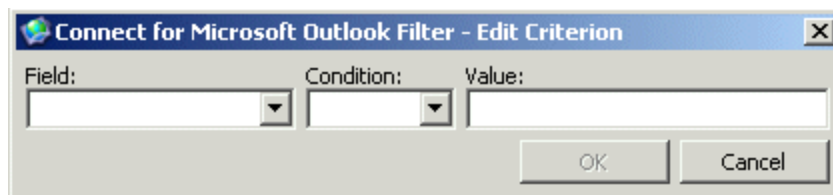
The associated records display below the top-level record. In the following screenshot, you see the **Activities** and **Contacts** check boxes below the **Client** check box:



- Click the check box beside the associated record type for which you want to create a filter. Then, click the name of the associated record beside the check box. In this example, we clicked the **Activities** check box and name to create a filter for activities associated with clients.

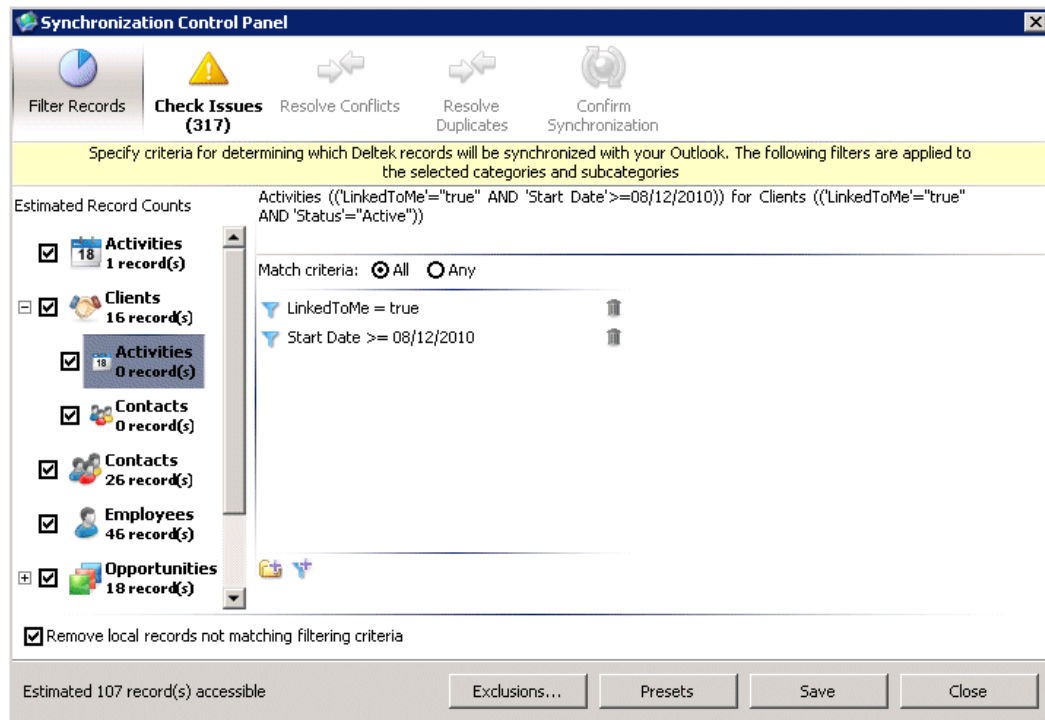


- In the filter criteria pane, click the **Add a condition**  icon to open the Connect for Microsoft Outlook Filter – Edit Criterion dialog box. Select a field, condition, and value for the association record filter and click **OK**.

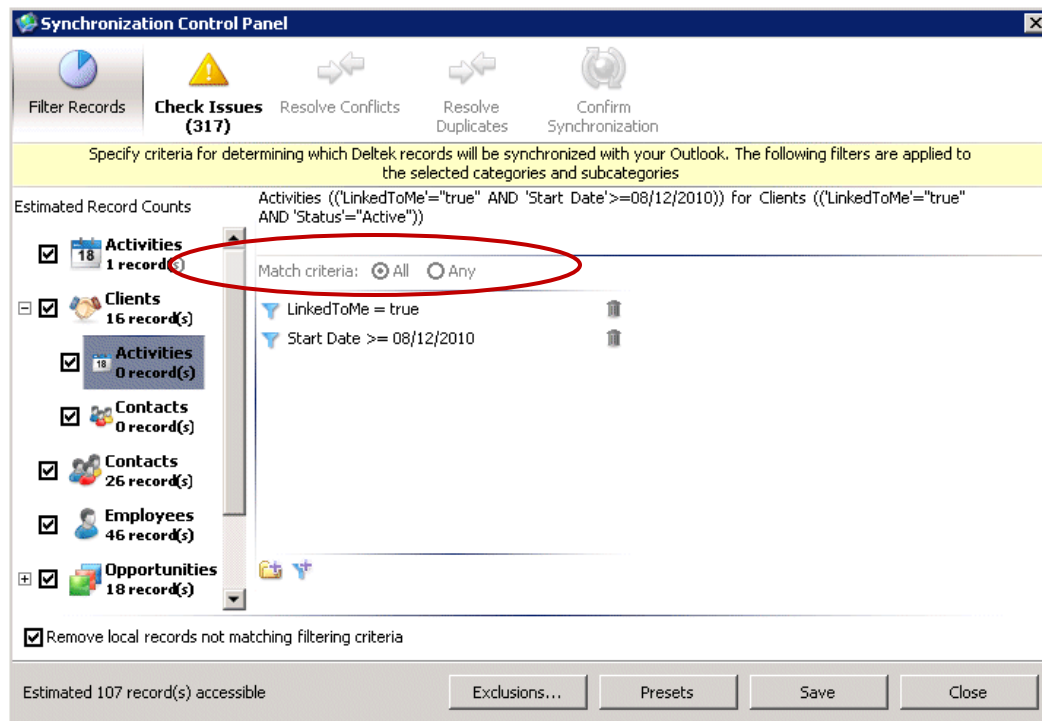


5. Repeat step 4 to create additional conditions for the associated record.

The filter conditions that you create display in the filter criteria pane. This example displays the filter condition to retrieve my activities that have a start date that is greater than or equal to 08/12/2010.



6. In the filter criteria pane, select the **Match criteria** setting as follows:
 - If you enter more than one filter, select **All** (AND-based) if you want only associated records that match all of the conditions to be synchronized.
 - If you enter more than one filter, select **Any** (OR-based) if you want associated records that match any one of the filter conditions to synchronize; associated records do not have to meet all the filter conditions.



7. When you finish creating filter conditions click **Save** on the Filter Records screen.



- On the Filter Records screen, when you clear a top-level record check box to remove the filter conditions, any filter conditions for associated records are also removed.
- When you create two filter conditions for the same record type, but one condition is at the top level and the other is at the associated record level, the conditions are combined as an OR statement. For example, if the top-level filter for contact records is set to contacts who are associated with me, and the filter for contacts who are associated with top-level customer records is set to all contacts, then the filters return contacts associated with me OR contacts associated with any customer that match the customer record top-level filter.

Group Filter Conditions

You can create filter condition groups that are comprised of conditions within a condition. These are also referred to as nested conditions. You can create an unlimited number of condition groups and add an unlimited number of single filter conditions to a condition group.



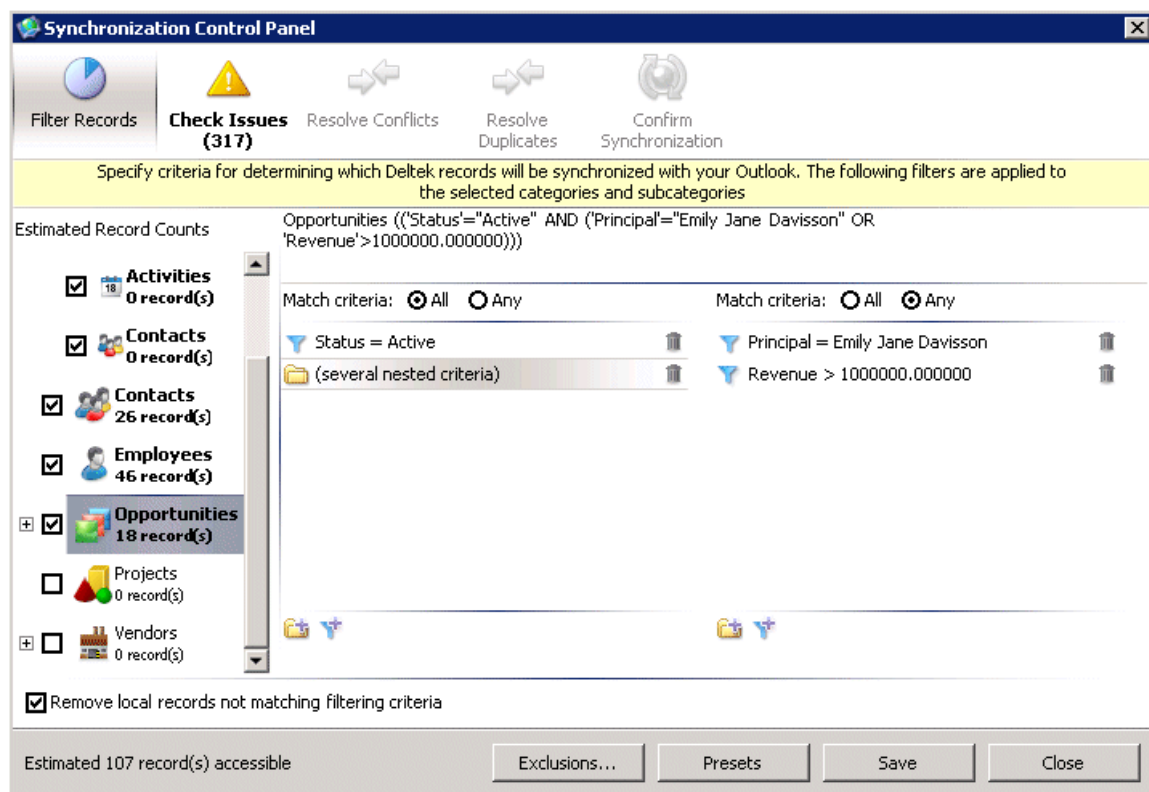
To create filters that mix AND and OR conditions, you must use a group condition.

An example of a group condition for Opportunities:

Status = Active AND (Principal = Emily Davisson OR Revenue > 1000000)

This statement gives you all active opportunities where Emily Davisson is the principal or the revenue is greater than \$1,000,000.

The following screenshot displays this example after you create the filter conditions:



An example of a group condition for Clients:

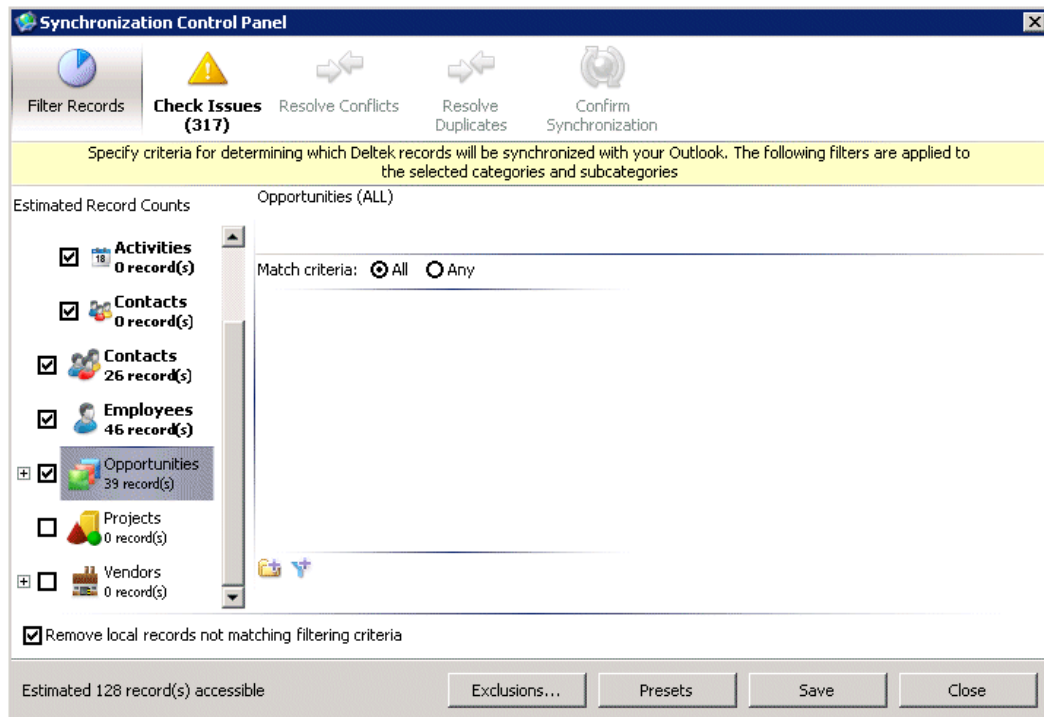
(Status = Active AND Type = Healthcare) OR (Status = Active AND Primary Address Indicator = True AND Primary Address State = CO)


This statement gives you all active customers that have a customer type of Healthcare or have a primary address in Colorado.

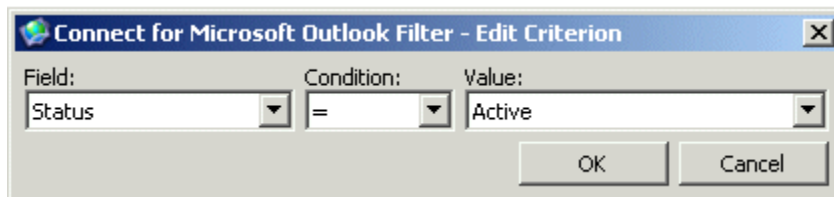
To create a group condition, complete the following steps:

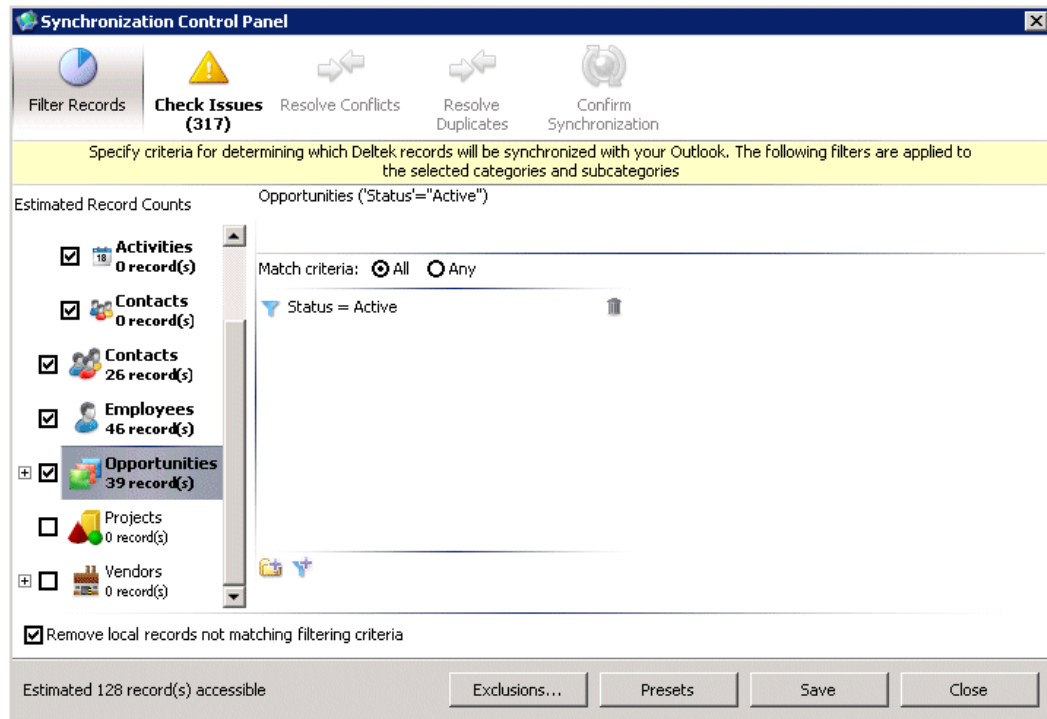
The opportunity filter example that returns opportunities with an active status, where Emily Davisson is the principal or the revenue is greater than \$1,000,000 is illustrated in the following instructions.

1. In the pane on the left side of the Filter Records screen, select the check box for the type of Vision record for which to create a group condition. Then click the check box name to highlight the check box name and display the **Match criteria: All** and **Any** setting in the filter criteria pane.




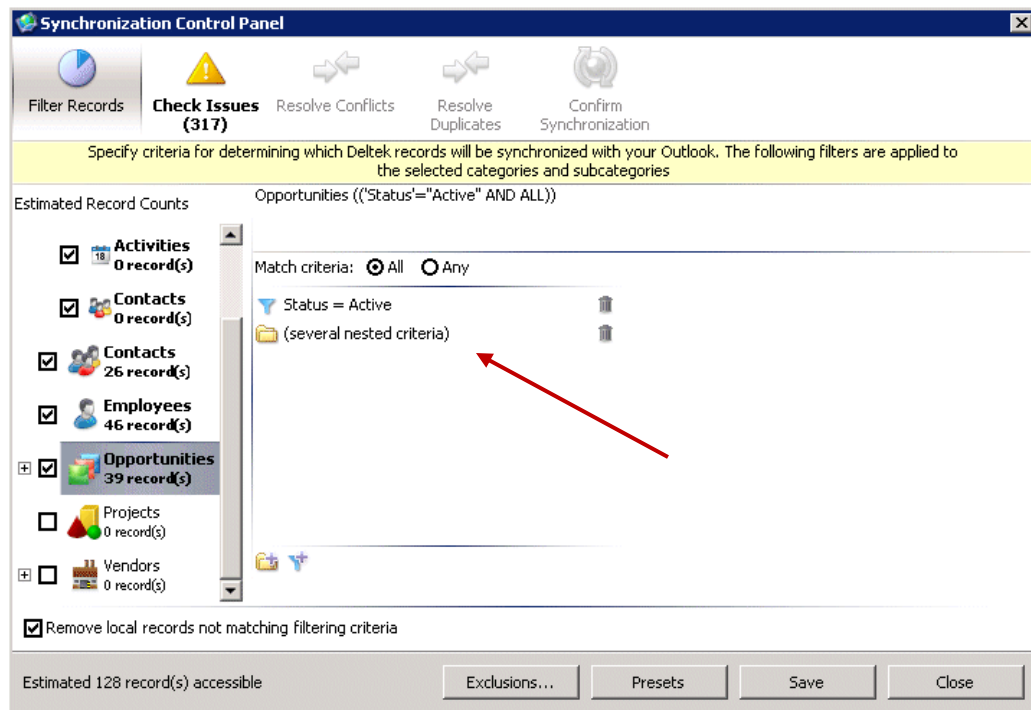
2. In the filter criteria pane, click the **Add a condition** icon  to open the Connect for Microsoft Outlook Filter – Edit Criterion dialog box. Enter a filter condition, and click **OK**. In this example, we enter a condition that returns all opportunities with an active status.





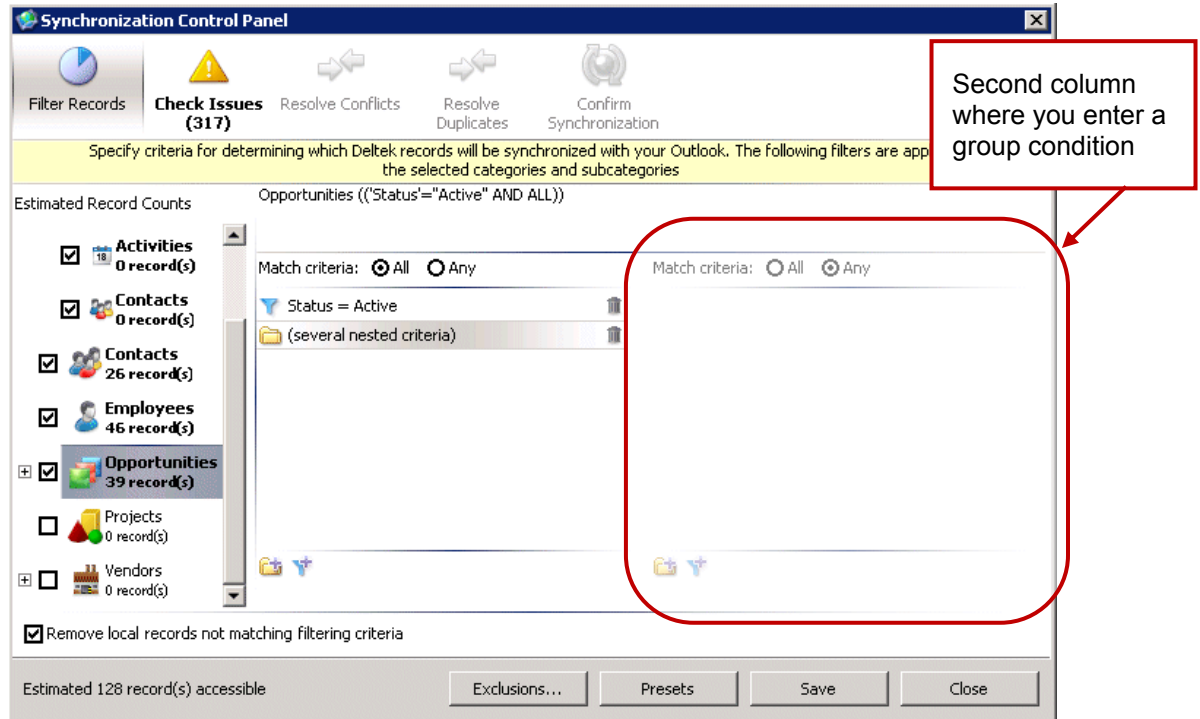




In this example, we leave the **Match criteria** setting at **All** (AND-based). This means all single conditions in this column must be met. In this example, we have only one filter condition.


3. In the filter criteria pane, click the **Add group of conditions**  icon
A **(several nested criteria)** folder displays in the filter criteria pane.

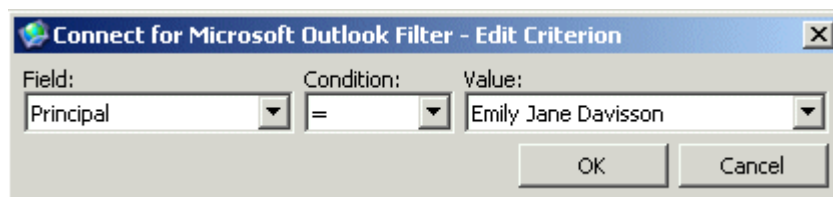


- Click the **(several nested criteria)** folder to display a second column on the right side of the filter criteria pane that displays the **Match criteria: All** and **Any** setting and the  and  icons. In this second column, you add single or group conditions that make up a group condition.



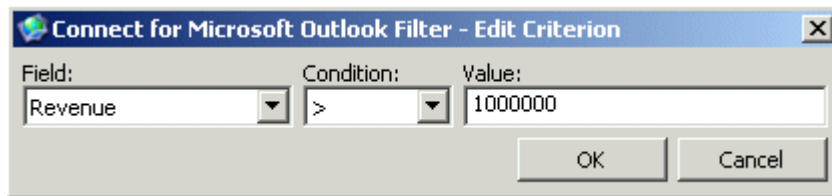
- In the second column, click the **Add a condition**  or **Add group of conditions**  icons to open the Connect for Microsoft Outlook Filter – Edit criterion dialog box and add a filter condition. Click **OK** to save it and return to the filter criteria pane.

In this example, we click the **Add a condition**  icon, and enter a condition to return opportunities where Emily Jane Davisson is the principal.



6. Repeat step 5 to enter another filter condition.

In this example, we enter another single condition to return opportunities that have revenue greater than \$1,000,000.



The dialog box titled "Connect for Microsoft Outlook Filter - Edit Criterion" has three input fields: "Field:" with a dropdown menu showing "Revenue", "Condition:" with a dropdown menu showing ">", and "Value:" with a text box containing "1000000". At the bottom right are "OK" and "Cancel" buttons.

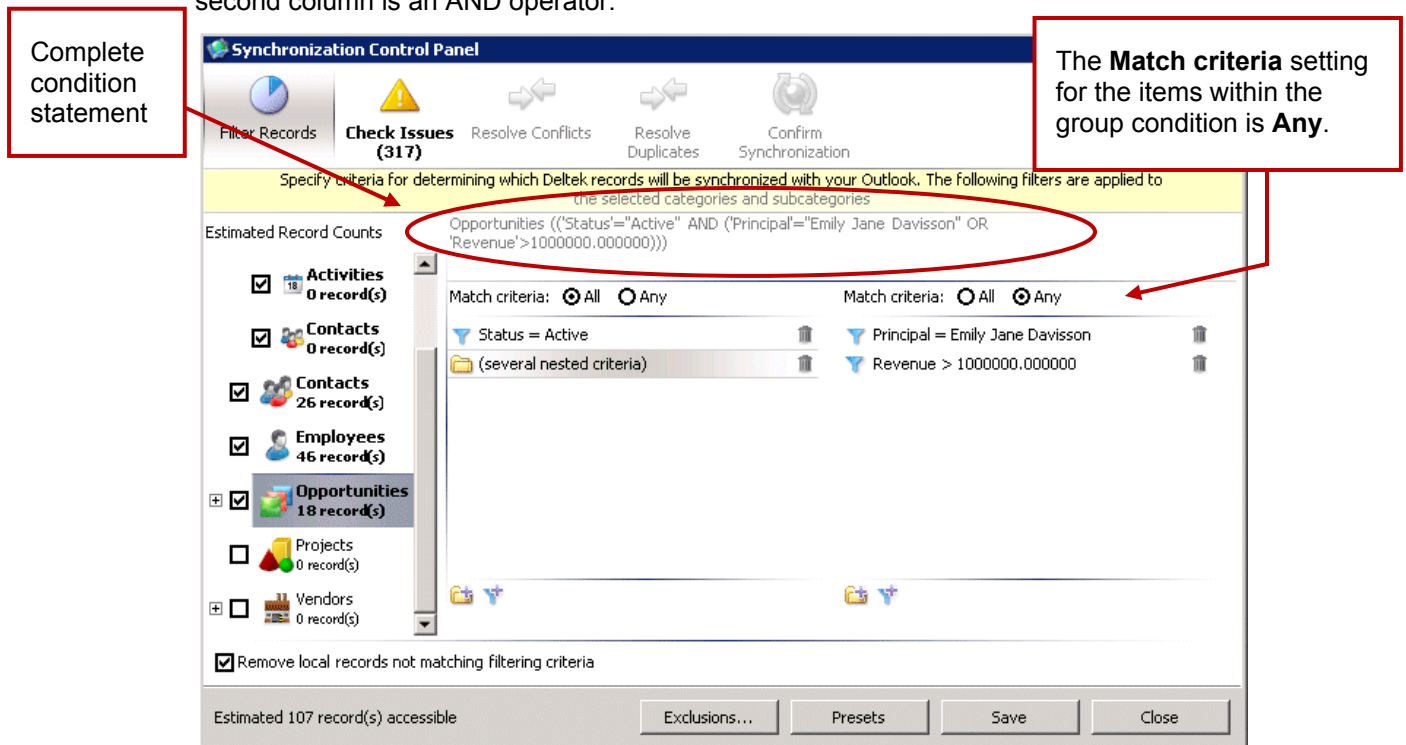
7. In the group condition pane on the right side of the Filter Records screen, select the **Match criteria** setting for the group condition.

In this example, we select **Any** (OR-based), so that opportunities with either Emily as the principal or revenue greater than \$1,000,000 are returned by the synchronization filter.

Notice the complete condition statement at the top of the filter criteria pane is:

Opportunities (('Status'="Active" AND ('Principal'="Emily Jane Davisson" OR 'Revenue'>1000000.000000)))


Between the single filter condition in the first column and the group condition in the second column is an AND operator.



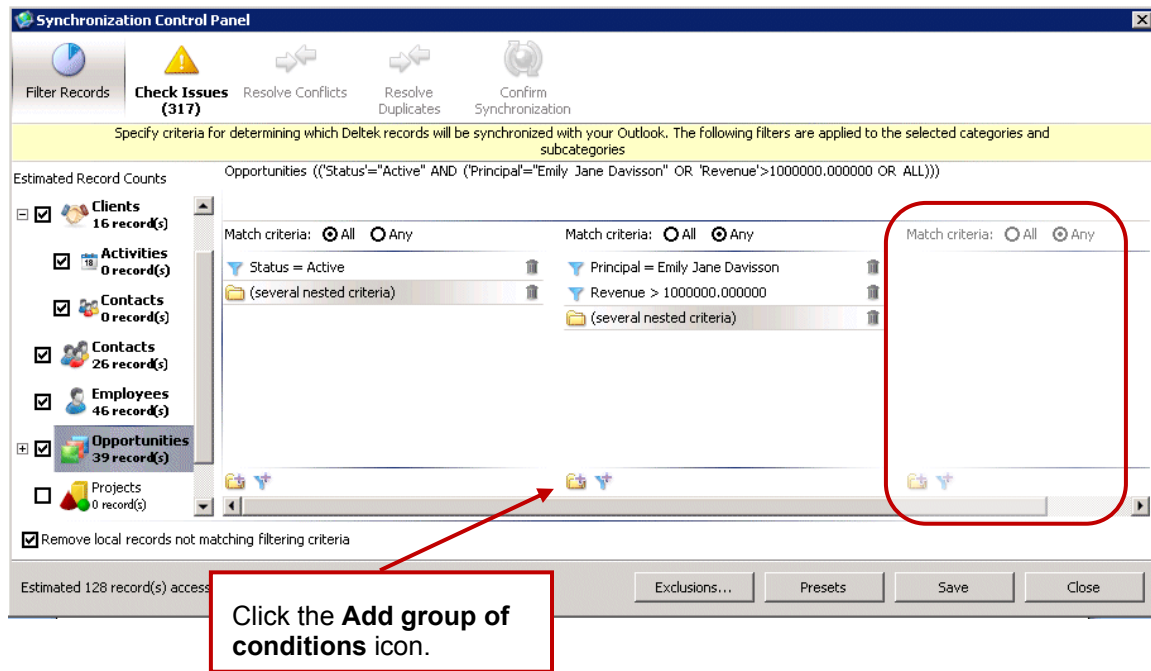
The screenshot shows the "Synchronization Control Panel" with a left sidebar listing record counts for various categories: Activities (0), Contacts (0), Contacts (26), Employees (46), Opportunities (18), Projects (0), and Vendors (0). The "Opportunities" category is selected. The main pane displays the filter criteria: "Specify criteria for determining which Deltek records will be synchronized with your Outlook. The following filters are applied to the selected categories and subcategories". Below this, the complete condition statement is shown: "Opportunities (('Status'="Active" AND ('Principal'="Emily Jane Davisson" OR 'Revenue'>1000000.000000)))". A red circle highlights this statement, with an arrow pointing to a callout box that says "Complete condition statement". To the right, the "Match criteria" section shows two columns of criteria. The first column has "Status = Active" and "(several nested criteria)". The second column has "Principal = Emily Jane Davisson" and "Revenue > 1000000.000000". Above these columns, the "Match criteria" radio buttons are set to "Any", with an arrow pointing to a callout box that says "The Match criteria setting for the items within the group condition is Any". At the bottom, there are buttons for "Exclusions...", "Presets", "Save", and "Close". The status bar at the bottom indicates "Estimated 107 record(s) accessible".

8. When you finish adding conditions for the group condition, click **Save**.

Note:

In the group condition column (second column) on the filter criteria pane, when you click the **Add group of conditions**  icon, a third column displays. In this column, enter another set of conditions.

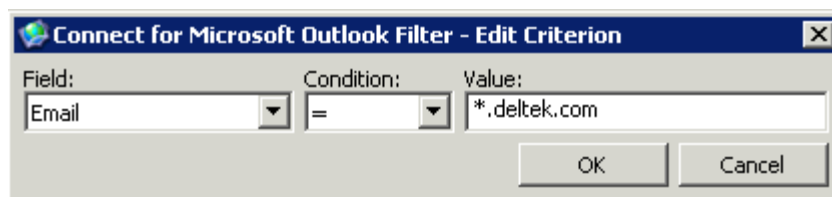
The operator between each column of conditions is AND.



Wildcards (Asterisks) for Conditions

For text fields such as the contact **First Name**, **Last Name**, and **Email** fields, when you enter a condition on the Connect for Microsoft Outlook Filter – Edit Criterion dialog box, you can use an asterisk (*) as a wildcard character to represent any pattern. You can place an asterisk anywhere in the **Value** field and use as many asterisks as you need in the field.

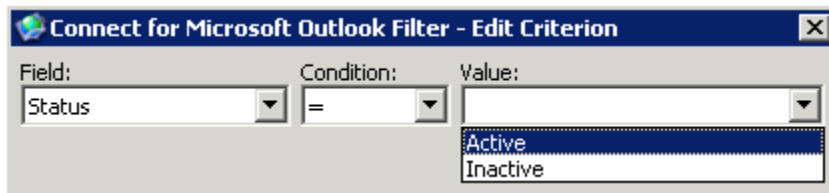
For example, you could enter a condition for email addresses to include only email addresses with "@deltek.com" in them. To do this, enter ***.deltek.com** in the **Value** field for the contact **Email** field:



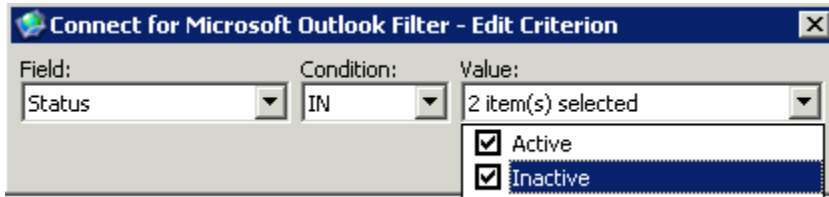
IN Condition

When you create a condition for a drop-down list field or a lookup field, you can choose one or many items in the value field.

To choose one value in the **Value** field on the Connect for Microsoft Outlook Filter – Edit Criterion dialog box, select = (equal) or <> (except) in the **Condition** field.

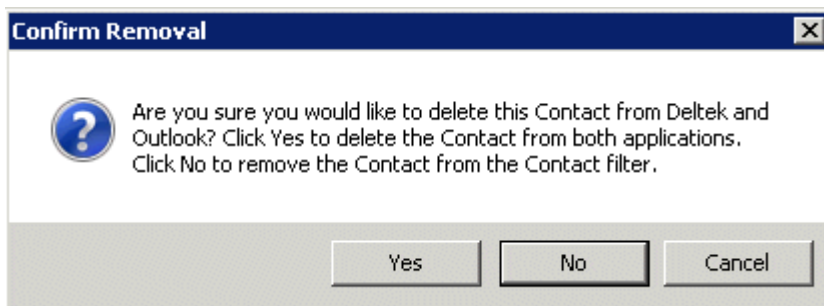


To choose multiple values in the **Value** field on the Connect for Microsoft Outlook Filter – Edit Criterion dialog box, select **IN** in the **Condition** field.



Exclusions

When you delete a shared-with-Vision contact in Connect for Microsoft Outlook, you receive the following Confirm Removal dialog box.




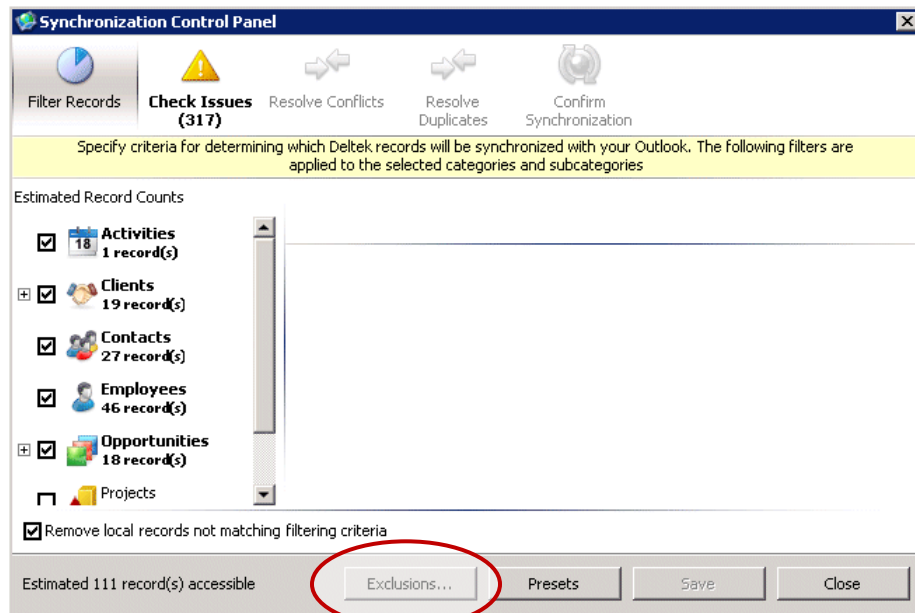
If you click **Yes** in the Confirm Removal dialog box, the contact is deleted from Connect for Microsoft Outlook and Vision when you synchronize.

If you click **No** in the Confirm Removal dialog box, the contact is deleted from Connect for Microsoft Outlook, but it remains in Vision. It also becomes an exclusion to the synchronization filter. This means it will not be synchronized and brought back into Connect for Microsoft Outlook even if the contact matches your synchronization filter.

If you change your mind in the future and you want the contact to be synchronized with Connect for Microsoft, you can remove the contact from the exclusion list.

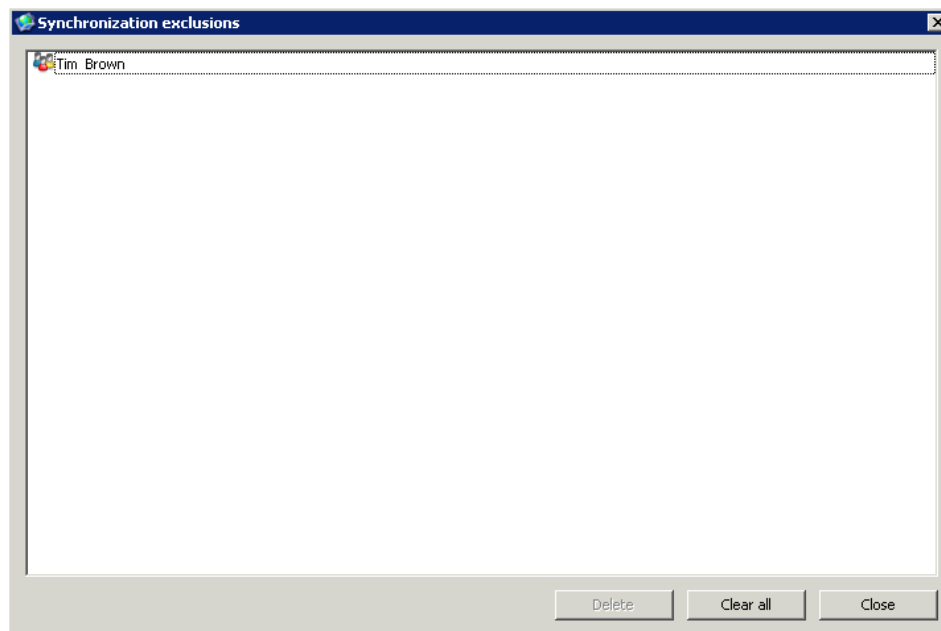
To remove a contact from the synchronization exclusion list, complete the following steps:

1. On your Windows task bar, right-click the Connect for Microsoft Outlook application  icon, and select **Show Control Panel**.
2. On the Filter Records screen of the Synchronization Control Panel dialog box, click the **Exclusions** button.



3. On the Synchronizations exclusion dialog box, select the contact that you want to remove from the exclusion list and click **Delete**.

When you delete the contact from the exclusions list, the contact will be uploaded to Connect for Microsoft Outlook the next time you synchronize if the contact matches your synchronization filters.



Filters and the Vision Client Hierarchy Feature

When you create a filter condition that brings a client into Connect for Microsoft Outlook that is in a Vision client hierarchy, all other clients in that hierarchy (above and below that client) are downloaded as one of the following:

- Complete records if you have view rights to them, and they match your client filter.
- Incomplete records if you have view rights to them, and they do not match your client filter. (You can open the record and see some information such as the notes, but the association grids are incomplete.)
- Client name and number only if you do not have view rights. When you click the **Client Hierarchy** button (on the Client form) for one of the clients that you have security rights to, you see this record in the list. However, if you try to open the record, you receive a message stating that you do not have rights.

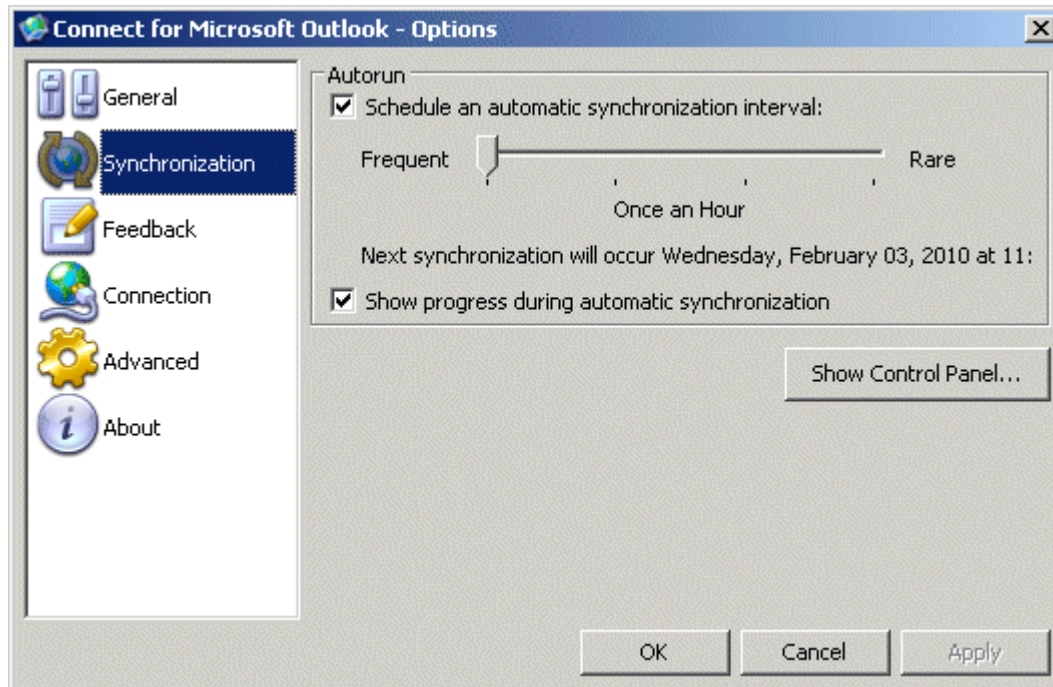


See "Appendix A: Complete and Incomplete Records After Synchronization" on page 99.

For more information about the client hierarchy feature, see the Vision online help. Open the help Contents tab, and then click the following books: **Info Center » Client Info Center » Client Hierarchy**.

Appendix C: Synchronization Schedules



When you open Outlook for the first time after you install Connect for Microsoft Outlook and you run the Connect for Microsoft Outlook Assistant, you choose whether or not to schedule automatic synchronization between Connect for Microsoft Outlook and Vision. You make this selection on the Synchronization tab of the Connect for Microsoft Outlook – Options dialog box.



Manual Synchronization

If you do not choose to synchronize automatically, you run the synchronization manually as needed at any time.

To perform a manual synchronization, complete either of the following:

- Right-click the Connect for Microsoft Outlook  icon on your Windows taskbar, and then click **Synchronize Now!**.
- Left-click the Connect for Microsoft Outlook  icon on your Windows taskbar. Synchronization starts immediately.

Automatic Synchronization

For automatic synchronizations, you select the synchronization frequency — once a week, once a day, twice a day, or once an hour on the Synchronization tab of the Connect for Microsoft Outlook – Options dialog box.

Synchronization Timer

For automatic synchronizations, the synchronization timer starts at the end of each synchronization, starting with the initial synchronization that takes place after you configure the Connect for Microsoft Outlook for the first time.

If Connect for Microsoft Outlook is not open at the time of the next scheduled synchronization interval, it waits for the full interval before checking to synchronize again.

If you perform a manual synchronization in between the scheduled synchronization interval, the next synchronization is scheduled to start at the scheduled interval based on the time that the manual synchronization finishes.

Example

You configure Connect for Microsoft Outlook to synchronize hourly and the initial synchronization ended at 3:35 PM. The next automatic synchronization is scheduled to start at 4:35 PM.

At 4:35 PM, synchronization begins; it finishes at 4:40 PM. The next synchronization is scheduled for 5:40 PM.

If you close Connect for Microsoft Outlook after the synchronization completed at 4:40 PM, no synchronization would occur at 5:40 PM (and 6:40 PM, and so on) because Connect for Microsoft Outlook is not open.

If you open Connect for Microsoft Outlook again the next morning at 8:00 AM, another synchronization starts at 8:40 AM. It resumes where the timer left off at 40 minutes past the hour.


If you perform a manual synchronization at 9:15 AM (in between the automatically scheduled synchronization interval), and the synchronization finishes at 9:20 AM, the next synchronization is scheduled to start at 10:20 AM.

Automatic Synchronization Has Stopped Completely

If you rely solely on automatic synchronization and you turn your workstation off at the end of the day, it is possible that with a synchronization interval other than hourly, you will eventually prevent synchronization from occurring. This happens because the synchronization will be scheduled to occur outside normal working hours when your workstation is turned off. When this occurs, perform a manual synchronization to resolve it.

Change Synchronization Settings

To change synchronization settings at any time after you use the Connect for Microsoft Outlook Assistant during the initial installation, complete the following steps:

1. On the Windows taskbar, right-click the Connect for Microsoft Outlook  icon and click **Options**.
2. On the Connect for Microsoft Outlook – Options dialog box, click the Synchronization tab.

Appendix D: Vision Records and Fields in Connect for Microsoft Outlook

The following tables identify the Vision records and fields that appear in Connect for Microsoft Outlook.

Activity Record

The following Vision Activity fields appear in Connect for Microsoft Outlook:

| Vision Activity Field/Grid | Connect for Microsoft Outlook Field/Grid | Connect for Microsoft Outlook Form |
|---------------------------------|---|------------------------------------|
| Subject | Subject | Activity, Task, and calendar item |
| Location | Location | Activity and calendar item |
| Type | Type | Activity, Task, and calendar item |
| Priority | Priority | Activity and Task |
| Completed check box | Completed check box | Activity and calendar item |
| Completed check box | % Complete | Task |
| Private check box | Private check box | Activity |
| Private check box | Private icon in the Options group on the Outlook Ribbon | Task |
| Client | Client | Activity, Task, and calendar item |
| Primary Contact and/or Contacts | Primary Contact field and/or Contacts grid | Activity, Task, and calendar item |
| Opportunity | Opportunity | Activity, Task, and calendar item |
| Project | Project | Activity, Task, and calendar item |
| Activity Owner | Owner | Activity and Task |
| Activity Owner | Employees | Calendar item |
| CreatedBy | CreatedBy | Activity |
| Start Time (date and time) | Start Time | Activity and calendar item |
| End Time (date and time) | End Time | Activity and calendar item |
| Start Time (date) | Start Date | Task |
| End Time (date) | Due Date | Task |

| Vision Activity Field/Grid | Connect for Microsoft Outlook Field/Grid | Connect for Microsoft Outlook Form |
|---|--|------------------------------------|
| Reminder check box | Reminder check box | Activity and Task |
| Reminder amount and minutes, hours, or days | Reminder amount and unit of time | Activity and Task |
| Reminder amount and minutes, hours, or days | Reminder amount of time in the Options group on the Outlook Ribbon | Calendar item |
| All Day Event check box | All Day Event check box | Activity and calendar item |
| Show Time As | Show Time As | Activity |
| Contacts grid | Contacts grid | Activity |
| Employees | Employees | Task and calendar item |
| Attendees grid | Employees grid | Activity |
| Notes text box | Notes text box | Activity |
| Notes text box | Description text box | Task and calendar item |
| Recurring Activity | Recurring | Task and calendar item |
| Recurrence Type | Recurrence | Task and calendar item |
| Pattern | Recurrence Pattern | Task and calendar item |
| Recurrence End | Recurrence Range End | Task and calendar item |

Client Record

The following Vision Client fields display on the Client form in Connect for Microsoft Outlook:

| Client Field/Grid Name |
|------------------------|
| Name |
| Number |
| Client check box |
| Vendor check box |
| Parent |
| View Client Hierarchy |
| Addresses |

| Client Field/Grid Name |
|---|
| Phone |
| FAX |
| Minority Status check boxes — Disadvantaged Business, Small Business, Veteran Owned Small Business, Disabled Vet. Small Business, Minority Business, Woman Owned, HBCU, and Alaska Native |
| Specialty |
| Prior Work check box |
| Recommend check box |
| Type |
| Status |
| Relationship |
| Website |
| Aliases grid |
| Activities grid |
| Files grid |
| Contacts grid |
| Opportunities grid |
| Projects grid |
| Employees grid |

Contact Record

The following Vision Contact fields display on the Contact form in Connect for Microsoft Outlook:

| Contact Field/Grid Name |
|---|
| First Name, Middle Name, and Last Name — the Full Name field in Connect for Microsoft Outlook |
| Preferred |
| Client/Vendor |
| Title (job) |

| Contact Field/Grid Name |
|--|
| Email |
| Business Phone |
| Business Fax |
| Mobile |
| Home |
| Pager |
| Client Address — Address 1, Address 2, Address 3, Address 4, City, Country, State/Province, and ZIP/Postcode |
| Other/Home Address — Address 1, Address 2, Address 3, Address 4, City, Country, State/Province, and ZIP/Postcode |
| Mailing check box for the address fields |
| Notes text box |
| Activities grid |
| Opportunities grid |
| Employee grid |
| Projects grid |
| Files grid |

Opportunity Record

The following Vision Opportunity fields display on the Opportunity form in Connect for Microsoft Outlook:

| Opportunity Field/Grid Name |
|-----------------------------|
| Name |
| Number |
| Description |
| Organization |
| Primary Client |
| Primary Contact |

| Opportunity Field/Grid Name |
|-----------------------------|
| Principal |
| Project Manager |
| Supervisor |
| Regular Project |
| Status |
| Stage |
| Type |
| Source |
| Date Open |
| Date Closed |
| Estimated Start |
| Estimated Completion |
| Revenue |
| Probability |
| Weighted Revenue |
| Clients grid |
| Employees grid |
| Files grid |
| Activities grid |
| Contacts grid |
| Vendors grid |

Vendor Record

The following Vision Vendor fields display on the Vendor form in Connect for Microsoft Outlook:

| Vendor Field/Grid Name |
|---|
| Number |
| Name |
| Associated Client |
| Organization |
| Addresses — Address 1, Address 2, Address 3, Address 4, City, Country, State/Province, and ZIP |
| Phone |
| FAX |
| Minority Status check boxes — Disadvantaged Business, Small Business, Veteran Owned Small Business, Disabled Vet. Small Business, Minority Business, Woman Owned, HBCU, and Alaska Native |
| Status |
| Specialty |
| Specialty Description text box |
| Web Site |
| Prior Work check box |
| Recommend check box |
| Aliases grid |
| Opportunities grid |
| Files grid |
| Contacts grid |
| Projects grid |