Deltek Vision® Connect for Microsoft® Outlook 7.1

Connect for Microsoft Outlook

Installation Guide

September 24, 2014

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Contents

Overview

This guide provides the information that you need to install Deltek Vision Connect for Microsoft Outlook for Vision 7.1 Controlled General Availability on your Vision Web server and how to install, implement, and configure it on users' workstations.

This applies for new installations as well as upgrade installations.

This guide includes the following information:

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

What is Deltek Vision Connect for Microsoft Outlook?

Deltek Vision Connect for Microsoft Outlook is add-in software that allows you to perform important and common Vision tasks directly in Microsoft Outlook. You can manage Vision business appointments, email messages, and contacts, as well as Vision clients, activities, and opportunities, all from Outlook.

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

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

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

Connect for Microsoft Outlook provides you with the following capabilities:

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

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

Connect for Microsoft Outlook Documentation

Terminology

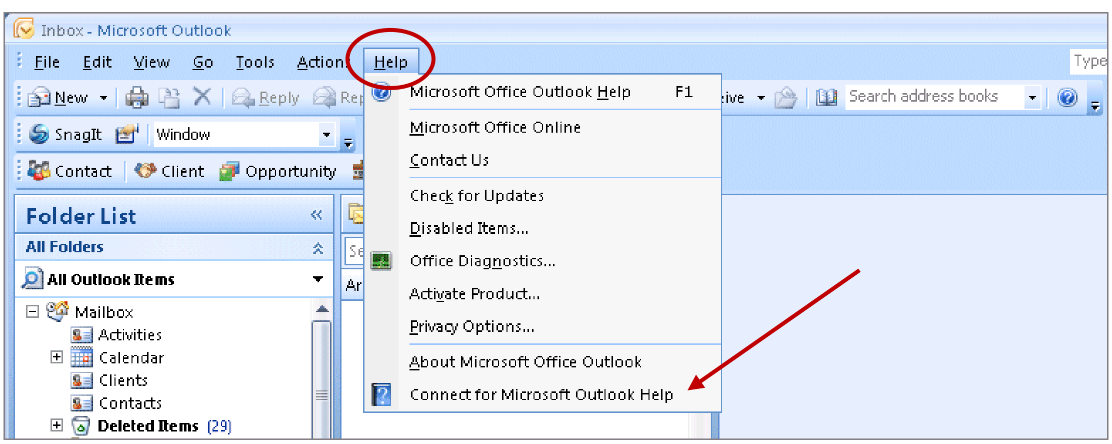
In the Connect for Microsoft Outlook documentation, when we refer to Connect for Microsoft Outlook, we are referring to opening Outlook with the Vision Connect for Microsoft Outlook add-in software installed.

Microsoft Outlook 2007

The Connect for Microsoft Outlook documentation and screen shots are based on Microsoft Outlook 2007, unless otherwise noted.

Online Help

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



The Connect for Microsoft Outlook online help:

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

Customizing Configuration Settings in Connect for Microsoft Outlook

System administrators, IT staff, or custom developers can use this guide to create preset configurations for the Connect for Microsoft Outlook. Presets are a component of the Connect for Microsoft Outlook customization package that you can use to pre-configure various settings and behaviors of Connect for Microsoft Outlook.

This guide 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.
- Implement default and custom synchronization filters.

You can download this guide from the Knowledge Center at the Deltek Customer Care Connect site.

Deltek’s Global Services team can also provide you with presets as a consulting service.

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 the 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 file 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 Connect for Microsoft Outlook, 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.

Downloading Deltek Products 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 Connect site, you do not have to log on since you are already logged into the Customer Care Connect site.

Accessing DSM Directly

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

1. Launch Deltek Software Manager by taking one of the following actions:
   - Click here.
   - On your desktop, click **Start » Programs » Deltek » Vision » Deltek Software Manager**.
2. On the Deltek Software Manager logon dialog box, enter your Deltek Customer Care Connect **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 on the Settings dialog box.

5. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.

   If you clicked the link in step 1 to access DSM, the application automatically selects Vision for you.

6. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
7. In the table, select the check box that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.

   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 Customer Care Connect site, complete the following steps:

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

1. Enter your Customer Care Connect **Username** and **Password**, and click **Log In**.
2. When the Customer Care Connect site displays, click the Product Downloads tab.

   You are automatically logged in Deltek Software Manager.
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 the Deltek product that you want to download, if it is not already expanded.
6. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
7. In the table, select the check box that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.

   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.

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.

Software Requirements for Connect for Microsoft Outlook

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

Supported operating systems installed on workstations:

- Microsoft Windows 7 SP1, 32-bit or 64-bit (x64)
- Microsoft Windows Vista SP2, 32-bit or 64-bit (x64)
- Microsoft Windows Professional XP SP3, 32-bit or 64-bit (x64)

Although the Vision application supports Windows 8, Connect for Microsoft Outlook is not yet supported on workstations with Microsoft Windows 8.

Supported Microsoft Office versions installed on workstations:

- Microsoft Office 365 — The Outlook component of Office 365 (with a full local installation of Microsoft Outlook configured with the Cached Exchange Mode enabled). For adequate user experience and performance, Deltek recommends a reliable network connection with a throughput of 100 Kbps or better.
- Microsoft Office 2010 (32-bit version only)
- Microsoft Office 2007 SP2
- Microsoft Office 2003 SP3

Microsoft Office 2010 products are available in 64-bit versions. However, for the best productivity and user experience, Microsoft recommends 32-bit Office 2010 for both 32-bit and 64-bit operating systems. Office 2010 64-bit is optimized for advanced data analysis scenarios that most users do not require, and existing 32-bit add-ins are not supported on Office 64-bit.

For more information about Office 2010 64-bit, see the following Microsoft Web page:

http://office.microsoft.com/en-us/products/office-2010-frequently-asked-questions-HA101674631.aspx#About_Office_2010_4

Supported Microsoft Outlook versions installed on workstations:

- Microsoft Outlook 365, with a full local installation of Microsoft Outlook configured with the Cached Exchange Mode enabled. For adequate user experience and performance, Deltek recommends a reliable network connection with a throughput of 100 Kbps or better.
- Microsoft Outlook 2013, 32-bit and 64-bit
- Microsoft Outlook 2010 (32-bit version only)
- Microsoft Outlook 2007 SP2
- Microsoft Outlook 2003 SP3

Supported Microsoft Exchange Server versions installed on your email server:

- Microsoft Exchange Server 2013, Cached Exchange Mode only
- Microsoft Exchange Server 2010, Cached Exchange Mode only
- Microsoft Exchange Server 2007 SP2, Cached Exchange Mode only
- Microsoft Exchange Server 2003 SP2, Cached Exchange Mode only

Supported Microsoft Outlook Configurations

Outlook Profiles and Default Email Delivery Location

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

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

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

Default Email Delivery Location	Description
A Microsoft Exchange mailbox	The Connect for Microsoft Outlook data is stored on the Exchange server. **Cached Exchange Mode** When you configure Outlook, you must enable cached exchange mode. This allows Outlook to store and manage the Microsoft Exchange Server mailbox data locally in the offline storage table (.OST) file on a user's workstation. If the cached exchange mode is not enabled, or you disable it when Connect for Microsoft Outlook is installed, the following behavior may occur in Outlook: ▪ Outlook will crash. ▪ Outlook will hang or freeze when launched. ▪ Exchange connection issues will occur in Outlook and will also be included in the Connect for Microsoft Outlook logs. ▪ Outlook forms may not display the Connect for Microsoft Outlook elements such as the Sharing bar. ▪ Outlook forms may hang, freeze, or take a long time to load. ▪ The Connect for Microsoft Outlook synchronization processing may hang. For more information about how to check whether or not the cached exchange mode is enabled, see the next section in this guide.
SMTP or POP3 email service	The Outlook mail profile must use the Outlook default storage (.PST file) as the default email delivery location on a user’s workstation.

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

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

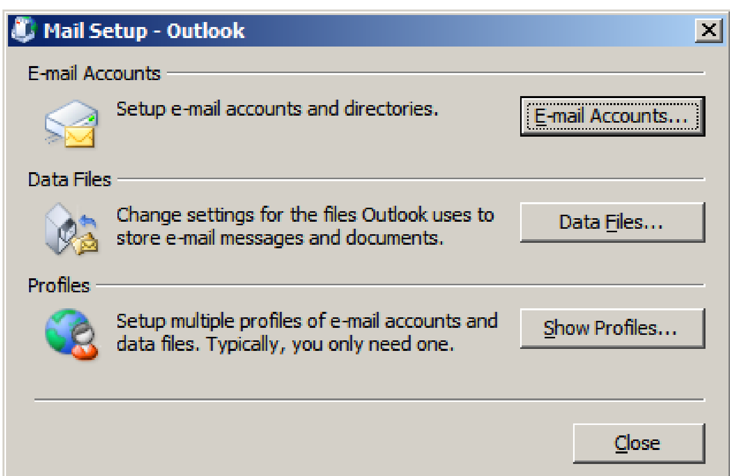
Cached Exchange Mode

Use the following instructions to check whether the cached exchange mode is enabled for an Outlook mail profile on a workstation and change the setting if needed. These steps apply for all versions of Microsoft Outlook.

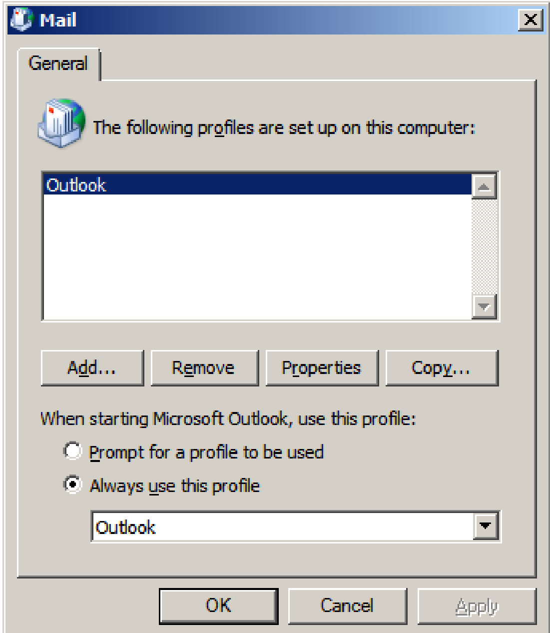
To check and change the cached exchanged mode setting for an Outlook mail profile on a workstation, complete the following steps:

1. On a workstation, exit Microsoft Outlook.
2. Open the Microsoft Windows Control Panel.
3. Complete one of the following, based on the version of Windows that you have:
   - For Windows XP or Windows Vista users, click **Switch to Classic View**.
   - For Windows 7 users, in the upper right corner of the Adjust your computer's settings screen, select either **Small icons** or **Large icons** in the **View by** drop-down list.
4. Click the **Mail** icon.

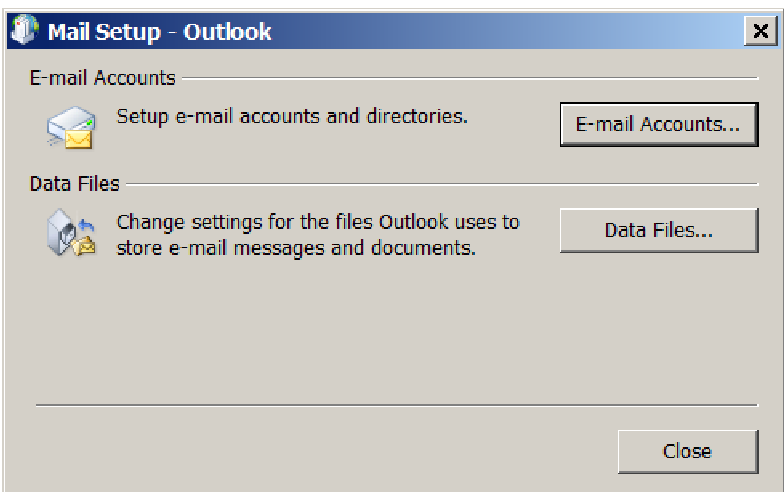
   If you are using a 64-bit machine, click the **Mail (32-bit)** icon.
5. On the Mail Setup – Outlook dialog box, click the **Show Profiles**… button.



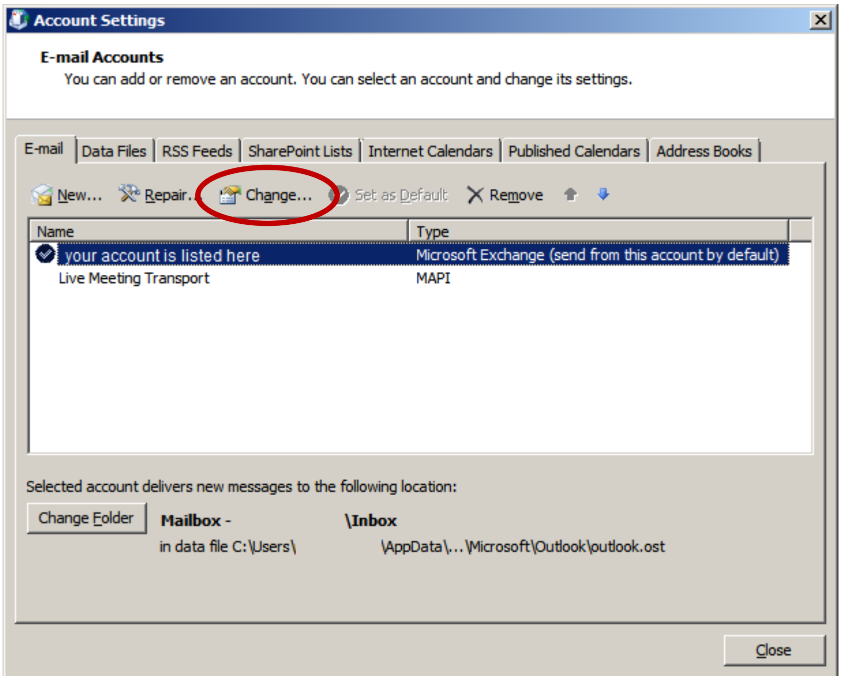
6. On the General tab of the Mail dialog box, click the mail profile that you want to check or change, and then click the **Properties** button.



7. On the Mail Setup – Outlook dialog box, click the **E-mail Accounts…** button.

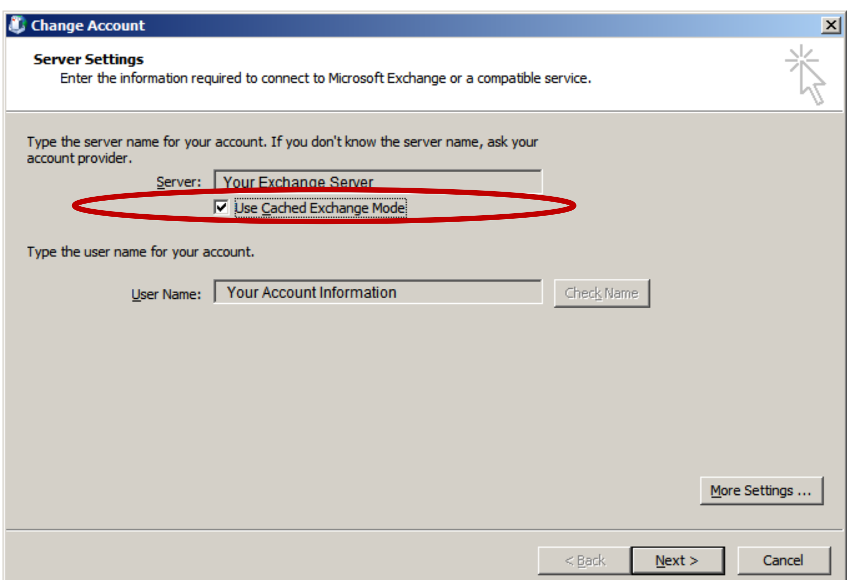


8. On the E-mail tab of the Account Settings dialog box, click the **Change…** icon that is located directly below the row of tabs.



9. On the Change Account dialog box, make sure that the **Use Cached Exchange Mode** check box below the **Server** field is selected.

   The check box must be selected for Vision Connect for Microsoft Outlook to work properly.



10. Exit the Change Account program:
    - If you made no changes, click **Cancel** to exit the Change Account program.
    - If you changed the **Use Cached Exchange Mode** setting, click the **Next** button to continue on and save the new setting.

11. Launch Microsoft Outlook for the changes to take effect.

    Outlook will begin to save the mailbox data into the local cached copy. Allow the process to finish before you install Connect for Microsoft Outlook.

Third-Party Outlook Add-Ins

Some third-party Outlook add-ins may slow the performance of Connect for Microsoft Outlook or cause application crashes. This section provides a list of known incompatible and compatible add-ins.

Known Incompatible Third-Party Add-Ins

Known third-party Outlook add-ins that are **not** compatible with Connect for Microsoft Outlook are:

- **Adobe PDF** — With versions earlier than 8.0, you receive an "Outlook experienced a serious problem with the 'pdfmoutlook' add-in…" error message. Adobe PDF versions 8.0 and later are supported.
- **Colligo** — Outlook crashes.
- **EMC SourceOne**
- **IronPort**
- **Kaspersky Anti-Virus** — Versions earlier than Kaspersky Anti-Virus 2012 can cause an application error when you synchronize Connect for Microsoft Outlook. Kaspersky Anti-Virus 2012 is supported.
- **Kerio Outlook Connector (Outlook add-in)** — This product does not work with Connect for Microsoft Outlook. Kerio Connect (the email server product) is also not designed to work with Connect for Microsoft Outlook.
- **Microsoft Access Outlook Add-in for Data Collection and Publishing**
- **Microsoft BCM (Business Contact Manager)**
- **Microsoft Live meeting**
- **Microsoft Outlook Connector** — Outlook hangs when you switch the language.
- **Skype** — Outlook remains in memory after closing.
- **TaskLine**
- **Xobni**

This list includes only tested and confirmed add-ins. Other add-ins may be incompatible but have not been tested yet. This list will be updated periodically.

Known Compatible Third-Party Add-Ins

The following are known third-party Outlook add-ins that **are** compatible with Connect for Microsoft Outlook (tested with no problems detected):

- **Apple iTunes**
- **Cisco Webex**
- **GoodApp**
- **Google Apps Sync**
- **LinkedIn**

- **Mindjet MindManager**
- **OneNote Notes about Outlook Items**
- **Outlook Social Connector**
- **Redemption Helper Outlook Extension**
- **Skype Toolbar**

This list includes only tested and confirmed add-ins. Other add-ins may be compatible but have not been tested yet. This list will be updated periodically.

Connect for Microsoft Outlook Add-Ins

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

- Connect for Microsoft Outlook
- CRMDesktop Ribbon Helper

Microsoft Office 2007 Add-Ins

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

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

Microsoft Office 2010 Add-Ins

Microsoft Office 2010 installs the following COM (Component Object Model) add-ins by default:

- Microsoft Office Communicator 2007 Add-ins
- Business Connectivity Services Add-In
- Microsoft SharePoint Server Colleague Import Add-in
- Microsoft Exchange Add-kin
- Microsoft SharePoint Workspace Proxy for Outlook Add-in
- OneNote Notes about Outlook Items
- Microsoft Outlook Social Connector

Third-Party Add-Ins

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

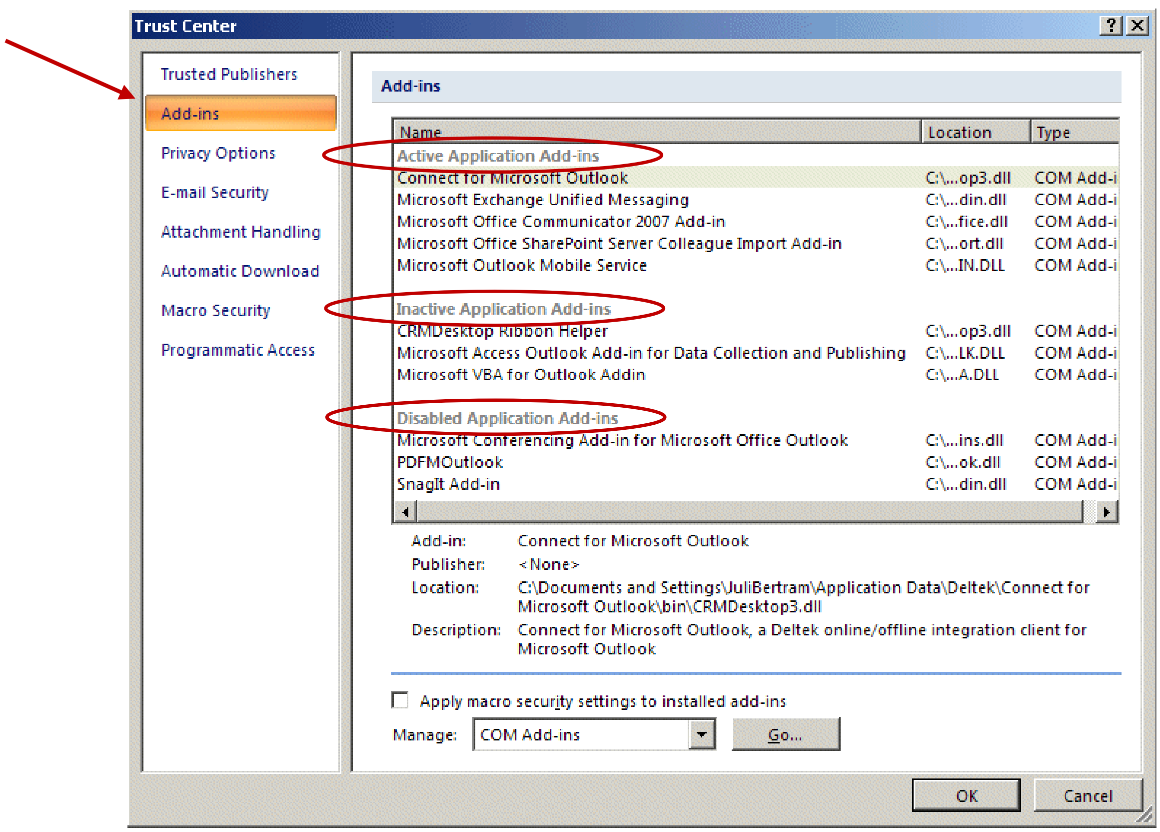
You must disable all of the add-ins from the above list of known incompatible third-party add-ins that display in the **Active Applications Add-ins** section of the Trust Center Add-ins screen. After that, if you still experience any crashes in Connect for Microsoft Outlook, disable the other third-party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

Check for Third-Party Add-Ins Installed in Outlook

To check for third-party Outlook add-ins before you install Connect for Microsoft Outlook, complete the following steps in Outlook 2007:

12. Open Outlook.
13. On the Outlook menu bar, click **Tools » Trust Center**. (In Outlook 2010, click **File » Options » Add-Ins**. This directly opens the Add-ins screen.)
14. On the Trust Center dialog box, click **Add-ins**.

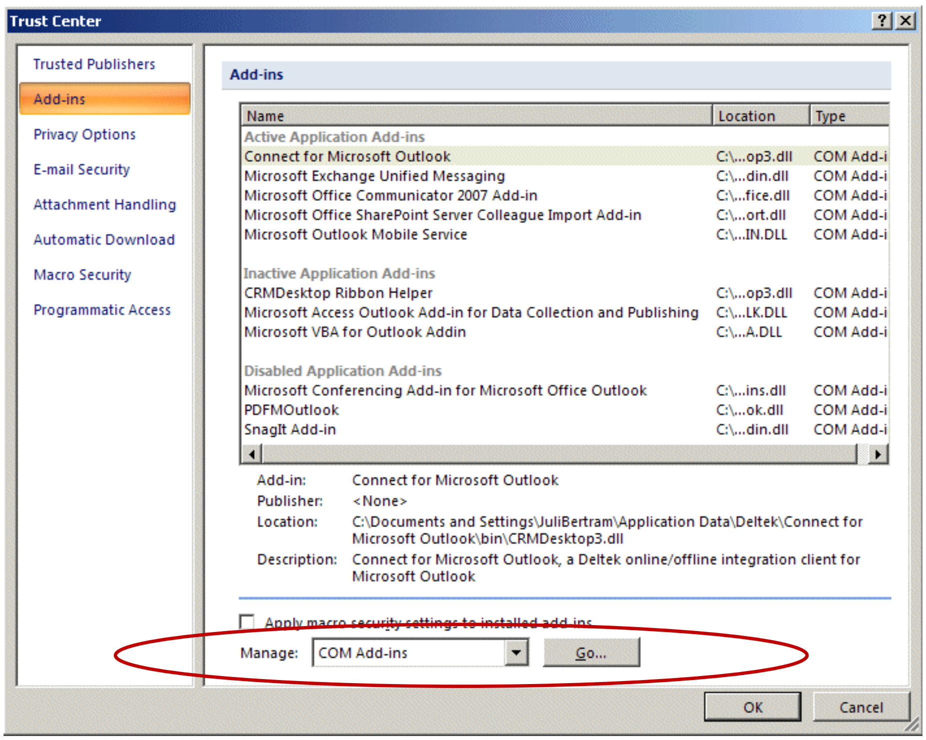
    Active, inactive, and disabled application add-ins are identified on the Add-ins screen.



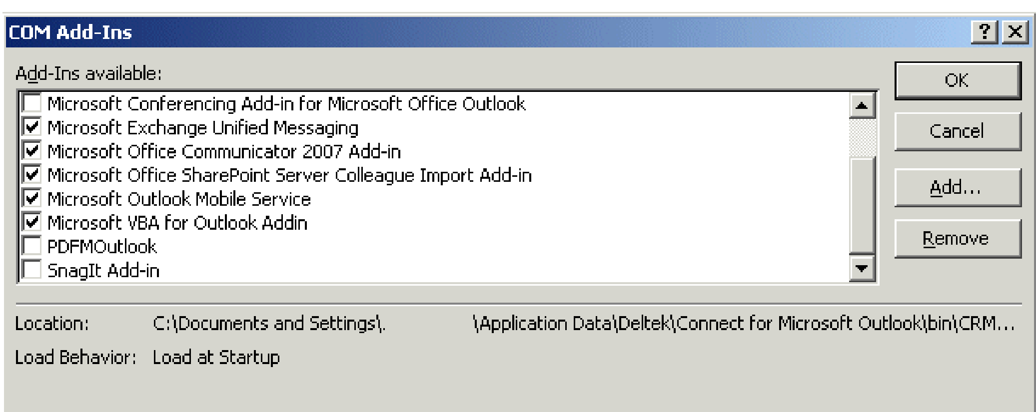
Disable Third-Party Add-Ins Installed in Outlook

To disable any third-party add-in listed in the Active Applications Add-ins section of the Trust Center, complete the following steps in Outlook 2007:

1. Open Outlook.
2. On the Outlook menu bar, click **Tools » Trust Center**. (In Outlook 2010, click **File » Options » Add-Ins**. Then continue with step 4.)
3. On the Trust Center dialog box, click **Add-ins**.
4. On the Add-ins screen, be sure that **COM Add-ins** is selected in the **Manage** field, and click **Go** beside this field.



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



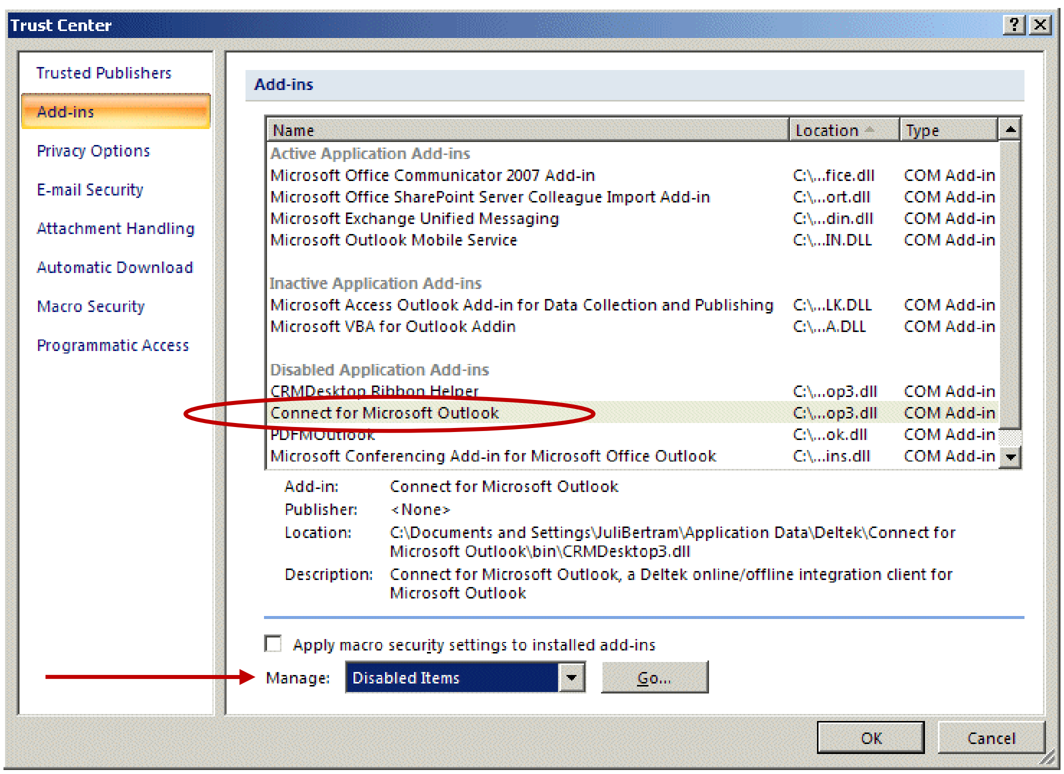
When you click **Tools » Trust Center » Add-ins** again, you should now see any add-ins that you disabled listed in the **Disabled Application Add-ins** section.

Re-Enable Connect for Microsoft Outlook Add-Ins

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

To re-enable the Connect for Microsoft Outlook add-ins in Outlook 2007, complete the following steps:

1. Open Outlook.
2. On the Outlook menu bar, click **Tools » Trust Center**. (In Outlook 2010, click **File » Options » Add-Ins**. Then continue with step 4.)
3. On the Trust Center dialog box, click **Add-ins**.
4. On the Add-in screen, click **Connect for Microsoft Outlook** in the **Disabled Applications Add-in** section of the box that lists all the add-ins.
5. From the drop-down list in the **Manage** field at the bottom of the screen, select **Disabled Add-ins** and click **Go**.



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

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

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

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

Supported Deltek Configurations

Multiple Users Who Use the Same Workstation

When a user on a workstation installs Connect for Microsoft Outlook, it is installed into that individual user's Windows local profile location for applications.

The Windows local profile location for applications is as follows for the different Windows operating systems:

- For Windows 7 and Windows Vista, it is located in C:\Users\<UserName>\Roaming\Deltek\Connect for Microsoft Outlook.
- For Windows XP, it is located in C:\Documents and Settings\<UserName>\Deltek\Connect for Microsoft Outlook.

Each individual user must complete a separate installation of Connect for Microsoft Outlook on the shared workstation while logged in as themselves. The Connect for Microsoft Outlook application is installed within each user's profile and is visible only to the user who performed the installation.

For example, Mary, Tom, and Larry share workstation A and log into it at different times of the day. Mary logs into the workstation first and installs Connect for Microsoft Outlook and configures it when she launches Outlook. If Mary browses to %AppData\Deltek\Connect For Microsoft Outlook\, she will see her installation of Connect for Microsoft Outlook. When Tom or Larry eventually logs into the machine, neither of them will see Mary's installation. They must perform their own installation of Connect for Microsoft Outlook on workstation A.

Connect for Microsoft Outlook **cannot** be installed on multiple machines using Outlook profiles configured to the same mailbox. To install it on a single workstation, you **must** be logged into that machine as the user account whose mailbox is being used. That user **must** be a member of the local administrator group on that machine during the installation. Local administrator rights are not needed after the installation.

If you install Connect for Microsoft Outlook on multiple machines using Outlook profiles configured to the same mailbox, you can damage the mailbox customizations, which may be time consuming to fix..

Users with Multiple Mail Profiles

When users install Connect for Microsoft Outlook on their workstations, a user's mailbox is updated to accommodate the Vision data that will be accessed and manipulated from Microsoft Outlook. Connect for Microsoft Outlook uses the Outlook Mail Profile to update the mailbox.

Occasionally, some users may have one Outlook mail profile configured to access their personal email account (GMail, AOL, and so on) and another Outlook mail profile to access their corporate (work) email account. If a user has used the Mail icon in the Windows Control Panel to create multiple email profiles for different mailboxes, the Connect for Microsoft Outlook installation will recognize the additional mail profiles and prompt the user to choose which profile to use. Connect for Microsoft Outlook can be installed for only one Outlook Mail profile.

Languages

The following languages are supported for Connect for Microsoft Outlook:

- English (United States)
- English (International)

Customization for User-Defined Fields and Synchronization

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

- Add user-defined fields or grids to the Connect for Microsoft Outlook forms (Activity, Calendar, Client, Contact, Opportunity, Task, and Vendor forms).
- Add presets for synchronization filters. Presets allow you to select a pre-defined filter configuration on the Synchronization Control Panel dialog box in Connect for Microsoft Outlook. Thus, you avoid the complex task of building the correct filters from scratch.
- Limit synchronization frequency for users.
- Apply hidden synchronization filters. You can create a filter in the XML file that determines the maximum set of records that users can synchronize. Any filter set by individual users would be a subset of the hidden filter. For example, in the XML file you could set it up so that users can synchronize opportunities only in their own organization. If a user sets up a filter based on opportunity probability without including organizations, then the user could synchronize only the opportunities in his or her own organization that match the probability filter.

Microsoft Outlook has a technical limitation that allows a form to have only one rich-text field. If a rich-text field already exists on a form, then you cannot add user-defined memo fields to the form as rich-text fields. However, you can add user-defined memo fields as unlimited plain-text fields.

If a memo field is added to Connect for Microsoft Outlook as a plain-text field, then:

- The memo field will contain HTML codes that control the format of the field in Vision.
- If a user makes changes to the text in the memo field and the field was previously formatted in Vision, this formatting may be lost. Any new text that you add to the memo field will not be formatted.

Microsoft Outlook has a technical limitation that allows a form to have only one URL field. If a form already contains a URL field, then URL user-defined fields must be added as plain-text fields. A URL in a plain-text field will not contain a hyperlink to the URL.

If you have questions about user-defined fields, presets, and other customization, contact Deltek Global Services.

Microsoft Office Desktop Integration (MODI)

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

Licensing

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

Non-Supported Environments

Mobile Devices

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

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

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

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

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

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

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

Limitations using ActiveSync in an Exchange 2003 Environment

The use of Connect for Microsoft Outlook with ActiveSync in an Exchange 2003 environment has a significant technical limitation. The sync engine within ActiveSync in Exchange 2003 does not properly recognize Connect for Microsoft Outlook-related data and objects. As a result, when contact data is updated on a mobile device and then synchronized back to Outlook via ActiveSync, it is no longer recognized by Connect for Microsoft Outlook. This can result in data loss. This limitation applies only when you use ActiveSync within Exchange 2003. It does not apply when you use ActiveSync within Exchange 2007 or Exchange 2010.

Limitations on iOS Based Devices (iPhone and iPad)

When contact data is synchronized to an iOS device, a large amount of extraneous Connect for Microsoft Outlook data comes along with it. As a result, additional contact folders or groups that are meaningless show up on these devices. On iOS-based devices, you will see extra groups and contact items that are actually project names, client names, opportunity names, and so on.

This happens because Connect for Microsoft Outlook stores a lot of additional information in Outlook that is typically hidden; you never see this information. On iOS devices, this extra data is visible and makes it very difficult for you to sort through contact information.

Currently there is no workaround for this issue. The issue manifests itself more severely when using Exchange 2007. With Exchange 2010 the issue exists, but it is far more manageable.

This limitation is related to the iOS platform, over which Deltek has no control.

Outlook Web Access

Outlook Web Access (OWA) is part of Microsoft Exchange Server. The Vision-only data fields from Connect for Microsoft Outlook are **not** available in Outlook Web Access.

When you use Connect for Microsoft Outlook, the OWA for Exchange Server 2007 displays the hidden MAPI attributes of Contact folders and other Connect for Microsoft Outlook objects. This is a Microsoft software defect; these hidden fields are not displayed in the full Microsoft Outlook client. In OWA for Exchange Server 2007, users could accidentally delete or modify the custom configurations made by the Connect for Microsoft Outlook installation in the mailbox.

This defect potentially affects all Connect for Microsoft Outlook users who use OWA in Exchange Server 2007. This problem does not occur in OWA for Microsoft Exchange Server 2003 or Exchange Server 2010.

Microsoft has resolved this defect in rollup 2 or later for Microsoft Exchange Server 2007 SP3. The Microsoft article related to this defect is http://support.microsoft.com/kb/2210042. (A sub contact folder is still visible after you set the "PR_ATTR_HIDDEN" attribute to "True" in an Exchange Server 2007 environment.)

Outlook Contact Folders Without the "Contact" Name

Only contacts stored in the default Outlook “Contacts” folder are synchronized. If you rename your default Contacts folder, the contacts will not synchronize. Additionally, contacts stored within a subfolder of the default Contacts folder are not synchronized.

Lotus Notes

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

Microsoft Outlook Delegates

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

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

Vision Synchronization Server Migrations

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

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

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

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

Required Steps to Prevent Duplicate Contact Records

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

1. Run a script on the Vision server to add a **DLTKSYNC** category to contacts synchronized by Vision Synchronization Server users.
2. Run a final Synchronization Server synchronization to add the **DLTKSYNC** category to Vision contacts in each user’s Outlook Contact folder. This category will be used to identify the contacts for each user that are synchronized with Vision through the Synchronization Server.

If you configured Vision Synchronization Server for one-way synchronization ***only***—from Microsoft Outlook into Vision—or you do not use Synchronization Server but you manually imported your Outlook contact records into Vision during a data migration from another software or via another third-party product, you must add the **DLTKSYNC** category manually in Microsoft Outlook to the contacts that have already been synchronized with Vision. You need to do this because in this scenario, Vision is unable to send the category to Microsoft Outlook.

The "Summary of Installation and Configuration Steps" section on page 31 identifies the order of the Connect for Microsoft Outlook installation and configuration steps, including the additional steps for Synchronization Server migrations.

The specific instructions for performing the additional steps to prevent duplicate contacts are in the "Synchronization Server and Other Migrations: Prevent Duplicate Contacts" section on page 35 of this guide.

Synchronize Connect for Microsoft Outlook for the First Time

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

Contacts

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

Shared with Vision

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

Shared contacts:

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

Data that Does Not Synchronize with Connect for Microsoft Outlook

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

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

Unshared with Vision

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

Unshared contacts:

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

Tasks and Calendar Items

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

Shared with Vision

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

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

Unshared with Vision

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

Example:

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

Install and Configure Connect for Microsoft Outlook — New Installations

These instructions apply if you have not previously installed Connect for Microsoft Outlook, and you are installing it for the first time.

If you currently have 7.0 or a 6.x version of Connect for Microsoft Outlook installed and you are upgrading to 7.1, see the appropriate subsection of the "Upgrade Installations" section starting on page 87.

Summary of Installation and Configuration Steps

After you install the required software identified in the "System Requirements" section on page 9 of this guide, complete the steps listed in the table below in the order listed to install and configure Vision Connect for Microsoft Outlook. The specific instructions for each step are included in the sections that follow.

You must have Vision 7.1 installed before you complete the steps listed in the table below.

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

Step	Description	Complete By	Guide Section and Page
Steps to Perform on the Vision Web Server:			
1	Download and install Connect for Microsoft Outlook onto your Vision Web server. If you have multiple Web servers, complete this step for each server.	System administrator	"Download and Install Connect for Microsoft Outlook onto Your Vision Web Server" on page 33.
2	For Synchronization Server and other Migrations only: Perform steps to prevent duplicate contact records.	System administrator	"Synchronization Server and Other Migrations: Prevent Duplicate Contacts" on page 35.
	You must complete the steps to prevent duplicate contact records **before** you activate the Connect for Microsoft Outlook module in Vision.		
3	Activate the Connect for Microsoft Outlook module.	System administrator	"Activate Connect for Microsoft Outlook" on page 37.

Step	Description	Complete By	Guide Section and Page
4	Select Vision fields (natural keys) that determine duplicate records during synchronization.	System administrator	"Select Vision Fields that Determine Duplicate Records (Duplicate Check Formulas) on page 38.
5	Specify where you want Vision activities to display in Connect for Microsoft Outlook.	System administrator	"Specify Where You Want Vision Activities to Display" on page 43.
6	Provide Connect for Microsoft Outlook users with security access to download Connect for Microsoft Outlook and access appropriate applications and records.	System administrator	"Provide Security Access to Connect for Microsoft Outlook Users" on page 45.
	Vision configuration settings are updated to Connect for Microsoft Outlook users' workstations when an automatic or manual synchronization is performed on a workstation.	This occurs automatically during the synchronization process.	"Configuration Settings Passed from Vision to Connect for Microsoft Outlook" on page 49.
Steps to Perform on End Users' Workstations:			
7	Back up your Outlook data.	Connect for Microsoft Outlook user	"Back Up Your Outlook Data" on page 49.
8	Download and install Connect for Microsoft Outlook on a single workstation with Vision Utilities. or	Connect for Microsoft Outlook user	"Download and Install Connect for Microsoft Outlook on a Workstation Using Vision Utilities" on page 50.
	Download and install Connect for Microsoft Outlook for multiple users via Microsoft Systems Management Server (SCCM) or Group Policy with optional pre-configuration parameters. or	System administrator	"Download and Install Connect for Microsoft Outlook on Multiple Workstations Using Command Line Parameters" on page 56.
	Download and Install Connect for Microsoft Outlook on multiple workstations using Microsoft SMS or Group Policy. (Sample steps are provided.)	System administrator	"Download and Install Connect for Microsoft Outlook Using Microsoft SCCM, Group Policy, or Batch Files" on page 59.

Step	Description	Complete By	Guide Section and Page
	Connect for Microsoft Outlook **cannot** be installed on multiple machines using Outlook profiles configured to the same mailbox. To install it on a single workstation, you **must** be logged into that machine as the user account whose mailbox is being used. That user **must** be a member of the local administrator group on that machine during the installation. Local administrator rights are not needed after the installation. **If you install Connect for Microsoft Outlook on multiple machines using Outlook profiles configured to the same mailbox, you can damage the mailbox customizations, which may be time consuming to fix.**		
9	Configure the Connect for Microsoft Outlook software for the first time on a workstation using the Connect for Microsoft Outlook Assistant.	Connect for Microsoft Outlook user	"Configure Connect for Microsoft Outlook on a Workstation" on page 60.
	Deltek recommends that you stagger the initial Connect for Microsoft Outlook implementation so that a significant number of users are not performing the initial synchronization all at the same time. This will help prevent overloading your system (Vision and email) with potentially large numbers of records and data being synchronized during the first synchronization. Users perform the initial synchronization when they complete the Connect for Microsoft Outlook Assistant, as described in the "Configure Connect for Microsoft Outlook on a Workstation" section of the guide. For more information about synchronization schedules and automatic synchronization after the initial synchronization, see "Appendix E: Synchronization Schedules" on page 129.		

The "Access and Use Connect for Microsoft Outlook" section on page 77 of this guide will help you get started using Connect for Microsoft Outlook. It tells you where to find the Vision Connect for Microsoft functionality within Outlook.

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

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

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

The information in this section applies if you are installing Connect for Microsoft Outlook for the first time.

Use these instructions to download and install Deltek Connect for Microsoft Outlook for Vision 7.1 onto your Vision Web server. If you have multiple Web servers, you must perform the installation on each Web server.

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

You must have Vision 7.1 installed before you complete the steps in this section.

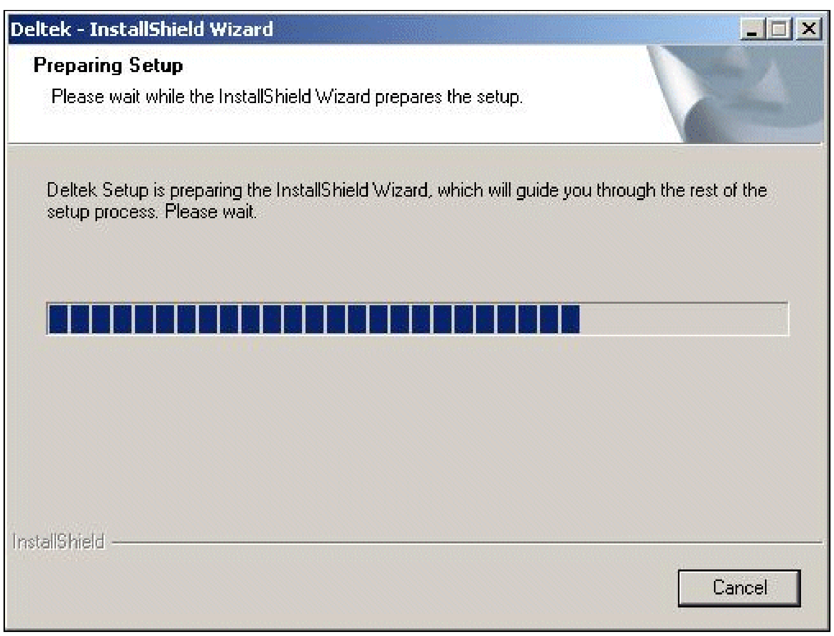
To download and install Connect for Microsoft Outlook for Vision 7.1 on your Vision Web server, complete the following steps:

1. Log on to your Vision Web server.
2. Open the Deltek Customer Care Connect Web site.
3. On the Product Downloads tab, click **Run Deltek Software Manager**.
4. On the Deltek Software Manager screen, navigate to **Vision 7.1** in the pane on the left side of the screen.
5. Click the plus sign beside **Vision 7.1**, and then click **Sub-Release** from the expanded list.
6. In the expanded grid, click the **Deltek Connect for Microsoft Outlook** check box to add it to the Download Queue.
7. Click the **Download** button.

   This downloads the **DeltekConnectForMicrosoftOutlookFor71_1.2.1.3.exe** file (a self-extracting utility) and the documentation PDF files.
8. Navigate to the folder that contains the files downloaded from the Deltek Software Manager, and double-click the **DeltekConnectForMicrosoftOutlookFor71_1.2.1.3.exe** file.

   The EXE file is within the Vision\71\GA folder.

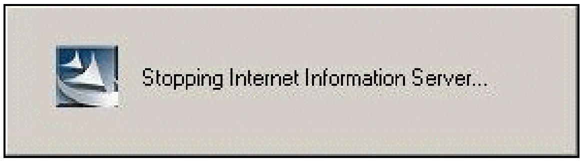
   A Deltek – InstallShield Wizard that extracts the installation package is launched. The Preparing Setup page displays.



The setup process verifies that you have Vision 7.1 prerequisites installed before it continues. If you do not have the most current prerequisites installed, you are instructed to install it first, and then re-run the Connect for Microsoft Outlook installation.

9. On the Welcome to the Deltek Vision 7.1 Hot Fix Installation Wizard page, click **Next** to continue.

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

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

11. When the installation is complete, on the Deltek Vision 7.1 Hot Fix Wizard Complete page, click **Finish**.

Synchronization Server and Other Migrations: Prevent Duplicate Contacts

Follow the instructions in this section only if you currently use Vision Synchronization Server with two-way or one-way data synchronization, and you are migrating to Connect for Microsoft Outlook.

- You must complete these steps to prevent duplicate contacts from being created.
- A system administrator must complete these steps **before** activating the Connect for Microsoft Outlook module in Vision.
- Back up your Microsoft Outlook data before you complete the steps in this section. Backup instructions are on page 49 of this guide. If you have entered data in Microsoft Outlook contact fields that do not exist in Vision (such as the **Birthday** and **Spouse/Partner** fields), the content in these fields in Connect for Microsoft Outlook may be removed when you synchronize Connect for Microsoft Outlook. For this reason, we urge you to back up your Outlook data so you can view any missing data if needed.

A summary of Synchronization Server migrations is provided on page 28 of this guide.

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

1. Run a script on the Vision server to add a DLTKSYNC category to contacts in Vision:
   a. Log in to SQL Server Management Studio, and open a query window on the Vision database.
   b. Enter the script name **getAllSyncContactsForAllEmployees**.
   c. Press the F5 key on your keyboard to execute the script.

   d. The DLTKSYNC contact category is assigned to all contacts in the Vision database.

2. Complete one of the following options that matches your situation:

   - If you currently use Synchronization Server with two-way data synchronization or one-way synchronization **from Vision to Outlook**:

     Run a final Synchronization Server synchronization so that the DLTKSYNC category is added to Vision contacts in each user's Outlook software. The category will be used to identify the contacts for each user that are synchronized with Vision through Synchronization Server.

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

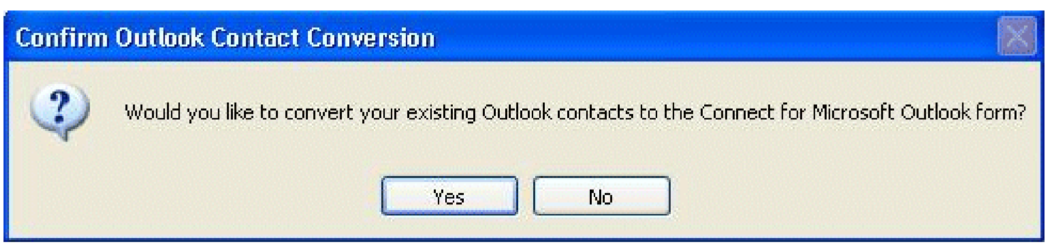
     Vision is unable to send the DLTKSYNC category automatically to Outlook. To avoid the duplication of contacts that were previously synchronized into Vision, you must manually apply the DLTKSYNC category to the contact records in Outlook that you know were previously synchronized to Vision.

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

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

     You **must** manually assign the DLTKSYNC category to **only** contacts that already exist in Vision. Any contact that has a DLTKSYNC category in Outlook that does not exist in Vision will be deleted from Outlook.

For either of the situations in step 2, when you follow step 18 on page 73 in the "Configure Connect for Microsoft Outlook on a Workstation" section on page 60, you **must** select **Yes** in the following Confirm Outlook Contact Conversion dialog box:



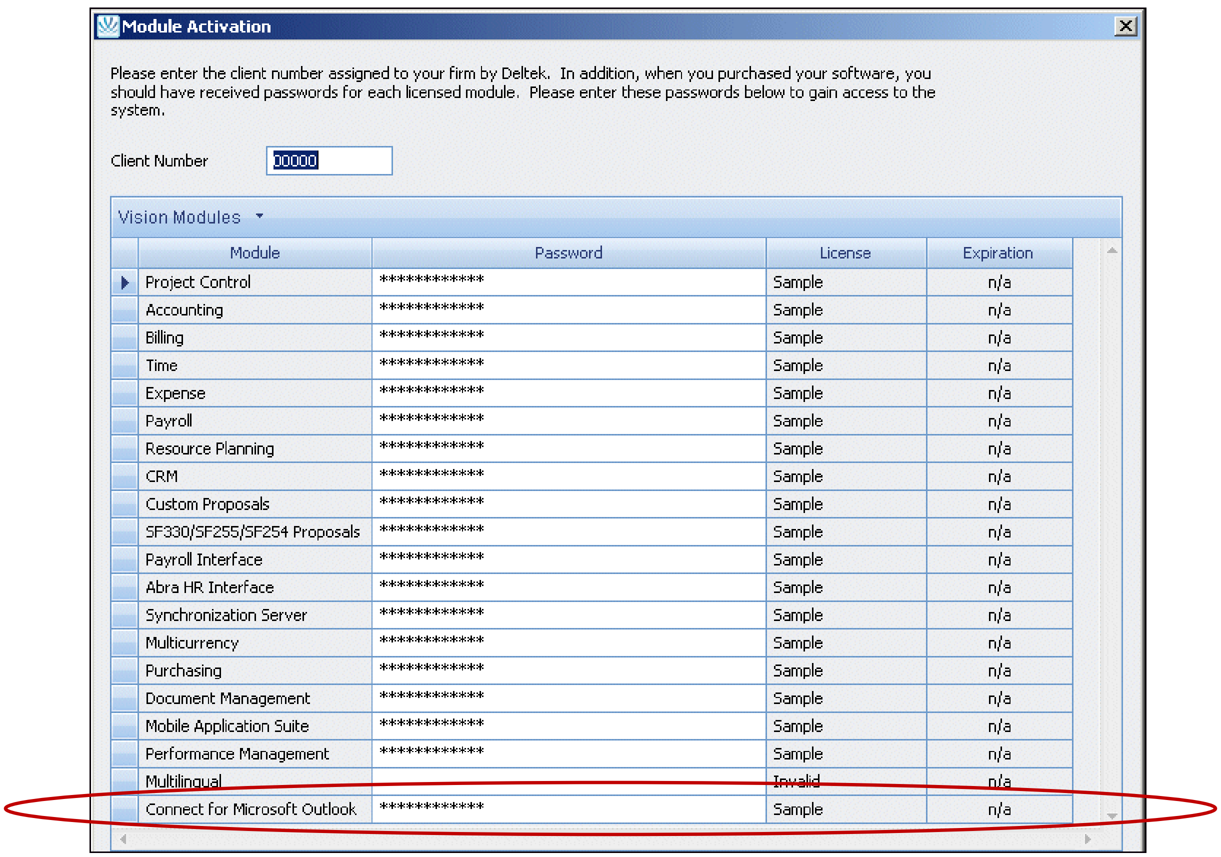
Activate Connect for Microsoft Outlook

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

- When you activate Connect for Microsoft Outlook, if you have Vision Synchronization Server installed, it is automatically inactivated.
- For Synchronization Server migrations, you must perform the steps in the Synchronization Server and Other Migrations: Prevent Duplicate Contacts section on page 35 before activating the Connect for Microsoft Outlook module.

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

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



Module Activation

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

Client Number 00000

Vision Modules

Module	Password	License	Expiration
Project Control	*************	Sample	n/a
Accounting	*************	Sample	n/a
Billing	*************	Sample	n/a
Time	*************	Sample	n/a
Expense	*************	Sample	n/a
Payroll	*************	Sample	n/a
Resource Planning	*************	Sample	n/a
CRM	*************	Sample	n/a
Custom Proposals	*************	Sample	n/a
SF330/SF255/SF254 Proposals	*************	Sample	n/a
Payroll Interface	*************	Sample	n/a
Abra HR Interface	*************	Sample	n/a
Synchronization Server	*************	Sample	n/a
Multicurrency	*************	Sample	n/a
Purchasing	*************	Sample	n/a
Document Management	*************	Sample	n/a
Mobile Application Suite	*************	Sample	n/a
Performance Management	*************	Sample	n/a
Multilingual		Invalid	n/a
Connect for Microsoft Outlook	*************	Sample	n/a

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

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

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

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

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

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

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

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

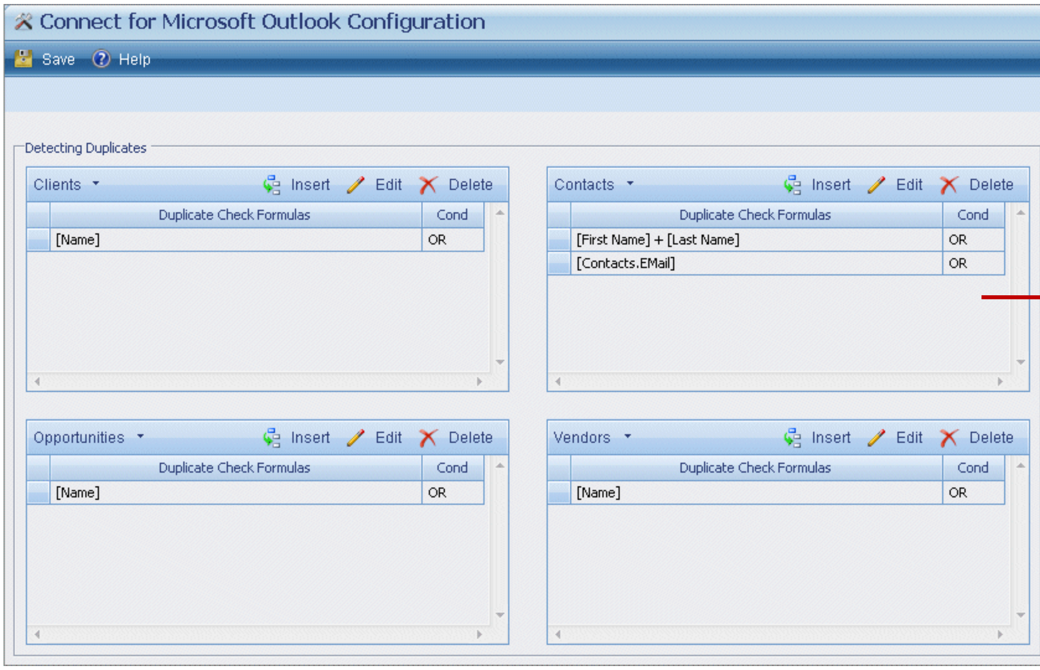
These fields are checked against all other activities in Connect for Microsoft Outlook when you save an activity. If another activity has the same content in these fields as the new activity that you created, you receive a message telling you that the activity already exists. You cannot save duplicate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

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

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

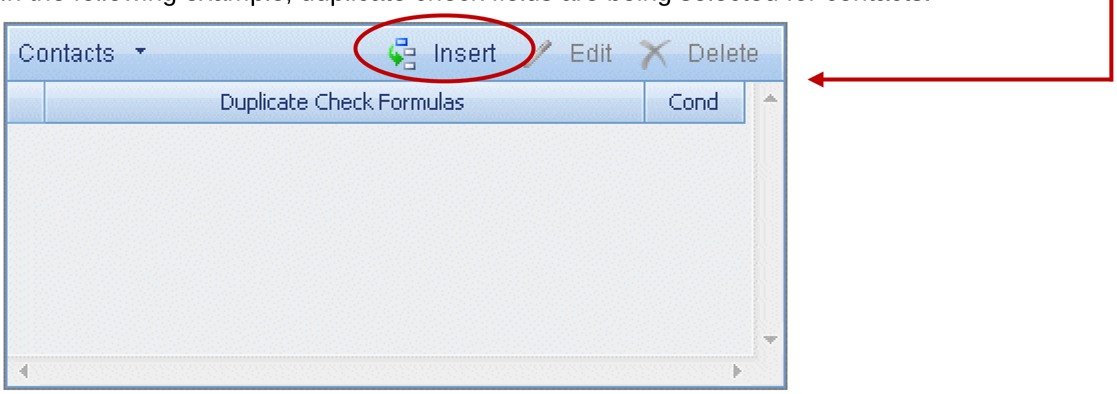
1. On the Vision Navigation menu, click **Configuration » General » Connect for Microsoft Outlook**.

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

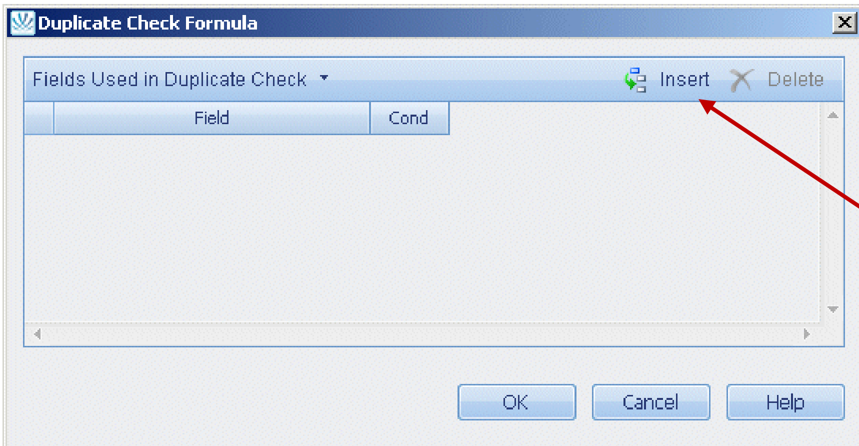


2. On a grid's toolbar, click **Insert** to open the Duplicate Check Formula dialog box and select the fields for a duplicate check formula.

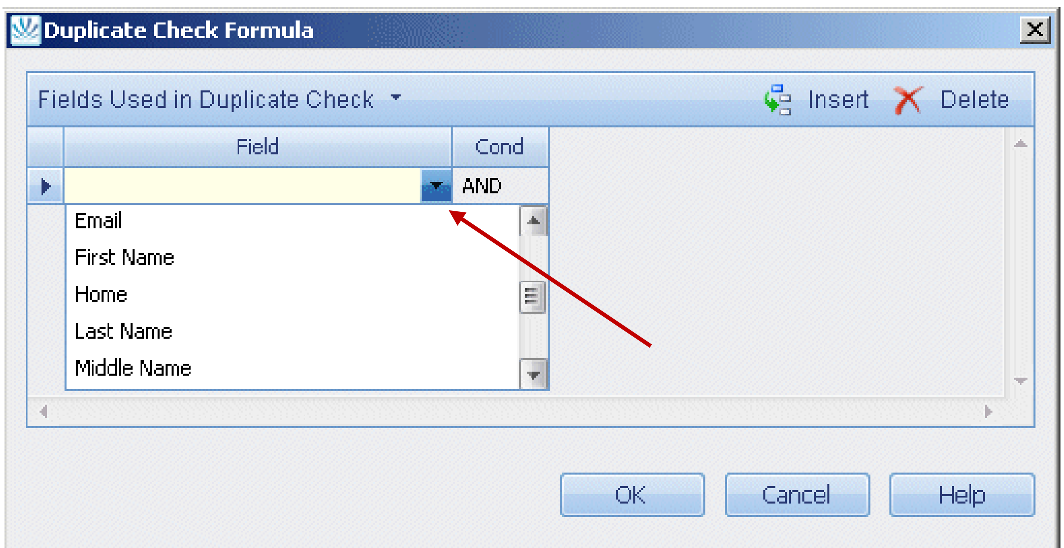
   In the following example, duplicate check fields are being selected for contacts.



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



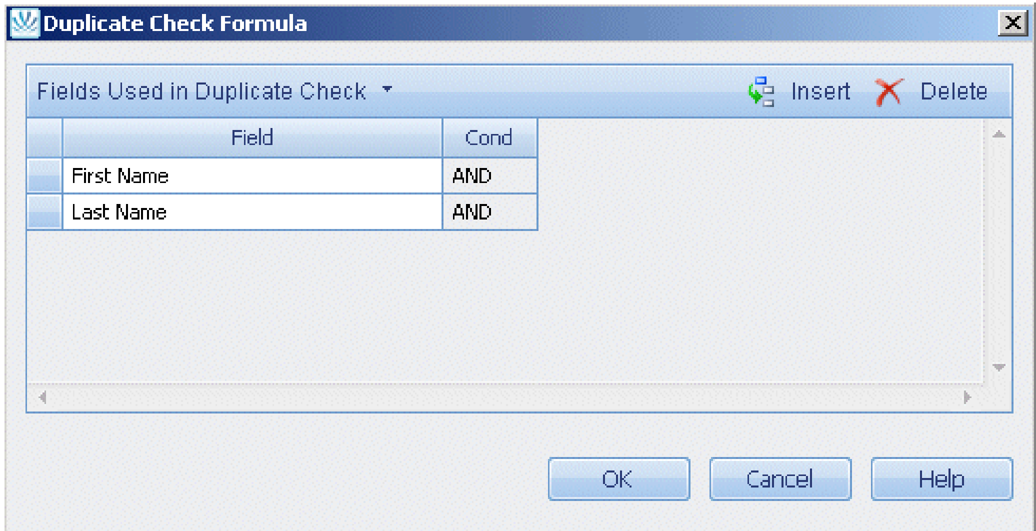
4. In the new row, click  in the **Field** column, and from the drop-down list, select a field to add to the duplicate check formula.



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

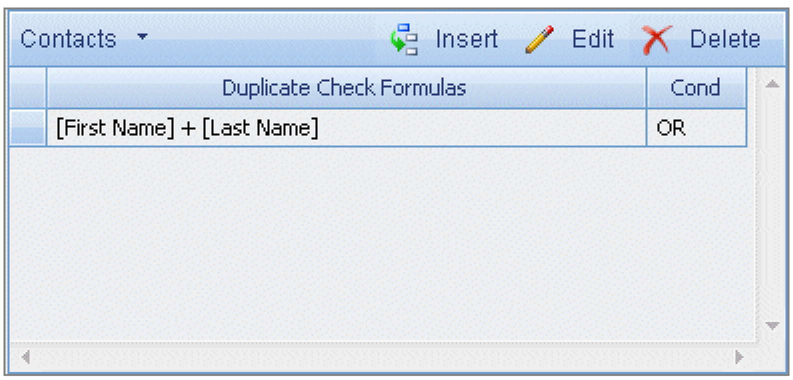
- You must select at least one field for a duplicate check formula.
- There is no limit to the number of fields that you can add to a duplicate check formula.
- The **Cond** column in the grid on the Duplicate Check Formula dialog box always displays **AND** to indicate that an AND operator is used between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

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



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

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

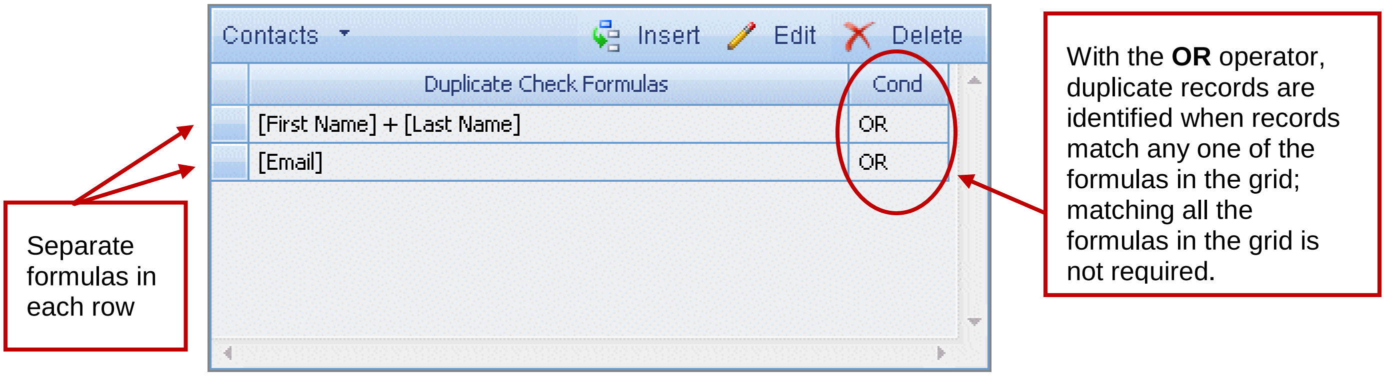


7. Repeat steps 2 through 6 to add another duplicate check formula.

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

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

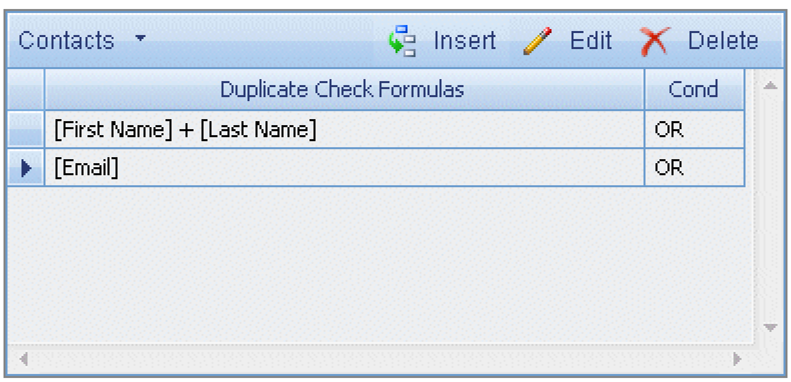
During synchronization, a duplicate contact is detected when multiple contacts have the same first and last names **or** when their email address is the same.



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

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

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



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

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

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

2. Click **Delete** on the grid toolbar. The formula/row is immediately deleted.

Specify Where You Want Vision Activities to Display

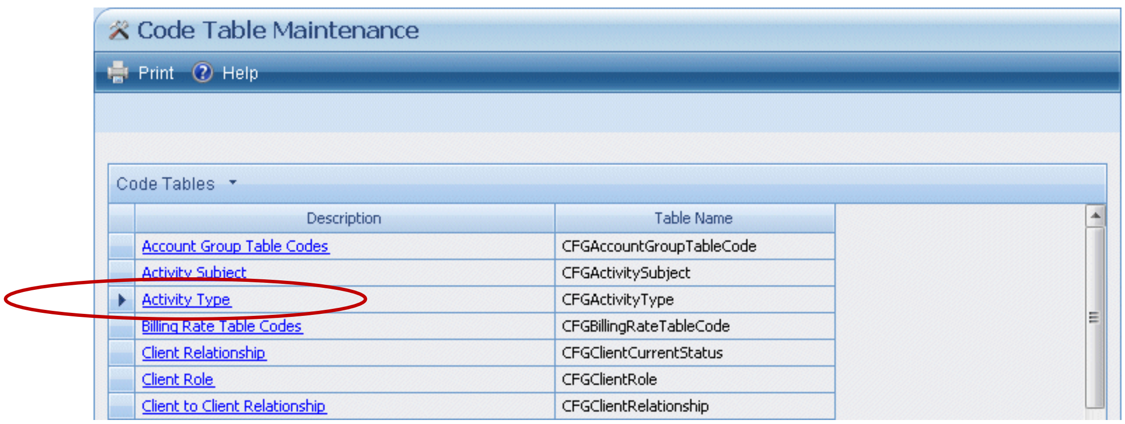
A Vision system administrator specifies where different types of Vision activities display in Connect for Microsoft Outlook. Vision activity types include appointments, mailings, meetings, tasks, and so on. You choose whether these display as calendar items, tasks, and/or items in the Activity Manager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

The Activities display setting:

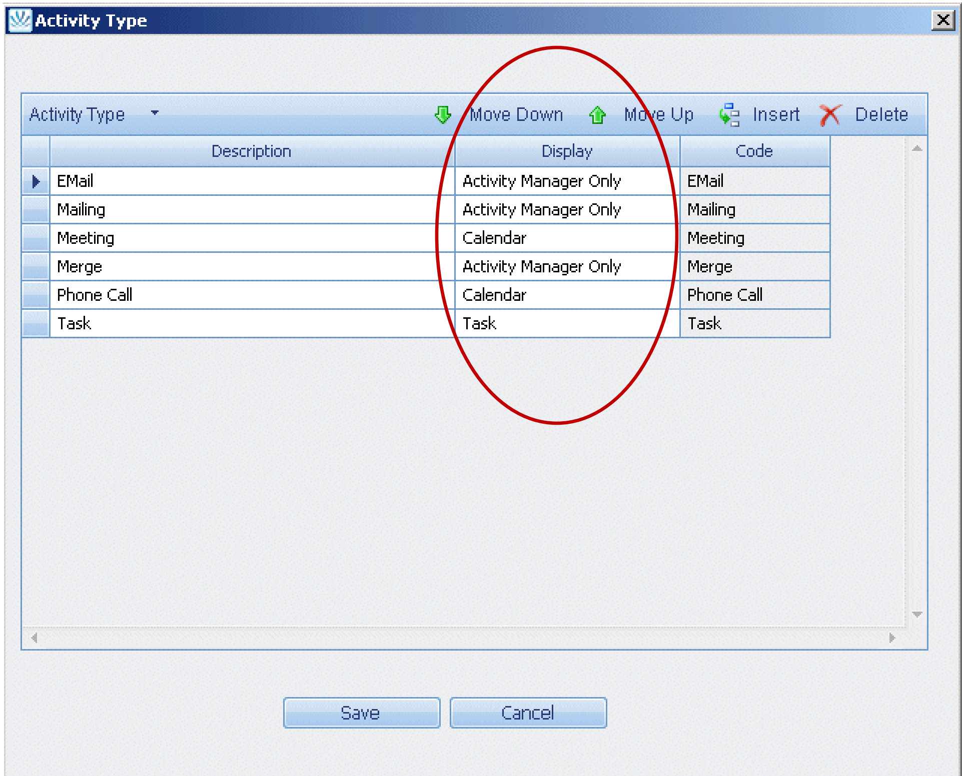
- Applies for all Vision users.
- Determines where the activities display in the Vision software as well as in Connect for Microsoft Outlook.

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

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



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



The display locations are:

- **Calendar**

  The calendar activity type displays in the following locations:

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

- **Task**

  The task activity type displays in the following locations:

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

- **Activity Manager Only**

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

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

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

Provide Security Access to Connect for Microsoft Outlook Users

Vision security is applied directly in Connect for Microsoft Outlook.

The Vision security role assigned to Vision users determines:

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

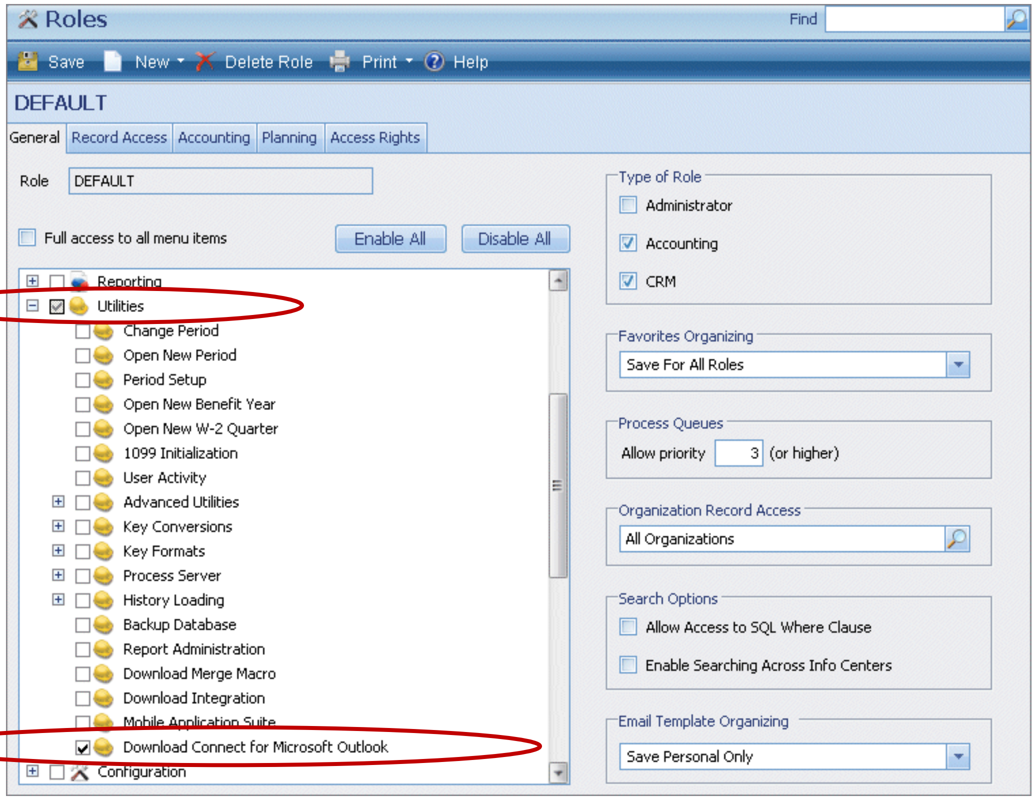
The Vision security role and screen designer settings described in this section allow users to view, create, modify, delete, and associate Vision records in Vision as well as in Connect for Microsoft Outlook.

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

Access to Download Connect for Microsoft Outlook

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

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



Access to Vision Applications

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

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

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

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

Access to Individual Records Within Vision Applications

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

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

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

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

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

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

Deleting Records

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

Associations

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

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

When you use a lookup dialog box in Connect for Microsoft Outlook to create an association with other Vision records, the lookup dialog box will contain only records that have been synchronized with Connect for Microsoft Outlook. This includes any records that matched your synchronization filter (complete records) and records that were synchronized because they are associated with a record that match your filter (incomplete records). See "Appendix A: Complete and Incomplete Records" on page 100 for more information about complete and incomplete records.

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

- When you use a lookup dialog box to select an employee or project record to associate with another record, if you do not have access rights to the Employee or Project Info Center, then you can see and associate only the employee or project records for which you have view rights.
- When you use a lookup dialog box to select a client, contact, vendor, opportunity, or activity record to associate with another record, you must have both access rights to the Client, Contact, Vendor, or Opportunity Info Center or the Calendar/Activities application and view rights to the specific record to be able to make an association. You cannot

make associations with these records if you have view rights only; you must have both access and view rights.

- If your security role has rights to access an application and update records in that application, in addition to making an association with record from that application, you can edit the associated record if needed.

Access to Fields Within Vision Applications

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

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

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

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

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

Employees and Projects

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

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

Vision Workflows

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

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

Workflows Example

Scenario:

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

Results:

Vision first checks your security role.

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

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

Configuration Settings Passed from Vision to Connect for Microsoft Outlook

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

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

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

Configuration changes made after the initial synchronization

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

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

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

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

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

Back Up Your Outlook Data

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

Export Data to a PST File

To back up data in Outlook, export data to a PST file by completing the following steps:

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

Copy Your Outlook Contacts Folder

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

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

This section is for **new** Connect for Microsoft Outlook users who are installing Connect for Microsoft Outlook for the first time.

The following instructions describe how individual Connect for Microsoft Outlook users can download and install Connect for Microsoft Outlook on their workstations with Vision Utilities.

Other ways that a system administrator can install the Connect for Microsoft Outlook 7.0 on users' workstations include the following:

- Use command line parameters to install Connect for Microsoft Outlook on multiple workstations. For instructions, see page 56.
- Download and install Connect for Microsoft Outlook on multiple workstations using Microsoft System Center Configuration Manager (SCCM) or Group Policy. For instructions, see page 59.

Connect for Microsoft Outlook **cannot** be installed on multiple machines using Outlook profiles configured to the same mailbox. To install it on a single workstation, you **must** be logged into that machine as the user account whose mailbox is being used. That user **must** be a member of the local administrator group on that machine during the installation. Local administrator rights are not needed after the installation.

If you install Connect for Microsoft Outlook on multiple machines using Outlook profiles configured to the same mailbox, you can damage the mailbox customizations, which may be time consuming to fix.

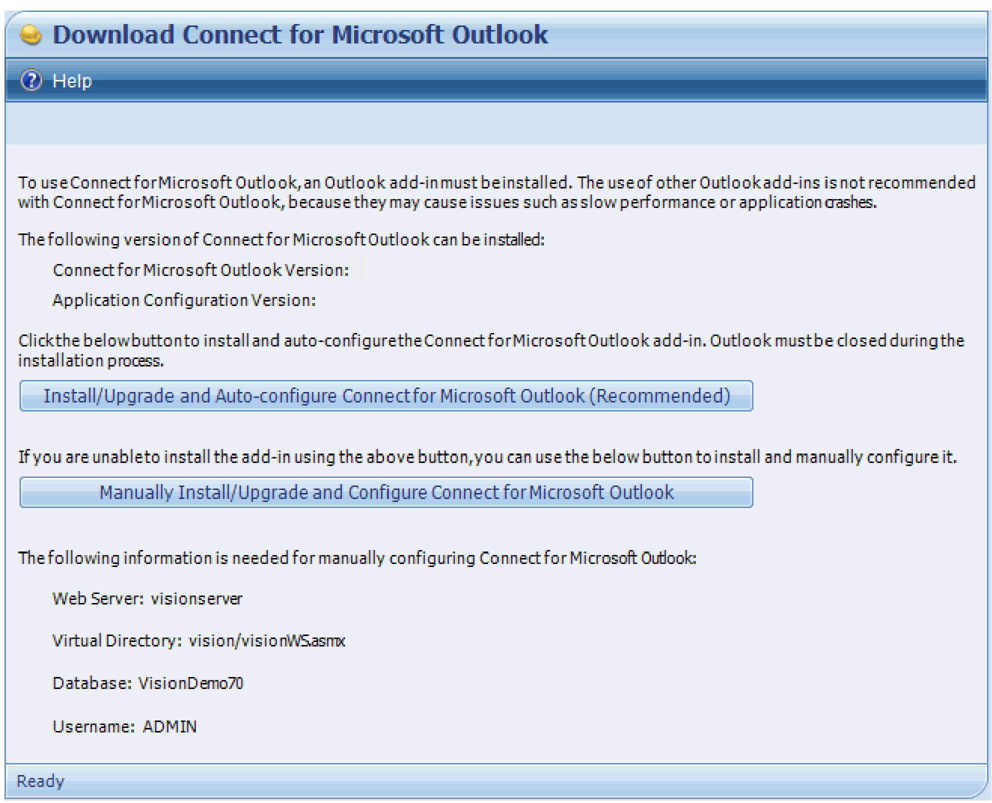
Before you download and install Connect for Microsoft Outlook on a workstation, the following tasks must be completed:

- You must have installed all the required software, and a Vision system administrator must have completed the Connect for Microsoft Outlook global configuration, as outlined in the previous sections of this guide.
- Microsoft Outlook must be installed on your workstation.
- An Outlook profile must be created for you.
- You must have opened Outlook and configured it.
- Because some antivirus products can interfere with installations, we recommend that you temporarily disable any antivirus products that are on a workstation. You can enable them immediately after you complete the Connect for Microsoft Outlook First Run Assistant (FRA) wizard.

Your Vision security role must have access rights to the Download Connect for Microsoft Outlook utility. See the "Access to Download Connect for Microsoft Outlook" section on page 45 of this guide for more information.

To download and install the Connect for Microsoft Outlook software on your workstation for the first time using Vision Utilities, complete the following steps:

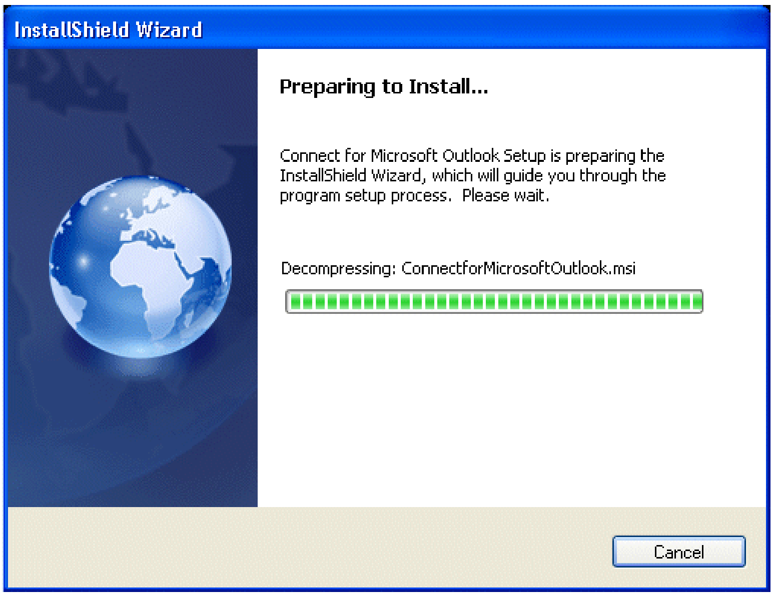
1. Close Outlook on your workstation.
2. On the Navigation menu in Vision, click **Utilities » Download Connect for Microsoft Outlook**.
3. On the Download Connect for Microsoft Outlook form, read the information on the screen, and click **Install and Auto-configure Connect for Microsoft Outlook** to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



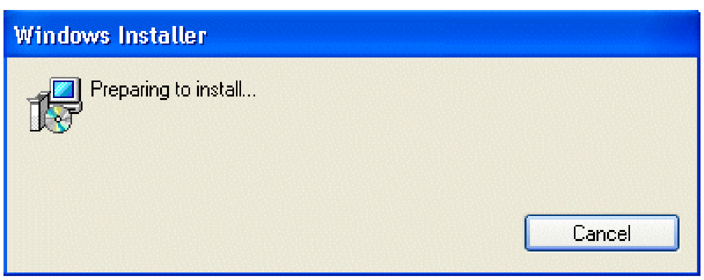
When you click the **Install and Auto-configure Connect for Microsoft Outlook** button, the Vision credentials that you used to log on to Vision will prefill in the Deltek - Login dialog box when you complete the Connect for Microsoft Outlook Assistant as described in the "Configure Connect for Microsoft Outlook on a Workstation" section on page 60.

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

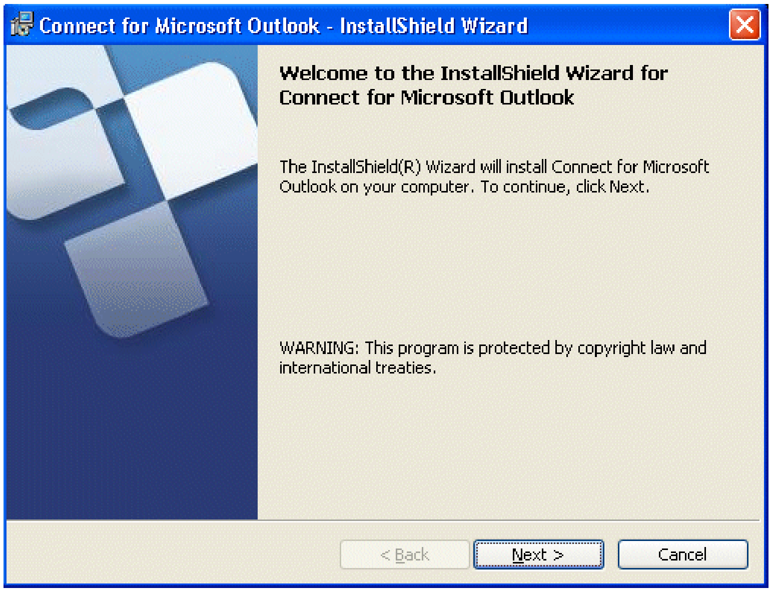
The Preparing to Install… wizard page displays.



The Preparing to install…dialog box displays.



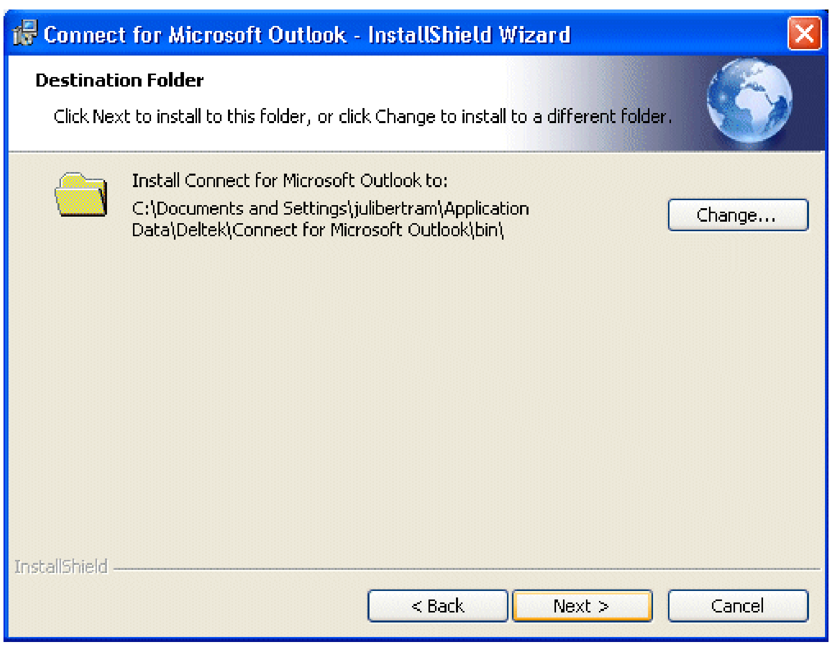
4. On the Welcome to the InstallShield Wizard… page, click **Next**.



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

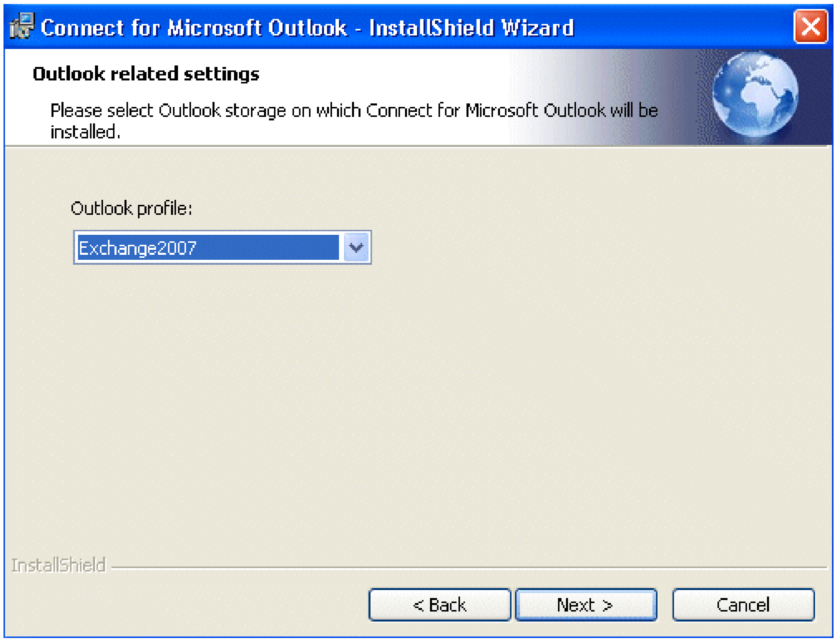
The default location is **C:\Documents and Settings\<*your user name*>\Application Data\Deltek\Connect for Microsoft Outlook\bin**.

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

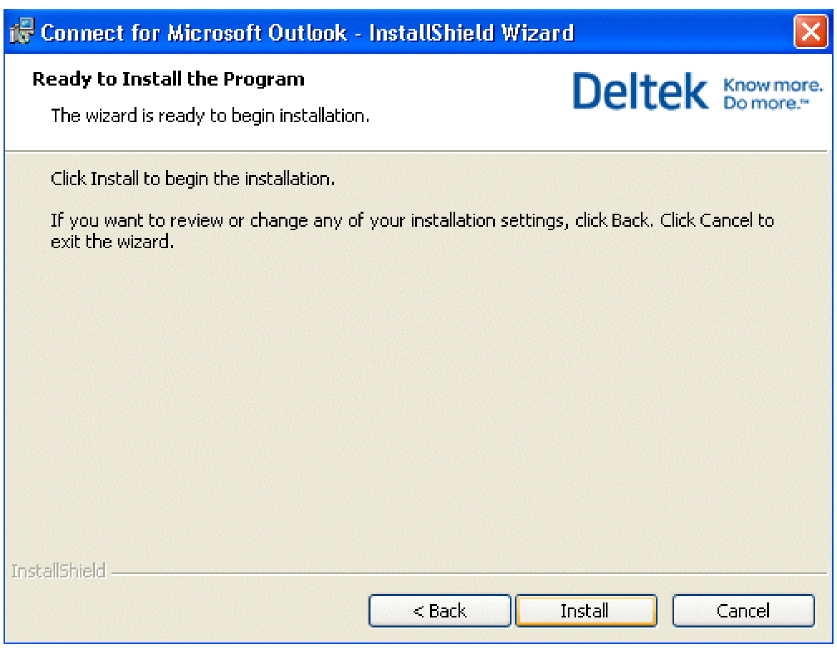


6. On the Outlook related settings page, select the Outlook profile to which to install Connect for Microsoft Outlook.

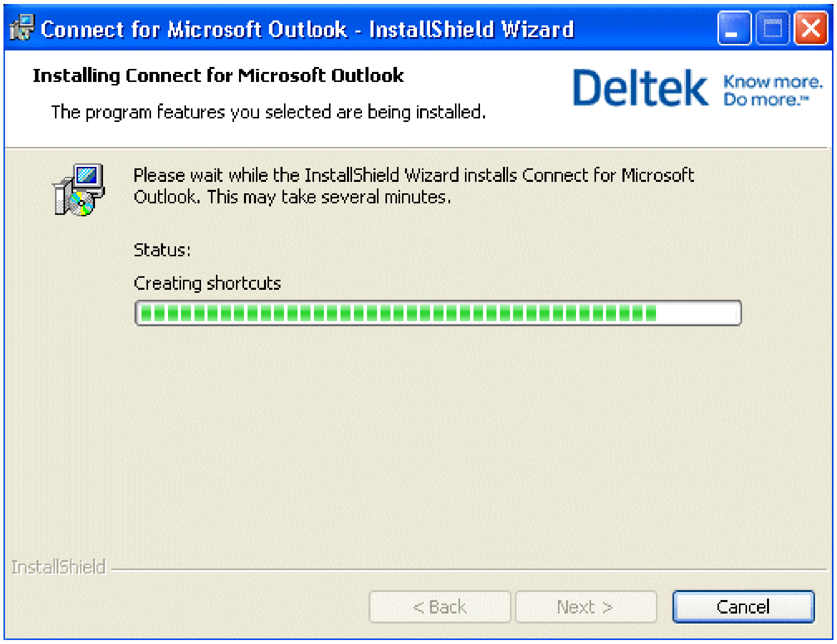
   The drop-down list displays only the profiles with the supported default email delivery locations described in the “Supported Microsoft Outlook ” section on page 11.



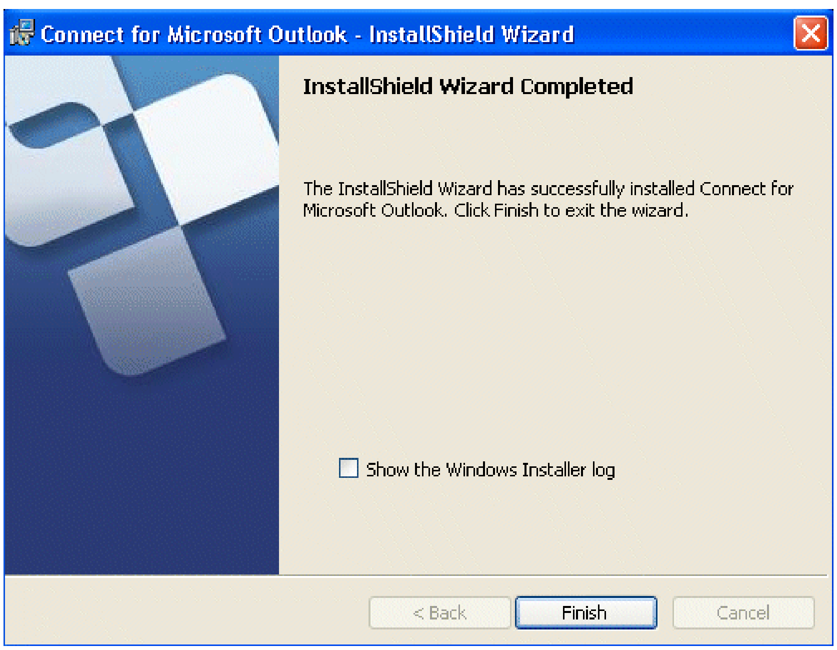
7. On the Ready to Install the Program page, click **Install** to start the installation.



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



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



You can now open Outlook and complete the Connect for Microsoft Outlook First Run Assistant to enter Connect for Microsoft Outlook configuration settings. See the "Configure Connect for Microsoft Outlook on a Workstation" section on page 60 for instructions.

Download and Install Connect for Microsoft Outlook on Multiple Workstations Using Command Line Parameters

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

After you follow the instructions in this section to install Connect for Microsoft Outlook on workstations, users can open Outlook and complete the Connect for Microsoft Outlook First Run Assistant to enter Connect for Microsoft Outlook configuration settings. See the “Configure Connect for Microsoft Outlook on a Workstation” section on page 60.

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

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

Because some antivirus products can interfere with installations, we recommend that you temporarily disable any antivirus products that are on a workstation. You can enable them immediately after you complete the Connect for Microsoft Outlook First Run Assistant (FRA) wizard.

The Connect for Microsoft Outlook installer contains an MSI package that supports most of the command line parameters for installing MSI for multiple users.

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

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

msiexec.exe /?

To use parameters with the Connect for Microsoft Outlook installer, you must use ***/v*** and then pass the other parameters. See the examples on page 59.

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

- http://kb.flexerasoftware.com/doc/Helpnet/installshield16helplib_sp1/IHelpSetup_EXECmdLine.htm
- http://kb.flexerasoftware.com/doc/Helpnet/installshield12helplib/IHelpSetup_EXECmdLine.htm

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Set Optional Parameters During Installation

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

1. Open a DOS command line.
2. Navigate to the directory that contains the **ConnectforMicrosoftOutlookSetup.exe** file, such as C:\Users\Administrator\Desktop.
3. Enter the command. Use the following syntax:

   ConnectforMicrosoftOutlookSetup.exe /v"<*optional_parameter_1*> <*optional_parameter_n*>"

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

   - For silent installations, you must specify the (/qr) parameter if you want to display a limited graphical user interface that allows users to see the status of the installation.
   - You must specify each optional parameter in the same command line after the name of the **ConnectforMicrosoftOutlookSetup.exe** file.
   - The ConnectforMicrosoftOutlookSetup.exe client installation file contains the MSI file that is used with msiexec.exe to perform the installation. In order to pass the optional parameters to the MSI file, you must use the /v option to pass command-line options and values through to the file.

     The entire set of parameters in the command line after the /v must be enclosed between a pair of double quotation marks (" ").

     Also, when a character is not a delimiter for the command line (it is a delimiter for the property/parameter value), you must enclose the character between a pair of backslashes and double quotation marks (\" \").
   - Parameter values must be enclosed between a pair of backslashes and double quotation marks.

     Example: \"<*parameter value*>\"
   - Each parameter must be separated by a single space as seen in the "Parameter Examples" section below.

   You can arrange optional parameters in any order. However, it is recommended that you put the (/qr) at the end of the parameter list.

4. Click **Enter**.

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

   You can use the optional /qr parameter at the end of your command line (to perform a silent installation) to automatically execute the dialog boxes that normally require user action. When you use the /qr parameter, the installer does not display dialog boxes that require user action.

   If your users currently have Connect for Microsoft Outlook from Vision 6.1 SP4 or earlier installed, they will be prompted during the installation that the installation will remove the data from the previous configuration and they will be presented with Yes or No options. The user must select Yes to continue. After synchronization with the new version, the data will return.

Optional Values and Parameters

The following special values are supported for the optional OL_PROFILE parameter:

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

Parameter Examples

Parameters

The following Deltek parameters that correspond to the initial Connect For Microsoft Outlook login and configuration form can be passed to the installer to preconfigure the application.

In the following list, optional parameters and switches are listed on separate lines to make it easy to follow. If you copy and paste these examples into a text file, remember to replace the carriage returns with a space. Also, remember there should be **no** space between the /v and the first double quotation mark.

Deltek Parameters	Value Description
OL_PROFILE=	This is an optional parameter. This is the Microsoft Outlook mail profile name that is found in the Windows **Control Panel » Mail » Show Profiles** section. If you are unsure what the mail profile name will be, do not enter this parameter. The Connect for Microsoft Outlook installation has built-in intelligence to use the default mail profile if this is not specified. This should be used only when a user has multiple Outlook mail profiles and the default is not being used with Connect for Microsoft Outlook. Example: OL_PROFILE=\"Outlook\"
DELTEK_SERVER_URL=	URL (with optional port number) to the Vision Web service ASMX page on the Vision Web server. The URL always ends in **visionws.asmx**. Example: DELTEK_SERVER_URL=\"http://webserver:80/vision/visionws.asmx\"
DELTEK_DATABASE=	This is the description field of the Vision database that you are connecting (as displayed in Weblink or from the login drop-down list). Example:

Deltek Parameters	Value Description
	DELTEK_DATABASE=\"VisionDemo62 (DBSERVER1)\"
DELTEK_USERNAME=	This is the Vision Login/Username. Use this parameter if you are **not** using Integrated Authentication to log in to Windows. This cannot be used with the DELTEK_NT_AUTH parameter. Example: DELTEK_USERNAME=\"ADMIN\"
DELTEK_NT_AUTH=	Enter this parameter if you are using Windows Integrated Authentication to log in to Vision. Example: DELTEK_NT_AUTH=\"1"

Command Line and Parameter Examples

Examples	Value
Example 1 The Outlook profile named “Outlook” is specified, and Deltek Security is used. Optional Windows Installer /qr switches are used to display installation status with no user interaction required.	"\\fileserver1\Deltek\ConnectforMicrosoftOutlookSetup.exe" /v"OL_PROFILE=\"Outlook\" DELTEK_SERVER_URL=\"http://webserver/Vision/VisionWS.asmx\" DELTEK_DATABASE=\"VisionDemo (DBSERVER1)\" DELTEK_USERNAME=\"ADMIN\" /qr"
Example 2 No Outlook profiles are specified and Windows Authentication is used. Optional Windows Installer /qr switches are used to display the installation status with no user interaction required.	"\\fileserver1\Deltek\ConnectForMicrosoftOutlookSetup.exe" /v"DELTEK_SERVER_URL=\"http://webserver:80/Vision/VisionWS.asmx\" DELTEK_DATABASE=\"VisionDemo61 (DBSERVER1)\" DELTEK_NT_AUTH=\"1\" /qr"
Example 3 Uninstalling with a command line parameter	**/uninstall** "\\fileserver1\Deltek\ConnectForMicrosoftOutlookSetup.exe" /x /S /v /qn

Download and Install Connect for Microsoft Outlook Using Microsoft SCCM, Group Policy, or Batch Files

A system administrator can use Microsoft System Center Configuration Manager (SCCM), Group Policy, or batch files to install Connect for Microsoft Outlook for multiple users. This section contains a summary of the installation steps using Microsoft SCCM 2003 Server and Group Policy.

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

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

Because some antivirus products can interfere with installations, we recommend that you temporarily disable any antivirus products that are on a workstation. You can enable them immediately after you complete the Connect for Microsoft Outlook First Run Assistant (FRA) wizard.

The following are general guidelines for using SCCM or Group Policy to install Connect for Microsoft Outlook:

- Create a collection that contains the users, computers, workgroups, or domains to which you want to distribute the Connect for Microsoft Outlook software.
- Create a distribution package for the collection you created. The distribution package should contain the Connect for Microsoft Outlook installation and command line parameters that you specify for the collection.
- When you enter command line information for program identification for the distribution package, you can enter either of the following:
  - The command line and the individual parameters.
  - A batch file containing the command line with any parameters you elect to use.

You can add optional parameters to the command line or the batch file. See the "Download and Install Connect for Microsoft Outlook on Multiple Workstations Using Command Line Parameters" section on page 56.

- Create an advertisement of the distribution package for the collection.
- The distribution package must be run with administrative rights.
- Notify Connect for Microsoft Outlook users that Connect for Microsoft Outlook is ready for them to configure on their workstations.

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

Configure Connect for Microsoft Outlook on a Workstation

When you open Outlook after you install Connect for Microsoft Outlook for the first time on a workstation, the Connect for Microsoft Outlook Assistant starts automatically. It guides you through the steps to configure Connect for Microsoft Outlook. After you enter configuration settings with the Connect for Microsoft Outlook Assistant and the initial synchronization finishes, you can start to use the Connect for Microsoft Outlook software.

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

For more information about synchronization schedules and automatic synchronization after the initial synchronization, see "Appendix E: Synchronization Schedules" on page 129.

Summary of Configuration Information

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

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

Steps to Configure

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

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

If you have more than one Outlook profile, you must enter the profile to which you installed Connect for Microsoft Outlook. This is the profile that you entered when you downloaded and installed Connect for Microsoft Outlook from the Download Connect for Microsoft Outlook form in Vision **Utilities » Download Connect for Microsoft Outlook**.

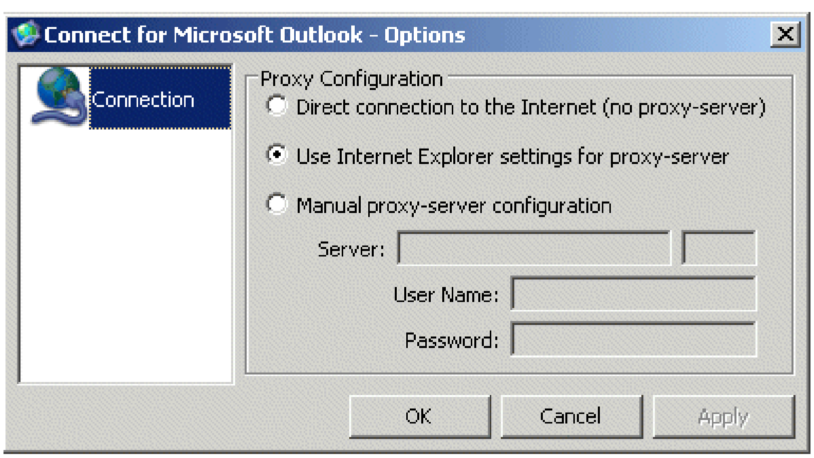
The Connect for Microsoft Outlook Assistant Welcome page displays in Outlook.

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

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

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

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



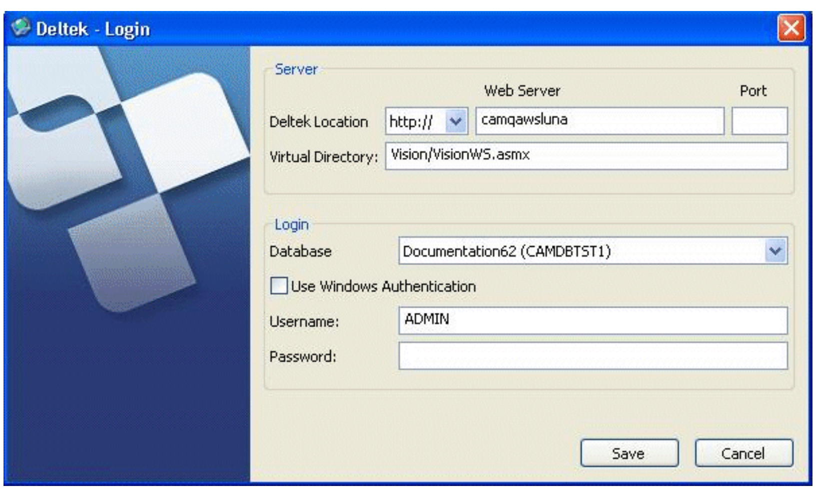
   Your Vision system administrator can provide you with Internet connection information if the connection is not made automatically.

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

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

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

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



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

   Server section:

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

   Login section:

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

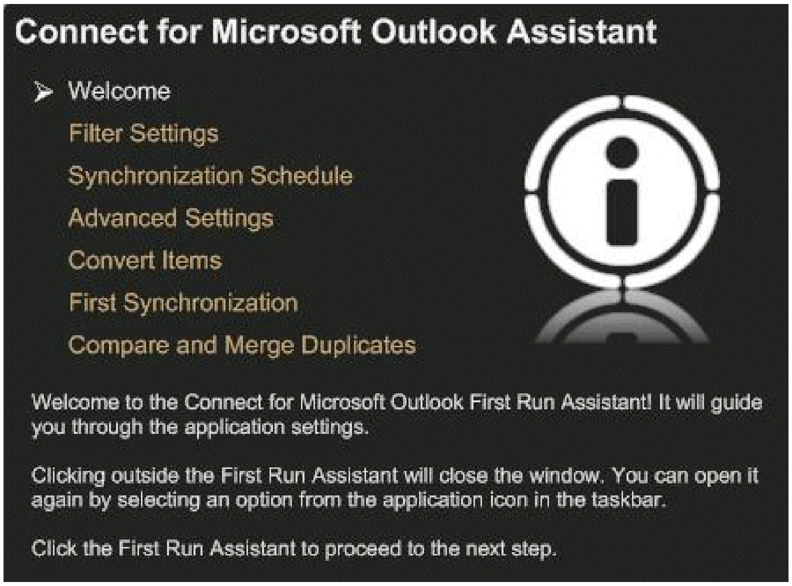
   - **Database** — After you enter the server information and connections are made, a list of available Vision databases display in the drop-down list. Select the appropriate Vision database.
   - **Use Windows Authentication** — Select this check box to use your Windows user name and password.
   - **User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

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

   The configuration settings that are based on your Vision employee information are automatically downloaded from Vision and applied to Connect for Microsoft Outlook during the "Obtain Package" process. This can take a few minutes. A box displays the progress of this download.

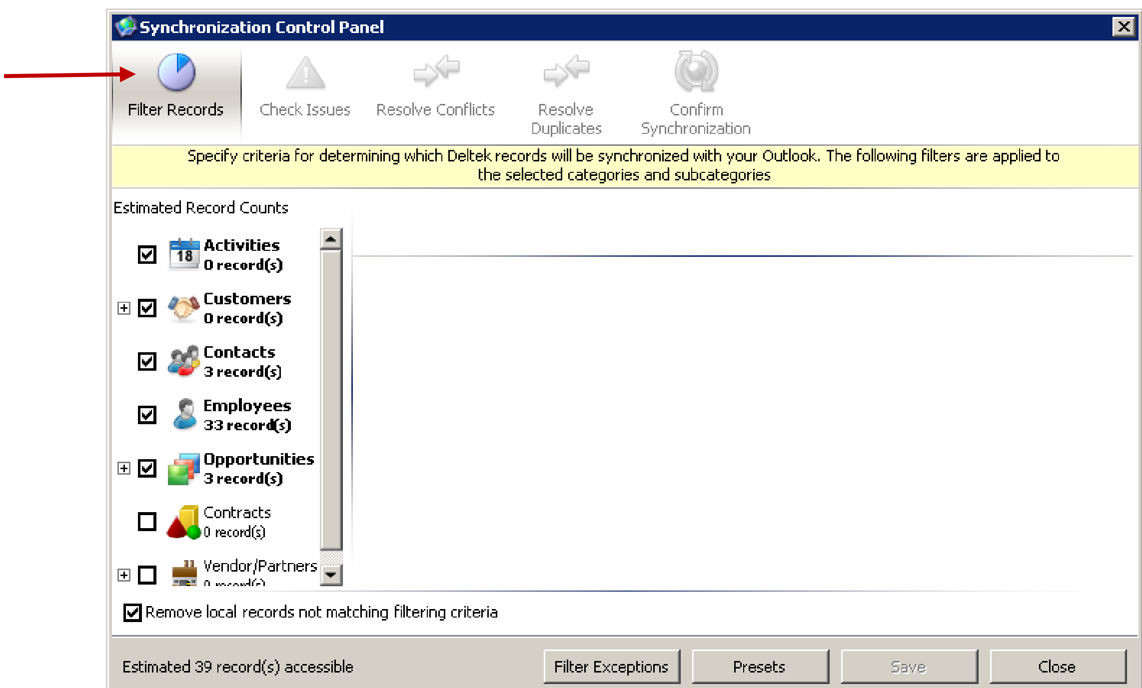
   

   When this process finishes, the following Connect for Microsoft Outlook Assistant Welcome page displays.



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

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

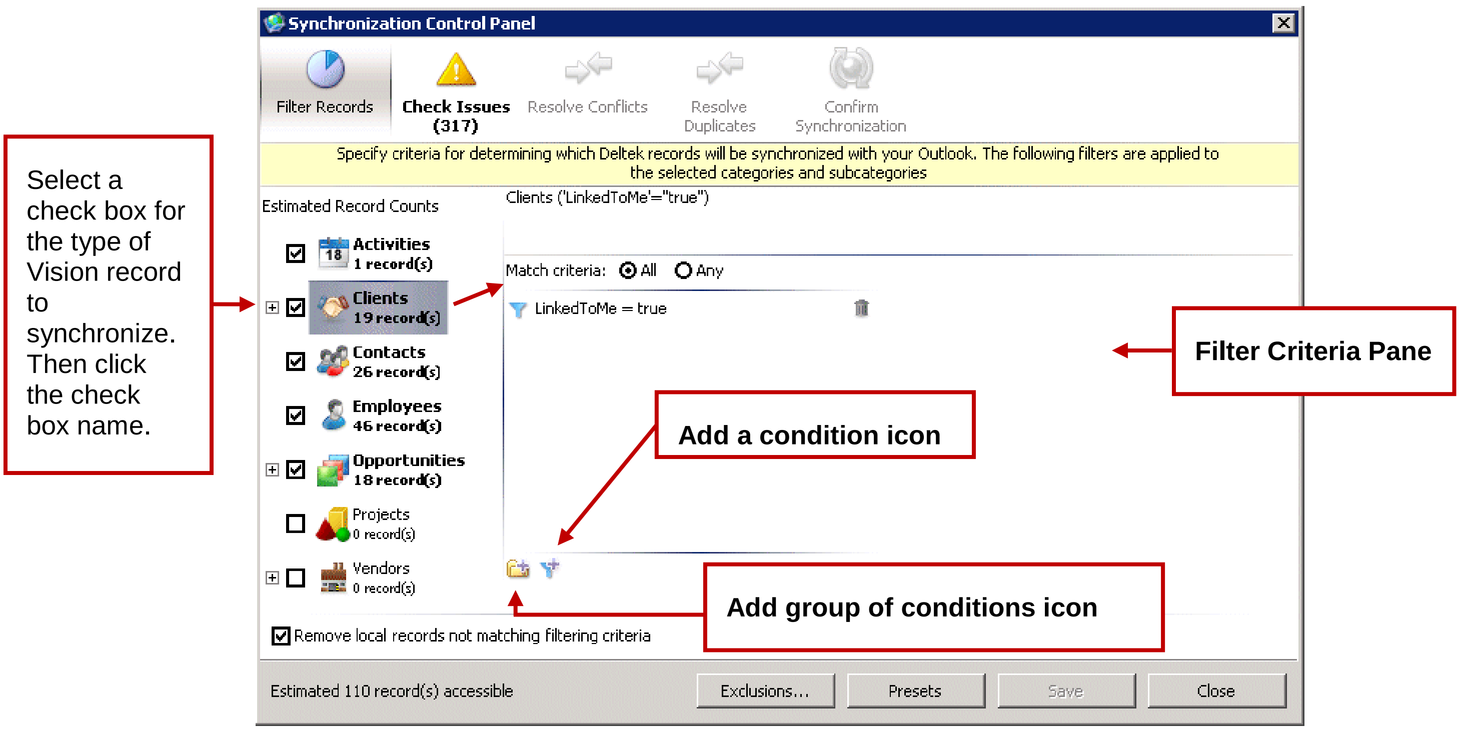


Set the filters to select only the records that you normally work with. Filtering records limits the amount of records that synchronize from Vision to Connect for Microsoft Outlook. This reduces the time it takes to synchronize.

On the Filter Records tab, you cannot save the filter if more than 7,000 Vision records match the filter criteria. For optimal performance, Deltek recommends no more than 5,000 records. The record count includes only complete records that match your filter. It does not include incomplete records that are synchronized because of associations.

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

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



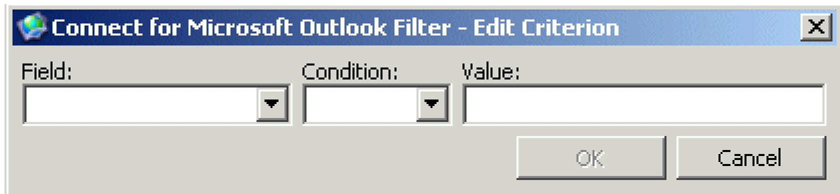
In the filter criteria pane, you see the default filter — **LinkedToMe = true**.

See "Appendix D: Synchronization Filters" on page 112 for more information about the default filters for Vision record types.

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

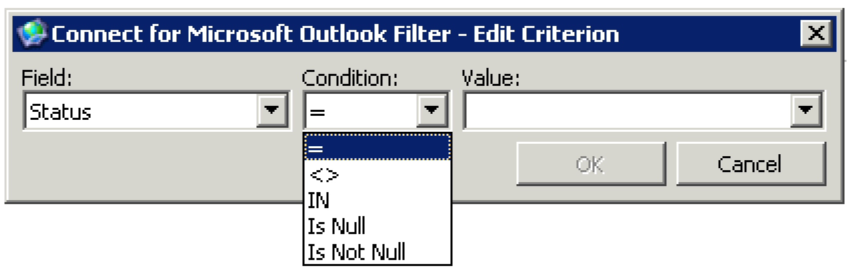
Check box names (**Activities**, **Customer**, **Contact**, and so on) on the Filter Records screen are bolded when filter conditions have been entered for them.

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

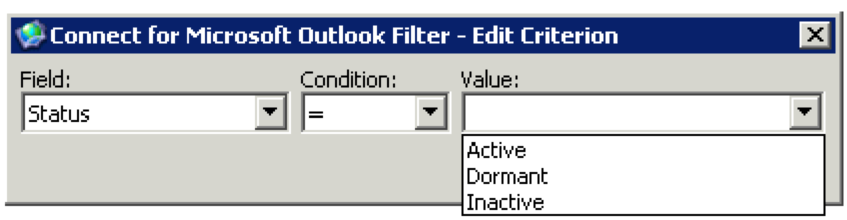


Filter condition example: To create a condition that retrieves all clients with an active status, select **Status** in the **Field** field, **=** in the **Condition** field, and **Active** in the **Value** field.

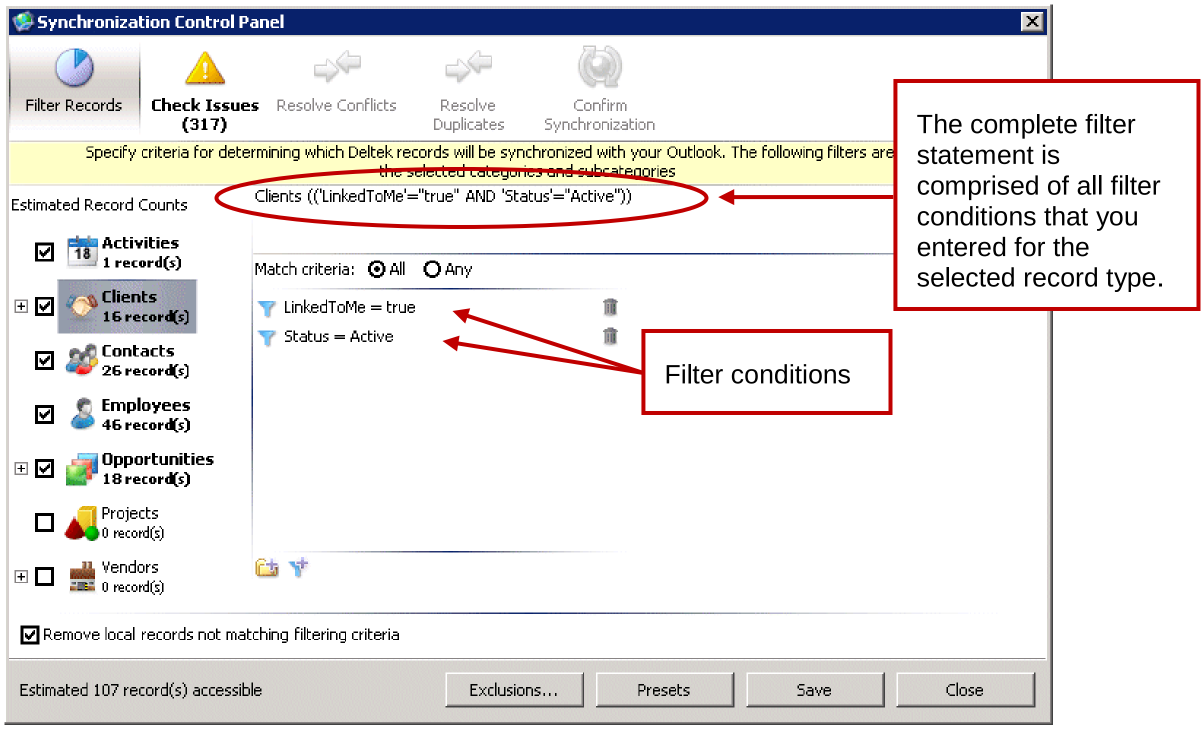
- The fields that display in the **Field** drop-down list are determined by the record (Activities, Client, Contact, and so on) that you choose on the Filter Record screen.
- The **Condition** drop-down list contains options, such as **=** (equal to), **<>** (except), **Is Null** (empty), and so on,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



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



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



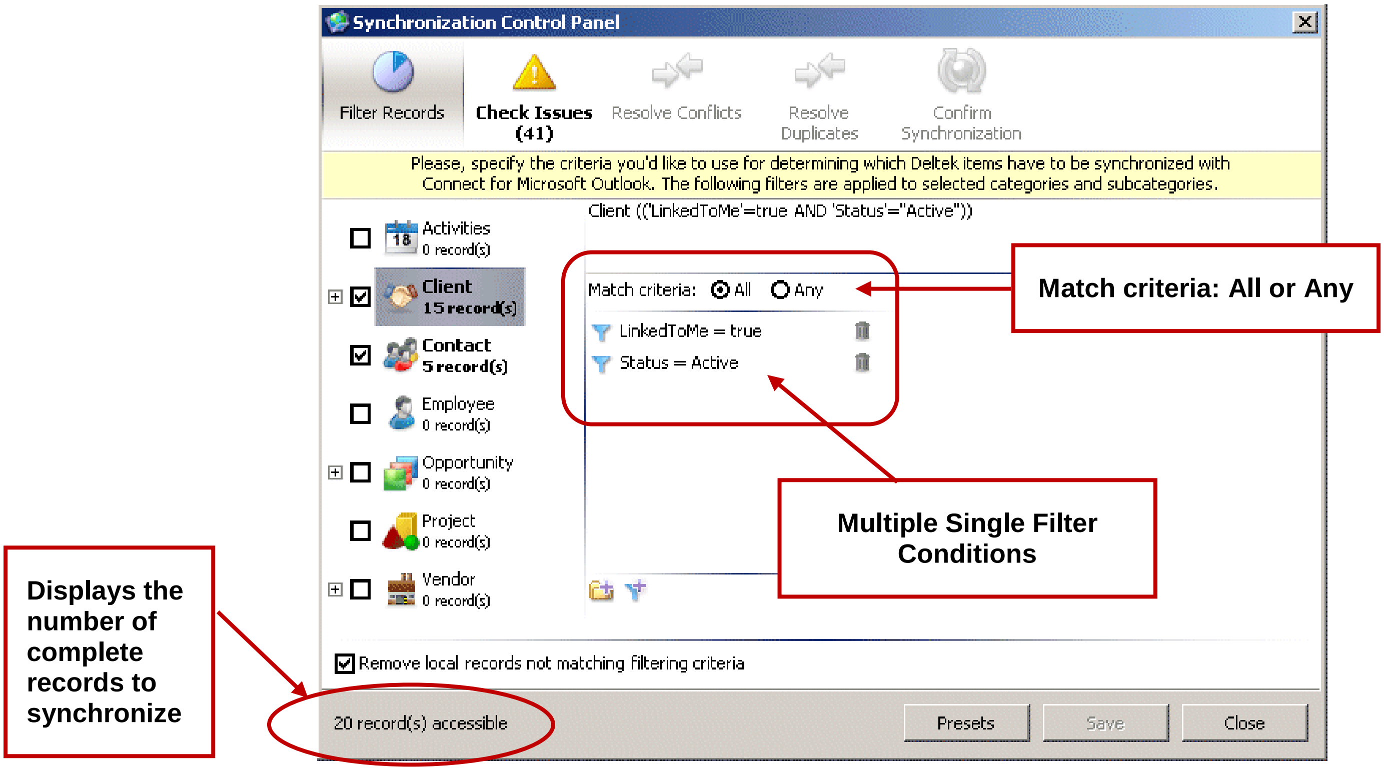
11. To enter additional filter conditions, repeat step 9. You can add:
    - An unlimited number of single conditions.
    - Conditions for the records that are associated with top-level records.
    - A group of conditions (nested conditions) using the **Add group of conditions** icon.

See "Appendix D: Synchronization Filters" on page 112 for more information about creating filter conditions. This includes instructions on how to create conditions for associated records and group conditions.

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

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

See "Appendix D: Synchronization Filters" on page 112 for more information on group conditions.



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

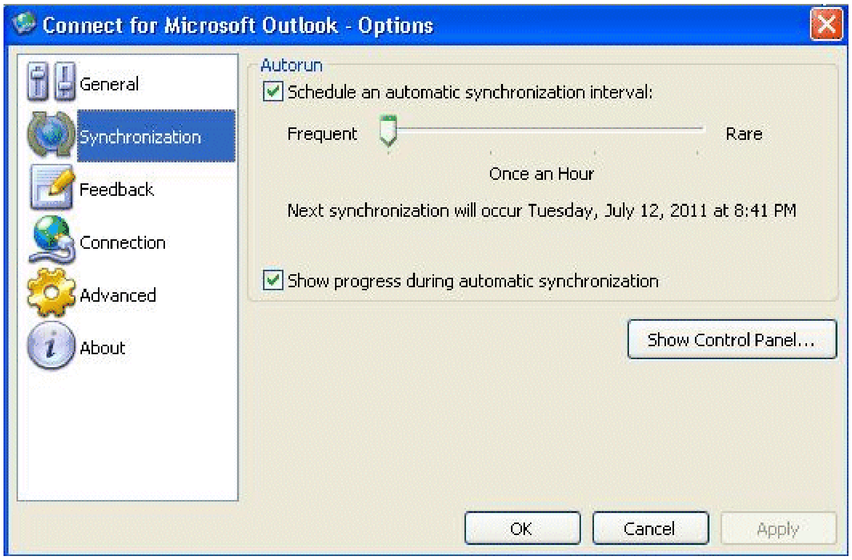
See "Appendix A: Complete and Incomplete Records" on page 100 for more information and an example of complete and incomplete records.

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

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

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

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



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

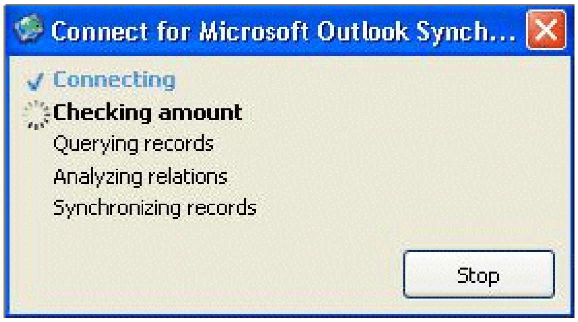
  The options are:

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

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

  See "Appendix E: Synchronization Schedules" on page 129 for more information about automatic synchronization scheduling.

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



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

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

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

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

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

15. When you finish entering settings on the Synchronization tab of the Options dialog box, click **OK** to save your settings. The Advanced tab of the Connect for Microsoft Outlook - Options dialog box displays automatically.

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

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

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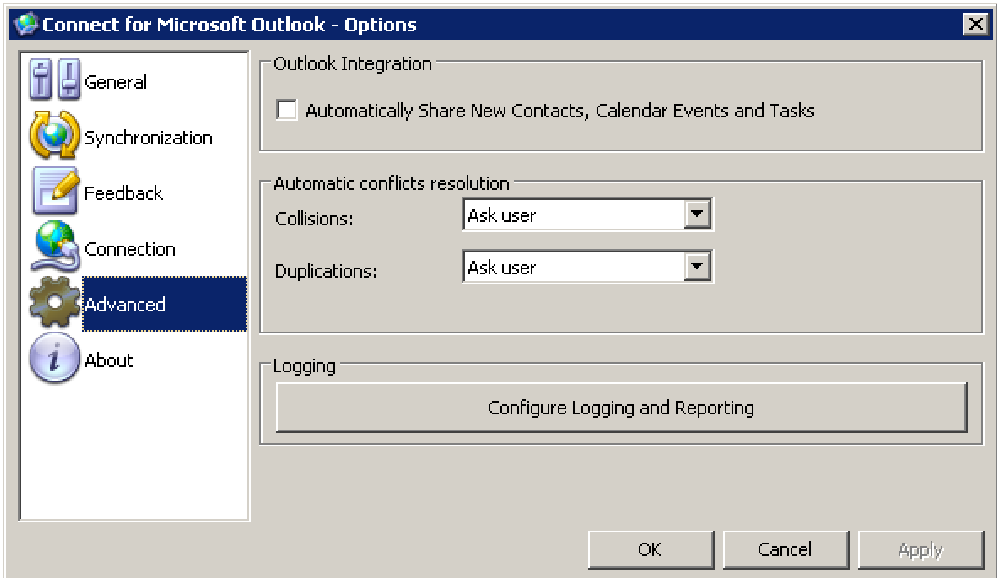
16. On the Advanced tab of the Connect for Microsoft Outlook - Options dialog box, select the **Automatically Share New Contacts, Calendar Events and Tasks** check box if you want new contacts, activities, and tasks that you create in Connect for Microsoft Outlook to be shared automatically with Vision by default. New shared records are updated in Vision when you synchronize Connect for Microsoft Outlook.



- After you complete the Connect for Microsoft Outlook Assistant, you can change the default setting for sharing new contacts, calendar events, and tasks at any time by right-clicking the Connect for Microsoft icon on the Windows taskbar and selecting the Options menu. Then select the Advanced tab on the Connect for Microsoft Outlook – Options dialog box.
- You can easily change the prefilled default setting and share or not share a new record when you create individual records in Connect for Microsoft Outlook.
- You can switch records from shared to unshared and vice versa at any time by clicking the **Shared with Deltek** button at the top of a Contact, Task, or calendar item form in Connect for Microsoft Outlook.

17. In the **Automatic conflicts resolution** section, in the drop-down list in the **Collisions** and **Duplications** fields, select how you want to resolve collisions and duplicate records during synchronization.

    The options are:

    - **Ask user —** The Synchronization Control Panel displays when a conflict is encountered during the synchronization. You can choose to resolve one or more of the conflicts at that time. Or, you can close the Control Panel and resolve the conflicts at a more convenient time.
    - **Resolve to the Outlook side —** The conflict is resolved automatically by using the record from Outlook. The Deltek record is ignored.
    - **Resolve to the Deltek side —** The conflict is resolved automatically by using the record from Deltek. The Outlook record is ignored.

When you select **Ask user**, the Synchronization Control Panel displays when a conflict is encountered during synchronization. A system administrator can change this default so that a balloon pop-up notification displays on the Windows taskbar, instead. For specific instructions on how to change the default, see the *Customizing Configuration Settings in Connect for Microsoft Outlook Guide*, which is available at the Deltek Customer Care Connect site.

For more information about resolving conflicts see the “Resolve Conflicts” and the “Resolve Duplicates” topic in the Connect for Microsoft Outlook online help.

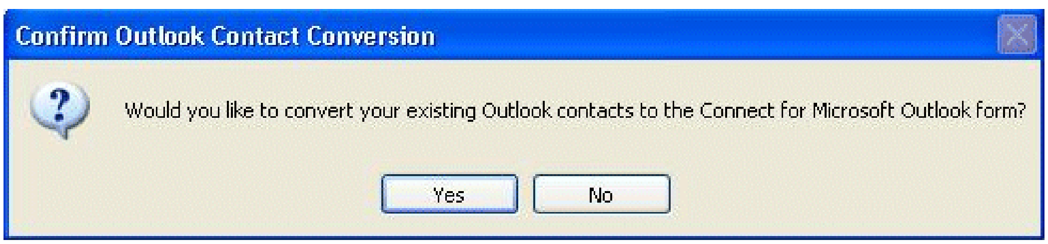
18. On the Advanced tab, click **OK** to continue.

You do not need to make any changes to the logging and reporting configuration settings in the **Logging** section of the Advanced tab. On the Logging Configuration dialog box that opens when you click the **Configure Logging and Reporting** button, the default setting in the **Logging Policy** field is **Basic**. You do not need to change this unless a Deltek Customer Care analyst instructs you to at a future time.

You can access the logging and reporting configuration at any time in Connect for Microsoft Outlook by opening the Connect for Microsoft Outlook – Options dialog box.

You can also use the Feedback tab of the Connect for Microsoft Outlook - Options dialog box to view and email the general log.

19. On the Confirm Outlook Contact Conversion dialog box, you choose whether or not to convert existing Outlook contacts to display on the Connect for Microsoft Outlook (Deltek) Contact form.



- Click **Yes** if you want all your existing Outlook contacts that were originally created in Outlook to be converted to display on the Deltek Contact form instead of the native Outlook Contact form.

  Deltek recommends that you click **Yes** if:

  - Most of your Outlook contacts should be added to Vision.
  - You have many Vision records already entered in Outlook.

- The Deltek Contact form contains Outlook fields and Vision fields such as **Client/Vendor** field, and the **Activities** and **Opportunities** grids. This form includes the Vision business logic. For example, fields that are required in Vision are required when you use the Deltek Contact form. An Outlook contact must display on the Deltek Contact form before you can share the contact with Vision.
- When you choose to convert all your Outlook contacts to display on the Deltek Contact form, the contacts are **not** shared with Vision until you change the Shared

with Deltek setting on the Deltek Contact form individually for each contact that you want to share.

If you convert all your Outlook contacts to display on the Deltek Contact form, you can easily convert one or multiple contacts back—to display on the native Outlook Contact form—at any time in Connect for Microsoft Outlook by using the **Convert to Native Outlook Form** command on the Actions menu.

For more information about the contact forms and sharing contact records, see "Appendix B: Contact Forms" on page 103 of this guide.

The online help in Connect for Microsoft Outlook has topics on converting contacts to display on the native Outlook Contact form or the Deltek Contact form and how to share or stop sharing contacts with Vision. See the Contacts book in the help Table of Contents.

Vision Synchronization Server Migrations

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

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

See the “Synchronization Server and Other Migrations: Prevent Duplicate Contacts” section on page 35 for more information about Synchronization Server migrations.

- Click **No** on the Confirm Outlook Contact Conversion dialog box if you want all your existing Outlook contacts to display on the native Outlook Contact form in Connect for Microsoft Outlook. If most of your Outlook contacts are private contacts, we recommend that you click **No**. This ensures that the Outlook **Company** field on the contact form is not a drop-down list with predefined Vision client or vendor names. The **Company** field remains a free-form field for your private, non-Vision contacts.

  Contacts that display on the native Outlook Contact form:

  - Remain as unshared contacts. They are not updated in Vision when you synchronize Connect for Microsoft Outlook.
  - Do not contain Vision data fields or Vision business logic.

  If you do not convert all your Outlook contacts to display on the Deltek Contact form, you can easily convert contacts to display on the Deltek Contact form at any time in Connect for Microsoft Outlook.

The online help in Connect for Microsoft Outlook has topics on converting contacts to display on the Deltek Contact form and how to share or stop sharing contacts with Vision. See the Contacts book in the help Table of Contents.

Calendar Items and Tasks

The converting process converts all existing calendar items and tasks to unshared if they do not match the synchronization filter criteria. If they match the filter criteria, they are automatically shared with Vision. You can share any calendar item or task on an item-by-item basis using the Shared with Deltek bar on the record form in Connect for Microsoft Outlook.

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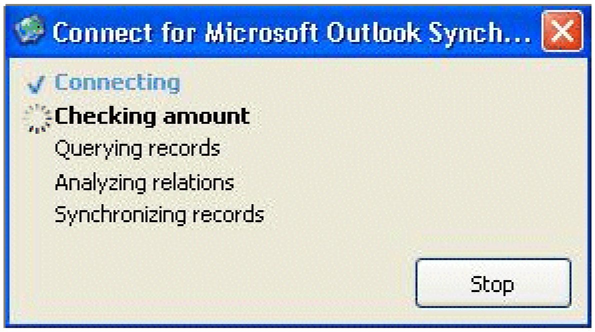
20. The Connect for Microsoft Outlook Synchronization dialog box displays automatically. Synchronization takes place to upload Vision data into Connect for Microsoft Outlook for the first time.



During the synchronization process, Vision data is downloaded into Connect for Microsoft Outlook based on the following:

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

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

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

For more information and an example of complete and incomplete records, see "Appendix A: Complete and Incomplete Records" on page 100.

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

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

When the Synchronization dialog box closes, the Compare and Merge Duplicate Contacts process begins automatically.

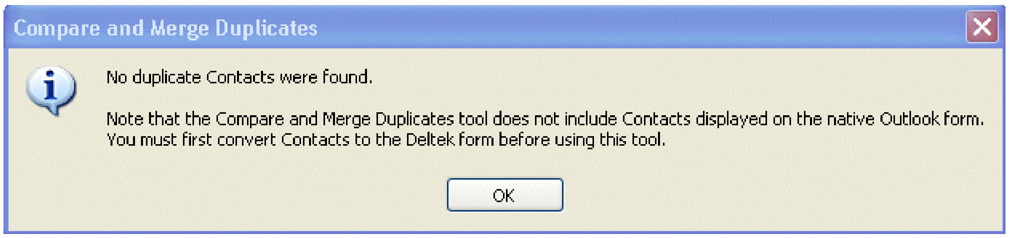
You may receive a message that the contacts have not completed the conversion process, and the Compare and Merge Duplicate Contacts process will begin when the conversion is complete. You can work in Outlook during this time, but you may not see all your contacts in Explorer view. The contacts are removed and they re-appear after the conversion, one at a time.

21. The Compare and Merge Duplicate Contacts process compares your original Outlook contacts with the Vision contacts that have been synchronized with Connect for Microsoft Outlook to prevent duplicate contact records from being created. However, it does the

comparison only if you converted all your Outlook contacts to display on the Deltek (Connect for Microsoft Outlook) Contact form in step 18.

This process allows you to merge duplicate contacts that have the same email address or the same first name and last name into a single shared contact record that displays in Connect for Microsoft Outlook and Vision.

- If no duplicate contacts are found, you receive the following message:



  The message explains that the Compare and Merge process does not compare Outlook contacts that were not converted to the Deltek (Connect for Microsoft Outlook) contact form.

  Click **OK**, the dialog box closes, and you can now use Connect for Microsoft Outlook.

- If duplicate contacts are found, follow the instructions in "Appendix C: Compare and Merge Duplicate Contacts" on page 105.

After you configure Connect for Microsoft Outlook for the first time, you can run the Compare and Merge Duplicate Contacts process at any time in Connect for Microsoft Outlook. Compare and Merge Duplicate displays on the Vision toolbar in Connect for Microsoft Outlook when you have the Contacts folder open.

After the Compare and Merge Contacts process finishes, you have completed the Connect for Microsoft Outlook configuration settings. You now see Vision information in Outlook.

If You Need to View or Modify Connect for Microsoft Outlook Configuration Settings

You can view or modify the Connect for Microsoft Outlook configuration settings after the initial set up at any time in Connect for Microsoft Outlook.

To view or modify the settings, complete the following steps:

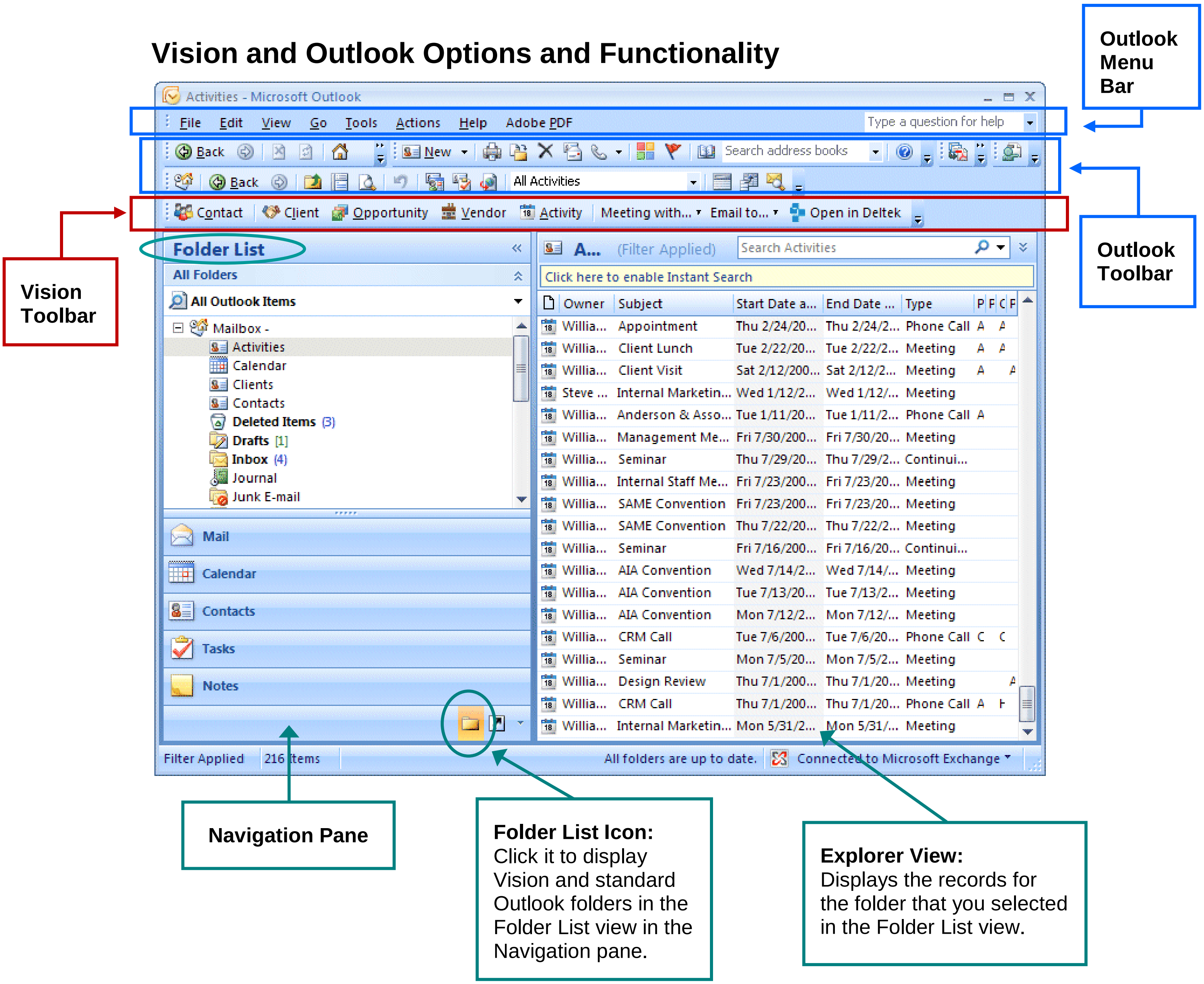
1. Right-click the **Connect for Microsoft Outlook**  icon on the taskbar that displays by default at the bottom of your Windows desktop.
2. Select one of the following:
   - **Show Control Panel** — Opens the Synchronization Control Panel where you select Filter Records criteria.
   - **Options** —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

Access and Use Connect for Microsoft Outlook

After you install and configure Connect for Microsoft Outlook, when you open Outlook, it now has both Outlook and Vision functionality. This section describes the basic components of the main window in Outlook with Connect for Microsoft Outlook installed.

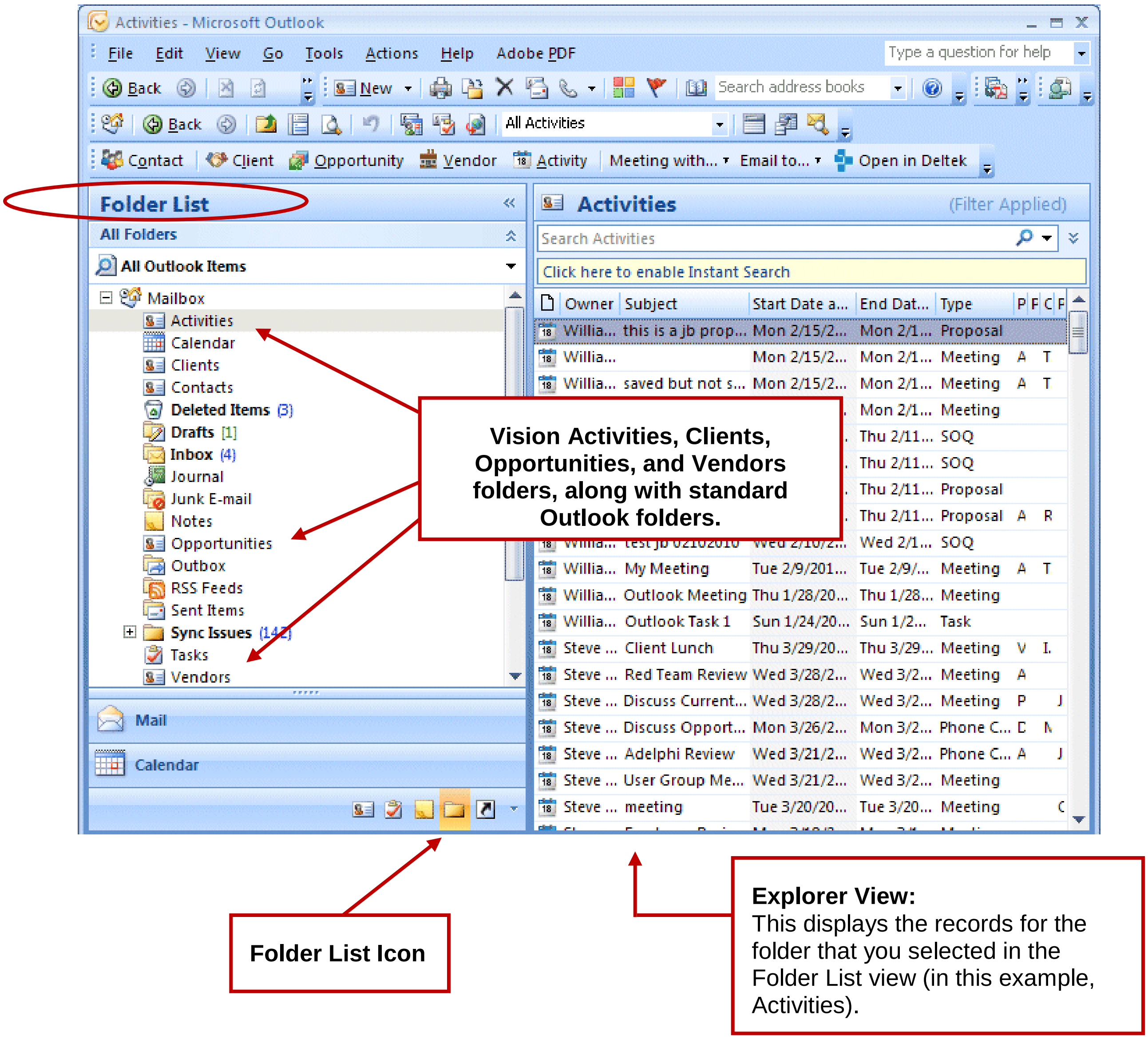
See the Connect for Microsoft Outlook online help for more detailed information on how to work in Connect for Microsoft Outlook. On the Outlook menu bar in Connect for Microsoft Outlook, click **Help » Connect for Microsoft Outlook**.

Vision and Outlook Options and Functionality



Vision Folders and Records

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



In Connect for Microsoft Outlook, you can share and synchronize records only if they are located in the top-level folders named Activities, Calendar, Clients, Contacts, Opportunities, Tasks, and Vendors (in the Folder List view). Records in top level folders with other names do no synchronize. Records in subfolders do not synchronize. (You will see a Shared with Deltek bar for sharing at the top of a form if you create a record in a subfolder; however the record will not synchronize.)

Explorer View

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

Only complete Vision records display in the Explorer view list. Complete records match your Connect for Microsoft Outlook synchronization filter. For more information about complete and incomplete records, see "Appendix A: Complete and Incomplete Records" on page 100 of this guide.

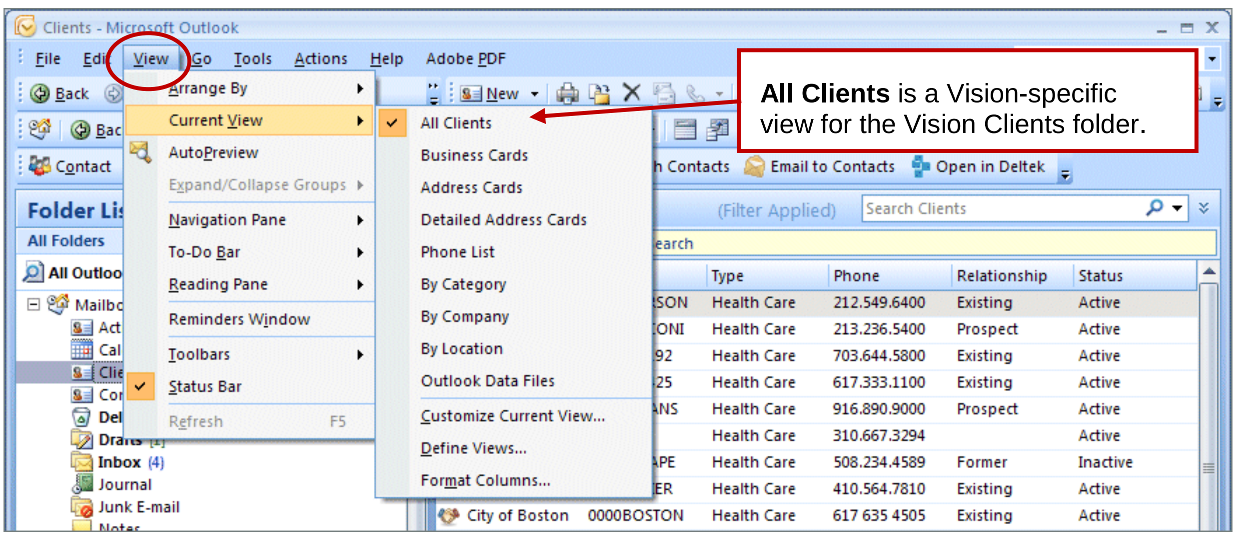
Views

Current View

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

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

The Current View menu includes standard Outlook views and Connect for Microsoft Outlook views.



Connect for Microsoft Outlook Explorer Views

The following are Connect for Microsoft Outlook views that you can select from **View » Current View**.

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

Vision Folder in Folder List View	Vision-Specific View in View » Current View
Opportunities	All Opportunities
Vendors	All Vendors

Deltek recommends that you **do not** modify the Connect for Microsoft Outlook views. It could be difficult to recreate an original view if you modify it. Instead, we recommend that you copy a Connect for Microsoft Outlook view and modify the copy to create a new view.

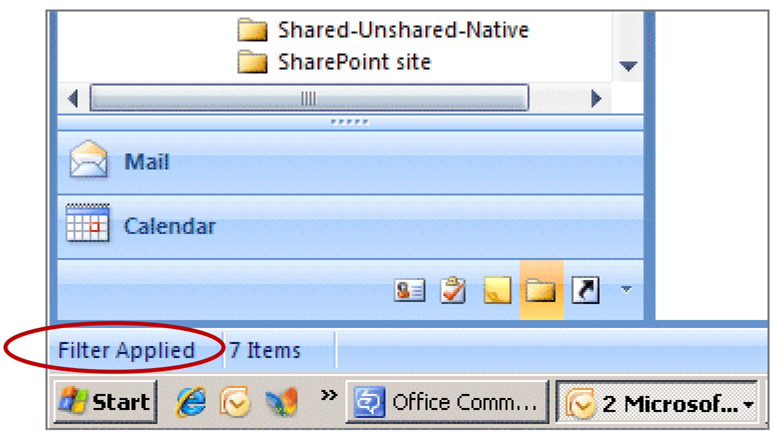
Customized and New Views

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

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

Filters and Views

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

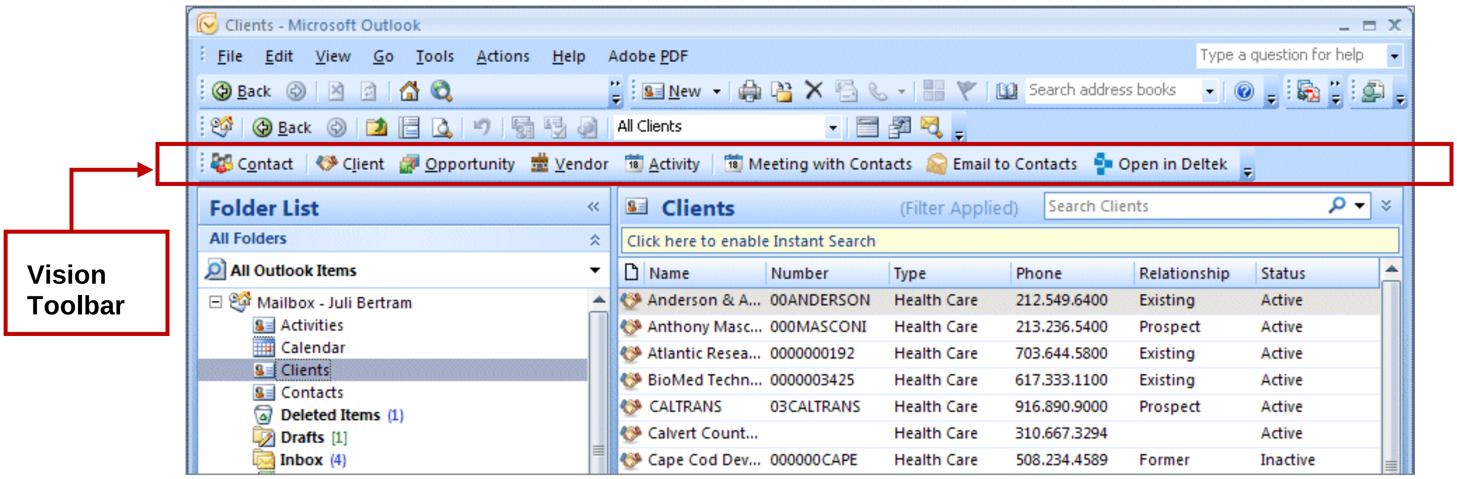


Vision Toolbar

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

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

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

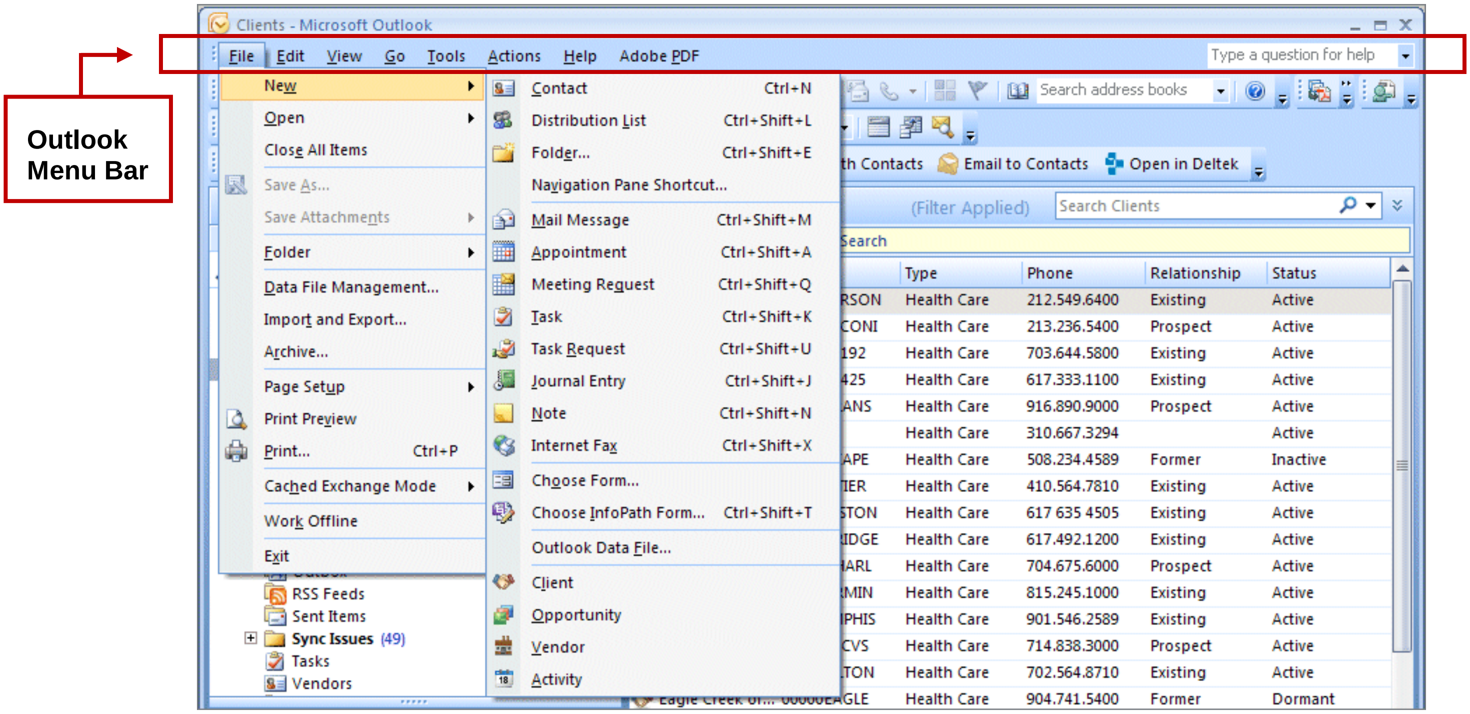


For more information about all the options on the Vision toolbar, see the Vision Toolbar topic in the Connect for Microsoft Outlook online help.

Outlook Menu Bar

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

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



The following table identifies Vision commands on the menu bar:

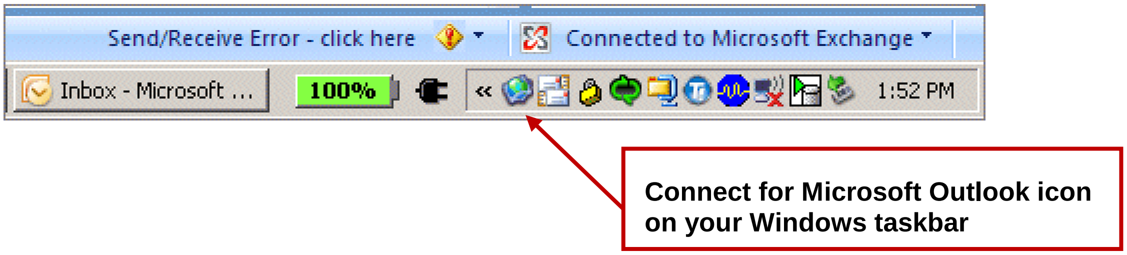
Vision Commands in the Outlook Menu Bar	Description
File » New » ▪ New Client ▪ New Activity ▪ New Opportunity ▪ New Vendor	Use these commands to create a new Vision client, activity, opportunity, or vendor.
File » New » Contacts	Use the Contacts command to create contacts on the Deltek Contact form.
Go » ▪ Clients ▪ Activities ▪ Opportunities ▪ Vendors	Use these commands to open the Clients, Activities, Opportunities, or Vendors.

Vision Commands in the Outlook Menu Bar	Description
Actions » Convert to Native Outlook Form	This command displays when you open the Contacts folder in the Folder List view. Use this command to convert an unshared contact that displays on the Deltek Contact form to display on the native Outlook Contact form. This removes the Vision fields and all the data contained in them. You can convert one or more contacts at a time.
Actions » Convert to Deltek Form	This command displays when you open the Contacts folder in the Folder List view. Use this command to convert a contact that displays on the native Outlook Contact form to display on the Deltek Contact form. You can convert one or more contacts at a time.
Help » Connect for Microsoft Outlook Help	Opens the Connect for Microsoft Outlook help system, where you find topics on how to use Connect for Microsoft Outlook. This help system is accessible when Connect for Microsoft Outlook is either online or offline.

For more information about the Vision commands on the Outlook menu bar, see the Connect for Microsoft Outlook Commands in the Outlook Menu Bar topic in the Connect for Microsoft Outlook online help.

Connect for Microsoft Outlook Application States

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



Connect for Microsoft Outlook Application State	Icon	Description	Menu Items Available When You Click the Icon
Not Configured		Connect for Microsoft Outlook is not configured to be used in the selected Outlook profile.	Right-click the icon, and select one of the following options: ▪ **Obtain package** — Select this option to apply the application configuration. This menu is available during initial application confirmation. It starts the customization package download and applies the application configuration. It can also open the Login dialog box if the user's credentials are not supplied. ▪ **Options** — Select this option to edit the proxy settings on the Connection tab of the Options dialog box. ▪ **Change credentials** — Select this option to specify the Vision user credentials on the Login dialog box.

Connect for Microsoft Outlook Application State	Icon	Description	Menu Items Available When You Click the Icon
Online		Connect for Microsoft Outlook is running, and the connection with the Vision server is available.	Right-click the icon, and select one of the following options: ▪ **Synchronize Now** — This starts a synchronization session. ▪ **Show Progress** — This opens or hides the Connect for Microsoft Outlook synchronization progress screen. This option is available during a synchronization session. ▪ **Show Control Panel** — This opens the Synchronization Control Panel dialog box. ▪ **Open Connect for Microsoft Outlook** — This opens Connect for Microsoft Outlook in the foreground if it is not your active application. ▪ **Options** — This opens the Connect for Microsoft Outlook Options dialog box.
Offline		The connection with the Vision server is unavailable. If a connection to the computer running the Vision server is not available, Connect for Microsoft Outlook switches to offline mode. In offline mode, you cannot synchronize, change credentials, or open the Connect for Microsoft Outlook Control Panel. When the connection is restored, Connect for Microsoft Outlook automatically switches to online mode. Any changes that you made while a connection to the server was not available are	Right-click the icon, and select one of the following options: ▪ **Open Connect for Microsoft Outlook** — This opens Connect for Microsoft Outlook in the foreground if it is not your active application. ▪ **Options** — This opens the Connect for Microsoft Outlook Options dialog box. The **Change** button on the General tab is disabled, and you cannot change the user credentials.

Connect for Microsoft Outlook Application State	Icon	Description	Menu Items Available When You Click the Icon
		synchronized when you run a synchronization session.	
Collisions Detected/ **Duplication Detected/** **Deletion Detected/** **Synchronization Issue**		A synchronization conflict or issue has occurred. The application is connected to the Vision server. See the Resolve Duplicates and Resolve Conflicts topics in the Connect for Microsoft online help for more information.	Right-click the icon, and select one of the following options: ▪ **Synchronize Now** — This starts a synchronization session. If the collision is not resolved, the session ends with the same collision indicator. ▪ **Show Progress** — This opens or hides the Connect for Microsoft Outlook synchronization progress screen. This option is available during a synchronization session. ▪ **Show Control Panel** — This opens the Synchronization Control Panel dialog box. ▪ **Open Connect for Microsoft Outlook** — This opens Connect for Microsoft Outlook in the foreground if it is not your active application. ▪ **Options** — This opens the Connect for Microsoft Outlook Options dialog box.
Broken Data Structure		One of the custom folders installed by Connect for Microsoft Outlook has been removed.	Right-click the application icon and select **Fix integrity** to re-install the data structure. This removes the current Connect for Microsoft Outlook data and reinstalls the data structure. Run synchronization to download the data from the server again.

Upgrade Installations

This section applies if you are upgrading to Connect for Microsoft Outlook 7.1 (Build 1.2.1.3) from an earlier version.

Upgrade Connect for Microsoft Outlook on Your Vision Web Server

You must install the Vision 7.1 software before you upgrade your Vision Web Server with Connect for Microsoft Outlook.

After you install Connect for Microsoft Outlook 7.1 on your server, Deltek recommends that you immediately install Connect for Microsoft Outlook on user workstations. If users open Connect for Microsoft Outlook before they install the new 7.1 upgrade on their workstations, they will receive an Internal Error message when a synchronization occurs on their workstation. The log file will indicate that the Connect for Microsoft Outlook version is incompatible. In this scenario, you need to download and install Connect for Microsoft Outlook 7.1 on the workstation.

Use these instructions to download and install Deltek Connect for Microsoft Outlook for Vision 7.1 on your Vision Web server. If you have multiple Web servers, you must perform the installation on each Web server.

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

You must have Vision 7.1 installed before you complete the steps in this section.

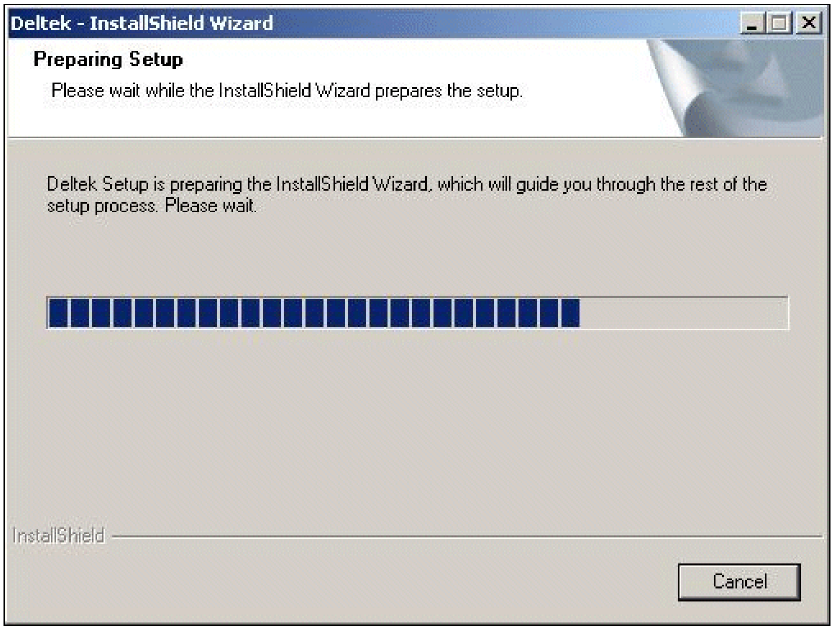
To download and install Connect for Microsoft Outlook for Vision 7.1 on your Vision Web server, complete the following steps:

1. Log on to your Vision Web server.
2. Open the Deltek Customer Care Connect Web site.
3. On the Product Downloads tab, click **Run Deltek Software Manager**.
4. On the Deltek Software Manager screen, navigate to **Vision 7.1** in the pane on the left side of the screen.
5. Click the plus sign beside **Vision 7.1**, and then click **Sub-Release** from the expanded list.
6. In the expanded grid, click the **Deltek Connect for Microsoft Outlook** check box to add it to the Download Queue.
7. Click the **Download** button.

   This downloads the **DeltekConnectForMicrosoftOutlookFor71_1.2.1.3.exe** file (a self-extracting utility) and the documentation PDF files.
8. Navigate to the folder that contains the files downloaded from the Deltek Software Manager, and double-click the **DeltekConnectForMicrosoftOutlookFor71_1.2.1.3.exe** file.

   The EXE file is within the Vision\71\GA folder.

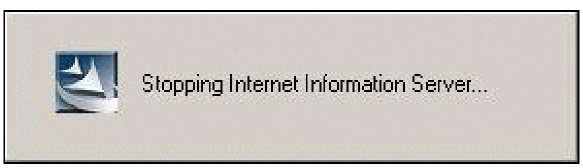
   A Deltek – InstallShield Wizard that extracts the installation package is launched. The Preparing Setup page displays.



The setup process verifies that you have Vision 7.1 prerequisites installed before it continues. If you do not have the most current prerequisites installed, you are instructed to install it first, and then re-rerun the Connect for Microsoft Outlook installation.

9. On the Welcome to the Deltek Vision 7.1 Hot Fix Installation Wizard page, click **Next** to continue.

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



10. On the Ready to Install page, click **Install** to update your database, and install the software on your Vision Web server.
11. When the installation is complete, on the Deltek Vision 7.1 Hot Fix Wizard Complete page, click **Finish**.

Upgrade Connect for Microsoft Outlook on Client Workstations

This section applies if you are upgrading to Connect for Microsoft Outlook 7.1 (Build 1.2.1.3) from an earlier version.

If you are upgrading from Connect for Microsoft Outlook 1.0.x.x or 1.1.x.x, complete the upgrade instructions in the “Major Upgrade” section below.

If you are upgrading from 1.2.x.x, complete the upgrade instructions in the “Minor Upgrade” section below.

Major Upgrade

This applies if you are upgrading from Connect for Microsoft Outlook versions 1.0.x.x or 1.1.x.x to version 1.2.1.3.

To upgrade Connect for Microsoft Outlook on a workstation, complete the following steps:

1. Complete the instructions in either of the following sections of the guide:
   - “Download and Install Connect for Microsoft Outlook on a Workstation Using Vision Utilities” on page 50.
   - “Download and Install Connect for Microsoft Outlook on Multiple Workstations Using Command Line Parameters” on page 56.

   This automatically removes the old Connect for Microsoft Outlook version and then installs the new version on a workstation.
2. Complete the Connect for Microsoft First Run Assistant as described in the “Configure Connect for Microsoft Outlook on a Workstation” section on page .

Minor Upgrade

This applies if you are upgrading from Connect for Microsoft Outlook version 1.2.x.x to version 1.2.1.3.

To upgrade Connect for Microsoft Outlook on a workstation, complete the following step:

1. Complete the instructions in either of the following sections of the guide:
   - “Download and Install Connect for Microsoft Outlook on a Workstation Using Vision Utilities” on page 50.
   - “Download and Install Connect for Microsoft Outlook on Multiple Workstations Using Command Line Parameters” on page 56.

   This automatically upgrades the Connect for Microsoft Outlook software without uninstalling the software.

You do not have to complete the First Run Assistant again. All the existing Connect for Microsoft configuration settings and synchronization filters are retained from the previous installation.

Uninstall Connect for Microsoft Outlook for a Single User

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

You uninstall the software:

- If you no longer plan to use Connect for Microsoft Outlook on your workstation.
- If you are reinstalling the same version of Connect for Microsoft Outlook.

You do not need to uninstall Connect for Microsoft Outlook on a workstation before upgrading to a newer version of Connect for Microsoft Outlook.

If You Use Microsoft Office Desktop Integration (MODI)

If you have Connect for Microsoft Outlook and the Deltek Microsoft Office Desktop Integration (MODI) modules installed on a workstation and you uninstall Connect for Microsoft Outlook, MODI may experience errors. If this occurs, you must log on to Vision and relaunch the MODI installation routine and choose the option to repair the installation. After the repair is performed, reconfigure the MODI options to continue using it.

Uninstall Procedure

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

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

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

4. From the Windows Start menu, open the Control Panel, and select **Add or Remove Programs**.
5. In the Currently installed programs window, click **Connect for Microsoft Outlook** in the list of programs, and then click **Remove**.
6. The Windows prompt allows you to confirm whether or not you really want to remove Connect for Microsoft Outlook. Click **Yes** to proceed with the removal.
7. A dialog box displays with the following message:

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

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

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

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

Uninstall Connect for Microsoft Outlook Using Microsoft SCCM

You can use Microsoft System Center Configuration Manager (SCCM) to remove Connect for Microsoft Outlook for multiple users.

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

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

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

   Example:

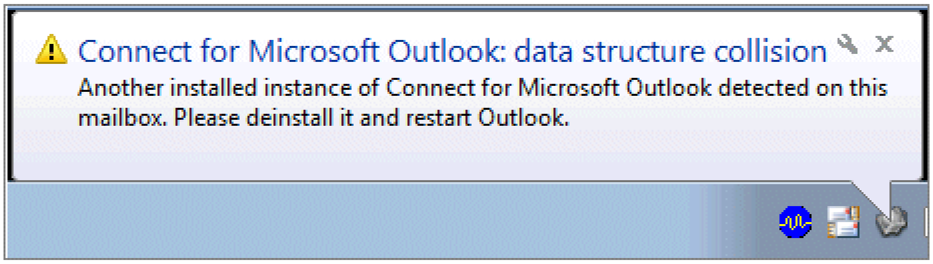
   \\fileserver1\Deltek\ConnectForMicrosoftOutlook.exe /v"x"

   This is the same as Example 3 on page 59.
8. Save the distribution package.
9. Run the advertisement for Connect for Microsoft Outlook.

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

Connect for Microsoft Outlook Cleanup Utility

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



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

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

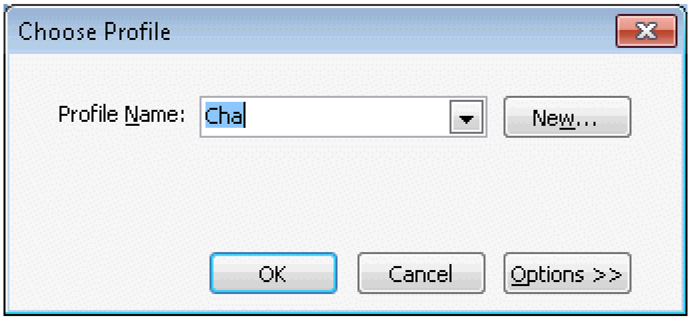
To use the Cleanup Utility, complete the following steps:

1. On the workstation that will permanently use Connect for Microsoft Outlook, close Connect for Microsoft Outlook.
2. From the Windows taskbar that displays at the bottom of your screen by default, click **Start » All Programs » Deltek » Cleanup Utility**.
3. On the Connect for Microsoft Outlook Cleanup dialog box that says this program will remove data structures installed by Connect for Microsoft Outlook from your Outlook profile, read the recommendation that urges you to try uninstalling and re-installing Connect for Microsoft Outlook to possibly solve your problem before you run the Cleanup Utility. Click **No**, and uninstall and then re-install Connect for Microsoft Outlook on your workstation.

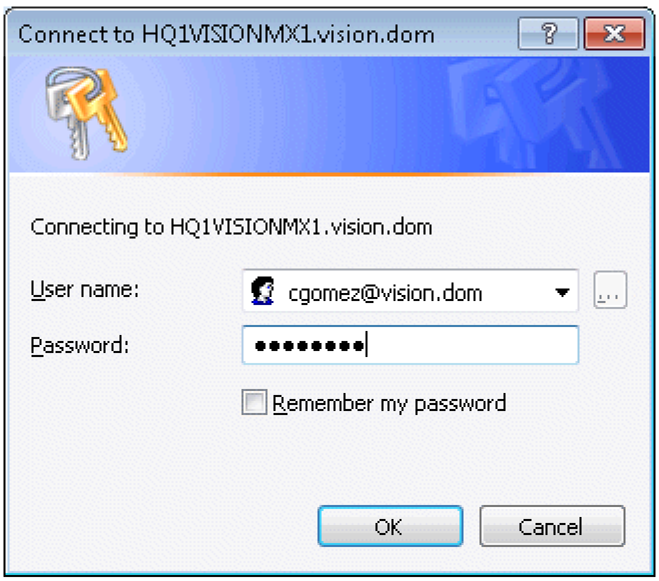
4. If uninstalling and re-installing did not solve your problem, start the Cleanup Utility again. On the "The Cleanup Utility will remove the data structure installed by Connect for Microsoft Outlook from our Outlook profile…. dialog box, click **Yes**.

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

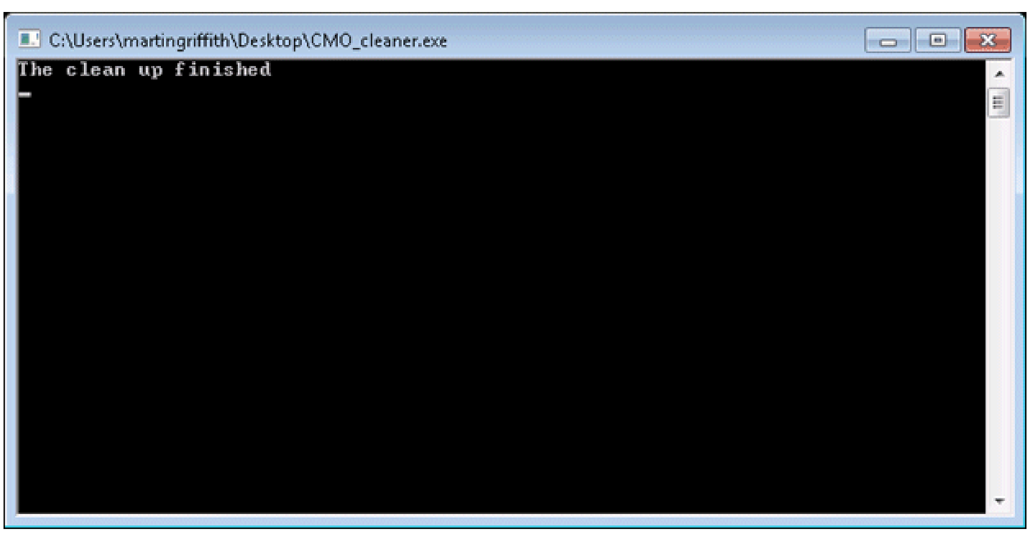
5. On the Choose Profile dialog box, from the drop-down list in the **Profile Name** field, select the profile that you used when you installed Connect for Microsoft Outlook.



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



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



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

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

Troubleshooting

Audit Reports

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

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

The possible source codes are:

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

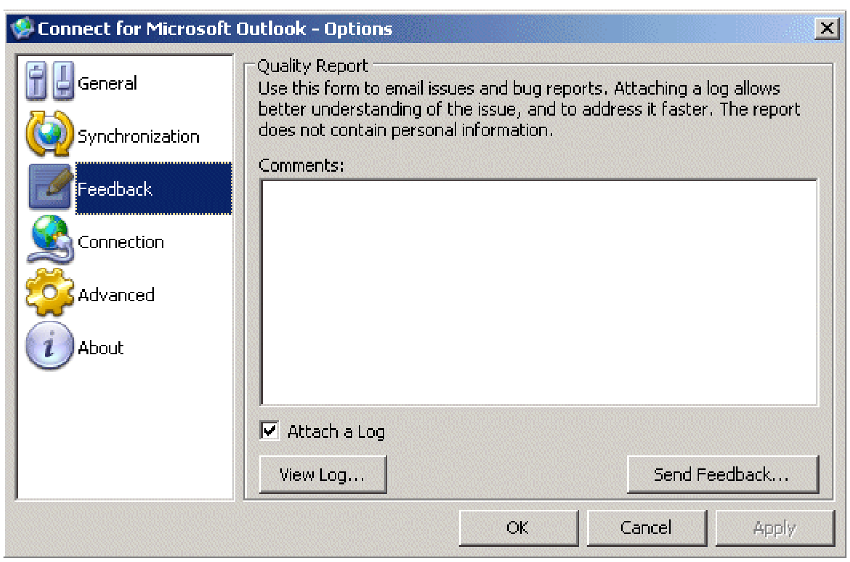
These reports are located in the Vision software in Reporting.

General Log

View the Log

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

Click the **View Log** button to open the **Log.0000.txt** file in Microsoft® Notepad.



You can also view the log from the Advanced tab on the Connect for Microsoft Outlook - Options dialog box. On the Advanced tab, click the **Configure Logging and Reporting** button, and on the Logging Configuration dialog box, click the **View Files** button beside the **General log** check box.

Email the Log

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

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

Advanced Logs

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

Send the Advanced Logs to Deltek

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

1. Capture screen shots of the Connect for Microsoft Outlook Synchronization Control Panel dialog box and the Filter Settings screen, and/or document the settings information and any other details.
2. Zip the Logs folder in the Connect for Microsoft Outlook Profile directory. This folder contains the logs for troubleshooting.

   Path to the Connect for Microsoft Outlook Profile directory:

   - **Windows XP:**

     %AppData%\Deltek\Connect for Microsoft Outlook\Profile

     (where %AppData% in the path is a system variable for the user's Windows profile)

     This will take you to C:\Documents and Settings\<*your UserName*>\Deltek\Connect for Microsoft Outlook.

     For example, a Windows user named MaryAnderson would find her logs in C:\Documents and Settings\MaryAnderson\Deltek\Connect for Microsoft Outlook\Profile folder.

   - **Windows 7 and Windows Vista:**

     %AppData%\Deltek\Connect for Microsoft Outlook\Profile

     (where %AppData% in the path is a system variable for the user's Windows profile)

     This will take you to C:\Users\<*your UserName*>\Roaming\Deltek\Connect for Microsoft Outlook.

For example, a Windows user named MaryAnderson would find her logs in C:\Users\MaryAnderson\Roaming\Deltek\Connect for Microsoft Outlook\Profile folder.

3. Send the following to Deltek Customer Care:
   - The zipped file containing the log files from the Outlook Profile directory.
   - Screen shots of the filter selections in the Synchronization Control Panel.
   - Any other screen shots or other detailed information.

Delete the Log Files

You can delete the Logs folder to prevent the log files from getting large. Before you delete the folder, you must exit Outlook. After you delete the folder, the log files are automatically recreated, and they start recording again.

Vision Data Structure is Inconsistent

Symptoms

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

Cause

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

Solution

To fix the inconsistent structure, complete the following steps:

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

Connect for Microsoft Outlook Does Not Start When You Launch Outlook

Symptoms

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

Cause

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

Solution

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

Outlook 2010:

1. On the Outlook toolbar, click **File**.
2. In the Info pane, click **Options**.
3. In the Outlook Options dialog box, click **Add-Ins**.
4. Ensure that **COM Add-ins** is selected in the **Manage** field, and then click **Go**.
5. On the COM Add-Ins dialog box, select the **Connect for Microsoft Outlook** check box if it is not already selected.
6. Click **OK**.

Outlook 2007:

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

Outlook 2003:

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

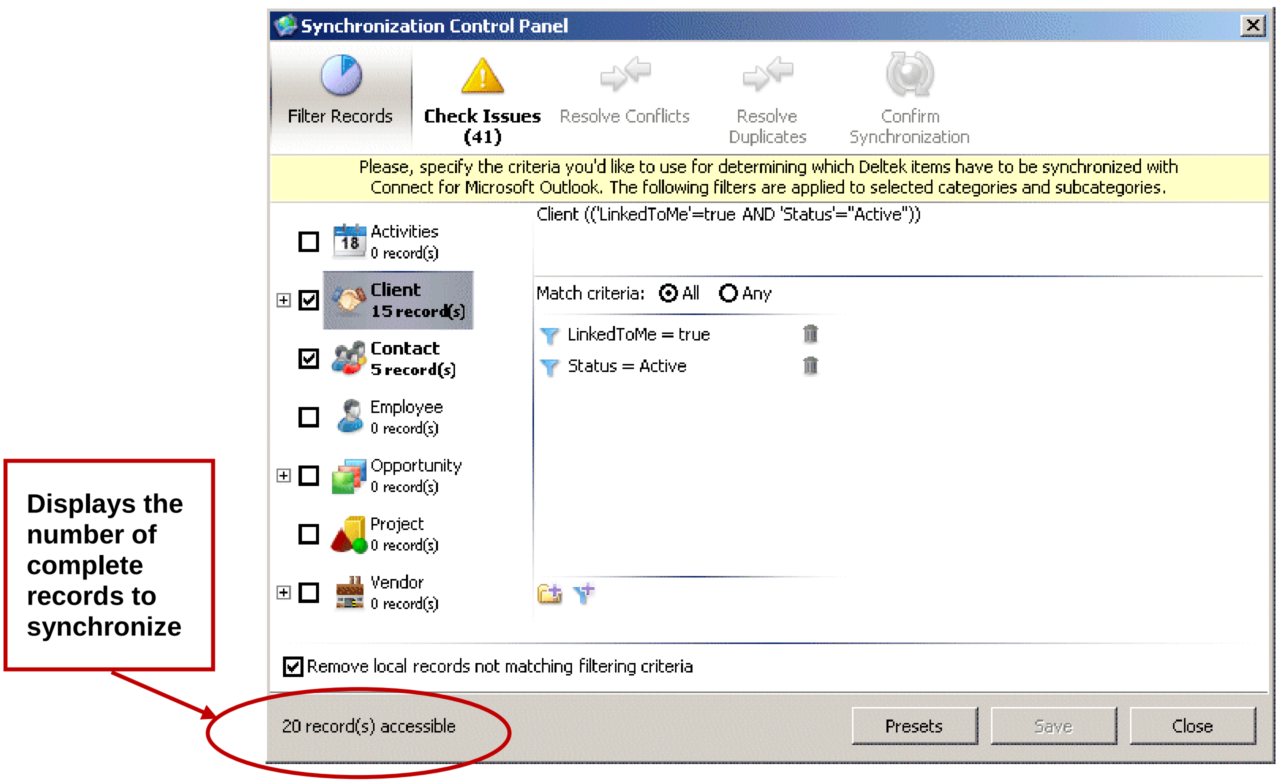
Appendix A: Complete and Incomplete Records

When you synchronize Connect for Microsoft Outlook and Vision, Vision activity, client, contact, opportunity, and vendor records are brought into Connect for Microsoft Outlook as complete or incomplete records.

Complete Records

Complete records match your synchronization filter and are brought completely into Connect for Microsoft Outlook. This means that all their information displays on the record form in Connect for Microsoft Outlook. You can edit these records.

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



Incomplete Records

Incomplete records:

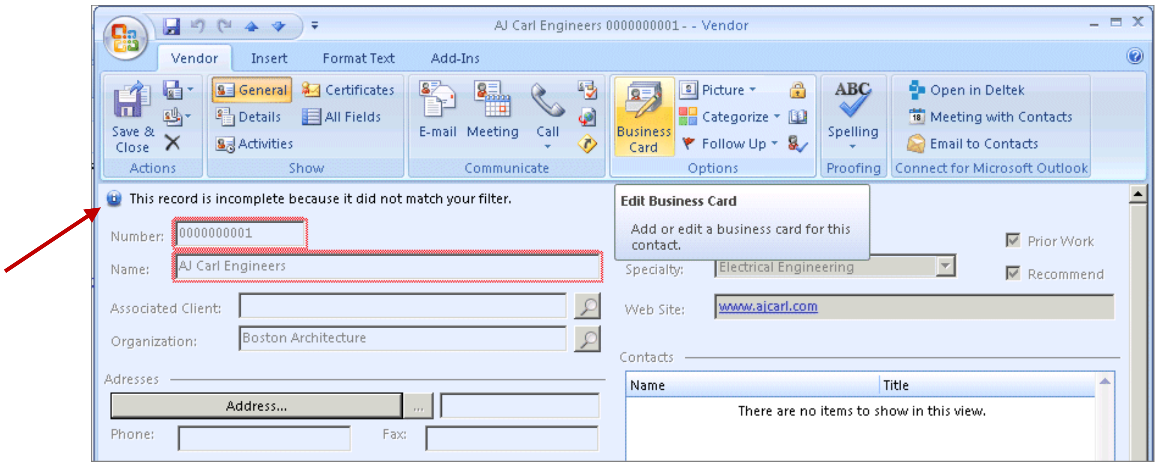
- Do not match your synchronization filter, but they synchronize because they are associated with a complete record that matches your filter.
- Are records that you have security rights to at least view.
- Are read-only in Connect for Microsoft Outlook, regardless of your security rights. You cannot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

You can see incomplete records in the association grids or lookup fields on record forms. For example, you will see incomplete contact records in the **Contacts** grid on the Opportunity form or incomplete client or vendor records in the Client/Vendor lookup in the **Client**/**Vendor** field on the Contact form.

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

How to Distinguish Incomplete Records from Complete Records

In Connect for Microsoft Outlook, incomplete records are identified with **"This record is incomplete because it did not match your filter."** at the top of their record form. You will see this on the Activity, Client, Contact, Opportunity, Task, and Vendor forms. You cannot edit the information on the form for incomplete records.



The activity, client, contact, opportunity, task, and vendor lists (that display in Explorer view) and the calendar include only complete Vision records.

Record lists are displayed using Connect for Microsoft Outlook views. Deltek recommends that you **do not** modify these views. It could be difficult to recreate an original view if you modify it. Instead, we recommend that you copy a Connect for Microsoft Outlook view and modify the copy to create a new view.

Example:

Scenario:

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

When you Synchronize:

- John Miller is brought into Connect for Microsoft Outlook as a complete contact record. All associations (including Bayfield Remodel) display for John on the Contact form. You can modify John's information on the Contact form.

- Bayfield Remodel is brought into Connect for Microsoft Outlook as an incomplete record. This means:
  - In the Connect for Microsoft Outlook Opportunities list (in Explorer view), Bayfield Remodel does not display.
- On the Contact form for John Miller, Bayfield Remodel displays in the Opportunity grid. If you open the Bayfield Remodel opportunity in the grid, Bayfield Remodel displays on the Opportunity form as read-only despite your modify rights.

  On the Opportunity form for Bayfield Remodel, you see John Miller in the Contacts grid because his record synchronized as a complete record.

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

Appendix B: Contact Forms

In Connect for Microsoft Outlook, contacts display on either the native Outlook Contact form or the Deltek Contact form.

The contact forms are not specifically labeled "Deltek Contact" and "Native Outlook Contact" in Outlook.

Contact Form	Description
Native Outlook Contact form	This form contains only fields and information from the original Outlook software. It does not contain any Vision fields, grids, or commands. The contacts that you originally created in Outlook or contacts that were imported into Outlook from mobile devices, web mail, card readers, vCards, and so on display on this form. These contacts are **not** shared with Vision when you synchronize Connect for Microsoft Outlook. To share Outlook contacts that display on the native Outlook Contact form with Vision, you must first convert them to display on the Deltek Contact form. You can convert them at any time using the Convert to Deltek Form tool.
Deltek Contact form	This form contains Outlook fields and Vision fields not found in Outlook, such as the Vision **Client**/**Vendor** field, the **Activities** grid, and the **Employees** grid. This form includes the Vision business logic. For example, fields that are required in Vision are required on the Deltek Contact form. A contact that displays on this form can be either shared or not shared with Vision. A Shared with Deltek bar at the top of the form allows you to share or not share a contact. The bar says either: ▪ **Click here to share <*contact*> with Deltek.** ▪ **Shared with Deltek. Click here to stop sharing and delete the item from Deltek.** You can change this setting for a contact at any time by clicking the bar. Shared contacts are updated and displayed in Vision when you synchronize Connect for Microsoft Outlook. After you install Connect for Microsoft Outlook, you can create new contacts only on the Deltek Contact form. You can, however, convert any of these contacts to display on the native Outlook Contact form at any time using the Convert to Native Outlook Form tool.

You can tell whether a contact is shared or not shared and whether it displays on the Deltek Contact form or the native Outlook Contact form by the icon that displays beside the contact name in the Contact list:

Icon	The contact displays on this form	Shared with Vision?
	Native Outlook Contact form	No
	Deltek Contact form	No
	Deltek Contact form	Yes

For more information about the contact forms, converting to different forms, and sharing or not sharing contacts, see the following topics in the Connect for Microsoft Outlook online help:

- Shared and Unshared Contacts and the Contact Form
- Contact Icons in the Contact List
- Contact Form
- Contact Forms: The Native Outlook Contact Form and the Deltek Contact Form
- Share Outlook Contacts that Display on the Deltek Contact Form
- Share Outlook Contacts that Display on the Native Outlook Contact Form
- Stop Sharing a Contact
- Convert to Deltek Form
- Convert to Native Outlook Form

Appendix C: Compare and Merge Duplicate Contacts

The Compare and Merge Duplicates process compares your original Outlook contacts with the Vision contacts that have been synchronized with Connect for Microsoft Outlook, to prevent duplicate contact records from being created. This process allows you to merge duplicate contacts that have the same email address or the same first name and last name into a single shared contact record that displays in Connect for Microsoft Outlook and Vision.

The Compare and Merge Duplicates process has two parts:

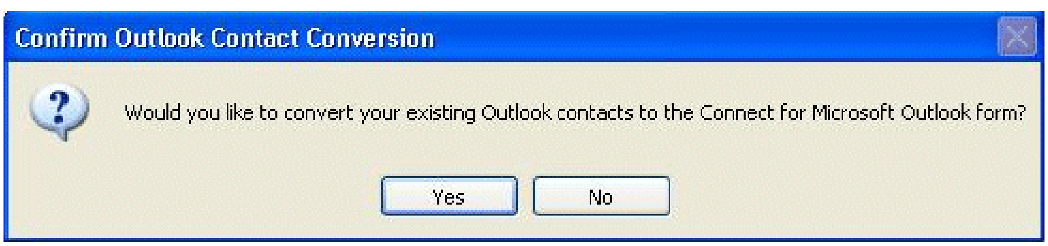
1. You can automatically merge duplicate contact records that do not have any fields with conflicting information. A field has conflicting information if the field is populated for both the original Outlook record and the Vision record that was synchronized with Connect for Microsoft Outlook, and the value in each field does not match exactly. You also have the option to review these contacts side by side before you merge them.
2. For duplicate contact records that have conflicting information, you must review them side by side and decide which conflicting information to keep before you merge the two into one contact record. You also have the option to keep both records instead of merging them.

Which Contact Records Are Compared for Duplicates?

Contacts that Are Compared

When the Compare and Merge Duplicates process automatically runs when you use the Connect for Microsoft Outlook Assistant, Outlook contacts are compared with synchronized Vision contacts. However, Outlook contacts are compared only if you converted all your existing Outlook contacts to display on the Deltek Contact form during step 19 (on page 73) of configuration.

On the Confirm Outlook Contact Conversion dialog box, you choose whether or not you want to convert existing Outlook contacts to display on the Connect for Microsoft Outlook (Deltek) Contact form.

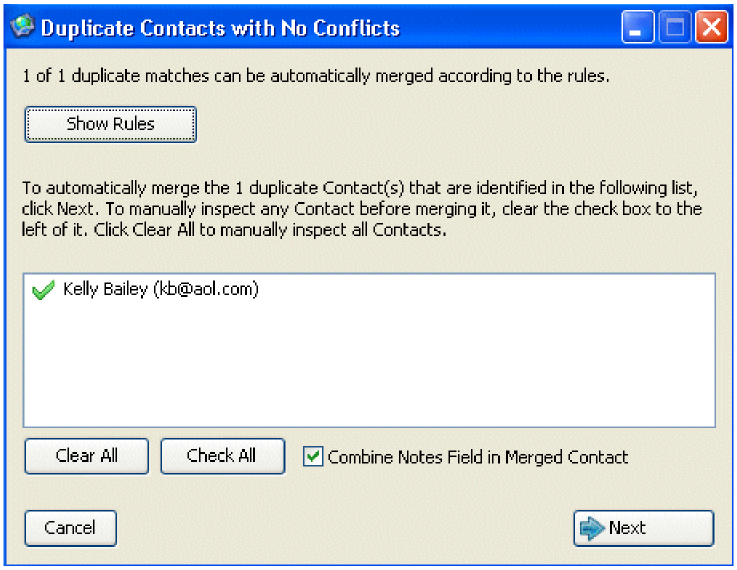


For more information about the native Outlook and Deltek Contact forms and shared and unshared contacts see "Appendix B: Contact Forms."

If Duplicate Contacts Are Found

If duplicate contacts are found, complete the following steps:

1. Review the list of duplicate contacts on the Duplicate Contacts with No Conflicts dialog box.



   - These are the duplicate contacts that have the same email address or the same first name and last name and **no** conflicting information. You can merge them automatically without reviewing them. For more information about the rules that determine conflicting information and the contacts that can be merged automatically, see the "Auto-Merge Rules for Duplicate Contacts" section on page 109.
   - Each contact in the list has a green check mark beside it to indicate that it will be merged automatically into one shared contact record.
   - If you prefer to inspect a duplicate pair of contact records that has no conflicts before you merge them, click the green check mark beside a contact to clear the check mark.

     Click the **Clear All** or **Check All** buttons to clear or select the check marks beside all the contacts in the list.

     You review these duplicate contacts on the next dialog box.

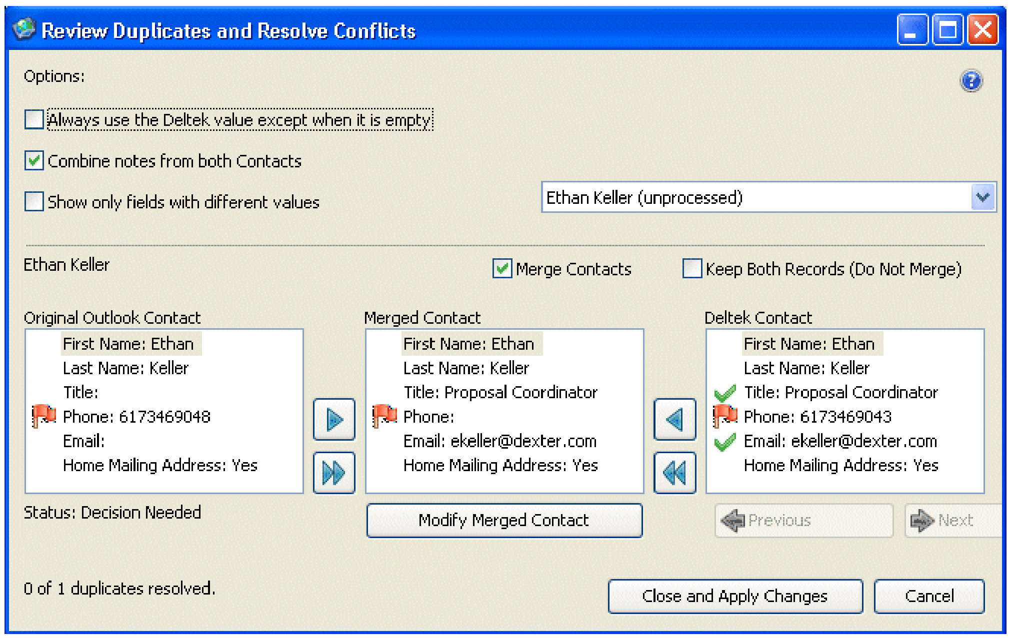
2. Select the **Combine Notes Field in Merged Contact** check box if you want the contents of the **Notes** field from both the Outlook contact and the Vision contact to be included in the **Notes** field for merged contact records. This check box applies to all contacts in the list that have a check mark beside their name.

   When you clear the **Combine Notes Field in Merged Contact** check box, only the notes from the Vision contact record are included in the **Notes** field for the merged contact record.

3. When you finish making selections on the Duplicate Contacts with No Conflicts dialog box, click **Next**.

   - If you have only duplicate contacts with **no** conflicts to resolve, and you also chose not to review any of these contacts (they all have a green check mark beside their name on the Duplicate Contacts with No Conflicts dialog box), then the contacts are merged automatically when you click **Next**. The Compare and Merge Duplicates process finishes, and no other messages or dialog boxes display.

   - If you have duplicate contacts with conflicts to resolve and/or you chose to review some contacts that have no conflicts (they have no green check mark on the Duplicate Contacts with No Conflicts dialog box), then the Review Duplicates and Resolve Conflicts dialog box displays when you click **Next**.



   On the Review Duplicates and Resolve Conflicts dialog box, you resolve the conflicting values for each duplicate pair of contacts. The original unshared Outlook contact, the shared Deltek contact, and the shared merged contact display on this dialog box, so that you can easily compare them.

4. At the top of the Review Duplicates and Resolve Conflicts dialog box, select the options that you want to apply to the specific contact record that currently displays on that dialog box.

   The options are:

   - **Always use the Deltek value except when it is empty**
   - **Combine notes from both Contacts**
   - **Show only fields with different values**

5. In the **Original Outlook Contact** pane, the **Merged Contact** pane, and the **Deltek Contact** pane, the conflicting values for the duplicate contact records have a red flag beside them.
   - To select the value from the original Outlook or Vision contact for the merged contact, click the value to highlight it, and then click or beside the **Original Outlook Contact** or **Deltek Contact** pane. The value is copied to the **Merged Contact** pane. The red flags disappear, and the value that you selected in either the Original Outlook or Deltek contact pane now has a green check mark beside it.
   - If you want all the values from either the Outlook contact or the Vision contact to be used for the merged contact, click either or beside the appropriate Outlook or Vision pane. All the values from that pane are copied to the Merged Contact pane.

   You can also double-click a value in the Original Outlook Contact pane or the Deltek Contact pane to move it to the Merged Contact pane.

6. If you need to enter information for the merged contact that is different than what is entered for the original Outlook contact or the Vision contact, click the **Modify Merged Contact** button. Then make your entries or selections for the merged contact on the Contact form. On this form, you can use Vision lookup lists to make selections in the Vision fields.

   Examples:
   - You want to revise the notes that are entered in the **Notes** field.
   - You want to select a title from the drop-down list in the **Title** field on the Contact form to be sure the exact Vision title is entered correctly.

7. When you finish resolving conflicts and the merged contact has all the correct information, click the **Next** button to move to the next pair of duplicate contacts to review.

   You can also use the **Find Contact** drop-down list at the top right corner of the dialog box to navigate to duplicate contacts.

8. Repeat steps 4–7 to resolve conflicts for all duplicate contacts.

9. When you are ready to merge all the duplicate contacts—contacts that were selected to be merged automatically on the Duplicate Contacts with No Conflicts dialog box and contacts that you compared and resolved on the Review Duplicates and Resolve Conflicts dialog box—click the **Close and Apply Changes** button.

   The resulting merged contact records become shared contacts that display on the Deltek Contact form.

   The following duplicate contact pairs are not merged when you click the **Close and Apply Changes** button. They remain as duplicate contact records:
   - Contacts for which you selected the **Keep Both Records (Do Not Merge)** option on the Review Duplicates and Resolve Conflicts dialog box.
   - Contacts that you reviewed, but which still have a red-flagged conflict.
   - Contacts that you did not view on the Review Duplicates and Resolve Conflicts dialog box.

   In Connect for Microsoft Outlook, you can rerun the Compare and Merge Duplicate process at any time to merge any remaining duplicate contact pairs.

In Connect for Microsoft Outlook, you can run the Compare and Merge Duplicate Contacts process at any time. The tool is located on the Vision toolbar when you have the Contacts list open.

The Contacts book on the Contents tab in the Connect for Microsoft Outlook online help contains more topics about the Compare and Merge Duplicate Contacts tool.

Auto-Merge Rules for Duplicate Contacts

The first part of the Compare and Merge Duplicates process allows you to merge automatically any duplicate contact records that have the same email address or the same first name and last name into a single record if they have no fields with conflicting information.

Conflicting Information

A field has conflicting information if it is populated for both contact records and the value in each field does not match exactly. When fields contain conflicting information, you must decide which piece of information to keep and which to discard before the duplicate records can be merged into a single record.

Example of Conflicting Information

The contact Emily Parks is entered in both Outlook and Vision with the email address EmilyParks@ABSAssociates.com. Her business phone number is entered as follows:

	Outlook Contact Record	**Vision Contact Record**
Emily Park's Business Phone	617 388-1776	617 472-3390

Because the business phone number in the same field is different in each record, Emily's duplicate contact records cannot be auto-merged. During the Compare and Merge Duplicates process, you must manually review Emily's contact records and select which phone number to use to create the one merged contact record.

Exceptions for Determining Conflicting Information

The following is a list of the exceptions for determining conflicting records.

Exception	Explanation
Blank fields	If a field is populated in one contact record and the same field is blank in a duplicate record, this is not considered to be a conflict. The value from the field with data is used to create the single contact record during the automatic merge. **Example**: In Outlook, no home phone number is entered for David Simms (the **Home** phone number field is blank). In Vision, a home phone number 703 295-1187 is entered for David Simms. The home phone number 703 295-1187 is used to create the single contact record for David during the automatic merge.

Exception	Explanation
Client or Vendor Name	The client or vendor company name that is entered for the contact in Vision is always used for the company in the merged contact. (On the General tab of the Contact form in Vision you select whether the contact is a client or a vendor, and then you select the client or vendor company name.) When the Vision client or vendor company name is used for the merged contact, the company that is entered in Outlook is added to the end of the **Notes** field. If a contact has no client or vendor company entered in Vision, but there is a company entered in Outlook for the contact, the Outlook company name is **not** used to create the merged contact record. The **Client** or **Vendor** field remains blank. ▪ In Vision, the client and vendor names are entered in a lookup field that contains a list of predefined names from the Client Info Center or the Vendor Info Center. ▪ In Outlook, the company name is entered in a free-form field. Because it is easy to type the same thing a little differently in a free form field (such as Inc., Inc, Incorporated, or omitting Inc. completely), it would be hard to compare the company name in Outlook with the Vision client or vendor and reach an accurate conclusion about whether the two different names are intended to be the same.
Client or Vendor Address	The client or vendor address from the Vision contact record is always used as the business address in the merged contact. (On the General tab of the Contact form in Vision, you select whether the contact is a client or vendor, you select the client or vendor name, and then you select the client or vendor address.) When the Vision client or vendor address is used for the merged contact, the business address entered in Outlook is added to the **Notes** field for the merged contact. If no business address is entered for a contact in Vision, but there is a business address entered in Outlook for it, the Outlook address is **not** used to create the merged contact record. The address field remains blank, and the original Outlook address is added to the **Notes** field for the merged contact.

<table>
<tr><th>Exception</th><th>Explanation</th></tr>
<tr><td>Other/Home Address</td><td>On the original Outlook Contact form, there are two separate address fields—Other and Home. On the Deltek Contact form, there is one field—Other/Home.

If it is populated in Vision, the address from the Other/Home field from the Vision contact record is always used in the merged contact. (This address is entered for a contact's client or vendor on the General tab of the Contact form in Vision.)

When the Vision Other/Home address is used for the merged contact, the Other and Home addresses from the original Outlook contact are added to the end of the Notes field on the merged contact.

If a contact has no address in the Vision Other/Home field, but there is an address in both the Other and Home fields for the original Outlook contact, then the address in the Outlook Other field is used for the Other/Home field on the Deltek Contact form. The address in the Outlook Home field is added to the end of the Notes field on the merged contact.

If a contact has no address in the Vision Other/Home field, but there is an address in either the original Outlook Other or Home field, then the address in the populated Outlook address field is used for the Other/Home field on the merged contact.</td></tr>
<tr><td>Notes field</td><td>The Notes field is not evaluated for conflicting information.

When duplicate contact records are auto-merged, you control the content of the Notes field with the Combine Notes Field in Merged Contact check box at the bottom of the Duplicate Contacts with No Conflicts dialog box.

▪ When you select this check box, the merged contact record contains text from the Notes field from both Vision and Outlook records.

▪ When you clear this check box, only the notes from the Vision contact record are included in the merged contact record.

This setting applies for all auto-merged contacts in the list on the Duplicate Contacts with No Conflicts dialog box.</td></tr>
<tr><td>Outlook fields that are not synchronized to Vision</td><td>For any field from Outlook (such as Spouse/Partner or Anniversary) that is not synchronized to Vision, the Outlook field's content is retained during the automatic merge.

If an Outlook contact is ever removed from Outlook and re-added, the information in these Outlook fields will be lost. This can happen if the contact did not match your synchronization filters or if you uninstall and reinstall Connect for Microsoft Outlook.</td></tr>
</table>

Appendix D: Synchronization Filters

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

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

Default Filters (Presets)

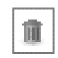
The following table identifies the default filters that are automatically set up for Vision records.

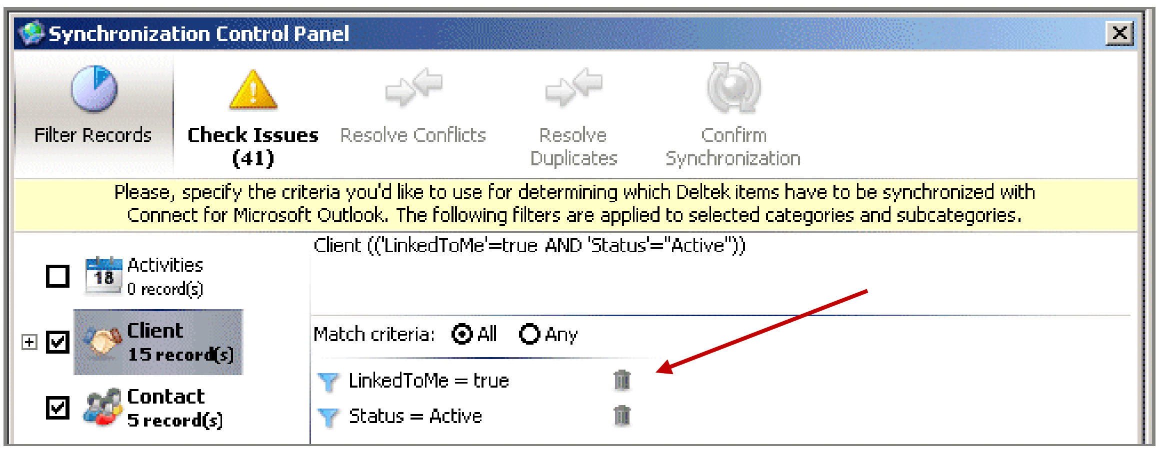
The **LinkedToMe = true** condition allows you to synchronize all records that are associated with you.

Vision Top-Level Record Type	Default Filter Condition
Contacts	**LinkedToMe = true** You are linked (associated) with contact records when your Vision employee name is entered in the **Employees** grid on a Contact record form.
Clients	**LinkedToMe = true** You are linked (associated) with client records when your Vision employee name is entered in the **Employees** grid on a Client record form.
Opportunities	**LinkedToMe = true** You are linked (associated) with opportunity records when your Vision employee name is entered in the **Employees** grid on an Opportunity record form.
Activities	Two conditions make up an activity record's default condition: ▪ **LinkedToMe=true** — Your Vision employee name is entered as the activity's owner or as an attendee. ▪ **Start Date >= <*today's date*> —** The activity start date is greater or equal to today's date. Today's date is not dynamic. It is always the date that you installed Connect for Microsoft Outlook.

Vision Top-Level Record Type	Default Filter Condition
Employees	**Status = Active** — All Vision employees with an active status in the Employee Info Center.
Projects	**None.** Only projects that are associated with other synchronized records are brought into Connect for Microsoft Outlook.
Vendors	**None.** Vendors that are associated with complete records are brought into Connect for Microsoft Outlook as incomplete records. See "Appendix A: Complete and Incomplete Records" on page 100 for more information about complete and incomplete records.

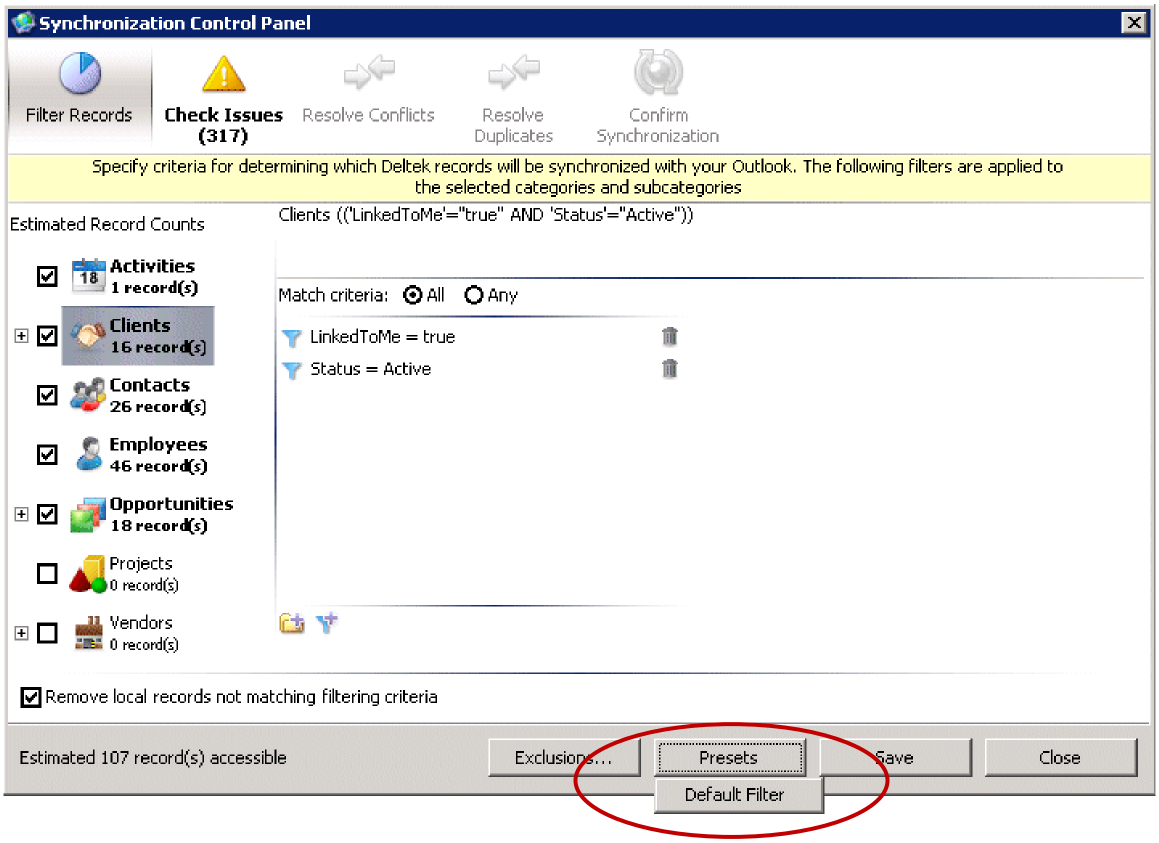
Delete Default Filters

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



Restore Default Filters

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



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

Filter Conditions for Associated Records

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

You can create conditions for the following associated records:

Top-Level Record	Associated Record
Clients	▪ Activities ▪ Contacts
Opportunities	Activities
Vendors	Contacts

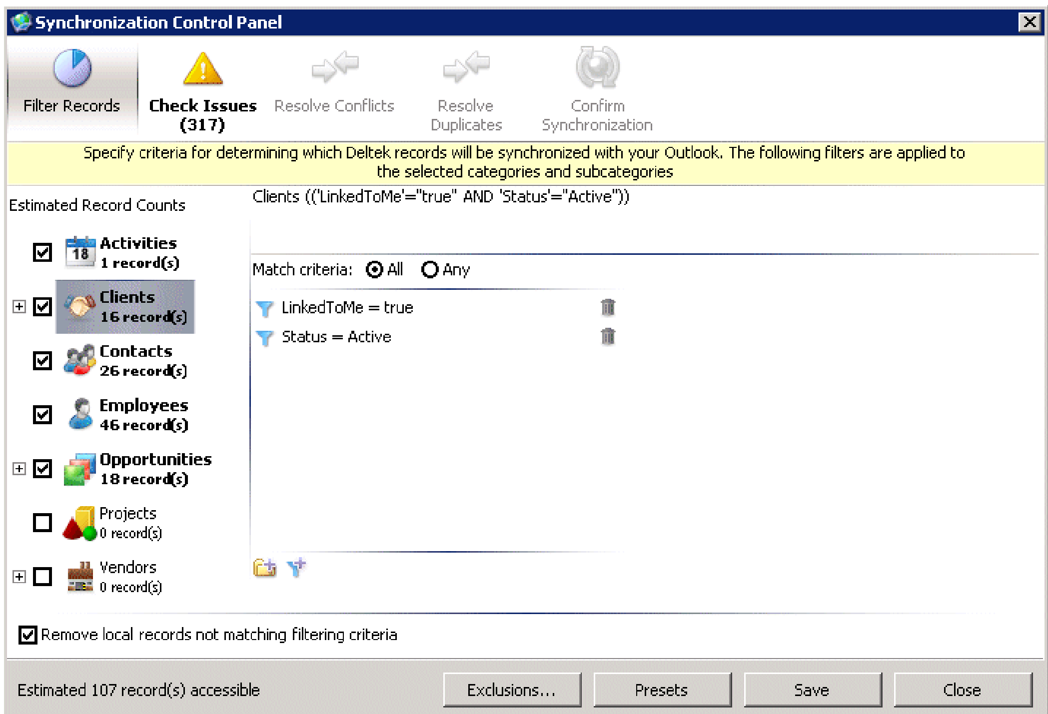
Example

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

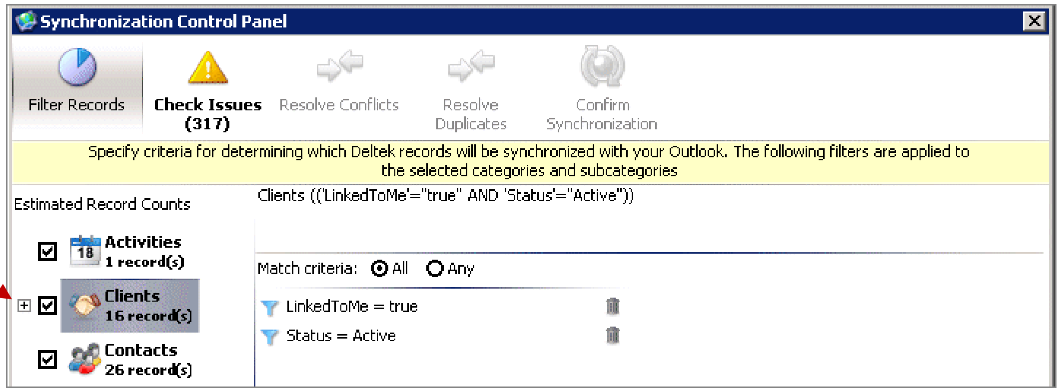
To create a filter condition for an associated record, complete the following steps:

1. Before you can create a filter condition for an associated record type, you must create a filter condition for its top-level record (Clients, Opportunities, or Vendors). See steps 8 and 9 in the "Configure Connect for Microsoft Outlook on a Workstation" section on page 60 of this guide for specific instructions.

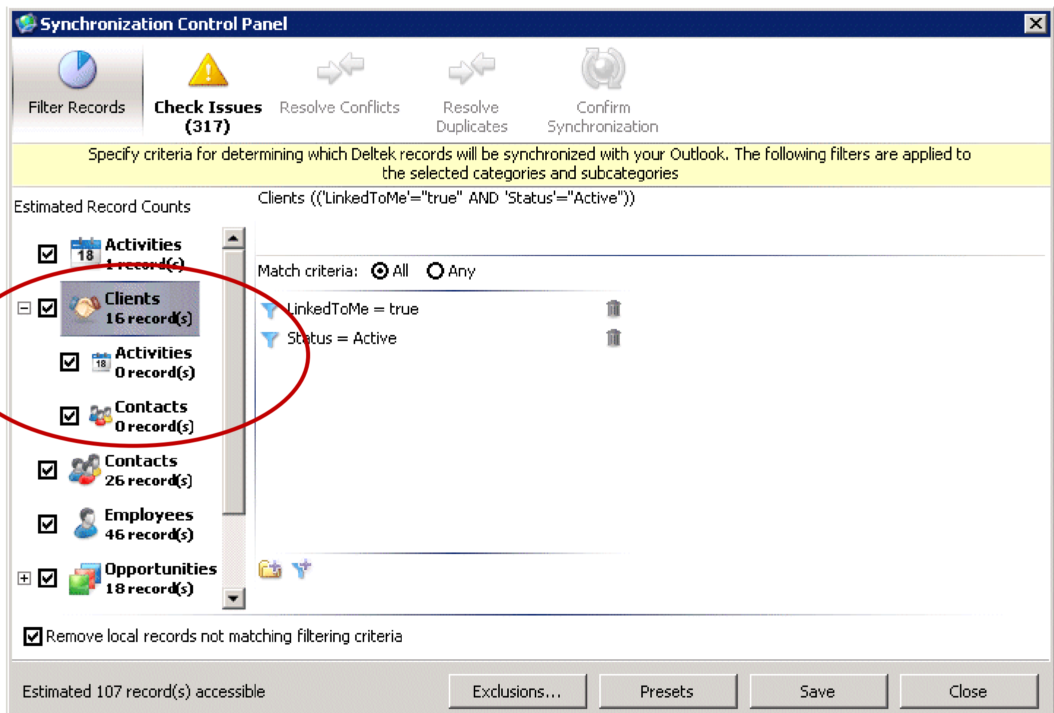
   The following screenshot displays the **LinkedToMe = true** and the **Status = Active** conditions that were created for Clients (top-level record).



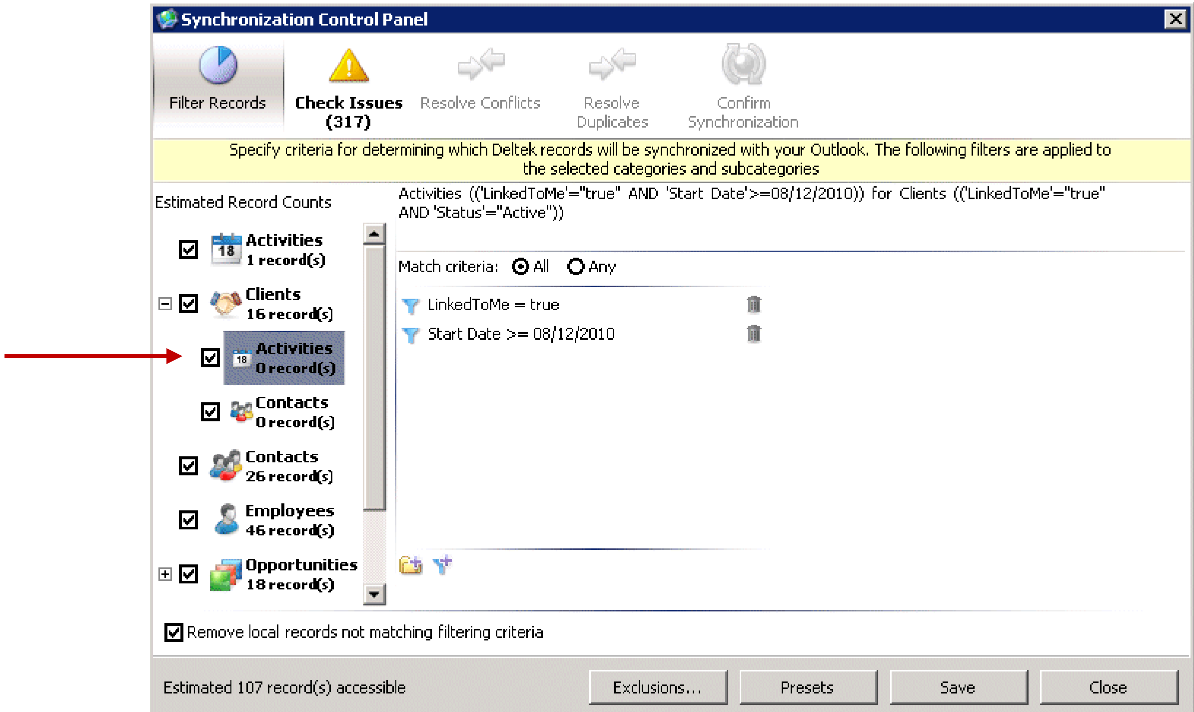
2. After you create a condition for the top-level record, click the plus sign ⊞ icon beside the top-level record to expand the record list and display the possible associated records.



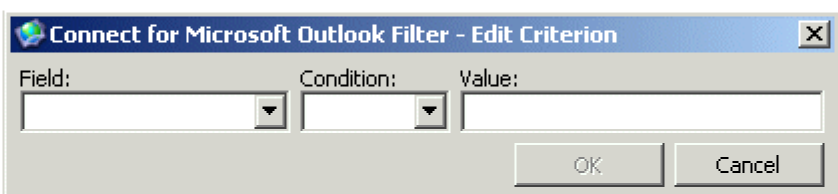
The associated records display below the top-level record. In the following screenshot, you see the **Activities** and **Contacts** check boxes below the **Client** check box:



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

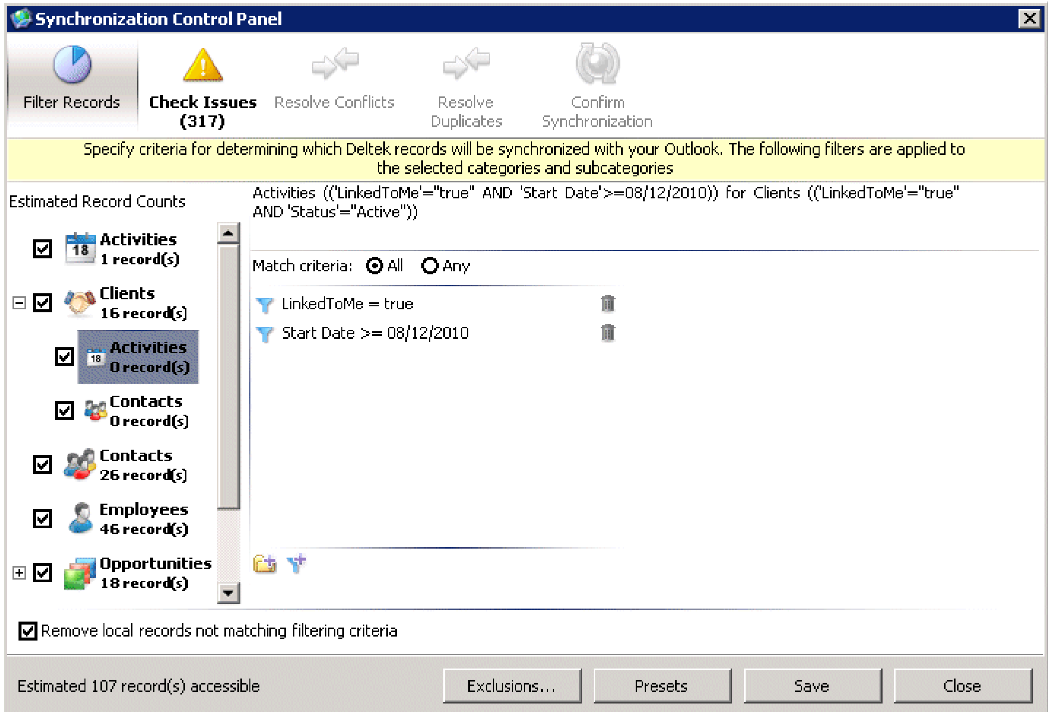


4. In the filter criteria pane, click the **Add a condition**  icon to open the Connect for Microsoft Outlook Filter – Edit Criterion dialog box. Select a field, condition, and value for the association record filter and click **OK**.

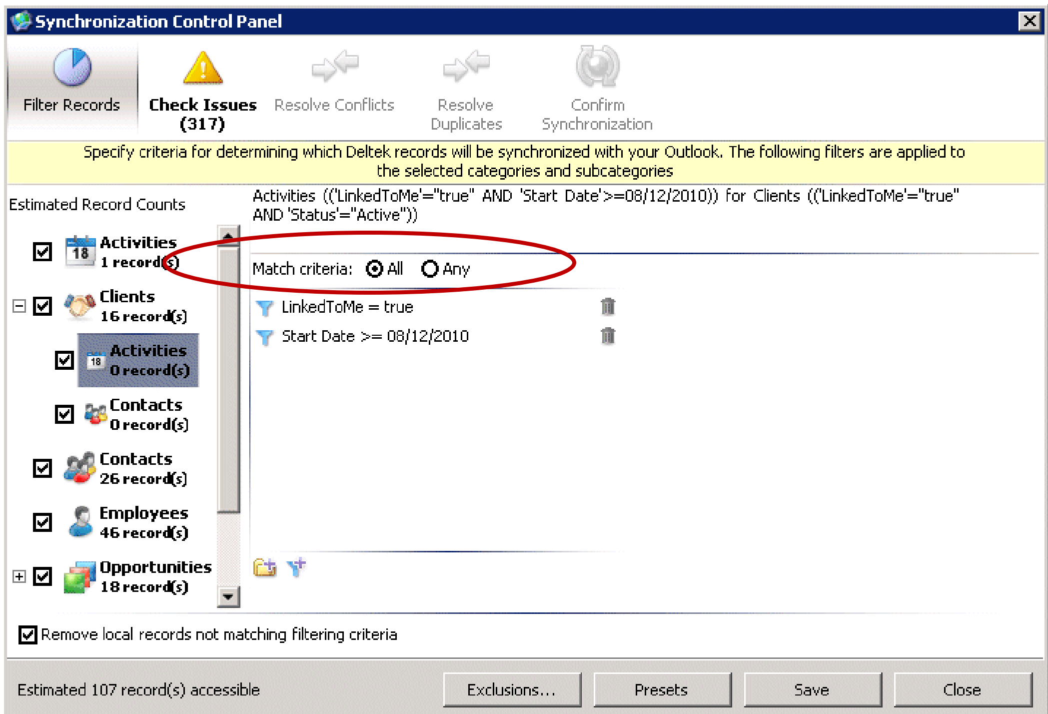


5. Repeat step 4 to create additional conditions for the associated record.

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



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



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

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

Group Filter Conditions

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

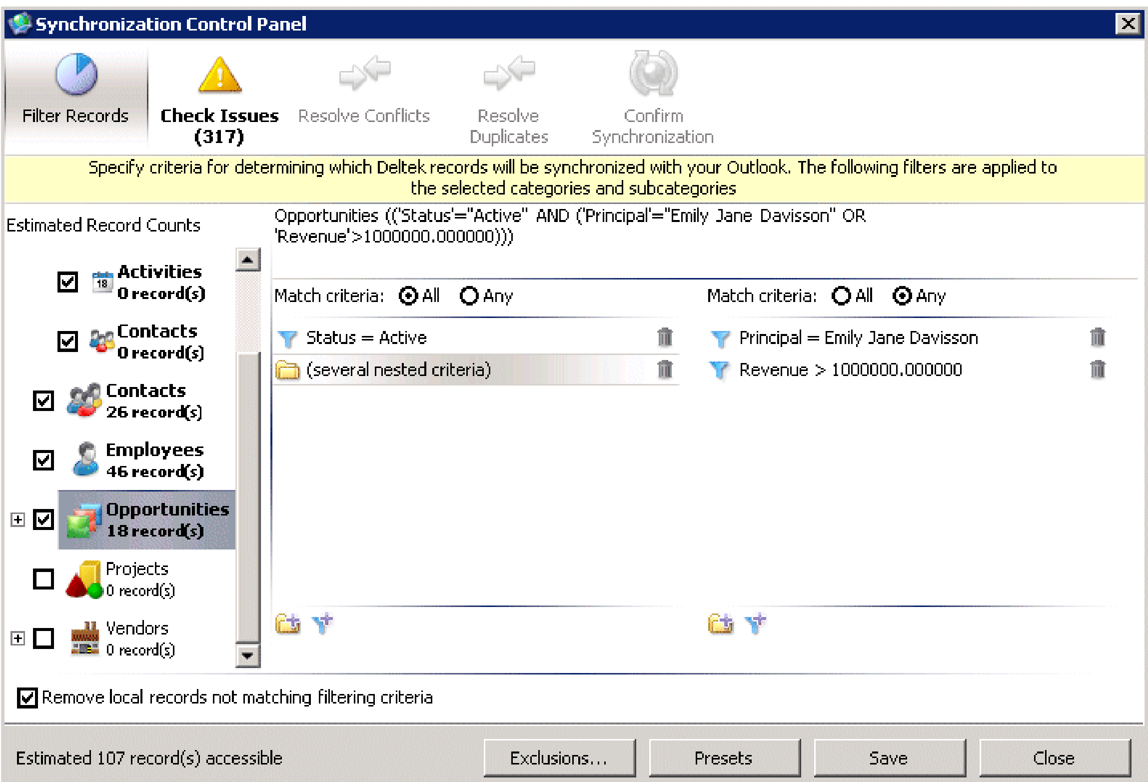
To create filters that mix AND and OR conditions, you must use a group condition.

An example of a group condition for Opportunities:

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

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

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



An example of a group condition for Clients:

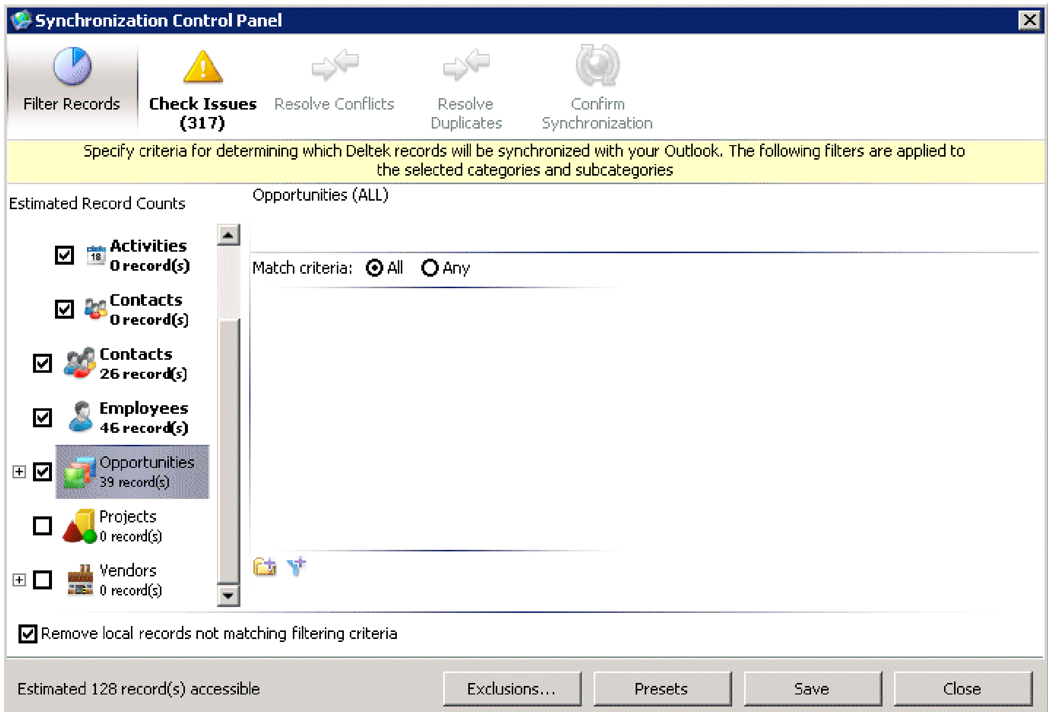
(Status = Active AND Type = Healthcare) OR (Status = Active AND Primary Address Indicator = True AND Primary Address State = CO)

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

To create a group condition, complete the following steps:

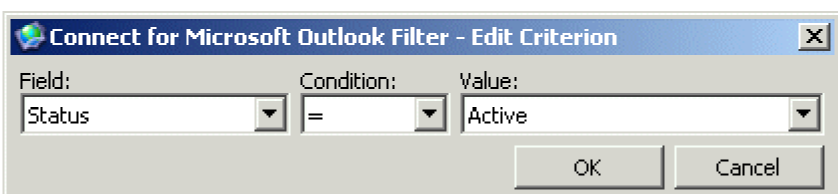
The opportunity filter example that returns opportunities with an active status, where Emily Davisson is the principal or the revenue is greater than $1,000,000 is illustrated in the following instructions.

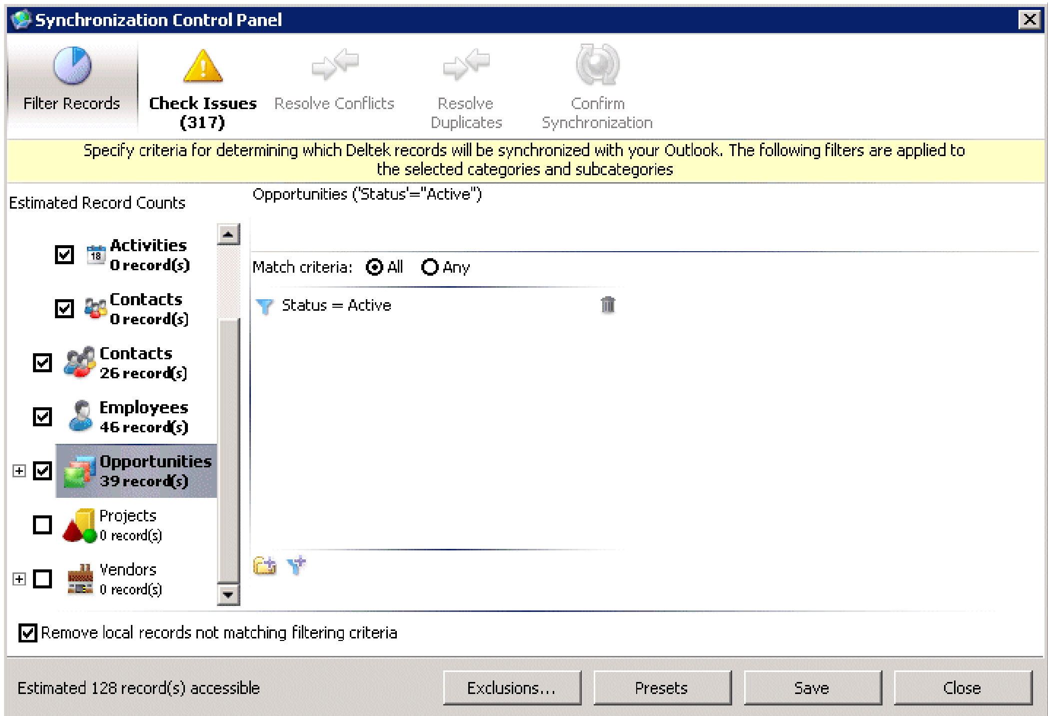
1. In the pane on the left side of the Filter Records screen, select the check box for the type of Vision record for which to create a group condition. Then click the check box name to highlight the check box name and display the **Match criteria: All** and **Any** setting in the filter criteria pane.



2. In the filter criteria pane, click the **Add a condition**  icon to open the Connect for Microsoft Outlook Filter – Edit Criterion dialog box. Enter a filter condition, and click **OK**.

   In this example, we enter a condition that returns all opportunities with an active status.

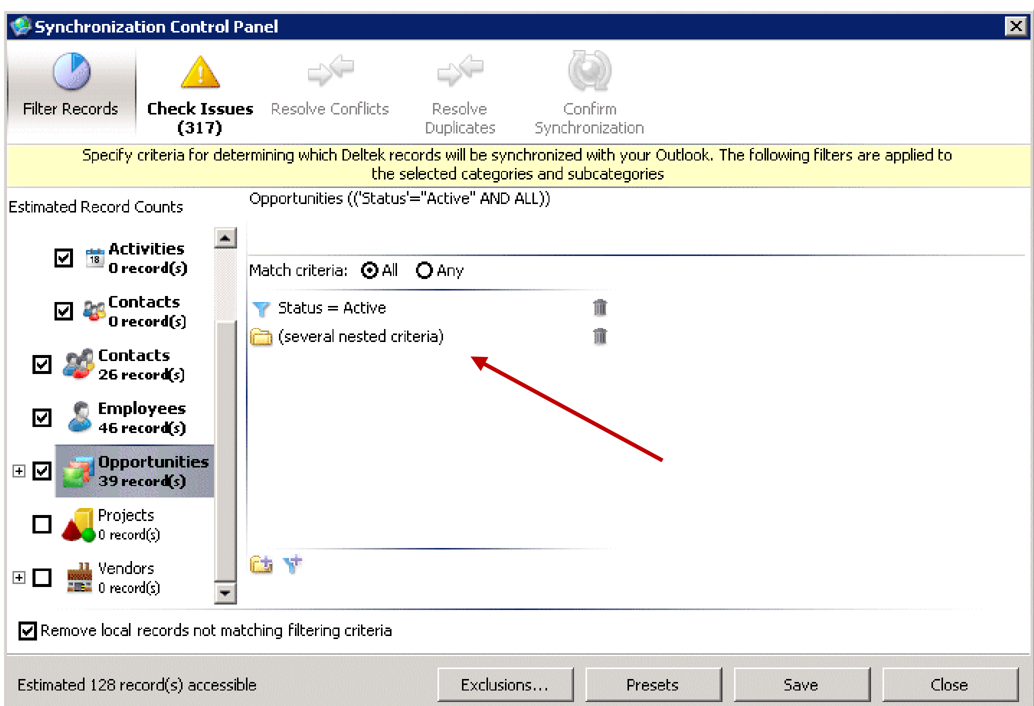




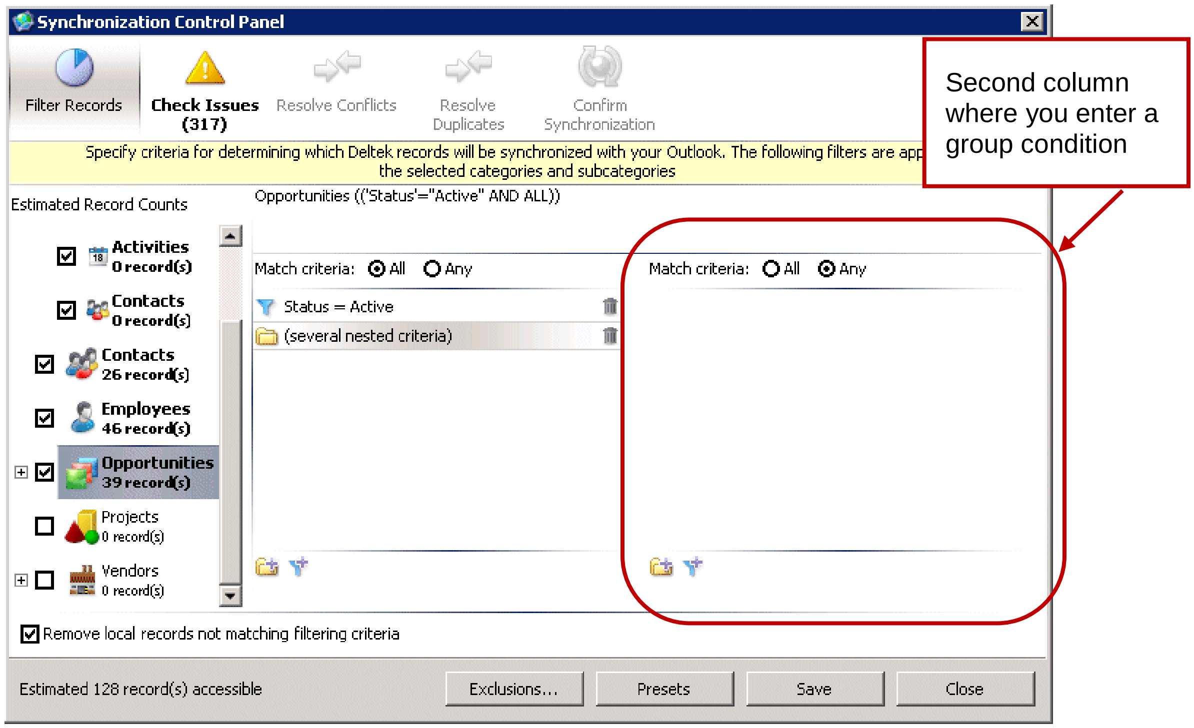
In this example, we leave the **Match criteria** setting at **All** (AND-based). This means all single conditions in this column must be met. In this example, we have only one filter condition.

3. In the filter criteria pane, click the **Add group of conditions**  icon

   A **(several nested criteria)** folder displays in the filter criteria pane.

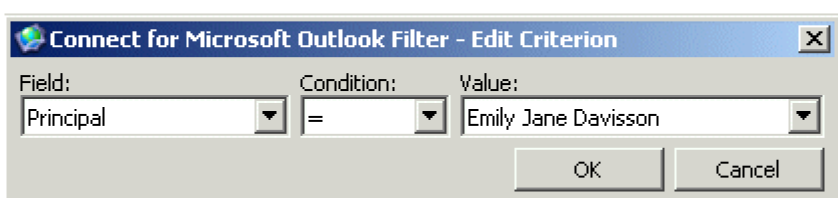


4. Click the **(several nested criteria)** folder to display a second column on the right side of the filter criteria pane that displays the **Match criteria: All** and **Any** setting and the and icons. In this second column, you add single or group conditions that make up a group condition.



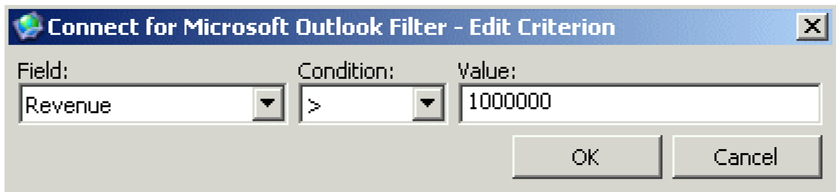
5. In the second column, click the **Add a condition** or **Add group of conditions** icons to open the Connect for Microsoft Outlook Filter – Edit criterion dialog box and add a filter condition. Click **OK** to save it and return to the filter criteria pane.

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



6. Repeat step 5 to enter another filter condition.

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



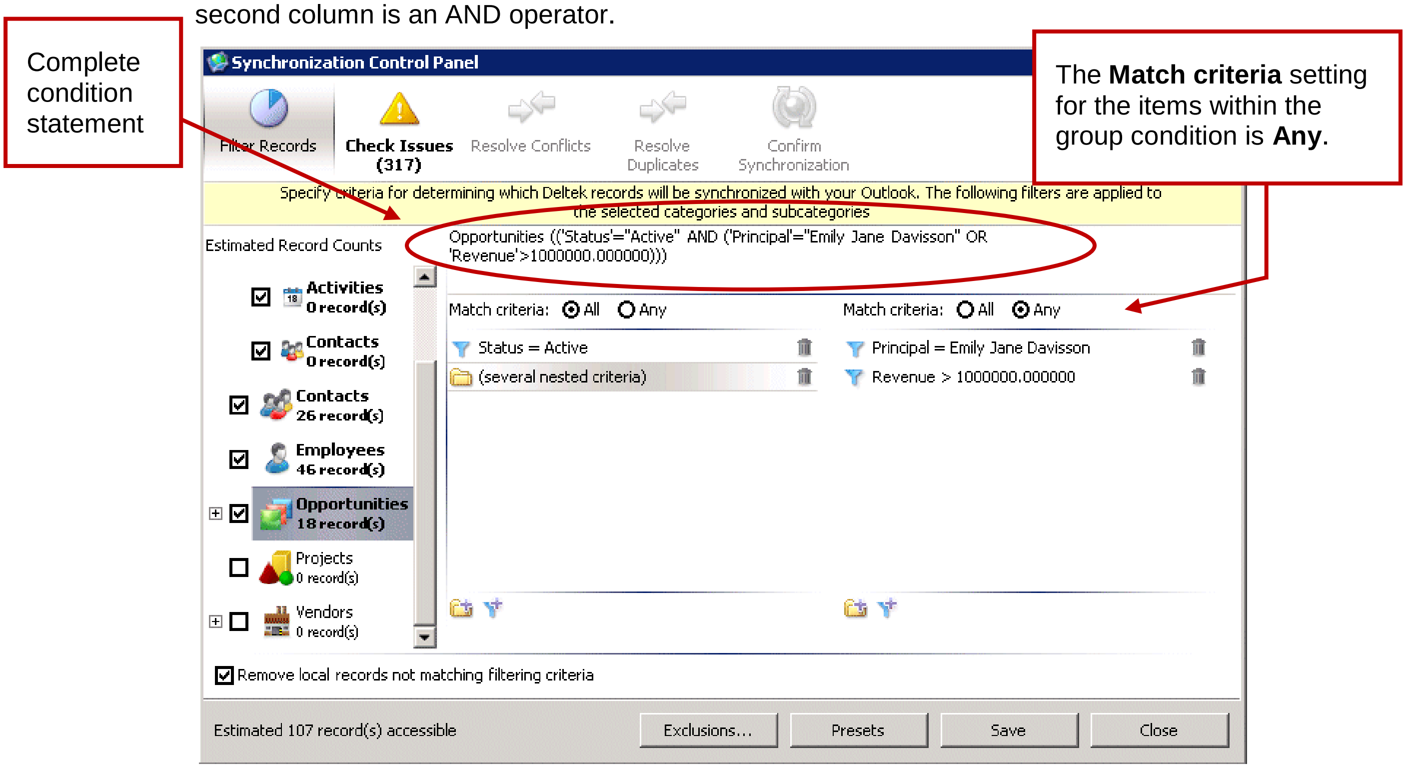
7. In the group condition pane on the right side of the Filter Records screen, select the **Match criteria** setting for the group condition.

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

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

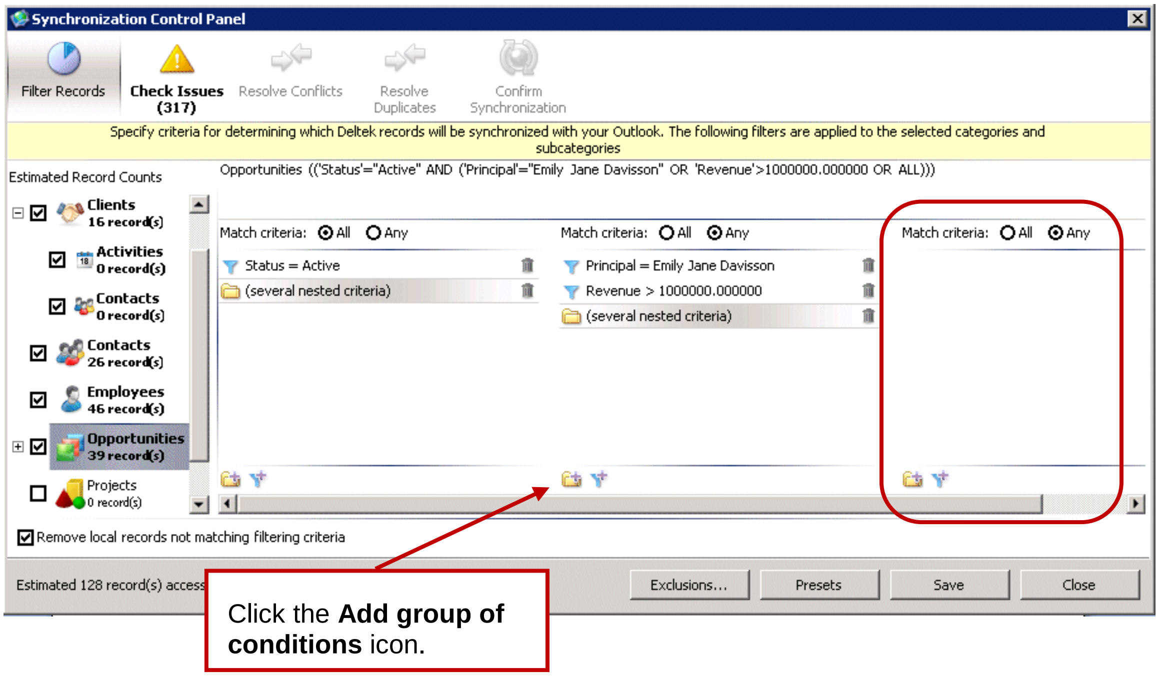
   Opportunities (('Status'="Active" AND ('Principal'=Emily Jane Davisson" OR 'Revenue">1000000.000000)))

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



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

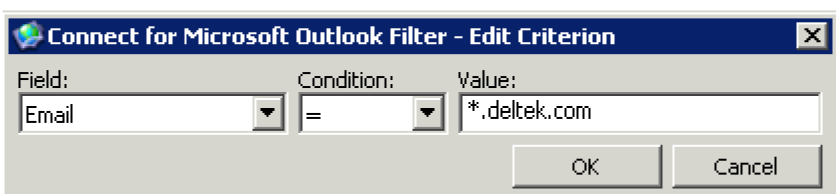
The operator between each column of conditions is AND.



Wildcards (Asterisks) for Conditions

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

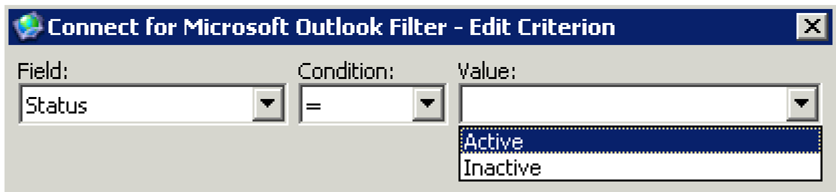
For example, you could enter a condition for email addresses to include only email addresses with "@deltek.com" in them. To do this, enter ***.deltek.com** in the **Value** field for the contact **Email** field:



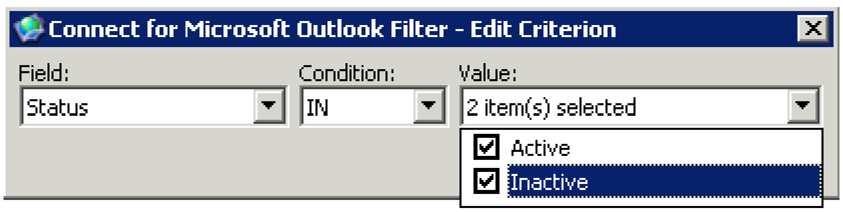
IN Condition

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

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

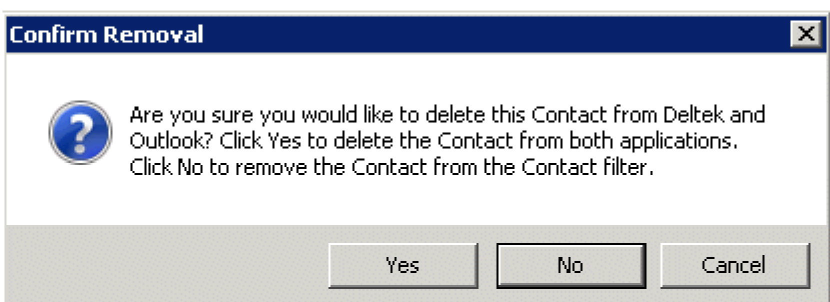


To choose multiple values in the **Value** field on the Connect for Microsoft Outlook Filter – Edit Criterion dialog box, select **IN** in the **Condition** field.



Filter Exceptions

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



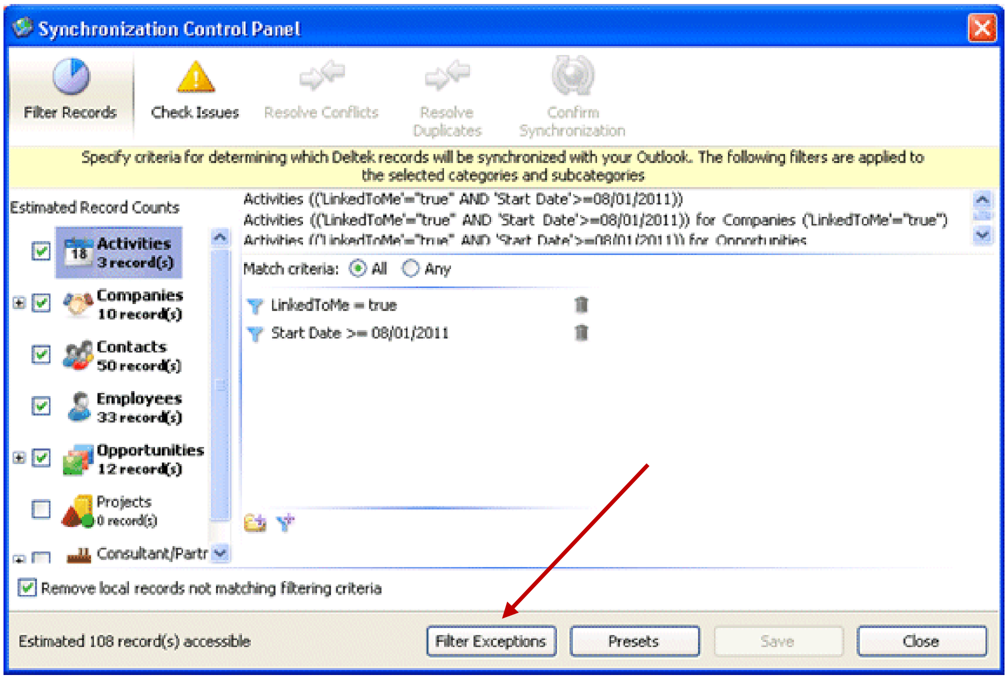
- If you click **Yes** in the Confirm Removal dialog box, the contact is deleted from Connect for Microsoft Outlook and Vision when you synchronize.
- If you click **No** in the Confirm Removal dialog box, the contact is deleted from Connect for Microsoft Outlook, but it remains in Vision. It also becomes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

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

Filter exceptions also include records that you brought into Connect for Microsoft Outlook using the mini-synchronization (Select in Deltek) feature. For more information about this feature see the "Associate a Deltek Record That Has Not Been Synchronized to Your Outlook" topic in the Connect for Microsoft Outlook online help.

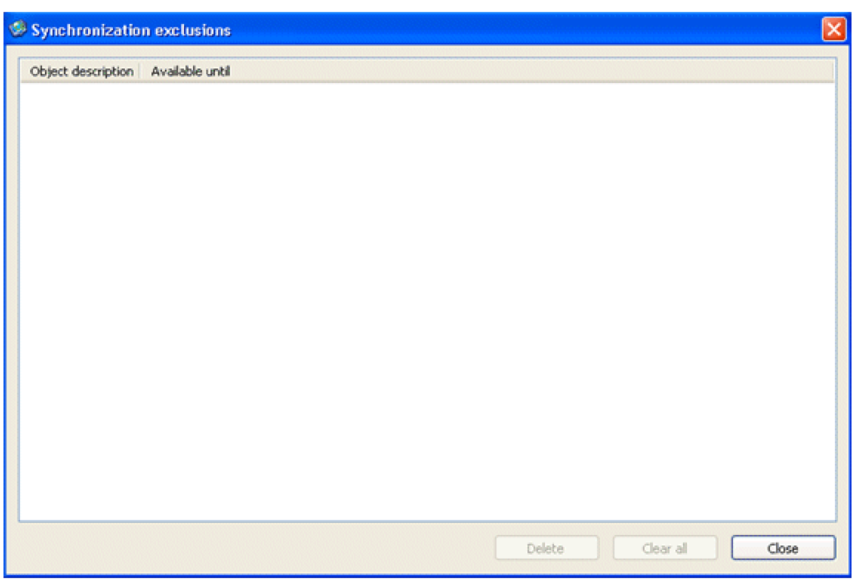
To remove a contact from the synchronization filter exceptions list, complete the following steps:

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



3. On the Filter Exceptions dialog box, select the contact that you want to remove from the filter exceptions list and click **Delete**.

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



Filters and the Vision Client Hierarchy Feature

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

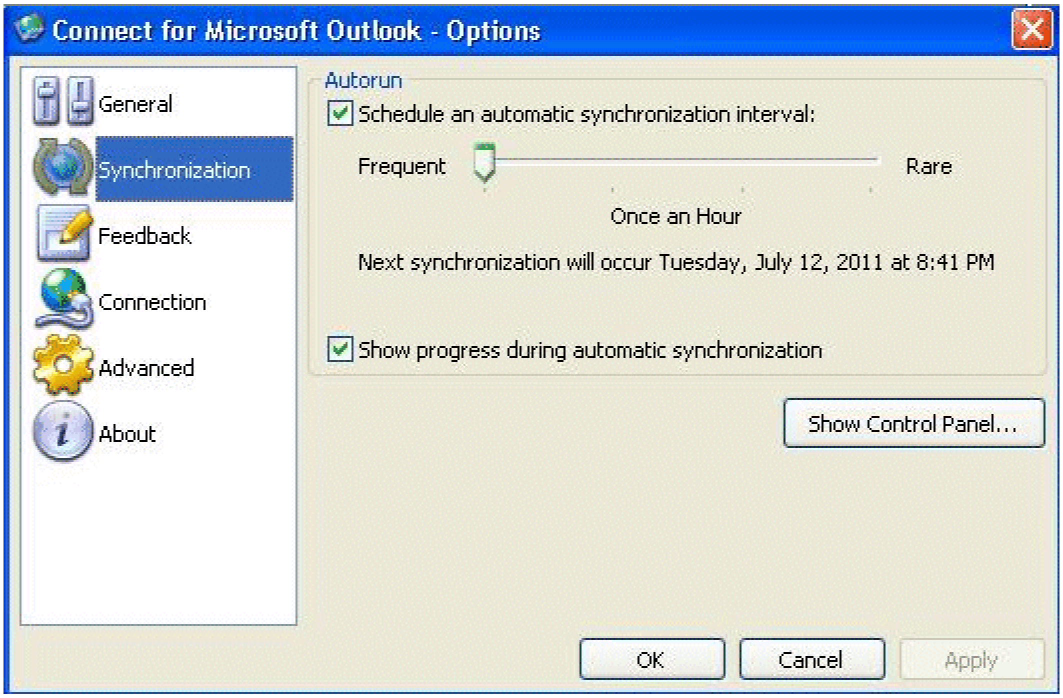
- Complete records if you have view rights to them, and they match your client filter.
- Incomplete records if you have view rights to them, and they do not match your client filter. (You can open the record and see some information such as the notes, but the association grids are incomplete.)
- Client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

"Appendix A: Complete and Incomplete Records" on page 100.

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

Appendix E: Synchronization Schedules

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



Manual Synchronization

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

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

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

Automatic Synchronization

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

Synchronization Timer

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

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

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

Example

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

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

- If you close Connect for Microsoft Outlook after the synchronization completed at 4:40 PM, no synchronization would occur at 5:40 PM (and 6:40 PM, and so on) because Connect for Microsoft Outlook is not open.
- If you open Connect for Microsoft Outlook again the next morning at 8:00 AM, another synchronization starts at 8:40 AM. It resumes where the timer left off at 40 minutes past the hour.
- If you perform a manual synchronization at 9:15 AM (in between the automatically scheduled synchronization interval), and the synchronization finishes at 9:20 AM, the next synchronization is scheduled to start at 10:20 AM.

Automatic Synchronization Has Stopped Completely

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

Change Synchronization Settings

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

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

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

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

Activity Record

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

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

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

Client Record

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

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

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

Contact Record

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

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

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

Opportunity Record

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

Opportunity Field/Grid Name
Name
Number
Description
Organization
Primary Client
Primary Contact
Principal
Project Manager
Supervisor

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

Vendor Record

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

Vendor Field/Grid Name
Number
Name
Associated Client
Organization
Addresses — Address 1, Address 2, Address 3, Address 4, City, Country, State/Province, and ZIP

Vendor Field/Grid Name
Phone
FAX
Minority Status check boxes — Disadvantaged Business, Small Business, Veteran Owned Small Business, Disabled Vet. Small Business, Minority Business, Woman Owned, HBCU, and Alaska Native
Status
Specialty
Specialty Description text box
Web Site
Prior Work check box
Recommend check box
Aliases grid
Opportunities grid
Files grid
Contacts grid
Projects grid
Payment Terms

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