

GovWin Contracts and Task Order to Vision CRM Integration

1.1

Users Guide

February 21, 2013

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Overview

This guide provides information to help you do the following:

- Set up GovWin Contracts and Task Order to Vision CRM Integration using the GovWin Contracts and Task Order Integration utility in Vision (**Utilities » Advanced Utilities » GovWin Contracts and Task Order Integration**).
- Use the GovWin Contracts and Task Order Integration utility to transfer opportunity data to Vision.
- Learn about the grids and fields on the CaTO Info tab in the Opportunity Info Center.

The information in this guide applies both to firms that install Vision on their own servers and to firms that instead use Delttek First Vision Essentials on a hosting vendor's server.

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

GovWin Contracts and Task Order to Vision CRM Integration Overview

GovWin Contracts and Task Order to Vision CRM Integration enables Vision to collect information from opportunities you select in GovWin. If you are using this feature, you already subscribe to GovWin Contracts and Task Order.

This integration feature provides access to the GovWin database of opportunity data over the Internet. As a GovWin Contracts and Task Order subscriber, you can select opportunities you want to import to Vision as opportunities for your company to pursue.

A predefined Web service call automatically transfers the selected opportunities from GovWin Contracts and Task Order into Vision and automatically refreshes them in Vision if they are updated in GovWin Contracts and Task Order. You run this integration utility from **Utilities » Advanced Utilities » GovWin Contracts and Task Order Integration** in Vision. For each opportunity record selected from GovWin Contracts and Task Order, a new opportunity record is created in Vision on the CaTO Info tab of the Opportunity Info Center. The opportunity name and GovWin Contracts and Task Order opportunity ID are created on the General tab for reference.



If the name in GovWin Contracts and Task Order has more than 255 characters, the corresponding field in the Opportunity Info Center only contains the first 255 characters.

You can update information on the CaTO Info tab for an opportunity record as long as the **CaTO Opportunity ID** field contains a valid value.

Set Up GovWin Contracts and Task Order to Vision CRM Integration

Follow the instructions below to set up Vision to run the GovWin Contracts and Task Order Integration utility. You only need to complete these steps once. Thereafter, you can run the utility whenever you need to, without updating configuration settings.

To set up GovWin Contracts and Task Order to Vision CRM Integration, complete the following steps:

1. If you have not already done so, subscribe to GovWin Enterprise so you can log on as a GovWin Contracts and Task Order member. Obtain the required user name, password, and queue ID to access their database.
2. Click **Utilities » Advanced Utilities » GovWin Contracts and Task Order Integration**.
3. Complete the Configuration tab (see the field descriptions on page 8).
4. Click **Save**.

Run the GovWin Contracts and Task Order to Vision CRM Integration Data Transfer

When you run the GovWin Contracts and Task Order Integration utility, it makes a request to the Web service for data. This data is then transferred to the appropriate fields in the Opportunity Info Center, including the custom fields on the CaTO Info tab.

To transfer data using the GovWin Contracts and Task Order Integration utility, complete the following steps:

1. Log in to GovWin and select opportunities to transfer by clicking the **Add to Queue** button on the TOOLS menu on any opportunity you wish to export to Vision.
2. Log in to Vision, and click **Utilities » Advanced Utilities » GovWin Contracts and Task Order Integration**.
3. On the GovWin CM CaTO Integration form, click **Run**.

Vision displays a "Please Wait..." message until the transfer process has completed. This process can take several minutes.

When the transfer is complete, overall transfer data displays in **Web Service Calls - Log** on the General tab. Detailed transfer information displays on the CaTO Info tab of Opportunity Info Center.

General Tab of the GovWin Contracts and Task Order Integration Utility

Use the General tab of the GovWin Contracts and Task Order Integration utility to view the history of all transfers of data between GovWin Contracts and Task Order and Vision.

This table refers to default tabs and fields. Some of the tabs and fields in your application may have been changed or added to meet your company's business requirements. Contact your system administrator for further information.

Field/Option	Description
Web Service Calls - Log	Displays the status of previous runs.
Clear Log	Click this grid option to clear all entries on the displayed log of GovWin Contracts and Task Order Integration utility runs. When you select this option, Vision displays a message asking you to confirm that you want to delete all of the historical log entries. Click Yes to proceed with the removal of all logs. Click No to cancel the removal of all logs. No logs will be deleted.
Call Date	This field displays the date and time that you ran the data transfer.
New Records	This field displays the number of new records transferred.
Updated Records	This field displays the number of changed/updated records transferred.
Records No IDs	This field displays the number of records not tagged in GovWin Contracts and Task Order but referenced in Vision.
User	This field displays the Vision user who ran the transfer (for example, ADMIN).
Error	This field displays the detail of any errors that occurred during the data transfer.

Configuration Tab of the GovWin Contracts and Task Order Integration Utility

Use the Configuration tab of the GovWin Contracts and Task Order Integration utility to set up the GovWin Contracts and Task Order Web service and the Vision Web service. Subscription information and preferences are detailed here.

The following table contains descriptions of all the fields on the Configuration tab of the GovWin Contracts and Task Order Integration utility.

Field/Option	Description
GovWin CM Settings	
GovWin CM Webservice URL	Enter the URL for the Vision Web Service asmx page on the Vision Web server. The URL always ends in visionws.asmx . Example: http://webserver:80/vision/visionws.asmx
Windows Authentication	To use the Windows integrated login, select this check box.
GovWin CM UserName or Windows UserName	Enter the user name for accessing Vision. This is the Vision login that will be used to update the database. If you selected the Windows Authentication check box to indicate you are using Windows integrated authentication, enter the Windows user name. (This user must also be set up as a user in Vision.)
GovWin CM Password or Windows Password	Enter the password associated with the Vision user name. If you selected the Windows Authentication check box to indicate you are using Windows integrated authentication, enter the Windows password.
Windows Domain	If you selected the Windows Authentication check box to indicate you are using Windows integrated authentication, enter the Windows domain for the account that will be used to connect to Vision. If you do not select Windows Authentication , this field is not available
GovWin CM Database	Enter the name of the database for Vision. This is the description field of the Vision database that you are updating (as displayed in Weblink or from the login drop-down list). Example: VisionDemo62 (DBSERVER1)
Test	Click this button to test the connection.

Field/Option	Description
GovWin CaTO Settings	
GovWin CaTO Webservice URL	<p>Enter the URL for the GovWin Contracts and Task Order Web service. This is the URL that the GovWin Contracts and Task Order Integration utility uses to transfer the opportunity data.</p> <p>The URL is always http://data-exchange.govwin.com/GovwinExportAPI/OpportunityExportService?sdl</p>
GovWin CaTO UserName	<p>Enter the user name for accessing this Web service.</p> <p>The GovWin Network team provides this value. It is customer-specific.</p>
GovWin CaTO Password	<p>Enter the password associated with the user name.</p> <p>The GovWin Network team provides this value. It is customer-specific.</p>
GovWin CaTO QueueID	<p>Enter the GovWin Contracts and Task Order queue ID.</p> <p>The GovWin Network team provides this value. It is customer-specific and encrypted.</p>
Test	Click this button to test the connection.
Preferences	
New Records	To transfer new data from GovWin Contracts and Task Order to Vision, select this check box. A new opportunity is created in Vision for each new record transferred from GovWin Contracts and Task Order.
Update Records	To transfer updated data from GovWin Contracts and Task Order to Vision, select this check box.
Submit	<p>Click Submit to save the configuration settings.</p> <p>Note: If you click on another tab before you click Submit, the entries will not be saved. and you will have to enter them again.</p>

Schedule Tab of the GovWin Contracts and Task Order Integration Utility

Use the Schedule tab of the GovWin Contracts and Task Order Integration utility to schedule the data transfer process to run at a later time. You can set up a schedule that runs the process once (after business hours on the current day, for example) or on a recurring basis (for example, every Monday at 1:00 a.m.).

The scheduler is based on the Windows Task Scheduler. The entries on the Schedule tab are translated into equivalent code that is read by the Windows Task Scheduler.

The following table contains descriptions of all the fields on the Schedule tab of the GovWin Contracts and Task Order Integration utility.

Field/Option	Description
Queue	This field displays the Windows Task Scheduler name.
Status	This field displays the status of the schedule: Enabled or Disabled . If the status is Enabled , the data transfer occurs automatically based on the schedule. If the status is Disabled , the scheduled processing does not occur.
Enable or Disable	If the status is Disabled , click Enable to make the schedule active. If the status is Enabled , click Disable to make the schedule inactive.
Run After	Select the start date for the schedule and the time to run the data transfer process.
Recurring activity	Select this check box if you want to set up the data transfer to recur automatically.
Recurrence type	Select Daily to set up a process that recurs daily or at an interval defined by a number of days. Select Weekly to set up a process that recurs weekly or at an interval defined by a number of weeks. Select Monthly to set up a process that recurs monthly or in specific months.
Pattern	The fields under Pattern vary depending on your selection in Recurrence type : <ul style="list-style-type: none"> ▪ If you selected Daily, you can set up the process to run every specified number of days (for example, every three days). ▪ If you selected Weekly, you can set up the process to run every specified number of weeks on specific days of the week (for example, every two weeks on Monday). ▪ If you selected Monthly, you can set up the process to run in specified months. You also specify either the calendar days of the month on which the process occurs (for example, on the 15th and

Field/Option	Description
	the 30 th) or the weeks and days (first week of the month, on Friday).
Repeat Task...	<p>Select this check box if, each time the schedule triggers the process, you want it to run more than once.</p> <p>Select the repetition frequency in Repeat Task Every and specify how long you want the repetitions to continue in for a duration of. For example, if you want the process to run every hour for 12 hours, select 1 hour and 12 hours in the two fields.</p>
Stop all running tasks at end of repetition duration	If you specified repetitions in Repeat Task... , select this check box if you want to stop any tasks that are still running at the end of the repetition duration, rather than letting them run to completion.
Recurrence End	<p>If you want the schedule to recur indefinitely, select No end date.</p> <p>If you want the schedule to end on a particular date, select End by and select the ending date.</p>
Save	If you changed the schedule and want to save those changes, click Save .
Reset	If you changed the schedule and have not yet saved those changes, click Reset to discard those changes and reset the schedule to its latest saved version.

Integration Field Mapping

The following tables describe how GovWin Contracts and Task Order fields are mapped to Vision tables and columns.

Opportunity Table in Vision

GovWin Contracts and Task Order Field	Vision Column	Vision Column Type	Notes
Auto Generate	OpportunityID	Varchar (32)	PK
Auto Number	Opportunity	Varchar (30)	Vision setting if AutoNumber is enabled
<title>	Name	Varchar (255)	Can contain more than 255 characters in GovWin Contracts and Task Order. Corresponding field in the Opportunity Info Center only contains the first 255 characters.
	Stage	Varchar (10)	First value from database for stage table
<opportunity_Summary>	Description	Varchar (max)	
<create_Date>	OpenDate	datetime	
<opportunity_Status>	Status	Varchar (1)	A or I (Active, Inactive)
<create_Date>	CreateDate	Datetime	

OpportunityCustomTabFields Table in Vision

GovWin Contracts and Task Order Field	Vision Column	Vision Column Type	Notes
Auto Generate	OpportunityID	Varchar (32)	
<dollar_Value>	CustCaTOValue	Decimal (19,5)	
<place_Of_Performance>	CustCaTOPlaceOfPerformance	Varchar (255)	
<status>	CustCaTOCurrentStatus	Varchar (255)	
<startDate>	CustCaTOSub_TeamingSought Start	Datetime	Based on Opportunity Type: Teaming or SubContracting
<endDate>	CustCaTOSub_TeamingSought EndDate	Datetime	Based on Opportunity Type: Teaming or SubContracting
<date>	CustCaTOIssueDate	Datetime	RFP_Issue_Date
<startDate>	CustCaTOPeriodofPerformance Start	Datetime	period_Of_Performance
<endDate>	CustCaTOPeriodofPerformance End	Datetime	period_Of_Performance
<date>	CustCaTOAwardDate	Datetime	award_Date
<date>	CustCaTOProposalDueDate	Datetime	proposal_Due_Date
<date>	CustCaTOQuestionDueDate	Datetime	question_Due_Date
<opportunity_Summary>	CustCaTOAdditionalDetails	Varchar (max)	
<status_Notes>	CustCaTOCurrentStatusNotes	Varchar (max)	
<status>	CustCaTOIssueDateStatus	Varchar (255)	RFP_Issue_Date

GovWin Contracts and Task Order Field	Vision Column	Vision Column Type	Notes
<status>	CustCaTOPeriodofPerformance Status	Varchar (255)	period_Of_Performance
<status>	CustCaTOAwardDateStatus	Varchar (255)	award_Date
<status>	CustCaTOProposalDueDate Status	Varchar (255)	proposal_Due_Date
<status>	CustCaTOQuestionDueDate Status	Varchar (255)	question_Due_Date
<startDateStatus>	CustCaTOSub_TeamingSought StatusStart	Varchar (255)	Based on Opportunity Type: Teaming or SubContracting
<endDateStatus>	CustCaTOSub_TeamingSought StatusEnd	Varchar (255)	Based on Opportunity Type: Teaming or SubContracting
<social_Economic_Status>	CustCaTOSocioEconomicStatus	Varchar (max)	opportunity_Requirements
<facility_Clearance>	CustCaTOFacilitiesClearances	Varchar (max)	opportunity_Requirements
<staff_Clearance>	CustCaTOStaffClearances	Varchar (max)	opportunity_Requirements
<organizational_Certifications>	CustCaTOOrganizational Certifications	Varchar (max)	opportunity_Requirements
<previous_Current_Customers>	CustCaTOPreviousorCurrent Customers	Varchar (max)	opportunity_Requirements
<opportunity_Id>	CustCaTOOpportunityID	Varchar (255)	
<opportunity_URL>	CustCaTOOpporutinityURL	Varchar (255)	
<update_Date>	CustCaTOLastUpdateDate	Datetime	
Current Date / Time	CustCaTOCRMLastUpdateDate	Datetime	

GovWin Contracts and Task Order Field	Vision Column	Vision Column Type	Notes
<title>	CustCaTOWinHeadline	Varchar (255)	Can contain more than 255 characters in GovWin Contracts and Task Order. Corresponding field in the Opportunity Info Center only contains the first 255 characters.
<endCustomer>	CustCaTOEndCustomer	Varchar (max)	opportunity_Details
<contract_Vehicle>	CustCaTOContractVehicle	Varchar (max)	opportunity_Details
<contract_Type>	CustCaTOContractType	Varchar (max)	opportunity_Details
<notice_Type>	CustCaTOTypeofNotice	Varchar (max)	opportunity_Details
<opportunity_Type>	CustCaTOOpportunityType	Varchar (255)	
<toon_Id>	CustCaTOTOONSID	Varchar (255)	
<time>	CustCaTOQuestionDueTime	Varchar (255)	proposal_Due_Date
<time>	CustCaTOProposalDueTime	Varchar (255)	question_Due_Date
<startDate_Time>	CustCaTOSub_TeamingSought StartTime	Varchar (255)	Based on Opportunity Type: Teaming or SubContracting
<startDate_Time_Zone>	CustCaTOSub_TeamingSought StartTimeZone	Varchar (255)	Based on Opportunity Type: Teaming or SubContracting
<endDate_Time>	CustCaTOSub_TeamingSought EndTime	Varchar (255)	Based on Opportunity Type: Teaming or SubContracting

GovWin Contracts and Task Order Field	Vision Column	Vision Column Type	Notes
<endDate_Time_Zone>	CustCaTOSub_TeamingSought EndTimeZone	Varchar (255)	Based on Opportunity Type: Teaming or SubContracting
<time>	CustCaTOIssueTime	Varchar (255)	RFP_Issue_Date
<time_Zone>	CustCaTOIssueTimeZone	Varchar (255)	RFP_Issue_Date
<time>	CustCaTOPeriodofPerformance StartTime	Varchar (255)	period_Of_Performance
<time_Zone>	CustCaTOPeriodofPerformance StartTimeZone	Varchar (255)	period_Of_Performance
<time>	CustCaTOPeriodofPerformance EndTime	Varchar (255)	period_Of_Performance
<time_Zone>	CustCaTOPeriodofPerformance EndTimeZone	Varchar (255)	period_Of_Performance
<time>	CustCaTOAwardTime	Varchar (255)	award_Date
<time_Zone>	CustCaTOAwardTimeZone	Varchar (255)	award_Date
<time_Zone>	CustCaTOProposalDueTime Zone	Varchar (255)	proposal_Due_Date
<time_Zone>	CustCaTOQuestionDueTime Zone	Varchar (255)	question_Due_Date
<NAICS_Code>	CustCaTOIndustryNAICSCode	Varchar (255)	opportunity_Requirements

Opportunities_CaTOCustomRequirements Table in Vision

GovWin Contracts and Task Order Field	Vision Column	Vision Column Type	Notes
Group: (1:M) <CustomRequirements>			Table for Custom Grid

GovWin Contracts and Task Order Field	Vision Column	Vision Column Type	Notes
Auto Generate	Seq	Varchar (32)	
Auto Generate	CustCaTORRequirementNo	Varchar (255)	
<custom_Requirements>	CustCaTORRequirement	Varchar (max)	

CaTO Info Tab of Opportunity Info Center

Use the CaTO Info tab of Opportunity Info Center to view the detailed opportunity information transferred by the GovWin Contracts and Task Order Integration utility to Vision. This data is for display only. You cannot make changes on this tab.

Use this tab to do the following:

- Review the newly created opportunities and the data transferred by the GovWin Contracts and Task Order Integration utility to Vision.
- Follow up and pursue transferred opportunities in Vision.
- Obtain additional information to complete other Opportunity Info Center tabs, as needed.

The CaTO Info tab consists of the following sections:

- General
- Opportunity Details
- Relevant Dates
- Teaming Partner/Subcontractor Requirements
- CaTO Custom Requirements
- CaTO Additional Details

General

Use the fields at the top of the CaTO Info tab of the Opportunity Info Center to view general information for the opportunity.

Field	Description
CRM Last Update Date	This field displays the last date that the opportunity was loaded/updated in Vision.
CaTO Headline	This field displays the name of the opportunity as it appears in GovWin Contracts and Task Order. If the name in GovWin Contracts and Task Order has more than 255 characters, this field only displays the first 255 characters.
CaTO Opportunity Type	This field displays the type of the opportunity as it appears in GovWin Contracts and Task Order (for example, Teaming or Subcontracting).
CaTO Opportunity URL	This field displays the Web URL of the opportunity on the GovWin Contracts and Task Order site.
CaTO Last Update Date	This field displays the last date that the GovWin Contracts and Task Order record was updated.
CaTO Opportunity ID	This field displays the unique ID of the opportunity.

Field	Description
CaTO TOONS ID	This field displays the ID of the task order in the Task Order Opportunity Notification System (TOONS), if it was imported from there into GovWin Contracts and Task Order.

Opportunity Details

Use the fields under **Opportunity Details** to view detail information for the opportunity.

Field	Description
CaTO End Customer	This field displays the end customer for whom the work specified in the opportunity is to be performed.
CaTO Value	This field displays the dollar value of the opportunity.
CaTO Place of Performance	This field displays the location at which the work specified in the opportunity is to be performed.
CaTO Contract Vehicle	This field displays the government contract vehicle under which the opportunity was issued.
CaTO Contract Type	This field displays the type of contract specified for the opportunity (for example, Fixed Price or Time and Materials).
CaTO Type of Notice	This field displays the type of notice specified for the opportunity (for example, Task Order, Request for Proposal (RFP), or Request for Information (RFI)).
CaTO Current Status	This field displays the status of the opportunity in your workflow (for example, Internal Review, In Process, or Submitted).
CaTO Current Status Notes	This field displays the notes associated with the opportunity's current status.

Relevant Dates

Use the fields under **Relevant Dates** to view key dates and times for the opportunity.

Field	Description
CaTO Sub/Teaming Sought	These fields display the start and end dates/times for which subcontractors or teaming partners are sought for this opportunity.
CaTO Issue Date	These fields display the issue date/time for this opportunity.
CaTO Period of Performance	These fields display the start and end dates/times for which the work specified in this opportunity is to be performed.

Field	Description
CaTO Award Date	These fields display the date/time that this opportunity was awarded.
CaTO Proposal Due Date	These fields display the date/time that a proposal for this opportunity is due.
CaTO Question Due Date	These fields display the date/time that questions regarding this opportunity need to be submitted.

Teaming Partner/Subcontractor Requirements

Use the fields under **Teaming Partner/Subcontractor Requirements** to view opportunity requirements related to teaming partners and subcontractors.

Field	Description
CaTO Socio-Economic Status	This field displays the set asides required or desired for the opportunity (for example, 8 (a), Small Business, or Veteran Owned).
CaTO Facilities Clearances	This field displays the level of facility clearance required for the opportunity.
CaTO Staff Clearances	This field displays the level of staff clearance required for the opportunity.
CaTO Industry/NAICS Code	This field displays the Industry or NAICS codes required for the opportunity.
CaTO Organizational Certifications	This field displays the organizational certifications required for the opportunity.
CaTO Previous or Current Customers	This field displays the customers for whom previous experience is required.

CaTO Custom Requirements

CaTO Custom Requirements displays any custom requirements specified for the opportunity.

CaTO Additional Details

CaTO Additional Details displays a general description and any additional information related to the opportunity.



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