GovWin Opportunity Manager to Vision CRM Integration 1.0

Installation Guide

September 29, 2014

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Contents

Overview

This guide provides instructions for downloading and installing GovWin Opportunity Manager to Vision CRM Integration.

After you download and install GovWin Opportunity Manager to Vision CRM Integration, you will have access to the Opportunity Manager Web Service utility and the Opp Manager tab in the Opportunity Info Center in Vision.

The information in this guide applies both to the installation of GovWin Opportunity Manager to Vision CRM Integration on customers' on-premise servers and to installation on Deltek Cloud Operations servers for access by customers who have a Vision SaaS Subscription.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it here free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at far right.

2. In the **Annotations** pane that displays, click 💬 **Sticky Note**. The cursor changes to match the button.

3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.

4. Enter your information in the text box.

5. Continue adding notes as needed.

6. Save the document.

> Deltek recommends that you save the document to a slightly different filename so as to keep the original from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

If You Need Assistance

If you need assistance installing, implementing, or using GovWin Opportunity Manager to Vision CRM Integration, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions

Access Customer Care Connect

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

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In.**

	If you do not have a username and password for the Customer Care Connect site, contact your firm's Vision system administrator.
	If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

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

Document Name	Description
GovWin Opportunity Manager to Vision CRM Integration User Guide	This guide provides information about setting up and using GovWin Opportunity Manager to Vision CRM Integration.

Downloading GovWin Opportunity Manager to Vision CRM Integration Using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, and sub-releases. You can access DSM directly or through the Deltek Customer Care Connect site.

When you access DSM directly, you will be prompted to log on before you can access the application. If you access DSM from within the Deltek Customer Care site, you do not have to log on since you are already logged into the Customer Care site.

Accessing DSM Directly

To access Deltek Software Manager directly, complete the following steps:

1. On your desktop, click **Start » Programs » Deltek » Vision » Deltek Software Manager**.

2. In the Deltek Software Manager logon dialog box, enter your Deltek Customer Care **User ID** and **Password**, and click **Logon**.

3. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.

> When you log on for the first time, Deltek Software Manager asks you to select a default folder where Deltek products are to be downloaded.

4. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

> You can change this folder anytime in the Settings dialog box.

5. In the left pane of Deltek Software Manager, expand **Vision**, if it is not already expanded.

6. Expand your version of Vision.

7. If you are doing a complete download of Vision, expand **Complete** and select the product. Then, in the right pane, click the Sub-Releases tab and confirm that GovWin Opportunity Manager to Vision CRM Integration is selected for downloading.

   If you are just downloading GovWin Opportunity Manager to Vision CRM Integration, expand **Sub-Release**, and select the check box for GovWin Opportunity Manager to Vision CRM Integration in the table.

> To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

8. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

Accessing DSM from within the Customer Care Connect Site

To access Deltek Software Manager from within the Customer Care Connect site, complete the following steps:

1. In your Web browser, go to http://support.deltek.com.

2. Enter your Customer Care Connect **Username** and **Password**, and click **Log In.**

3. When the Customer Care Connect site displays, click the Product Downloads tab.

   You are automatically logged into Deltek Software Manager.

4. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.

   > When you log on for the first time, Deltek Software Manager asks you to select a default folder where Deltek products are to be downloaded.

5. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

   > You can change this folder anytime in the Settings dialog box.

6. In the left pane of Deltek Software Manager, expand **Vision**, if it is not already expanded.

7. Expand your version of Vision.

8. If you are doing a complete download of Vision, expand **Complete** and select the product. Then, in the right pane, click the Sub-Releases tab and confirm that GovWin Opportunity Manager to Vision CRM Integration is selected for downloading.

   If you are just downloading GovWin Opportunity Manager to Vision CRM Integration, expand **Sub-Release**, and select the check box for GovWin Opportunity Manager to Vision CRM Integration in the table.

   > To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click here.

- To view a tutorial on how to use Deltek Software Manager, click here.

- To view more information on troubleshooting Deltek Software Manager, click here.

   > The above troubleshooting link will only work if you are logged into Deltek Customer Care Connect.

Prerequisites for Installing and Using GovWin Opportunity Manager to Vision CRM Integration

Before you can install and use GovWin Opportunity Manager to Vision CRM Integration, you must do the following:

- Install Vision 7.1 or a later version.

- Configure Microsoft IIS Web server. (Use the applicable set of instructions in the two sections that follow: "Configure Microsoft IIS Web Server Configuration on Windows 2012/2012 R2 Server" or "Configure Microsoft IIS Web Server Configuration on Windows 2008/2008 R2 Server" below.)

- Have a subscription to GovWin Enterprise.

  To obtain the account information required to log in as an Opportunity Manager member, contact your GovWin IQ account manager, and they can assist you.

Configure Microsoft IIS Web Server Configuration on Windows 2012/2012 R2 Server

Perform this procedure if you are going to install Opportunity Manager integration on Windows Server 2012/2012 R2. The integration installer verifies that Microsoft Internet Information Services (IIS) is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.

To configure Microsoft IIS Web server on Windows 2012/2012 R2 Server, complete the following steps:

1. From the desktop view, do either of the following to display the Charm Bar:

   - Move the mouse pointer to the lower right corner of the screen.

   - Press the Windows key + **C**.

   > For more information about Charm Bar, see the following:
   > http://windows.about.com/od/windowsforbeginners/a/Get-To-Know-The-New-Windows-8-Start-Menu.htm.

2. Click **Start » Administrative Tools » Server Manager**.

3. In the left pane, click **IIS**.

4. In the right pane, scroll down to display the ROLES and FEATURES section.

5. From the **Tasks** drop-down list, select **Add Roles and Features**. The Add Roles and Feature Wizard displays.

6. Click **Next**.

7. Select the **Role-based or feature-based installation** option.

8. On the Select Destination Server page, verify that **Select a server from the server pool** option is selected, and click **Next**.

9. On the Select server roles page,

   - Expand **Web Server (IIS) » Web Server » Application Development**, and select **CGI** and **ISAPI** extensions.

- Expand **Web Server (IIS) » Web Server » Management Tools**, and select **IIS Management Scripts** and **Tools**.

- Expand **Web server (IIS) » Web Server » Management Tools » IIS 6 Management Compatibility » IIS 6 Metabase Compatibility**.

10. Click **Next**, and click **Next** on the Select features page.

11. Click **Install**.

Configure Microsoft IIS Web Server Configuration on Windows 2008/2008 R2 Server

Perform this procedure if you are going to install Opportunity Manager integration on Windows Server 2008/2008 R2. The Opportunity Manager installer verifies that Microsoft Internet Information Services (IIS) is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.

To configure Microsoft IIS Web server on Windows 2008/2008 R2 Server, complete the following steps:

1. Click **Start » Administrative Tools » Server Manager**.

2. Expand the **Roles** tree in the left pane, and click **Web Server (IIS)**.

3. When the Web Server (IIS) screen displays, click **Add Role Services** in the lower right pane.

4. On the Select Role Services screen, do the following:

   - Click **Web Server » Application Development**, and select **ISAPI Extensions** and **CGI**.

   - Click **Web Server » Management Tools**, and select **IIS Management Scripts** and **Tools**.

   - Click **Web Server » Management Tools » IIS 6 Management Compatibility**, and select **IIS 6 Metabase Compatibility**.

5. Click **Next.**

6. Click **Install**.

7. Click **Close** when the installation completes.

8. Expand the Web Server (IIS) tree in the left pane, and click **Internet Information Services (IIS) Manager**.

9. On the Internet Information Services (IIS) Manager screen, expand the IIS computer name icon in the left pane.

10. Right-click the IIS computer name icon, and click **Stop** on the shortcut menu.

11. Right-click the IIS computer name icon again, and click **Start** on the shortcut menu.

12. Close the Services Manager window.

Install GovWin Opportunity Manager to Vision CRM Integration

A complete GovWin Opportunity Manager to Vision CRM Integration installation requires three primary steps:

1. Install the integration application on the Web/application server.

2. Apply the OppMgrTabCreate7x.sql script to your database.

3. Create the **Opp Manager Web Service** link in the Navigation pane in Vision.

## Install the Integration Application on the Web/Application Server

When you install Opportunity Manager integration, the setup log automatically defaults to **C:\Users\<User>\AppData\Local\Deltek** and creates a temporary shortcut on your desktop. When the installation is finished, the completed log is copied to the **<integration installation folder>\Databases\InstallLogs** folder. (The default installation location is **C:\Program Files (x86)\Deltek\Opportunity Manager\.**)

**To install GovWin Opportunity Manager to Vision CRM Integration, complete the following steps:**

1. After you download the GovWin Opportunity Manager to Vision CRM Integration installation file (DeltekOpportunityManager10.exe) from DSM, log on to your application server as a local administrator.

2. Run the installation file on the application server to launch the Opportunity Manager integration installation program.

3. On the Welcome page of the wizard, click **Next**.
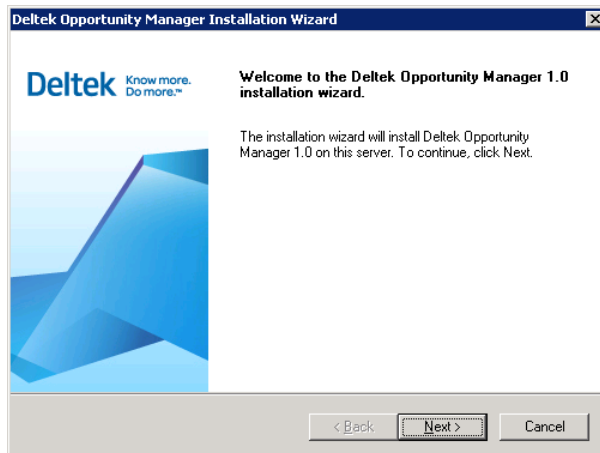
4. On the License Agreement page, review the license agreement, select the **I accept the terms of the license agreement** option, and click **Next**.
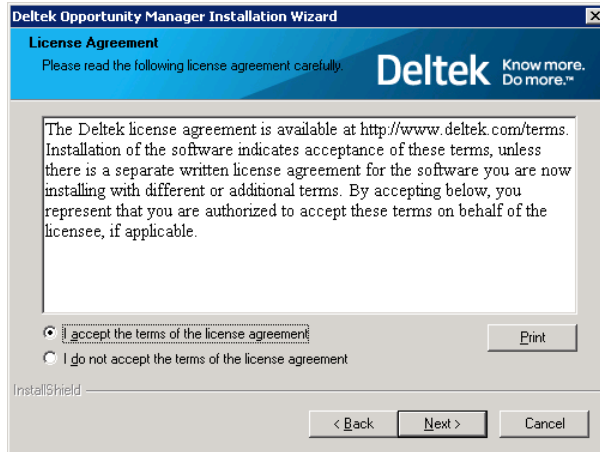
5. On the Choose Destination Location page, if you will not be using the defaults, click the **Change** button and select the folder in which you want to install files, and click **Next**.
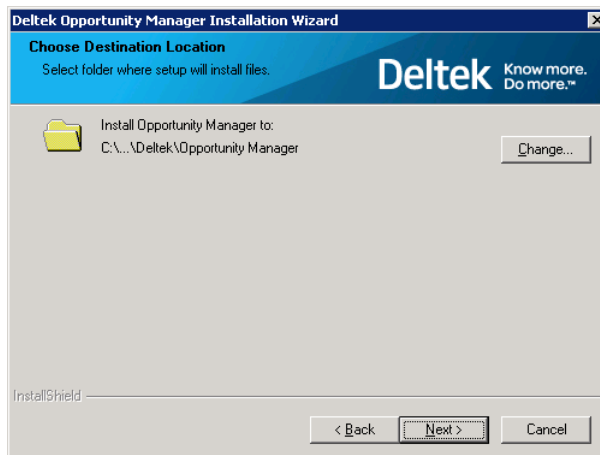
6. On the Customer Experience Improvement Program (CEIP) page, specify if you want to participate and click **Next**.
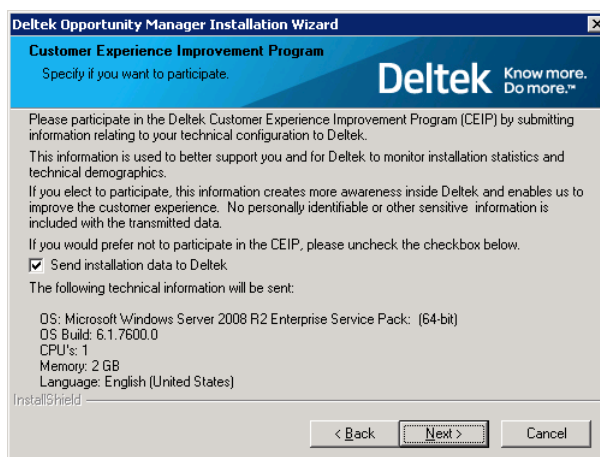

The installer begins installing the files and adding configuration settings in IIS. The process creates a new Opportunity Manager application pool in IIS and configures it with the same Default local account that the Vision core installer created.

> Deltek Security Best Practices recommend that after installation the default account usernames and/or passwords be modified for security reasons. If you have made any such changes, you must perform the following in IIS after the installation:
>
> - Configure the Opportunity Manager application pool with the same Identity account that is running the Vision application pool.
>
> - Ensure that the account has at least Modify NTFS rights to the Config and Logs folders located in the installation path for GovWin Opportunity Manager to Vision CRM Integration.
>
> - If you configure your Opportunity Manager application in IIS with Windows Authentication, end users may be prompted for their credentials when they click the **Opp Manager Web Service** link in the Navigation pane in Vision. To avoid the prompts, they must choose the option to save their credentials when prompted. In some cases, they may have to add the server to the Trusted Sites in Internet Explorer (if that option is available).

7. When the message below displays, click **OK** to continue.
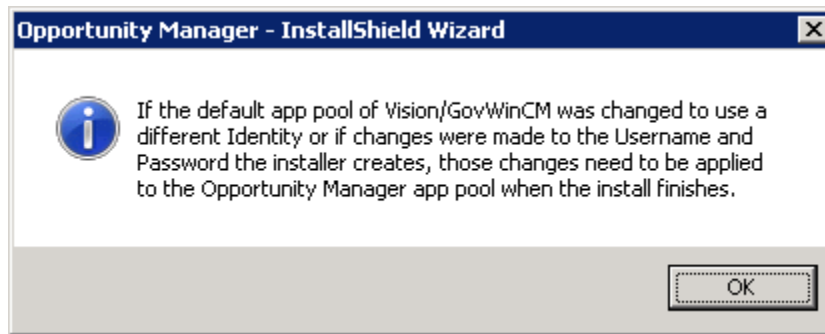
8. When the **Installation Complete** page displays, review the note at the bottom of that page before you click **OK** to finish.

Apply the OppMgrTabCreate7x.sql Script on your Database

After the integration application is installed, apply the OppMgrTabCreate7x.sql script to your database. That script updates the database for the new Opp Manager tab in the Opportunity Info Center. You only have to apply it once on your database.

OppMgrTabCreate7x.sql is located in <Deltek Vision installation folder>\Databases\Scripts. (The default location is C:\Program Files (x86)\Deltek\Vision\Databases\Scripts\.) You may need to copy it to a central location if you are not going to perform the steps below from the Web server.

> Deltek recommends making a backup of your database before applying any database script changes

You can apply the script in either of two ways:

- Using Weblink (recommended)
- Using SQL Management Studio

To apply the database script using Weblink, complete the following steps:

1. Launch Weblink.
2. Click the Database List View tab.

3. Select the **Select** check box for the databases you want to update.

4. Click **Insert** on the toolbar for the Scripts grid in the lower part of the window, and insert the OppMgrTabCreate7x.sql script name.

5. Click **Run Scripts** on the toolbar to apply the scripts.

To apply the database script using SQL Management Studio, complete the following steps:

1. On a computer that has a supported version of Microsoft SQL Server, launch SQL Server Management Studio.

2. Enter valid credentials to connect to your database server.

3. Expand the Databases folder.

4. Left-click your Vision database to select it.

5. On the File menu of SQL Management Studio, select **Open » File**.

6. Browse to and select the OppMgrTabCreate7x.sql file, and click **Open** to load it in the query window.

7. Verify that your Vision database is selected in the upper left, and click **Execute** (the toolbar button with the red exclamation point) to apply the script.

8. Click on the Messages tab in the lower half of the screen, and review the results to verify that there are no errors.

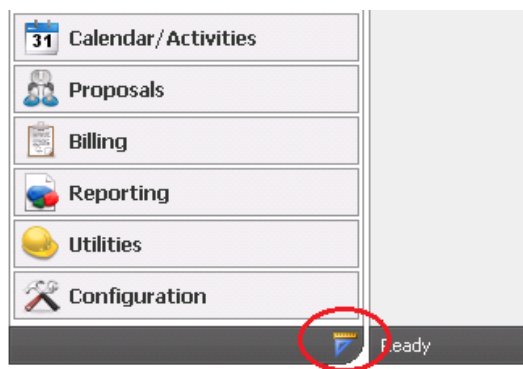## Create the Opp Manager Web Service Navigation Pane Link in Vision

The Opportunity Manager Web Service utility in Vision is used to configure the integration and to run or schedule the opportunity import process. To provide access to the utility, you need to add a link for it in the Navigation pane in Vision.

> The security features of the Web service require periodic changes to the passwords and will only accept connections from your firm's Web server IP address. Before performing the steps below, make sure that your IP address has been submitted to GovWin IQ Product Management to allow the connections.

To create the Opp Manager Web Service navigation link, complete the following steps:
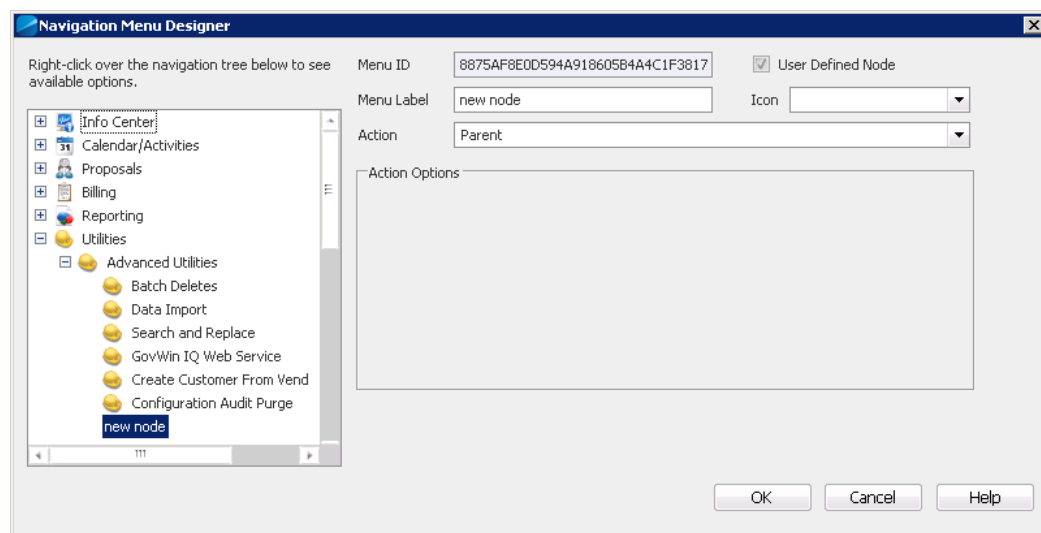
1. Log in to Vision.

2. Click the Navigation Tree Designer icon in the bottom-right corner of the Navigation pane.

3. In the Navigation Tree Designer dialog box, expand **Utilities** and **Advanced Utilities**.
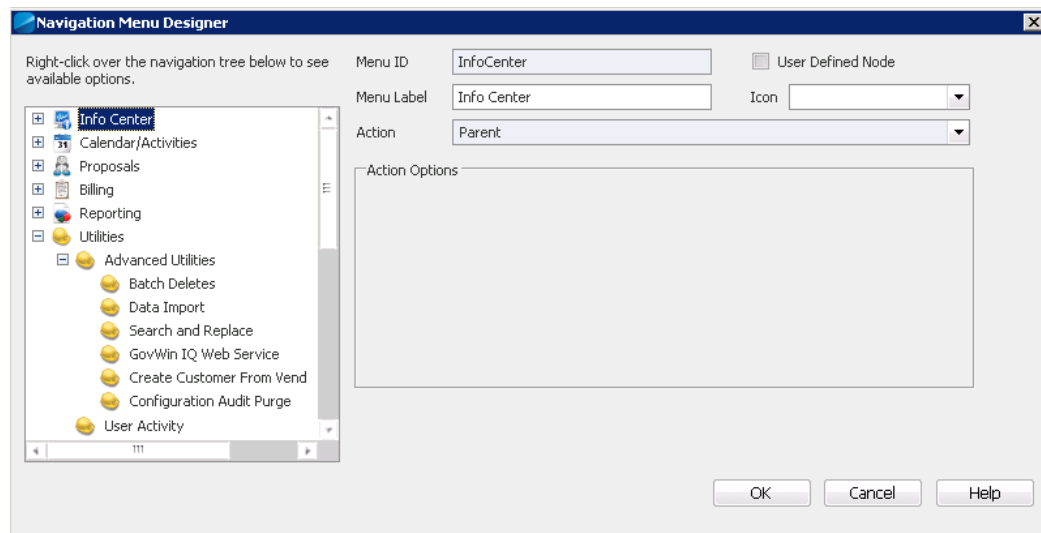
4. Right-click one of the utilities under **Advanced Utilities**, and click **Insert After** on the shortcut menu.

5. In **Menu Label**, enter **Opp Manager Web Service**.

6. If you want to assign an icon to the link, select the icon in **Icon**.

7. In **Action**, select **HTTP**.

8. In **Open** under **Action Options**, enter the URL for displaying the Opportunity Manager Web Service utility.

   This entry must be in the following format:

   http://<servername[:port]>/<installation folder>/DisplayLogs.aspx?NID=<encrypted Opportunity Manager network ID>

   Example:

   http://server1/OpportunityManager/DisplayLogs.aspx?NID=<encrypted Opportunity Manager network ID>

> The default port number in http traffic is 80. When you enter the URL in NavTree Designer, you do not need to include the port number if you are using the default, as in the example above.
>
> Be sure you include your network ID.

9. Click **OK**.

10. Close and restart Vision, and verify that GovWin Opportunity Manager to Vision CRM Integration is installed, as described on page 14.

11. In the Navigation pane in Vision, click **Configuration » Security » Roles.**

12. On the General tab of the Roles form, verify that all roles for users who will use the Opportunity Manager Web Service utility have access to the new Navigation pane link that you just created.

> The implementation is not complete and the integration cannot be used until you specify the settings on the Configuration tab of the Opportunity Manager Web Service utility.
>
> For information on how to fill out the fields on the Configuration tab, refer to the *GovWin Opportunity Manager to Vision CRM Integration User Guide.*
>
> If you have any questions, contact Deltek Customer Care.

Verify that GovWin Opportunity Manager to Vision CRM Integration Is Installed

To verify that GovWin Opportunity Manager to Vision CRM Integration is installed, complete the following steps:

1. Click **Help » About** on the Vision toolbar.

2. Click the **Details** button on the About dialog box.

3. Verify that **Vision Opportunity Manager Integration** is displayed in the **Additional Components Installed** list.

4. Click **Utilities » Advanced Utilities » Opp Manager Web Service**.

5. Verify that the GovWin Opportunity Manager Integration form displays.

> The implementation is not complete and the integration cannot be used until you specify the settings on the Configuration tab of the Opportunity Manager Web Service utility.
>
> For information on how to fill out the fields on the Configuration tab, refer to the *GovWin Opportunity Manager to Vision CRM Integration User Guide.*
>
> If you have any questions, contact Deltek Customer Care.

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