Deltek Vision® 7.1

Deploying Vision at a Hosting Provider

June 27, 2013

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Contents

Overview

This guide contains technical installation and setup information for the staff at your company who maintain the hardware and software required to deploy Deltek Vision at a Hosting Provider.

About This Guide

We revise this document regularly to provide the most up-to-date technical information and instructions. Visit the Knowledge Center tab of the Deltek Customer Care Connect site, https://support.deltek.com, to determine if your copy is the latest copy, and to download the most recent copy if necessary.

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 Vision, 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 Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

Deltek Vision includes an online help system that contains conceptual, procedural, and tab/field-level documentation. Click **Help » Contents on the Vision toolbar to access the online help.**

In addition to the online help system, Deltek provides user guides and quick reference cards (in PDF format) to help you install and use the Vision application. You can download user guides and quick reference cards from the Deltek Customer Care Connect site. The Knowledge Center article 62566 has a link to all the documents for Vision 7.1.

Deltek Vision Guides	
Deltek Vision Getting Started and Concepts Guides	
Deltek Vision Getting Started Guide	This guide contains information about the Vision Web interface and all the Vision applications, with tips for navigating through the system, using the dashboard, and finding and opening records.
Deltek Vision Concepts Guide	This guide describes the concepts underlying the basic accounting, project control, and customer relationship management (CRM) functions of the Vision application.
Deltek Vision Installation and Implementation Guides	
Deltek Vision Advanced Technical Administration Guide	This guide provides IT staff and system administrators with instructions for installing and configuring advanced technical components of Vision.
Deploying Deltek Vision at a Hosting Provider	This guide contains instructions for deploying Deltek Vision at a hosting provider.
Deltek Vision Implementation Guide	This guide contains information about configuring and setting up Vision applications and features.
Deltek Vision Migration Guides	
Deltek Advantage to Deltek Vision Migration Guide	This guide contains information about migrating from Advantage to Vision, including the steps in the migration process and an overview of Vision features.
Deltek FMS to Deltek Vision Migration Guide	This guide contains information about migrating from FMS to Vision, including the steps in the migration process,

	discussions of the key migration decisions, and procedures for verifying the converted data.
Deltek Sema4 to Deltek Vision Migration Guide	This guide contains information about migrating from Sema4 to Vision, including the steps in the migration process and an overview of Vision features.
Deltek Vision Quick Reference Cards	
Deltek Vision Quick Reference Cards	Quick reference cards provide snapshots of specific business processes or Vision forms, with tips for entering data and using application toolbars. The following quick reference cards are available: ▪ Accounts Payable (Create a Voucher from a Purchase Order) ▪ Create Client from Vendor Utility ▪ Dashboard ▪ Desktop and Microsoft Office Integration ▪ Expense Report ▪ Navigation Tree Designer ▪ Project Planning ▪ Purchasing (Create a Standard Purchase Order) ▪ Resource Management (Generic Resource Assignments and Resource Utilization) ▪ Screen Designer ▪ SF330 Proposals ▪ Template Based E-mails ▪ Timesheet ▪ User Options ▪ Visualization
Deltek Vision Document Management Guide	
Deltek Vision Document Management Installation Guide	This guide contains detailed information on the prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.
Deltek Vision Interface to Microsoft Project	
Deltek Vision Interface to Microsoft Project 2010	This guide describes how the manual scheduling feature in Microsoft Project 2010 impacts the two-way interface between Deltek Vision and Microsoft Project 2010.
Deltek Vision Performance Management Guides	
Deltek Vision Performance Management Technical	This guide provides instructions on how to install and configure the Analysis Cubes components of the Deltek

Deltek Vision Guides	
Installation Guide	Vision Performance Management module.
Deltek Vision Performance Management Content and Functionality Overview	This guide provides an overview of Vision Performance Management functionality and the pre-built visualizations that are included with it.
Deltek Vision Reporting Guides	
Deltek Vision Custom Reports and Microsoft® SQL Server Reporting Services	This guide provides instructions for creating, delivering, and generating Vision custom reports with Microsoft SQL Server Reporting Services and its report writing tools.
Deltek Vision Microsoft SQL Server Reporting Services Licensing FAQ	This guide explains the Microsoft SQL Server Reporting Services licensing implications for Vision.
Deltek Vision Connect for Microsoft Outlook Guides	
Deltek Vision Connect for Microsoft Outlook Installation Guide	This guide contains an overview of Vision Connect for Microsoft Outlook, as well as technical installation, setup, and maintenance information.
Deltek Vision Customizing Configuration Settings for Connect for Microsoft Outlook	**This guide was formerly named: Deltek Vision Connect for Microsoft Outlook Presets Configuration Guide** The guide is intended for system administrators, IT staff, or custom developers. It provides instructions on how to create presets to: configure default behavior for converting Microsoft Outlook contacts; control the display of the Synchronization Control Panel when issues occur during synchronization; and implement default and custom synchronization filters.
Deltek Vision Connect for Microsoft Outlook Frequently Asked Questions	This document contains frequently asked questions (FAQs) on topics regarding deployment, customization, environment, usage, and functionality.
Deltek VisionXtend Guides	
Deltek VisionXtend Web Services and APIs for Deltek Vision	This guide explains how to use the Deltek VisionXtend platform to integrate Vision with other applications, access web services, implement data validation routines, and establish workflow procedures using the Microsoft .NET Framework.
Deltek VisionXtend Test Client Application for Vision Web APIs/Web Services	This guide provides information about the Web Services Test Client application that is included with the Vision Utilities software.
Deltek Vision Navigator Guides	
Deltek Vision Navigator	This guide contains technical installation, setup, and

Deltek Vision Guides	
Installation Guide	maintenance information for Vision Navigator.
Deltek Vision Navigator Integration Guide	This guide provides technical information for using Vision Navigator with Deltek Vision.
Deltek Vision Project Connect Guides	
Deltek Vision Project Connect Installation and Administration Guide	This guide contains detailed information on installing and administering Project Connect for integrating Microsoft Project with Deltek Vision.
Deltek Vision Project Connect User's Guide for Microsoft Project 2010	This guide contains information for integrating for integrating Microsoft Project 2010 with Deltek Vision.
Deltek Vision Project Connect User's Guide for Microsoft Project 2007	This guide contains information for integrating for integrating Microsoft Project 2007 with Deltek Vision.

Deploying Deltek Vision 7.1 at a Hosting Provider

To deploy Deltek Vision 7.1 at a hosting provider, you must complete all of the steps listed in this guide.

Prerequisites

Install Vision on all applicable tiers as documented in the *Deltek Vision 7.1 Technical Installation Guide.*

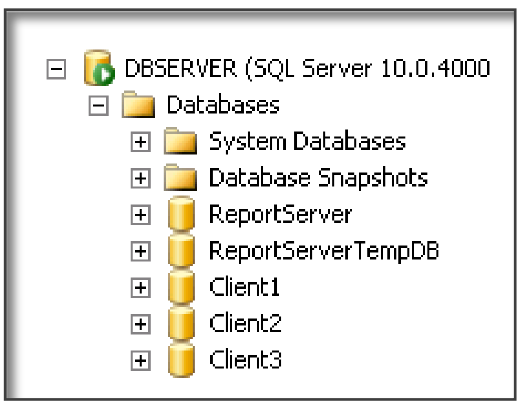
SQL Server

Connect to the Database Engine in SQL Server Management Studio and complete the following steps:

1. Configure SQL Server for Mixed Mode security, or use Windows authentication as the database connection account for each client's IIS application pool identity.

   If you use Mixed Mode security, you must secure the **sa** account with a unique password.

2. Create a unique SQL Server database for each client.



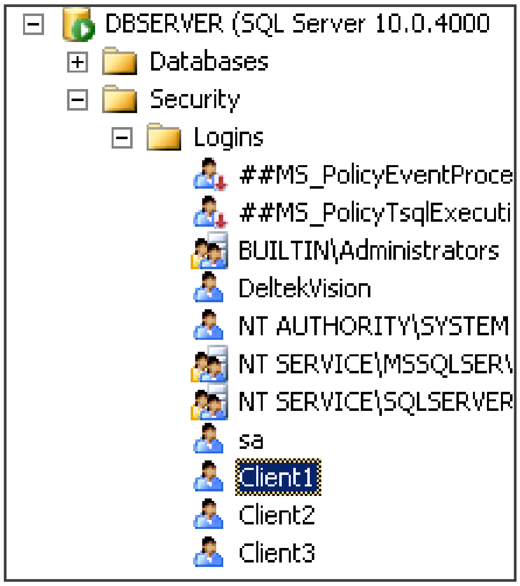
3. Create a SQL Server Maintenance Plan for each client's database.

   If you are using Microsoft® Exchange Server, you can also configure SQLAgentMail to notify an Administrator of the success or failure of each client's maintenance plans. Please refer to SQL Server Books online for more information.

4. Create a Backup Device for each client's database.

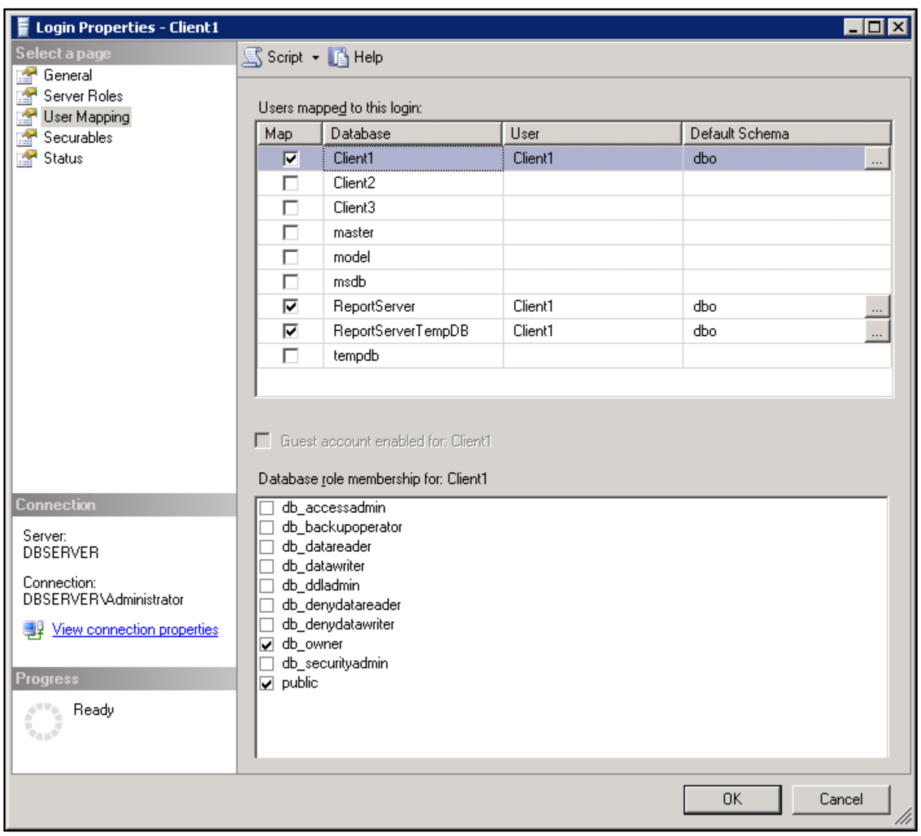
   If you do not create a backup device, the client will not be able to use the backup database functionality found in the Vision Utilities menu.

5. Create a unique SQL Server login ID and password for each client. You can use either a SQL Login ID, or create unique Windows accounts for each client's database connection and then create SQL Windows logins.



You must:

- Grant each login dbo rights ***only*** to that client's Vision database, and dbo rights to the ReportServer and ReportServerTempDB databases.



- Disable the DeltekVision SQL login ID (created by the Vision installation).
- Disable the DeltekVision local Windows account (created by the Vision installation).

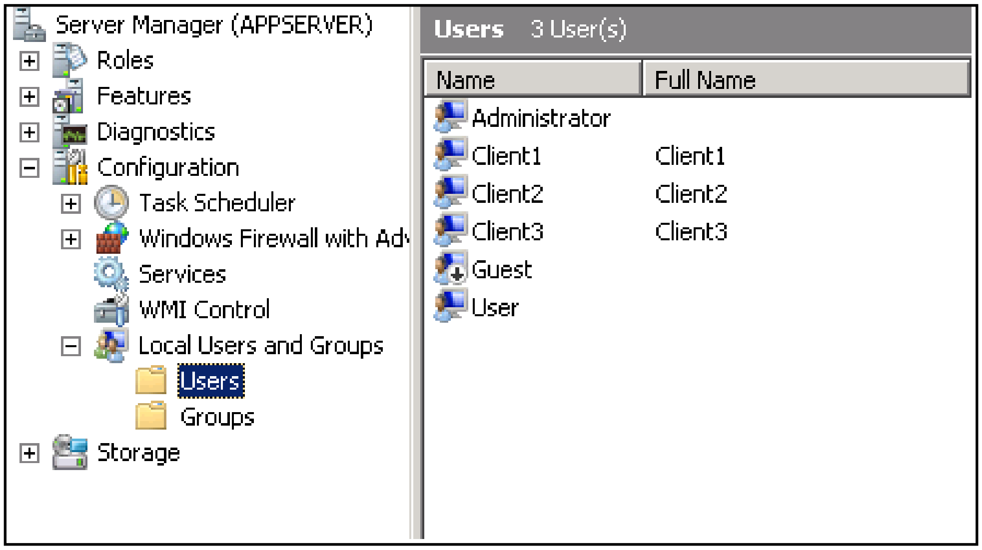
For Costpoint CRM installations:

- Disable the DeltekCostpointCRM SQL login ID (created by the Costpoint CRM installation).
- Disable the DeltekCostpointCRM local Windows account (created by the Costpoint CRM installation).

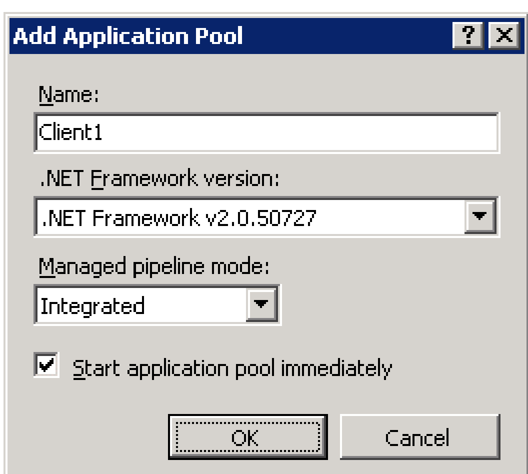
Vision Web Server – IIS 7.0/7.5

Perform the following steps on the Web Server:

1. Create a unique local Windows® account for each client. This is used as the application pool identity. This account must be a member of the Local Administrators group on the Vision Web server.

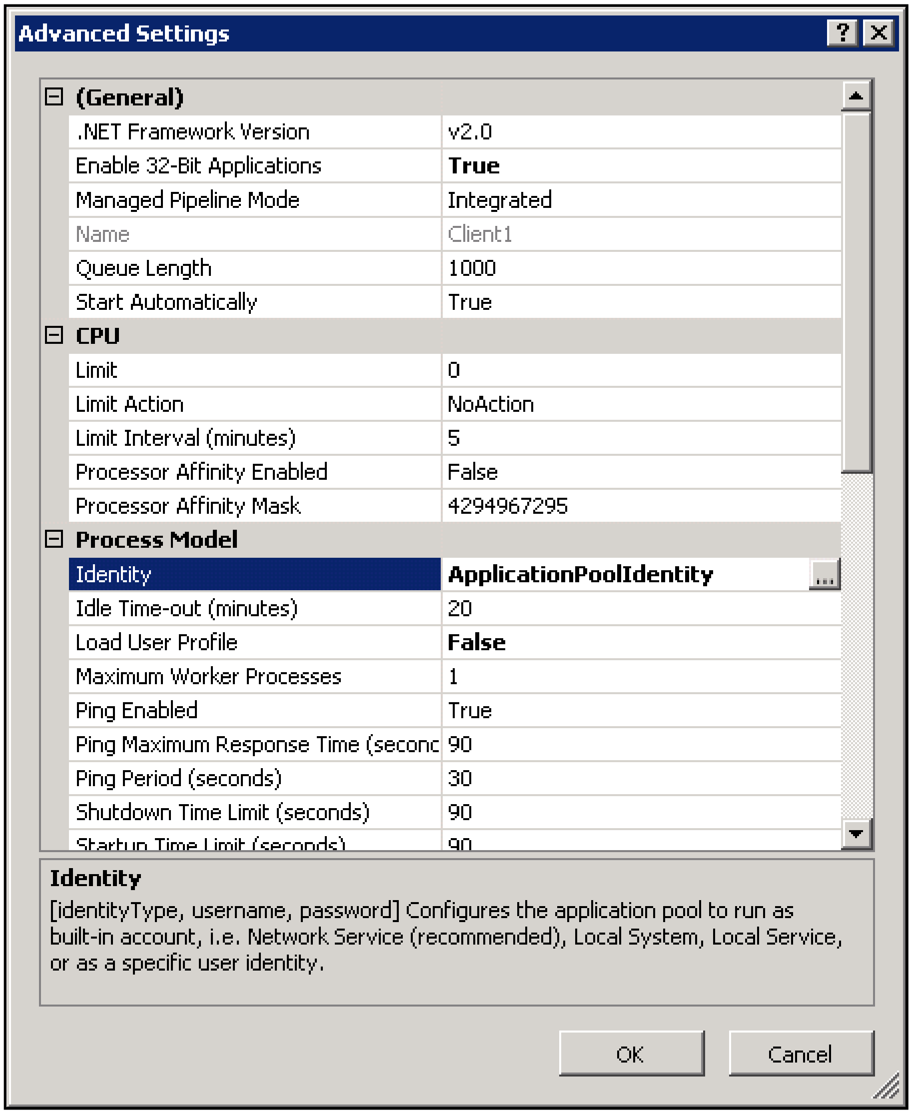


2. Disable the DeltekVision local Windows account on the Web Server (created by the Vision installation).
3. Create a unique application pool for each client.
4. On the Add New Application Pool dialog box, enter a unique **Name** for the application pool.
   - From the **NET Framework version** drop-down list, select **.NET Framework 2.0**.
   - From the **Managed pipeline mode** drop-down list, select **Integrated** (default) or **Classic** (IIS 6.0 mode).

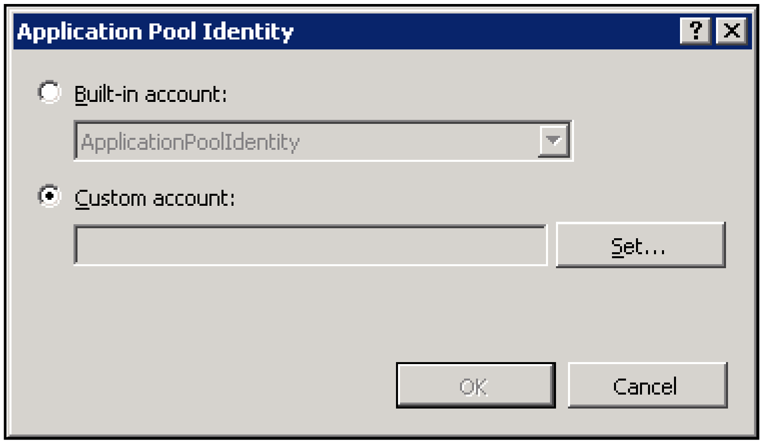


5. On the Advanced Settings dialog box for the Application Pool,

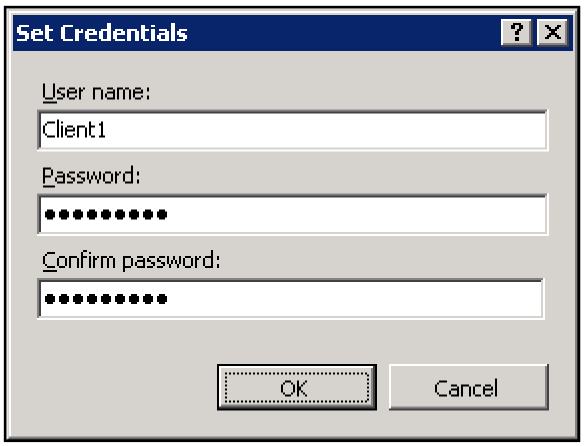
- If your server is 64-bit, Set the Value to **True** for the **Enable 32-Bit Applications** setting.
- Assign the Local User account created for that client as the **Application Pool Identity** of that client's application pool:



6. Click [...] to change the **Application Pool Identity**.
7. Select the **Custom account** option and click **Set**.



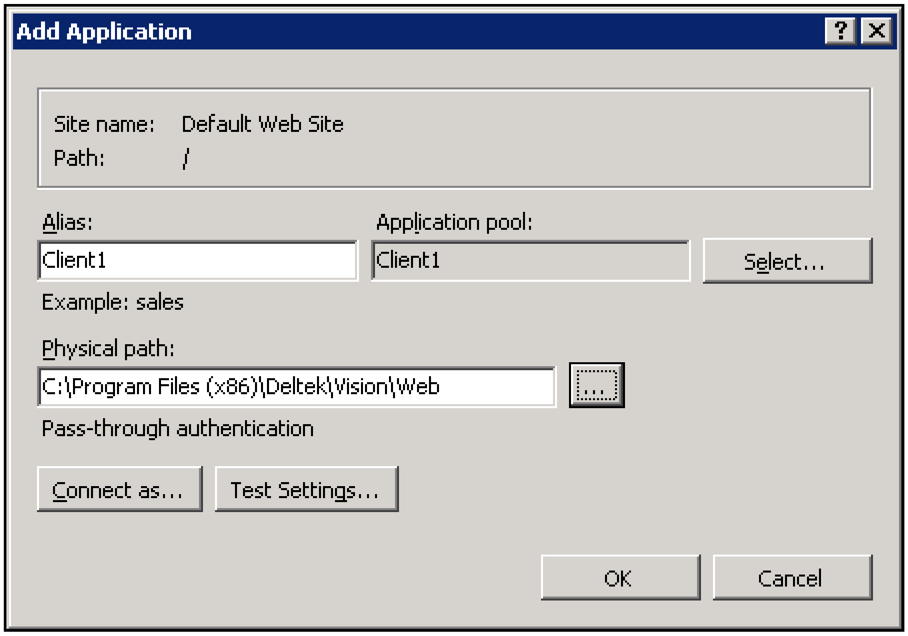
8. Enter t**he credentials** of the Windows ac**cou**nt and click **OK** three times.



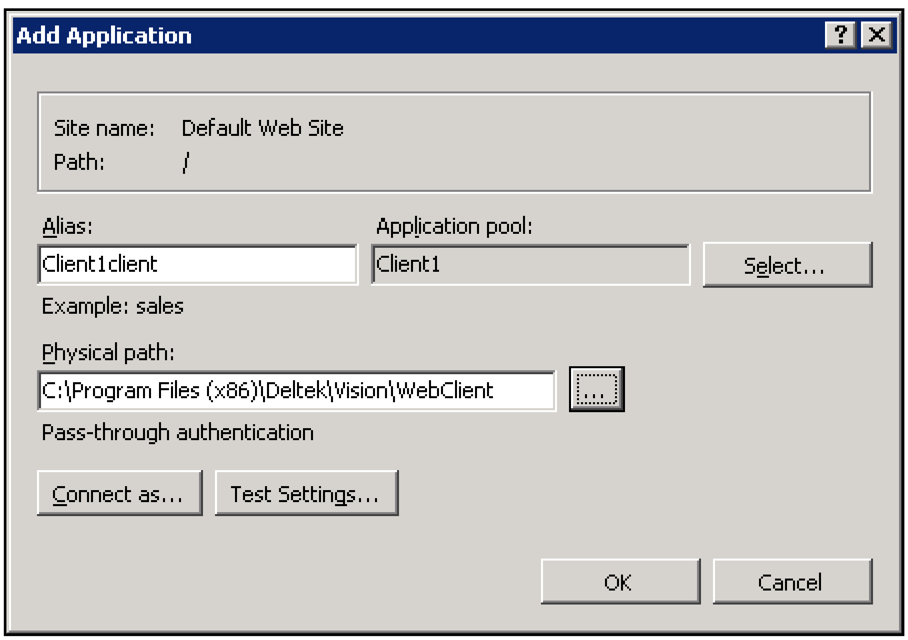
9. Create **two** unique virtual directories for each client and add the client's virtual directories to the client's application pool that you created earlier.

   - **Application Virtual Directory** - The first virtual directory is for the application and points to **\Program Files\Deltek\Vision\Web**.
   - **ClickOnce Deployment Virtual Directory** - The second virtual directory is for the ClickOnce deployment and points to **\Program Files\Deltek\Vision\WebClient**.

   You can name the application virtual directory whatever you want, but the deployment virtual directory must match the name of the application virtual with **Client** appended to it (for example, Client1 and Client1client).



And Client1client:



When you are finished, you should have one unique application pool for each client and two unique virtual directories that are part of the application pool.

The next steps involve:

- Setting the default document for the Application virtual directory.
- Setting IIS redirects from the Application virtual to the Deployment virtual directory. These settings have changed significantly in IIS 7.0 and IIS 7.5.

IIS 7.0/7.5 write certain settings (default document, redirect, and so on) to the application Web.config file, which is associated with the **physical path** by default. Because Vision can support multiple virtual directories, each pointing to the same physical path (for example, C:\program files\deltek\vision\web), it is not possible to have these settings written to the web.config file.

This new behavior in IIS 7.0/7.5 causes the redirect for each virtual directory to point to the **same** deployment virtual directory for all clients, which is not the behavior you want. The redirect must point to the specific deployment virtual directory for that client.

The following article explains this behavior:

http://learn.iis.net/page.aspx/127/deep-dive-into-iis-7-configuration/

The following steps show the settings that need to be written to the applicationhost.config file, located in C:\windows\system32\inetsrv\config. You can append these settings to the bottom of this file, above the </configuration> end tag.

> Due to the Server 2008 UAC (User Access Control) settings, you must open Notepad using **Run as Administrator**.

Complete the following steps to set the default document for the Application virtual and setting IIS redirects from the Application virtual to the Deployment virtual directory:

1. Modify each application virtual directory to ensure that index.htm is the default document, using the following settings:

```
<location path="Default Web Site/Client1">
  <system.webServer>
    <defaultDocument enabled="true">
      <files>
        <remove value="index.htm" />
        <add value="index.htm" />
      </files>
    </defaultDocument>
  </system.webServer>
</location>
```

> You must apply these settings for the Application virtual directory for **each** client.

2. Modify each deployment virtual directory to ensure that default.aspx is the default document using the following settings:

```
<location path="Default Web Site/Client1Client">
  <system.webServer>
    <defaultDocument enabled="true">
      <files>
        <remove value="default.aspx" />
        <add value="default.aspx" />
      </files>
    </defaultDocument>
  </system.webServer>
</location>
```

> You must apply these settings for the Application virtual directory for **each** client.

3. At the root of each application virtual you must also create an IIS redirect.

- Each request to Index.htm will redirect to the Deployment virtual directory\default.aspx which is this directory's default document (for example, http://server/visionClient1 will redirect to http://server/VisionClient1client).
- The default installation of Vision will also create a redirect for Weblink; however, in a hosted environment it is not appropriate for clients to access Weblink so that redirect can be removed (or not created).

Use the following example of the settings for the necessary redirects:

```
<location path="Default Web Site/Client1/index.htm">
  <system.webServer>
    <httpRedirect enabled="true" destination="/Client1Client/" />
  </system.webServer>
</location>
```

Since hosted clients should not be given access to the weblink application, here is an example of how to redirect requests to the weblink default file back to the login screen. This can be another option in addition to restricting access to the files using NTFS restrictions.

```
<location path="Default Web Site/Client1/weblink.htm">
  <system.webServer>
    <httpRedirect enabled="true" destination="/Client1Client/" />
  </system.webServer>
</location>
```

You must apply these settings for the Application virtual directory for **each** client.

You must apply these settings for each client virtual directory combination to the applicationhost.config file.

The following example contains all the elements combined together from the above three steps for editing the applicationhost.config file with the necessary default documents and redirects. You can copy the example to paste into your applicationhost.config file before the </configuration> end tag.

- Replace Client1 (application virtual directory) and Client1client (ClickOnce deployment virtual directory) with the corresponding values for the Application and Deployment virtual directory names you are using.
- Repeat this process for each pair of Client virtual directories you are implementing.

```xml
<location path="Default Web Site/Client1">
  <system.webServer>
    <defaultDocument enabled="true">
      <files>
        <remove value="index.htm" />
        <add value="index.htm" />
      </files>
    </defaultDocument>
  </system.webServer>
</location>
<location path="Default Web Site/Client1/index.htm">
  <system.webServer>
    <httpRedirect enabled="true" destination="/Client1Client/" />
  </system.webServer>
</location>
<location path="Default Web Site/Client1/weblink.htm">
  <system.webServer>
    <httpRedirect enabled="true" destination="/Client1Client/" />
  </system.webServer>
</location>
<location path="Default Web Site/Client1Client">
  <system.webServer>
    <defaultDocument enabled="true">
      <files>
        <remove value="default.aspx" />
        <add value="default.aspx" />
      </files>
    </defaultDocument>
  </system.webServer>
</location>
```

Secure Weblink

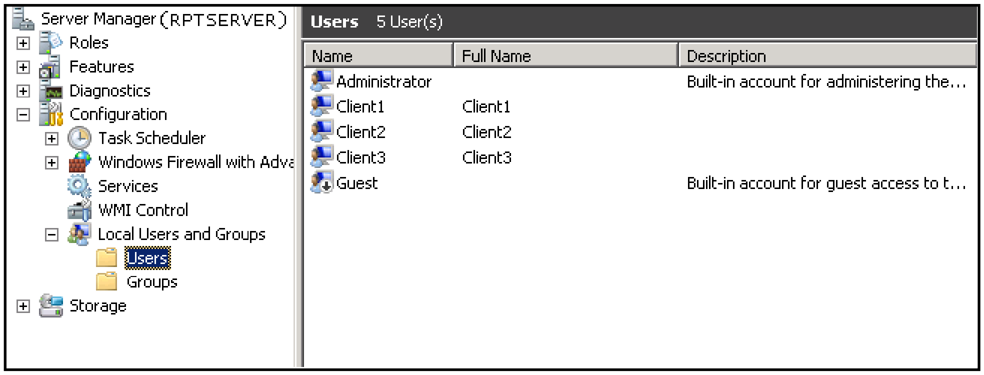
Even though Weblink is password protected, in a hosted environment you do not want the Weblink application available to individual clients to access. Because the ClickOnce deployment folder must be configured for Anonymous access, in order to secure Weblink you must configure the Weblink.application file with NTFS permissions so that only local Administrators can access it.

Vision Report Server – SQL Reporting Services

Deltek Vision 7.1 uses Microsoft SQL Server Reporting Services as the report management and delivery platform.

Perform the following steps on the Report Server in Windows:

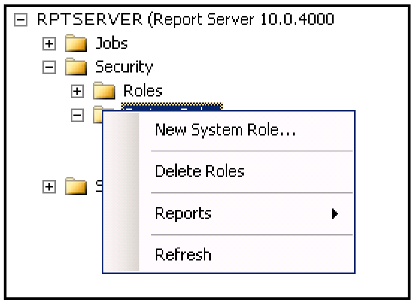
1. Install and configure SQL Server Reporting Services. Refer to the Deltek Vision 7.1 Technical Installation Guide for installation and configuration links.
2. Create a unique local Windows account for each client to use as the Report Server Web service account.



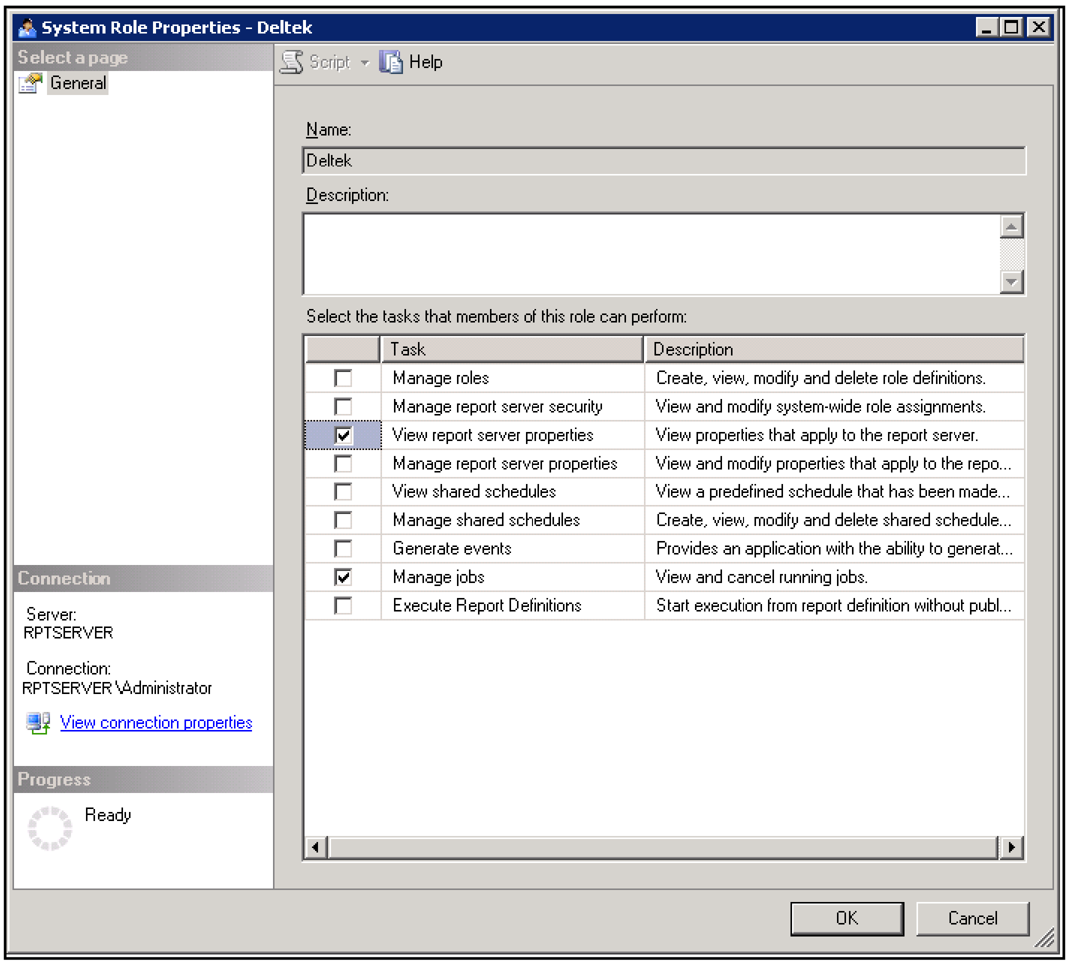
- This account only needs to be a User account—it does not need to be a local Administrator on the Report Server.
- Disable the DeltekVision local windows account on the Report Server (created by the Vision installation).

3. Launch SQL Server 2008/2008R2 Management Studio and connect to the Reporting Services .

4. Click **Security** » **System Roles**.
5. Right-click and select **New System Role…**



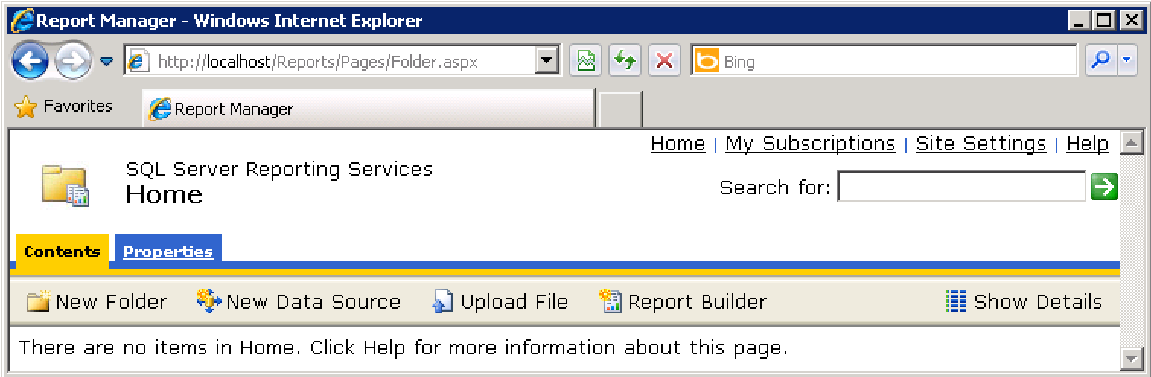
6. Enter **Deltek** as the new system role.
7. Select the **View Report Server Properties** and the **Manage Jobs** options.



8. Click **OK** to Save the changes.
9. Connect to the Report Manager (Reporting Services Web application) before continuing.

> You must use the Report Manager application and the functionality to perform the steps below.

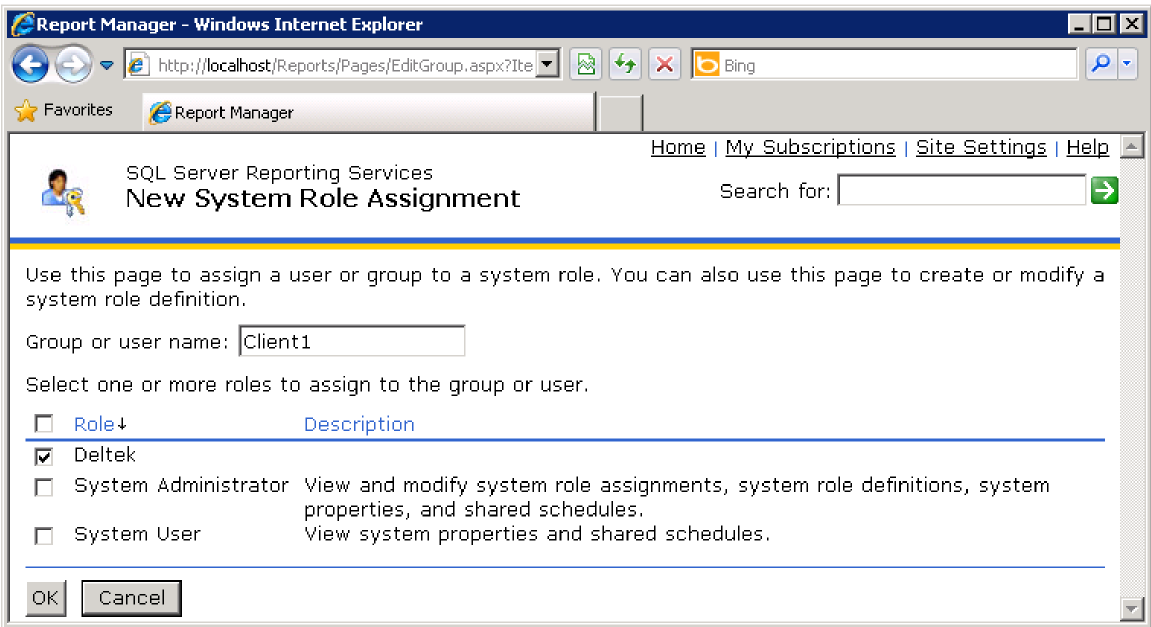
10. Connect to your server (for example, **Error! Hyperlink reference not valid.**).



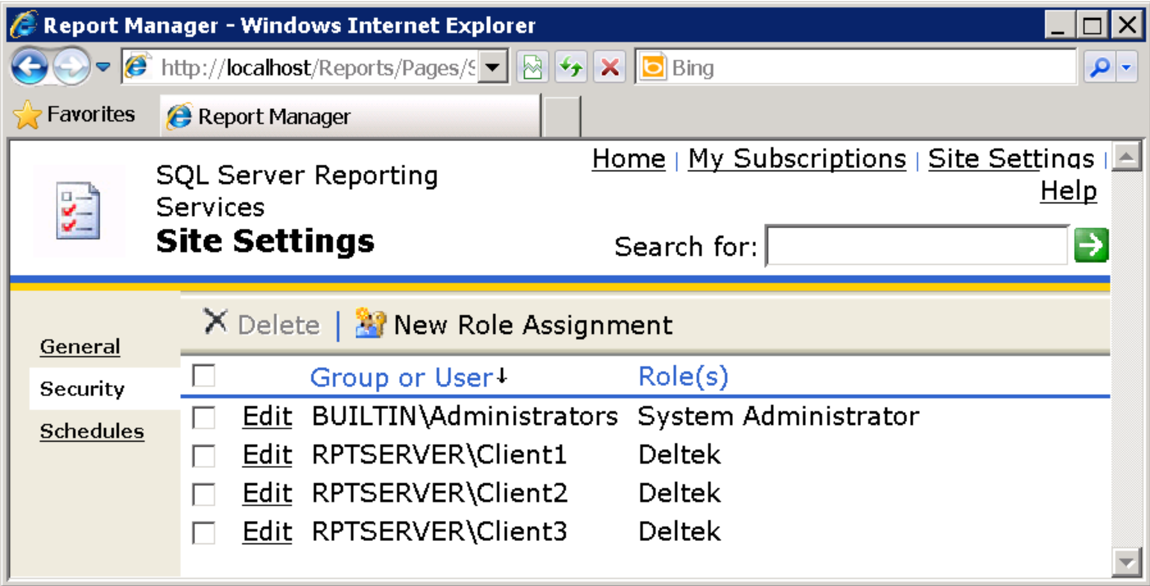
a. From the Reporting Services home page, click **Site Settings**.

b. Under the Security section, click **New Role Assignment**.

c. Click **New Role Assignment**.



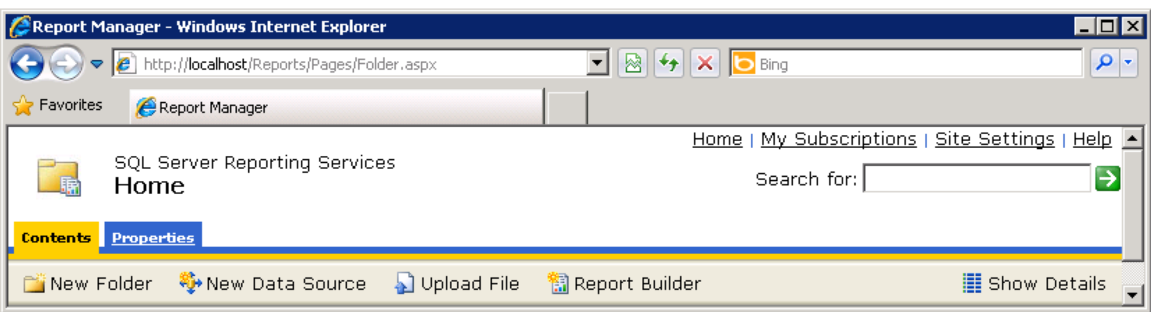
d. Add each client's user account to the new Deltek system role.



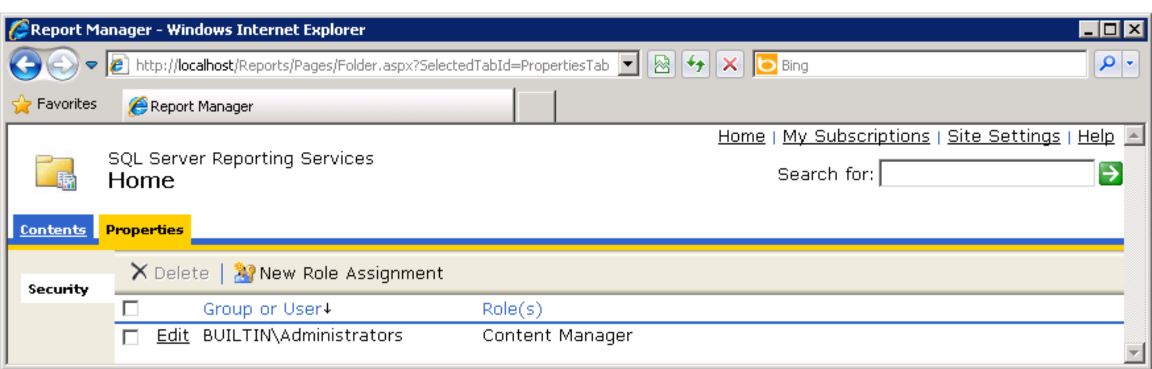
e. Select the **Deltek** role checkbox for each client's user account.

11. Grant **Publisher** role rights to each client’s Windows account to the Reporting Service Home folder. This ensures that the data source can be created by Weblink. (See the next section.)

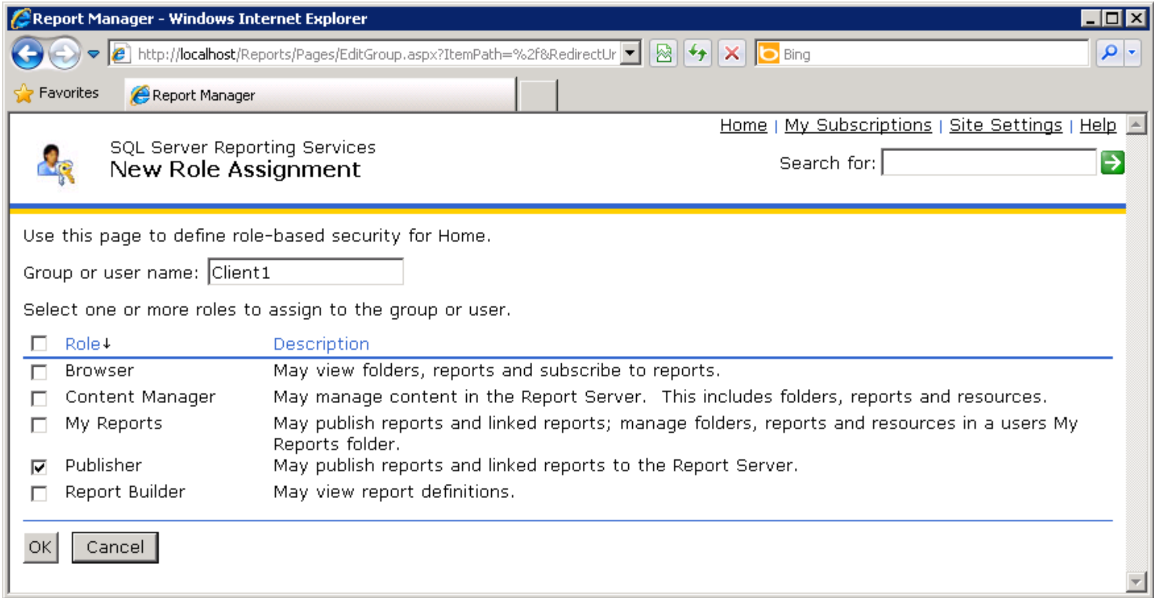
    a. Click the link for **Home** in the upper right corner.



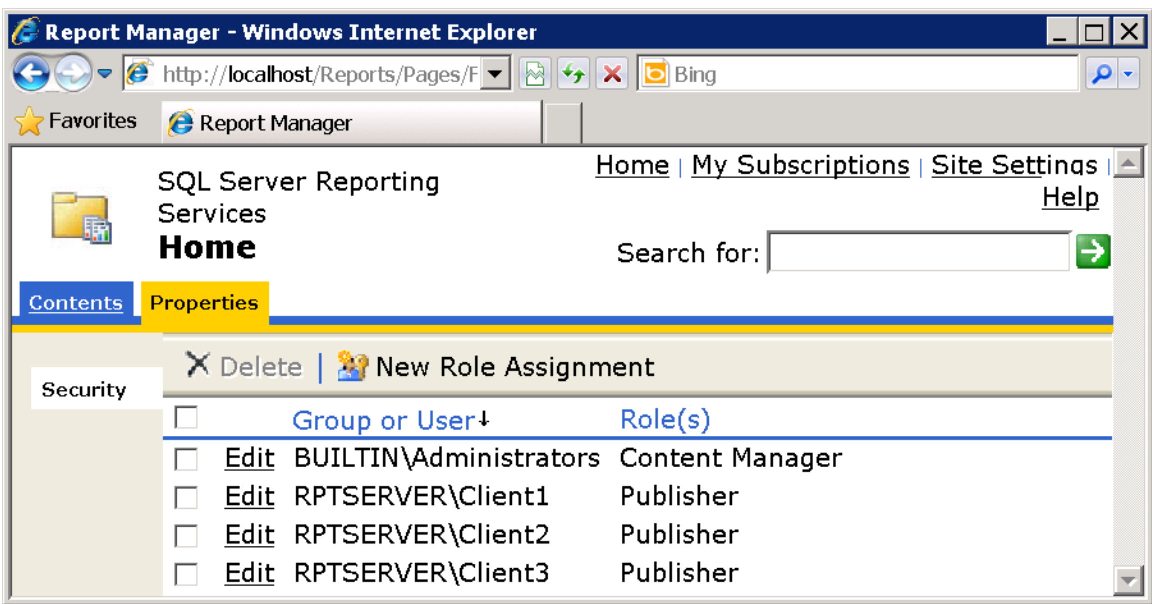
b. Click the **Properties** tab.



c. Under Security, click **New Role Assignment**.



d. Enter each client's local Windows account name, check the **Publisher** role and click **OK**.

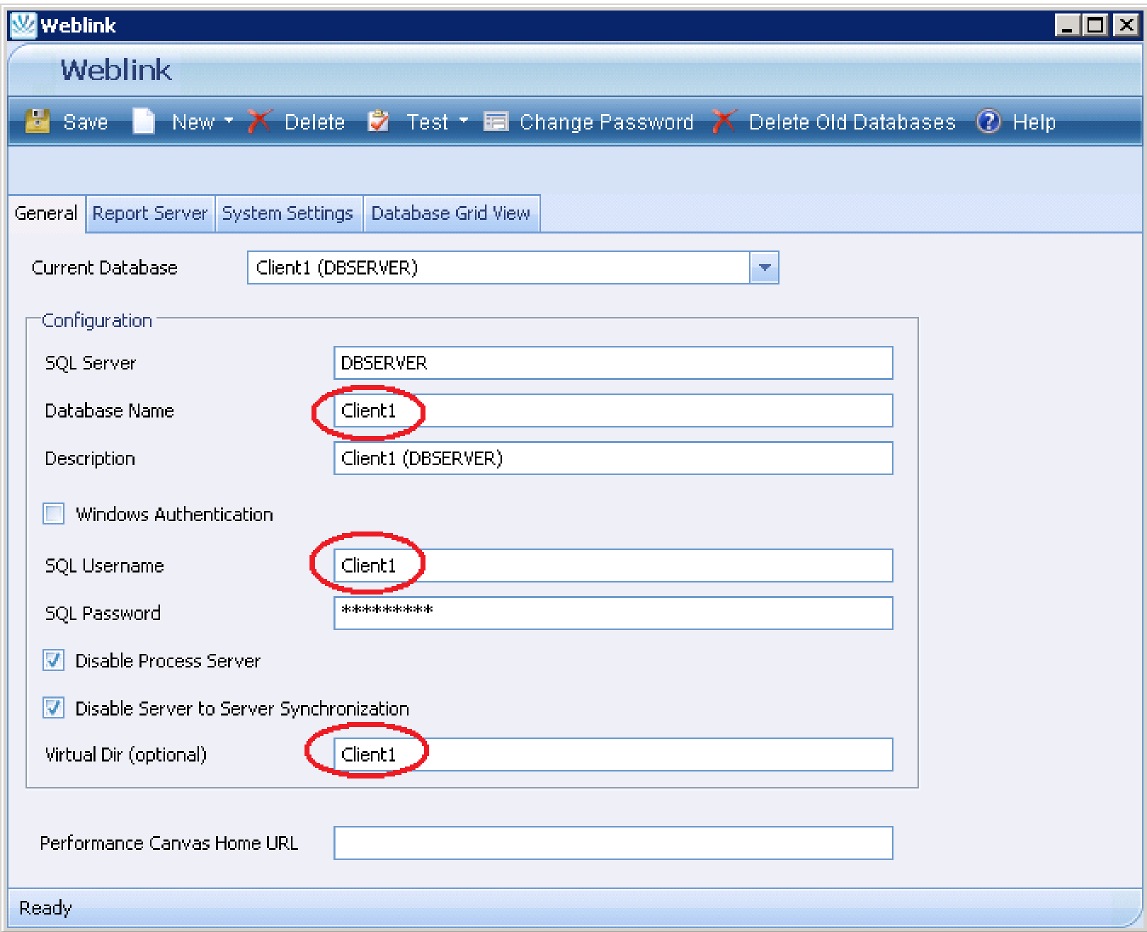


Before you can continue with the Report Server configuration, you must create the database and report server entries in Weblink for each client. This process ensures the database connection and also creates the default data source object for each client's Root folder on the Report Server.

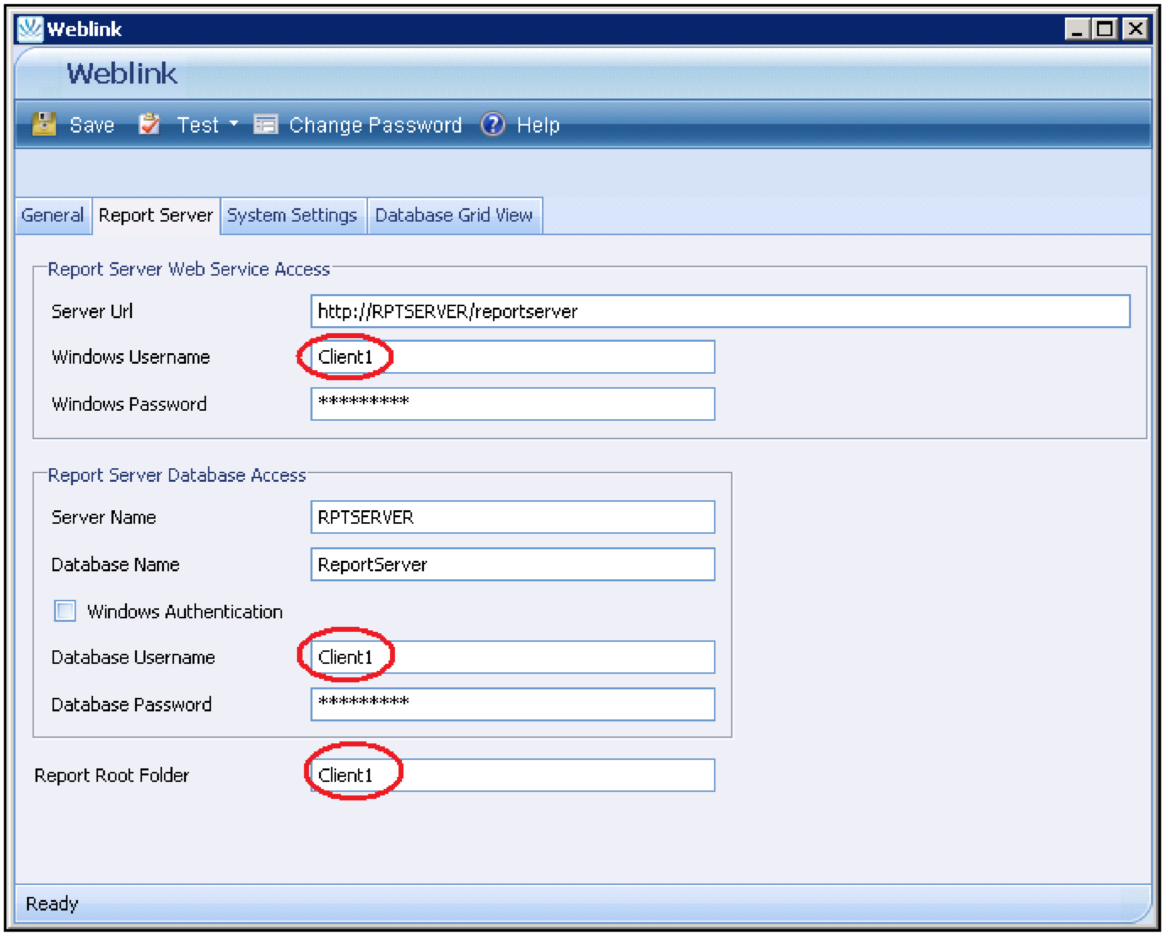
Create Database Entries in Weblink

To create a new database entry for each client using the Weblink application, complete the following steps on the Vision Web/Application server:

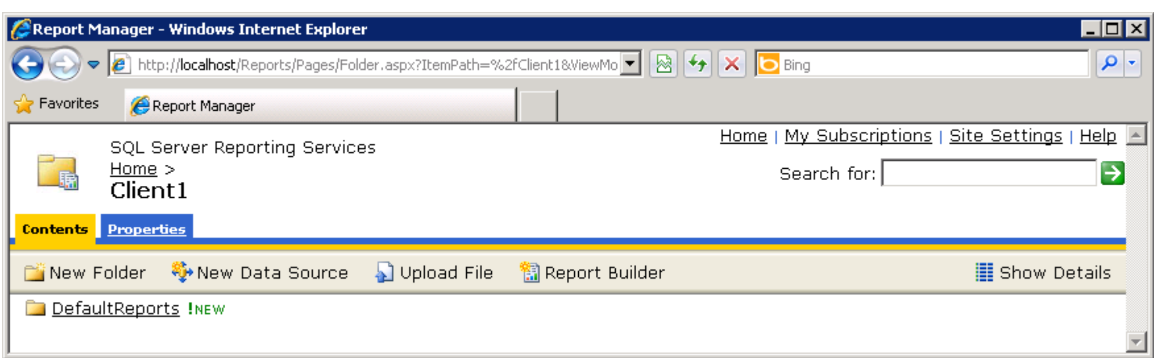
1. From the Start menu, click **Deltek Vision » Weblink** to launch Weblink from the Web/Application server.
2. Add a new database entry.
3. Complete the fields on the General tab, entering each client's unique database name, SQL Login, and application virtual directory name (for example, Vision, not VisionClient).



4. Click the **Test » Database Connection** button to ensure the information is correct and the proper rights have been granted.
5. Complete the fields on the Report Server tab, entering each client's unique Report Server windows account information, Report Server database SQL Login ID, and Reports Root folder.



6. Click **Save**. The Report Server root folder is created for this client, as well as the default data source necessary for reports to connect to the client's Vision database:

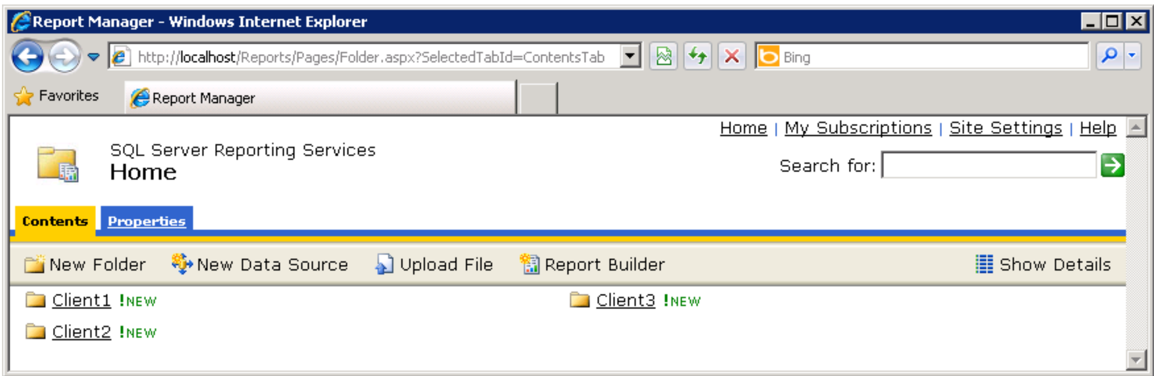


You can now continue with the Report Server configuration, which includes modifying permissions inherited from the Report Server **Home** folder. These steps are necessary to ensure that only the specified client has access to their reports.

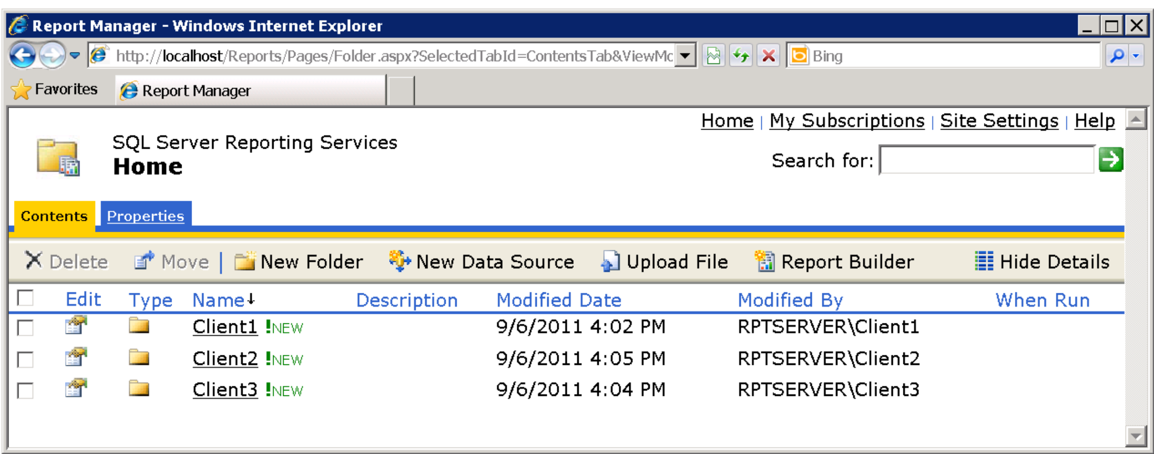
To grant Content Manager rights to each client's root folder and remove inherited permissions from the Report Server root folder, complete the following steps while you are connected to Report Manager (Reporting Services Web application):

> Complete this procedure for each client's Report Server root folder.

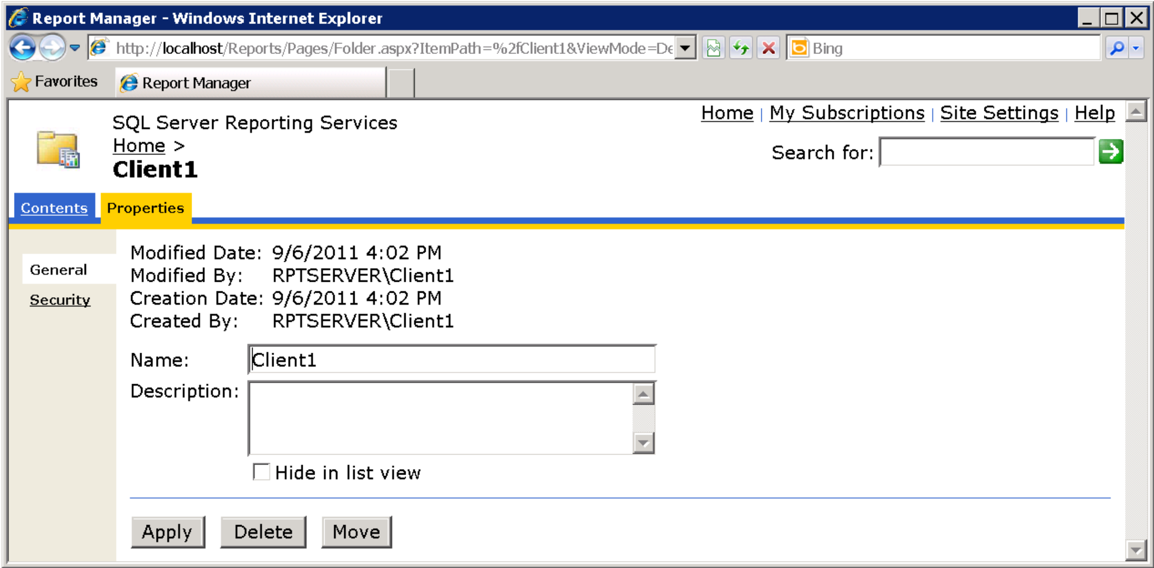
1. Click **Home** in the upper right corner.



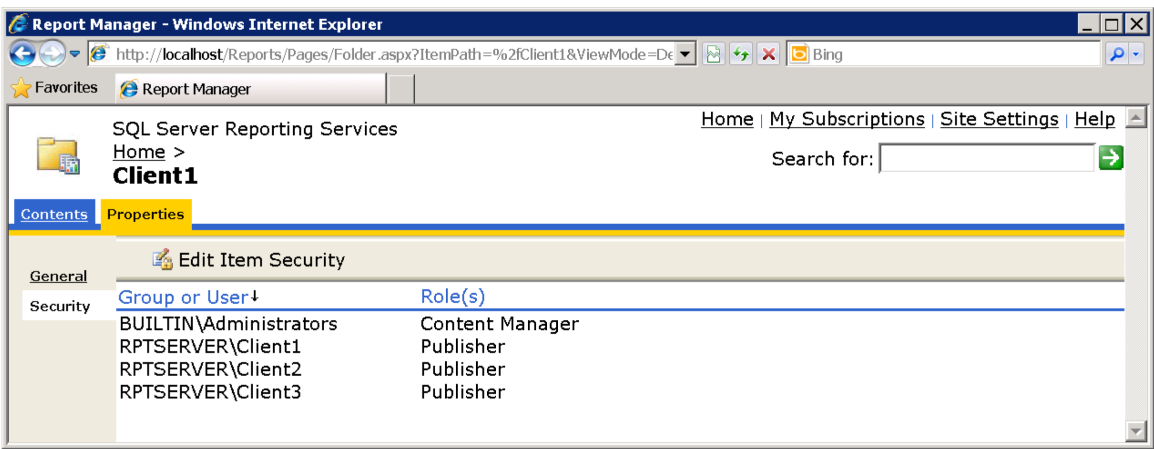
2. Click **Show Details** on the right side of the toolbar.



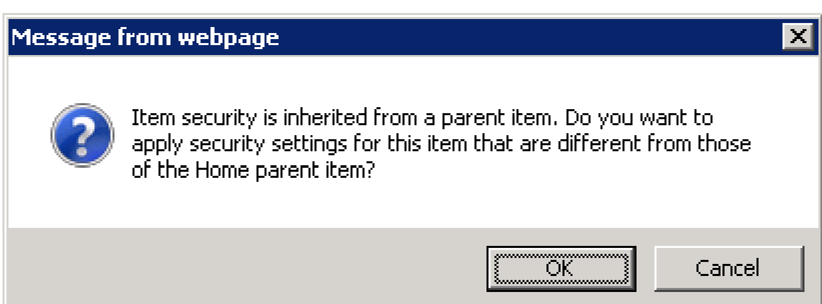
3. Click **Edit** for each client's root folder.



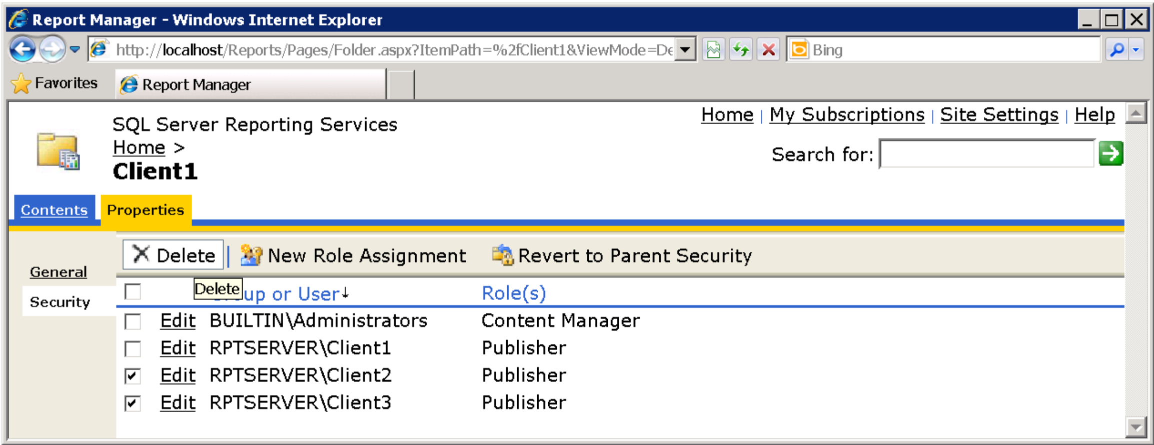
4. Click the link for **Security**.



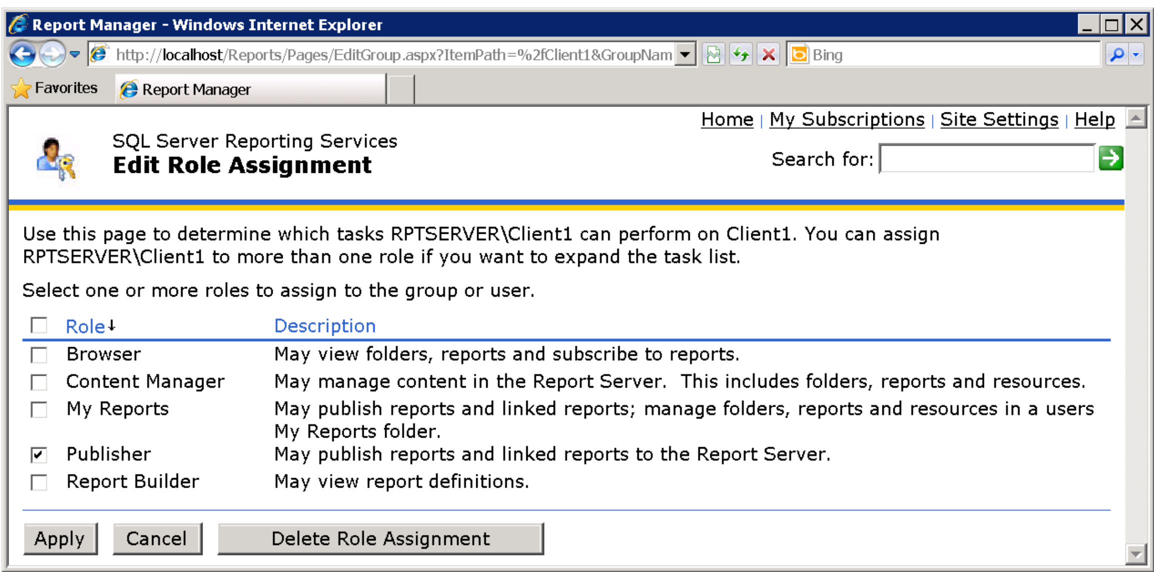
5. Click **Edit Item Security**. The following prompt displays:



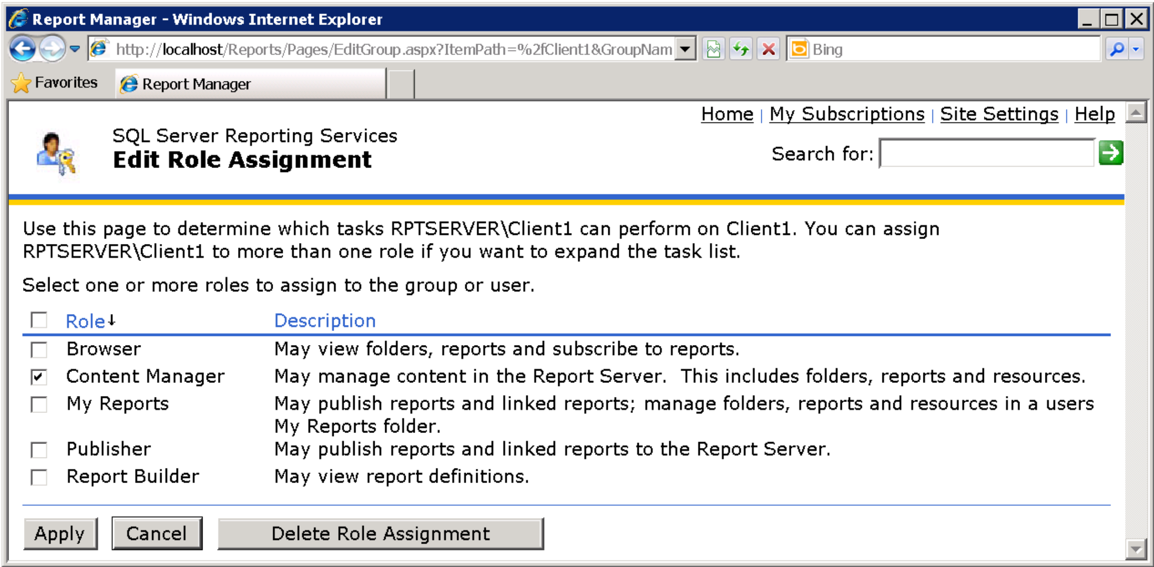
6. Click **OK** to accept.
7. Check the boxes for each client's Windows account that is ***not*** this client and click **Delete**.



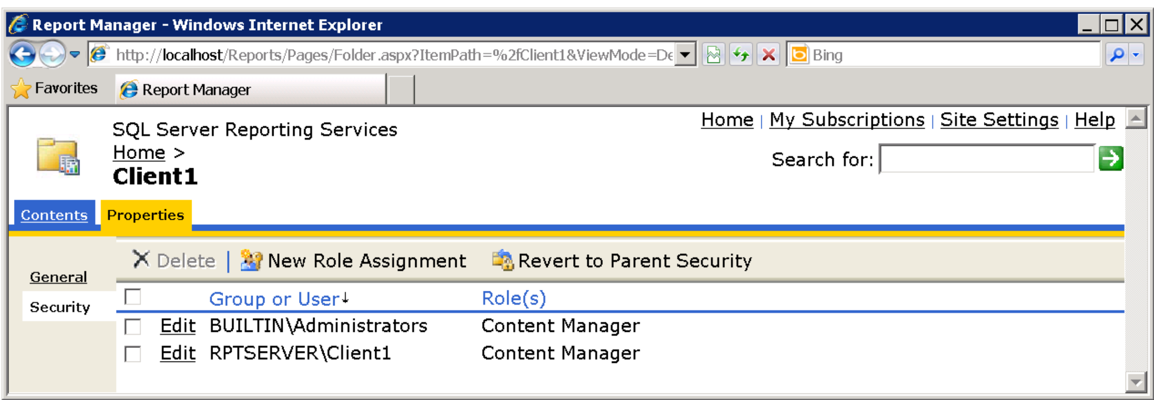
8. Click **Edit** for this client's Windows account.



9. Clear the **Publisher** role option for all user accounts and select the **Content Manager** option for the selected client's user account. Click **Apply**.



The following illustration shows how security should be configured for each client's root folder:

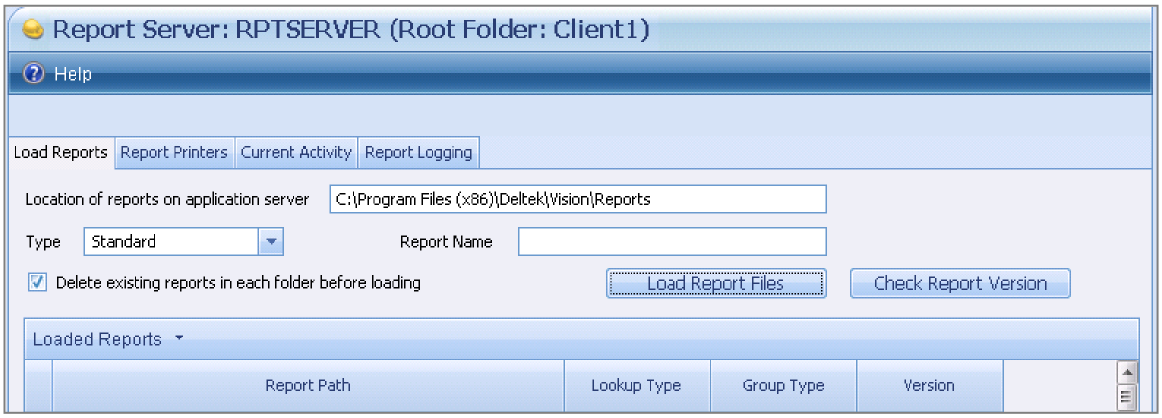


Import Vision Standard Reports into SQL Reporting Services

Each client must complete these steps from within the Vision application.

To Load Vision Reports, complete the following steps:

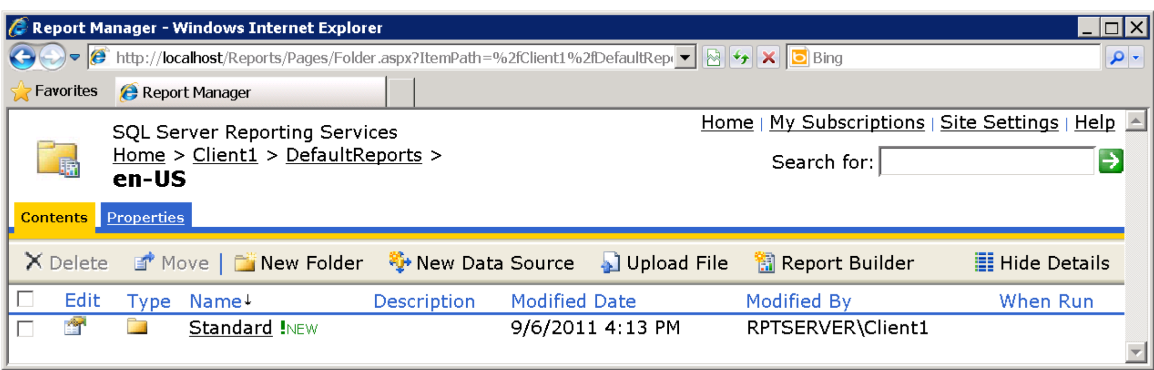
1. Log on to the Vision application and then log on to the client's database.
2. From the Vision Applications menu, select **Utilities » Report Administration**.
3. On the Load Reports tab, confirm the Report Server and the Vision Root Folder as shown on the following screen. This ensures that Weblink is configured to point to the proper location to store reports in Microsoft SQL Server Reporting Services.



4. Select **Standard** from the **Report Type** drop-down list.

> See the next section for information about importing custom reports.

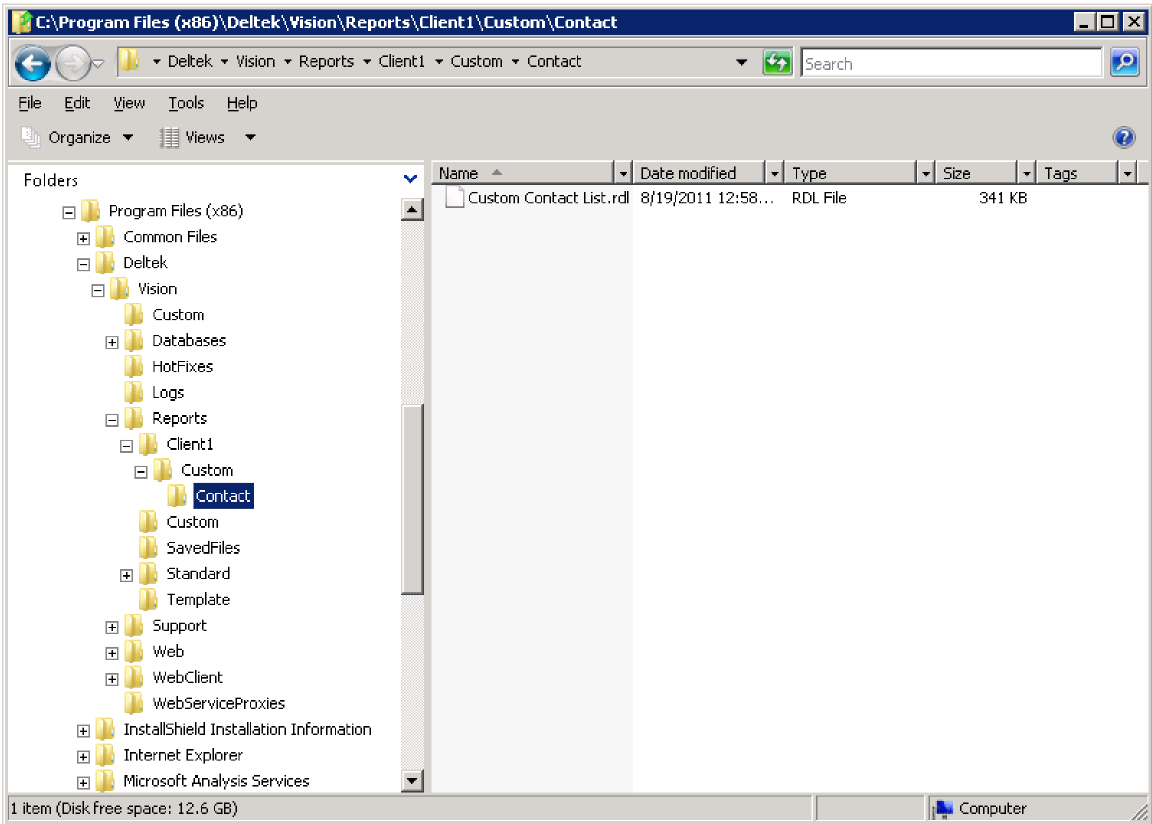
5. Click **Load Report Files** to load the Vision standard reports. This can take several minutes to complete. When complete, you should see a structure that is similar to the folder structure for all languages that you have purchased and logged into Vision with whose reports you have selected and reloaded. See the following for an example.



Vision Custom Reports for ASP Clients

Because many clients have custom reports, you must develop a folder structure on the Vision Web/Application server to store these reports.

The following screen illustrates one method you can use to create this structure:



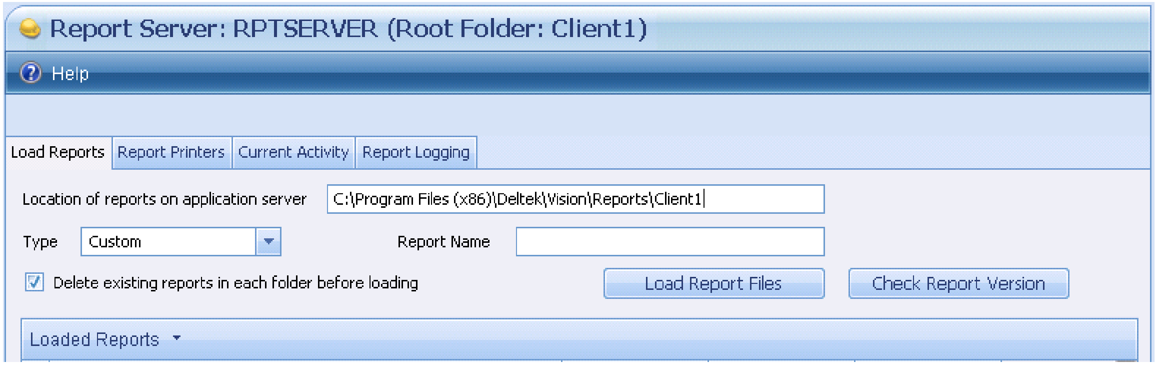
In this example, a client folder is created under **C:\Program Files (x86)\Deltek\Vision\Reports\<client folder>**. Within each client folder, you can create a Custom folder and then folders for each specific report type (for example, Client, Contact, Project, and so on). These report type folders must mirror the Report type folders under the Reports\Standard folder.

After you have copied the custom reports to the appropriate client folders, you must load these reports to Vision.

> You must complete these steps for each client database that has custom reports.

To load custom reports into Vision, complete the following steps:

1. Log on to the client's Vision database with Administrative rights.
2. From the Vision Applications menu, select **Utilities » Report Administration**.
3. On the Load Reports tab, enter the exact location to this client's custom reports in the **Location of reports on application server** field, as shown on the following screen:



Vision includes the custom sub-folds, so you only need to list the path to the client's folder.

4. From the **Report Type** option's drop-down list, select **Custom**.
5. Click **Load Report Files**.

Required Infrastructure Changes

The ReportViewer Winform control requires direct access to the Report Server Web service on the Report Server. For this reason, you must open port 80 inbound (or 443 if using SSL) to both the Vision Web/Application and SQL Reporting Services servers.

An alternative is to use Windows Server 2008/IIS 7.0 or 2008 R2 (IIS 7.5) as the Vision Web/Application server and deploy the Microsoft Application Request Routing (ARR) IIS 7.0/ 7.5 extension to deploy a reverse proxy. See the *Vision 7.1 Advanced Technical Administration Guide* for details on installing and using for detailed steps on deploying this solution.

Effect of *SaaS/Hosted Instance* Weblink Setting

The following changes are impacted when the SaaS flag in Weblink is enabled for a database:

- Limit number of days for audit history to a 30 day maximum
- Display pop up message at login when message is present in web folder (admin version and standard version)
- Hide Report Administration (unless DELTEKCLOUDOPS) user
- Give User Friendly message for timeout in SaaS
- Hide Utilities » Report Administration » Report printers
- Utilities» Report Administration » Load Reports, disable report folder field
- Hide Utilities » Process Server » Server Management
- Hide Utilities » Backup Database
- Hide Configuration » General » System Settings > Servers
- Configuration » Security > Users and Passwords, disable Integrated Enabled, Domain and Report Printer columns
- Configuration > Roles, Access Rights, disable Report Printers selection
- Configuration > General > System Settings > Email, disable fields
  - Email Server
  - Port
  - Username
  - Password
  - Application URL
- User Options > Reporting > Default Printer, disable and set to <local printer>»

Deltek Vision 7.1 Transaction Document Management (TDM)

Vision TDM uses Microsoft SQL Server FILESTREAM technology to store and retrieve transaction related documents in a SQL Server database. Deltek has chosen to configure FILESTREAM functionality and to store these documents in a separate database than your Vision transactional database. See the *Vision 7.1 Advanced Technical Administration Guide* for details on installing and using Vision TDM.