GovWin Contracts and Task Order to Vision CRM Integration FÈ

Installation Guide

February 4, 2013

Contents

Overview

This guide provides instructions for downloading and installing GovWin Contracts and Task Order to Vision CRM Integration.

After you download and install GovWin Contracts and Task Order to Vision CRM Integration, you will have access to the GovWin Contracts and Task Order Integration utility and the CaTO Info tab in the Opportunity Info Center in Vision.

The information in this guide applies both to Deltek customers who have Vision running on their own servers and to hosting vendors who are adding GovWin Contracts and Task Order to Vision CRM Integration to a hosted instance of Vision.

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 Contracts and Task Order 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 Contracts and Task Order to Vision CRM Integration Users Guide	This guide provides information about setting up and using GovWin Contracts and Task Order to Vision CRM Integration.

Downloading GovWin Contracts and Task Order 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 Contracts and Task Order to Vision CRM Integration is selected for downloading.

    If you are just downloading GovWin Contracts and Task Order to Vision CRM Integration, expand **Sub-Release**, and select the check box for GovWin Contracts and Task Order 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 Contracts and Task Order to Vision CRM Integration is selected for downloading.

    If you are just downloading GovWin Contracts and Task Order to Vision CRM Integration, expand **Sub-Release**, and select the check box for GovWin Contracts and Task Order 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 Contracts and Task Order to Vision CRM Integration

Before you can install and use GovWin Contracts and Task Order to Vision CRM Integration, you must do the following:

- Install Vision 6.1 SP4, 6.2 SP2, or 7.0 SP1.

- If you installed a previous version of GovWin Contracts and Task Order to Vision CRM Integration, uninstall that version.

- Install IIS 6 Metabase compatibility. (See additional information under "Install IIS 6 Metabase Compatibility" below).

- Create an IIS Site for GovWin Contracts and Task Order to Vision CRM Integration. See "Create an IIS Site for GovWin Contracts and Task Order to Vision CRM Integration" on page 7 for instructions.

  GovWin Contracts and Task Order to Vision CRM Integration requires the following in IIS:

  - The URL for GovWin Contracts and Task Order to Vision CRM Integration must be directly accessible to the Deltek client application. If any users will connect using the internet, the URL must be exposed to the internet for them.

  - Both the Vision Web server and the Vision users must be able to resolve the URL for GovWin Contracts and Task Order to Vision CRM Integration. To get the GovWin Web service to resolve the URL, either use a DNS reference, or create a host file entry on the server.

  - The installation requires an IIS site that does not have redirection enabled. Because the Deltek Web Applications always use folder redirection as part of the installation by default, GovWin Contracts and Task Order to Vision CRM Integration cannot be installed into the same IIS site that contains the Deltek Web Applications. If you do not create a separate Web site for GovWin Contracts and Task Order to Vision CRM Integration, you will get an error during setup.

- Have the GovWin Contracts & Task Order product.

  To obtain the account information and queue ID required to configure the integration, contact your Sales Representative/Account Manager, and they can assist you.

Uninstall Previous Version of GovWin Contracts and Task Order to Vision CRM Integration

If you installed an earlier version of GovWin Contracts and Task Order to Vision CRM Integration, you must do the following before you install this version:

1. Uninstall the earlier version of GovWin Contracts and Task Order to Vision CRM Integration.

2. Delete all files and folders under C:\inetpub\wwwroot\<CaTOInstallationFolder>\GovWinCMCaTOIntegration.

Install IIS 6 Metabase Compatibility

If you have Microsoft Windows Server 2003, you also have IIS 6 installed, which uses the metabase. No additional steps are necessary.

If you have Microsoft Windows Server 2008 or 2008R2 and are installing IIS 6 Metabase compatibility as part of a new IIS 7 installation, follow the steps in Appendix A of the *Deltek Vision Technical Installation Guide.* When you enable the sub-options under **Internet Information Services** as part of that procedure, also select **Management Tools » IIS 6 Management Compatibility » IIS 6 Metabase Compatibility**.

If you have already installed IIS 7 and just need to enable IIS 6 Metabase compatibility, complete the following steps:
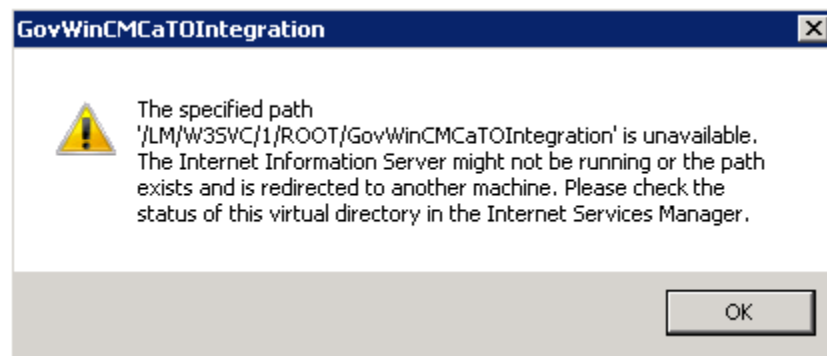
1. Log onto your Microsoft Windows Server 2008 server as a domain or local administrator.
2. Click **Start » Control Panel » Administrative Tools » Launch Server Manager.**
3. Select **Web Server (IIS)** under **Roles**.
4. Select **Add Role Services**.
5. Select **Management Tools » IIS 6 Management Compatibility » IIS 6 Metabase Compatibility**.
6. Click **Next**.
7. Click **Install**.

Create an IIS Site for GovWin Contracts and Task Order to Vision CRM Integration

GovWin Contracts and Task Order to Vision CRM Integration requires the following in IIS:

- The URL for GovWin Contracts and Task Order to Vision CRM Integration must be directly accessible to the Deltek client application. If any users will connect using the internet, the URL must be exposed to the internet for them.

- The installation requires an IIS site that does not have redirection enabled. Because the Deltek Web Applications always use folder redirection as part of the installation by default, GovWin Contracts and Task Order to Vision CRM Integration cannot be installed into the same IIS site that contains the Deltek Web Applications.

  If you do not create a separate Web site for GovWin Contracts and Task Order to Vision CRM Integration, you will get an error similar to the following during setup:

To create an IIS site, perform the following steps:

Step 1

Go to C:\inetpub\wwwroot\, and create a new folder named **VisionCaTOIntegration.**

Step 2

1. Open IIS.
2. In the left pane, expand **Sites**.
3. Under **Sites**, right-click **Add Web Site**.

4. In **Site name**, enter **VisionCaTOIntegration**.
5. Click **Select** next to **Application pool**, and select **DeltekVisionAppPool**.
6. In **Physical Path**, browse to the VisionCaTOIntegration folder you created under C:\inetpub\wwwroot\ and select it.
7. Under **Binding,** change the port from 80 to any other (for example: 8080). This is necessary because the Default Web Site uses port 80.
8. Click **OK**.
9. Continue with the installation of GovWin Contracts and Task Order to Vision CRM Integration on page 9.

Install GovWin Contracts and Task Order to Vision CRM Integration

To install GovWin Contracts and Task Order to Vision CRM Integration, complete the following steps:
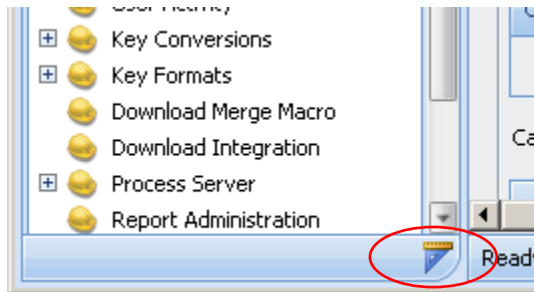
1. After you download the GovWin Contracts and Task Order to Vision CRM Integration installation file (VisionCaTOIntegration<Vision version>.exe) from DSM, log on to your application server as a local administrator.

2. Run the installation file on the application server and follow the instructions provided in the installation wizard.
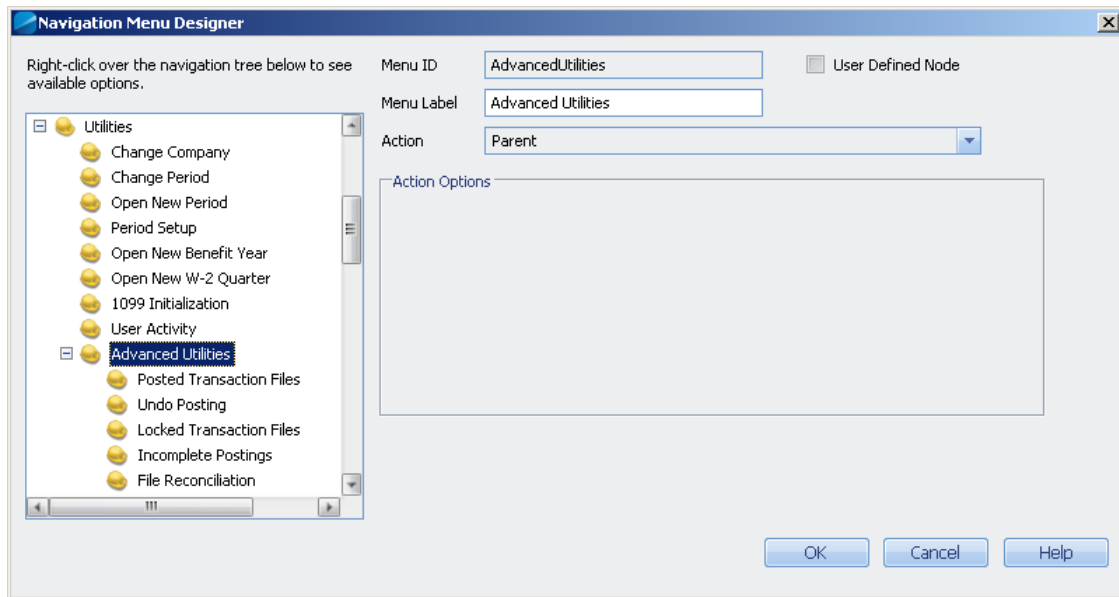
    > GovWin Contracts and Task Order to Vision CRM Integration requires the addition of user-defined columns and grids to the Opportunity Info Center. If you do not allow the database script to add the columns and grids when you are prompted to do so during the installation process, you must run the script manually when the installation process is finished.
    >
    > The script file is CaTOTabCreate70.sql (or CaTOTabCreate.sql for versions prior to Vision 7.0). The file is located in <Vision installation folder>\Databases\Scripts.
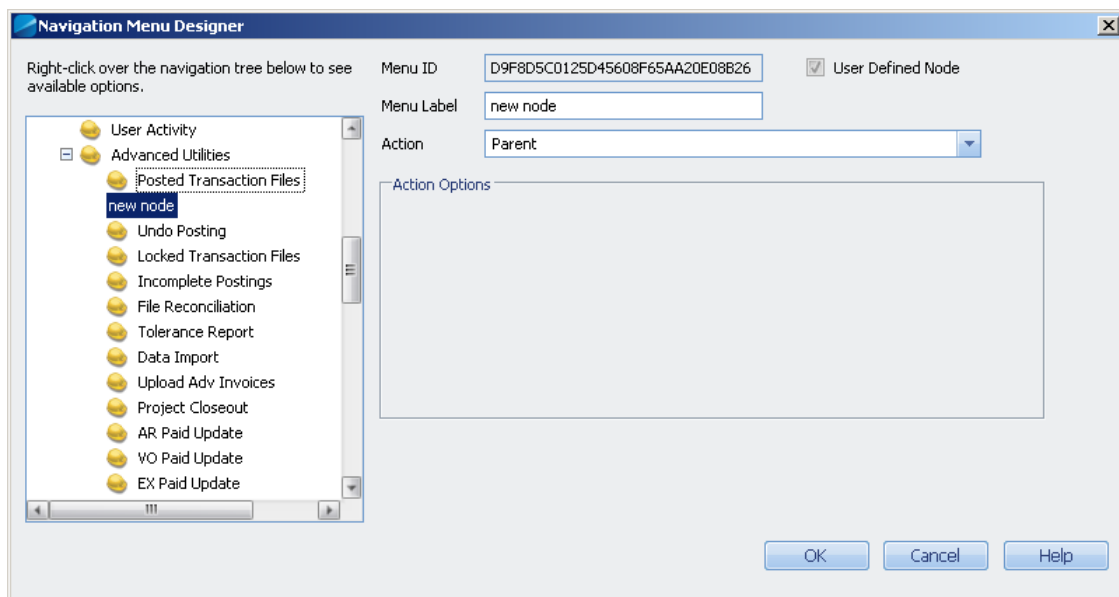
3. On the Select Installation Address screen, select **VisionCaTOIntegration** in **Site**.

4. In **Application Pool**, select **DeltekVisionAppPool**.

5. Click **Next** to continue.

6. After the installation is completed, log in to Vision.

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

8. In the Navigation Tree Designer dialog box, expand **Utilities** and **Advanced Utilities**.

9. Right-click one of the utilities under **Advanced Utilities**, and click **Insert After** on the shortcut menu.

10. In **Menu Label**, enter **GovWin Contracts and Task Order Integration**.

11. In **Action**, select **HTTP**.

12. In **Open** under **Action Options**, enter the URL for displaying the GovWin Contracts and Task Order Integration utility.

    This entry must be in the following format:

    http://<servername[:port]>/<installation folder>/DisplayLogs.aspx?QID=<CaTO encrypted queue ID>

Example:

http://server1:8080/GovWinCMCaTOIntegration/DisplayLogs.aspx?QID=< CaTO encrypted queue ID >

	When you enter the URL in NavTree Designer, be sure you include the port number and queue ID, as in the example above.

13. Click **OK**.

14. Close and restart Vision, and verify that GovWin Contracts and Task Order to Vision CRM Integration is installed, as described on page 12.

15. In the Navigation pane in GovWin CM, click **Configuration » Security » Roles.**

16. On the General tab of the Roles form, verify that all roles for users who will use the GovWin Contracts and Task Order Integration utility have access to the new Navigation pane link that you just created.

	For information on how to configure and run GovWin Contracts and Task Order to Vision CRM Integration, refer to the *GovWin Contracts and Task Order to Vision CRM Integration Users Guide* If you have any questions, contact Deltek Customer Care.

Verify that GovWin Contracts and Task Order to Vision CRM Integration Is Installed

To verify that GovWin Contracts and Task Order 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 **GovWin CM CaTO Integration** is displayed in the **Additional Components Installed** list.

4. Click **Utilities » Advanced Utilities » GovWin Contracts and Task Order Integration**.

5. Verify that the GovWin CM CaTO Integration form displays.

> For information on how to configure and run GovWin Contracts and Task Order to Vision CRM Integration, refer to the *GovWin Contracts and Task Order to Vision CRM Integration Users Guide*
>
> If you have any questions, contact Deltek Customer Care.

Deltek is the leading global provider of enterprise software and information solutions for professional services firms, government contractors, and government agencies. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. Over 14,000 organizations and 1.8 million users in approximately 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resource, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.®

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