



Vision Project Connect

Release 1.5

User Guide

Vision Project Connect provides seamless integration of Deltek Vision's resource and project planning functionality with Microsoft Project.

March 2011

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Introduction

Vision Project Connect provides packaged integration between Deltek Vision and Microsoft Project. This creates the capability for project managers to leverage the resource planning benefits of Deltek Vision while managing the complexities of the schedule in Microsoft Project with relationships, constraints and critical paths.

Vision Project Connect implements a set of pre-packaged integration processes designed specifically with project management to ERP integration best practices and the advanced resource planning features of Deltek Vision in mind. The data mappings and information flow provided create an out-of-the-box business process integration for managing projects externally to Deltek Vision.

The integration processes use an information management approach to data transfer as opposed to ETL (Extract, Transform and Load) style data synchronization. This allows data to be managed in context of the project lifecycle, as information. The product provides information management processing for projects, plans, actual labor, resources, and cost.

The product provides packaged composite applications for interactive and on-demand integration processes.

Using This Guide

Throughout the guide, you will see call out boxes with different symbols. These provide important information that is being highlighted so that it is not missed. Here is each of the callout types:



This will cause an error or introduce data integrity issues. Don't do it!



Vision Project Connect documentation is delivered in a set of purpose-scoped documents. This refers to another document within the set.



This is a recommendation or best practice that will help make the Vision Project Connect software easier to use and maintain. Do these!

Supported Applications

Deltek Vision

Vision Project Connect supports 6.x releases with the same functionality.

Your application administrator has configured the Vision Project Connect server to interface with your company's Deltek Vision implementation. This is the master system for information such as resources, actual hours and costs.

Microsoft Project

Vision Project Connect supports Microsoft Project Server 2007 and Microsoft Project 2007 desktop editions. If your company is using Microsoft Project Server 2007, then your administrator has configured the Vision Project Connect server to interface with your company's Microsoft Project Server 2007 instance.



Only one of the Microsoft Project interfaces should be used for any given project. Mixing use of the Server and Desktop interfaces will cause data integrity problems.

If your company is using Microsoft Project Server 2007, then you will be able to upload and download Microsoft Project XML files through the interactive user interface.

If your company is using the desktop version of Microsoft Project 2007, then you will be able to use the Project Connect toolbar directly from Microsoft Project.

Web Browser

Vision Project Connect supports Microsoft Internet Explorer 7.0. Microsoft Internet Explorer 8.0 may be used only with IE 7 compatibility mode enabled.

Integrated Projects Best Practices

This section describes a number of practices that users of Microsoft Project and Deltek Vision should adopt when working with integrated projects. Due to differences in the treatment and capabilities for data in each of these systems, it is important to follow these guidelines to achieve good results with the integrated projects.



Only use one of the Microsoft Project interfaces for any given project. Mixing use of the Server and Desktop interfaces will cause data integrity problems.



Use only Microsoft Project to create new Tasks and perform scheduling. If you create tasks in Deltek Vision and Microsoft Project, data conflicts can occur.



Do not assign the same resource to a task in Deltek Vision. Multiple assignments of a resource to a task are not supported in Microsoft Project.

The Vision Project Connect User Interface

The Vision Project Connect user interface is accessed depending on the Microsoft Project environment and version that is being used.

The user interface for Microsoft Project Server environments accessed via a browser and is entirely web based. The integration applications are delivered as Portlets, which are self-contained web applications hosted within the Vision Project Connect Portal.

The user interface for Microsoft Project 2007 is embedded into Microsoft Project as an Add-In that provides a new toolbar. From here, it is possible to upload and download projects and to retrieve resource information from Vision. Some features, such as managing WBS maps, viewing audits and administrative functions require the use of the Vision Project Connect Portal using a Web Browser.



For more information about the Vision Project Connect Portal features, setup and configuration, see the *Vision Project Connect 1.5 Administrator Guide*.

The interactive integration processes can be accessed in multiple ways including using the Vision Project Connect portal or embedding an integration community (collection of related portlets) within the Vision Dashboard.

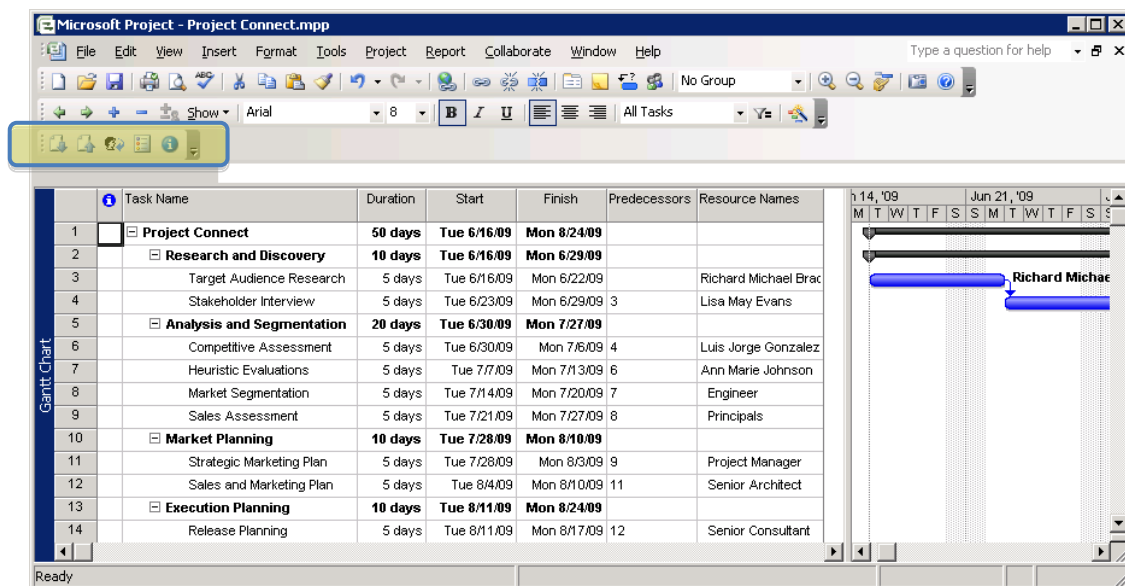
Vision Project Connect
Release 1.5
SAP

Project 2007 Add-In

If you are using Microsoft Project 2007 desktop, you can access the majority of the Vision Project Connect features directly from your toolbar.



For information on how to install the Vision Project Connect Add-In for Microsoft Project 2007 SP2, see the *Vision Project Connect 1.5 Client Installation Guide*.



Microsoft Project: Project Connect Add-In

Project Connect Portal

If you are using Microsoft Project 2007 Server, you can access all the functionality from the Vision Project Connect Portal.

Vision Project Connect Portlet Features

Selection Tables

Selection tables allow you to filter on a list of information and select an option for processing in the next step of the workflow.

Action	Name ↑↓
<input type="radio"/>	Demo- Project Scenario 1
<input type="radio"/>	Development- Project Scenario 001
<input type="radio"/>	Development- Project Scenario 002
<input type="radio"/>	RF1
<input type="radio"/>	Template- Project Scenario 1
<input type="radio"/>	Test- Project Case 900
<input type="radio"/>	Test- Project Scenario 001

Selection Table

To filter the results to a smaller set of information, simply type the letters or words into the search box of the item that you are looking for. For example, to see only Development projects from this list, simply type “Dev” into the search box and watch as the information is filtered.

Action	Name ↑↓
<input type="radio"/>	Development- Project Scenario 001
<input type="radio"/>	Development- Project Scenario 002

Filtered Selection Table



Tables can be sorted on any column by clicking on the column header label. Each click on the header changes the directionality of the sort.

Restart Workflow

Any workflow can be restarted by clicking on the “Restart Workflow” link on the bottom of the portlet window. This will return you to the initial screen of the workflow

Project Server/Vision Plan Management

VISION PROJECT CONNECT / PROJECT INTEGRATION / UPDATE PROJECT FROM VISION

Select a plan from which to update an external project.

Search:

Action	Name ↓
<input type="radio"/>	121_Test
<input type="radio"/>	1QA_Project
<input type="radio"/>	2QA_Desktop
<input type="radio"/>	2QA_Project

[Restart Workflow](#)

Restart Workflow Link

Using the Vision Project Connect Portal

Deltek - Welcome - Windows Internet Explorer

http://deltek-qa2:8280/web/guest/home

File Edit View Favorites Tools Help

Deltek - Welcome

Deltek

Welcome!

Welcome

Sign In

Login:

Password:

Remember Me ☐

[Forgot Password?](#)

Done

Local intranet

100%

Vision Project Connect Login Screen

The first step to using the Vision Project Connect Portal is to log in to the portal web application. To do this, simply point your browser to the URL provided by your application administrator and enter your credentials according the account information you were provided.

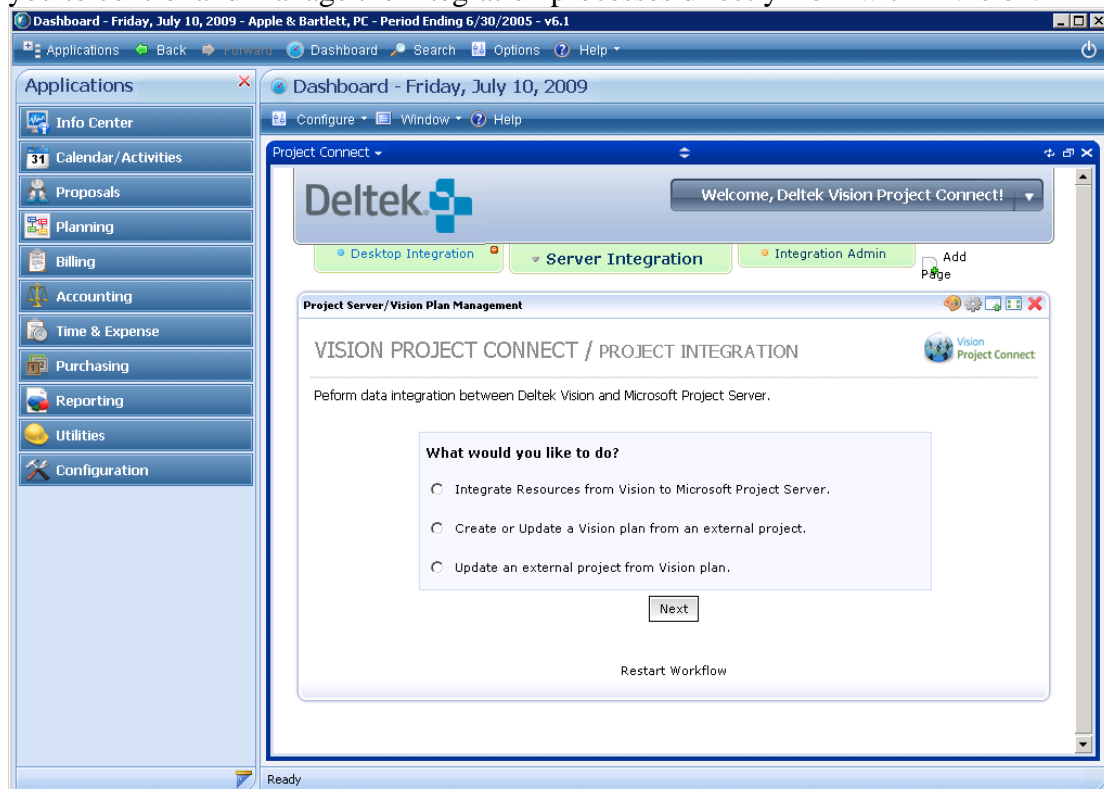
- ❶ Enter the username provided by your administrator in the “Login” box.
- ❷ Enter the password provided by your administrator in the “Password” box.
- ❸ Click on the “Sign In” button.

When you log in to Vision Project Connect, the portlets that display, and thus the workflows you can access, are based on how your application administrator configures your user account and whether your organization is using the Project Server or Project Desktop interfaces.

If you log in to the Vision Project Connect Portal and do not see the integration portlets, you will need to contact your application administrator to configure your account.

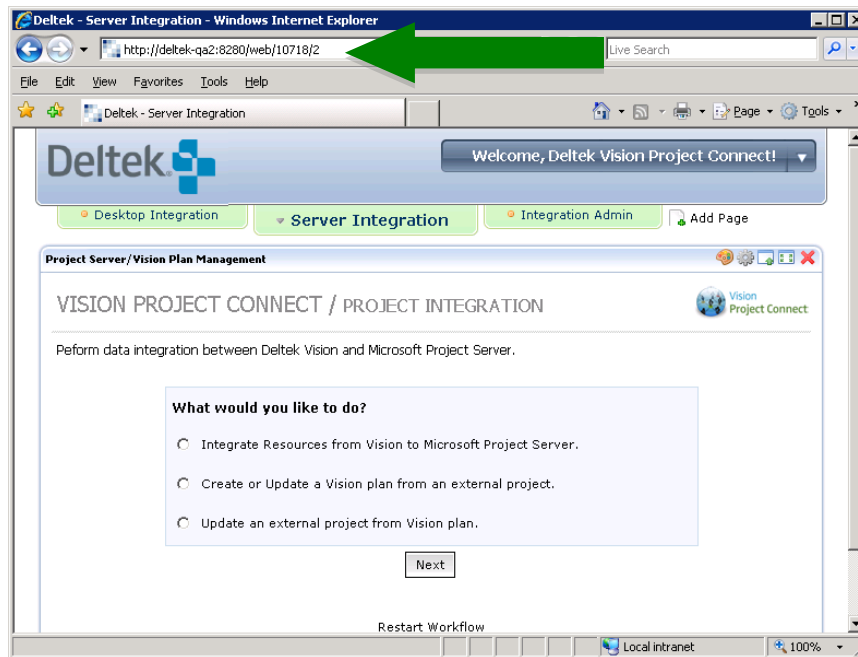
Using Portlet Communities in Vision

If you are a Deltek Vision user, your application administrator may have configured a Vision Dashboard part with a Vision Project Connect portlet community. This allows you to control and manage the integration processes directly from within Vision.



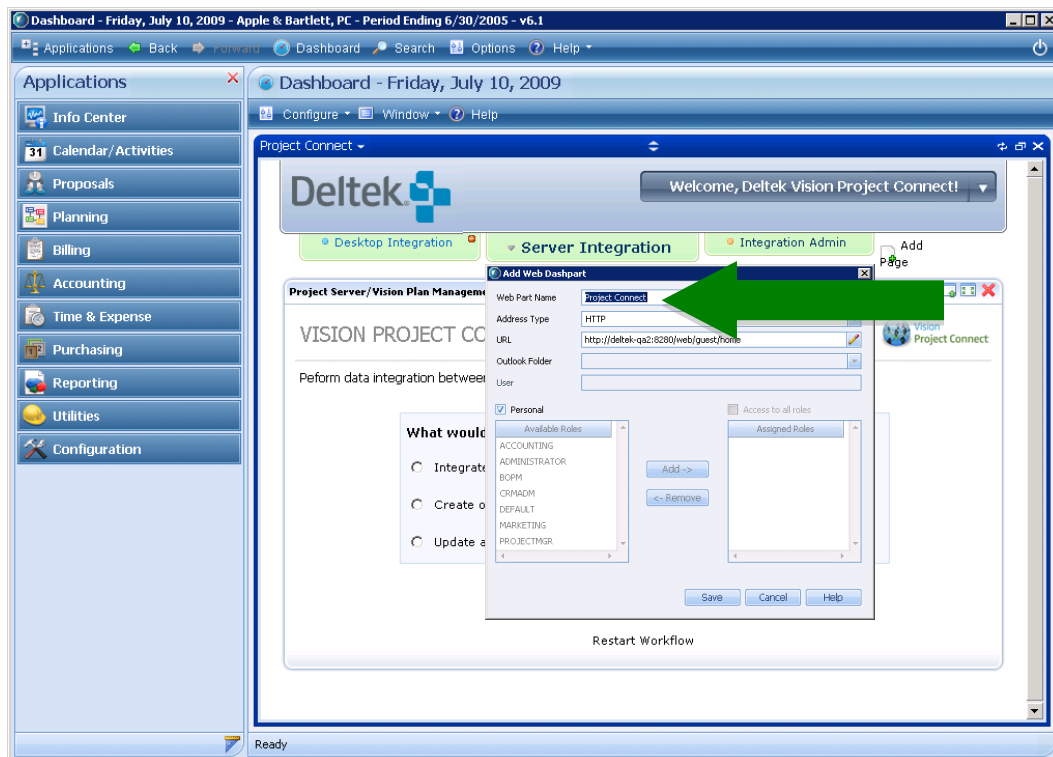
Vision Project Connect in the Vision Dashboard

You can also create your own portlet community in Vision if you have the privileges required in Vision to access and create Dashboard parts. To do this, first log into the Vision Project Connect Portal and navigate to the page that you wish to be the default page within the Dashboard. Copy the URL from your browser's navigation control; this will be used in the Vision Dashboard as the community URI.



Copy the URL from the Portal Community Page.

From the Dashboard in Vision, create a new HTTP URL Type part and paste the community URI from the Vision Project Connect Portal to the URL field in the Dashboard part configuration panel. Complete the rest of the form items to your needs and return to the dashboard. You may wish to resize the Dashboard part viewport.



Configure the Vision Wep Part Name.

Project Server 2007 Interfaces

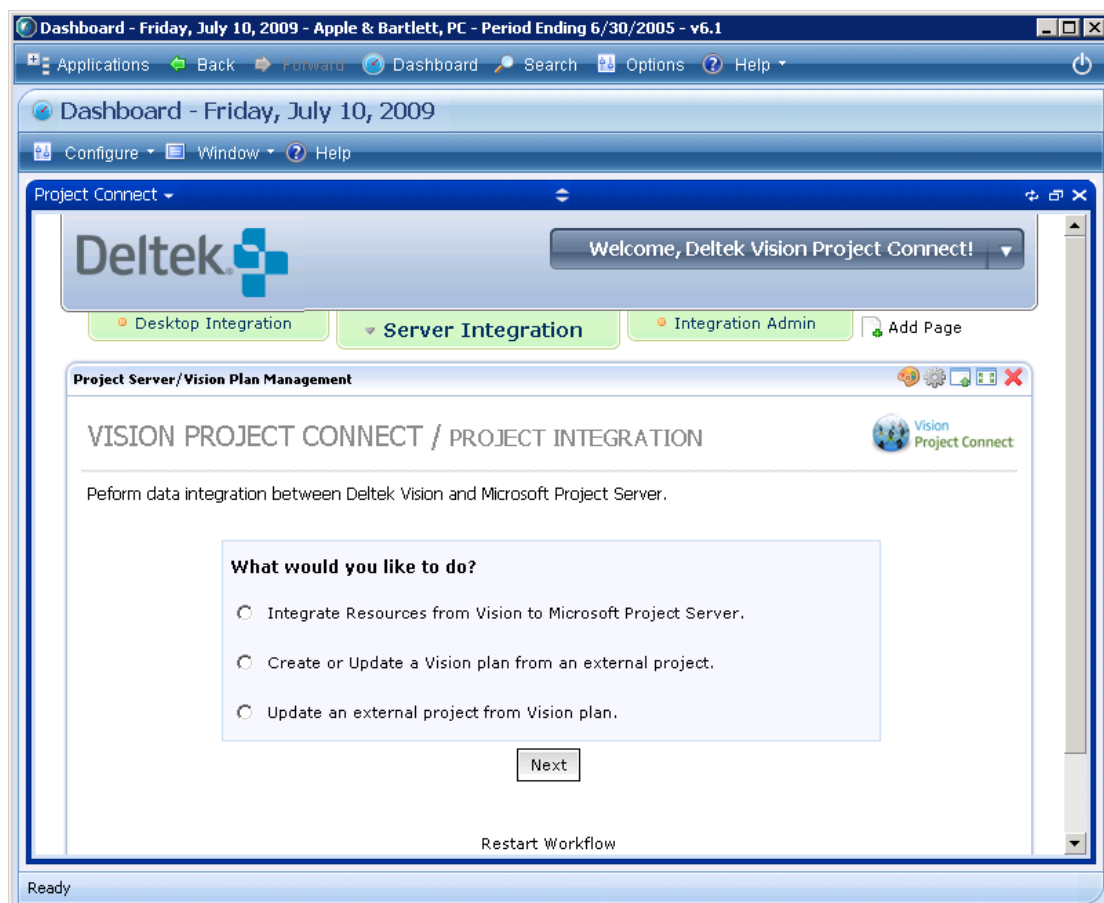
If your company uses Project Server 2007, then you should be presented with the workflows relevant to integration with Project Server.



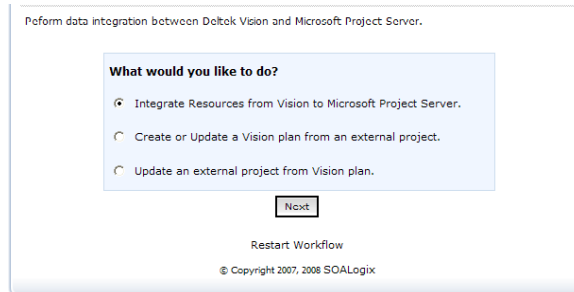
When you are finished working with a project managed in Project Server 2007, be sure to both Publish and Check-In your project in addition to Saving. This will ensure the project data and any changes you have made will be available to the integration process.

The user interface is designed as a “wizard” style workflow that allows you to select the type of integration process desired along with the information and options to process the integration request with.

The first screen provides the ability to select the type of integration process to run.



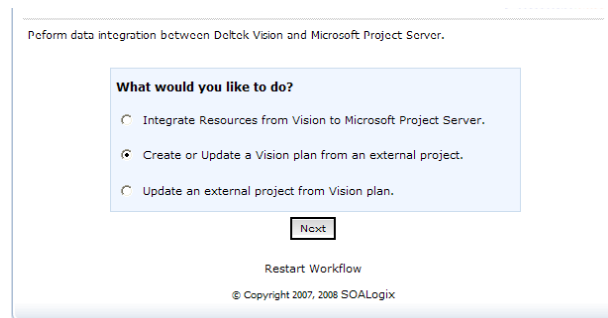
Project Server Integration Workflow



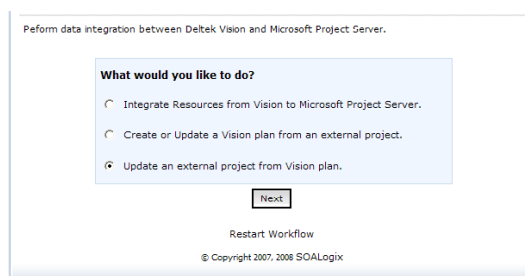
The first option provides the ability to maintain the Project Server enterprise resource dictionary based on the current employee data defined within Vision. The integration process performs a set of discrepancy and quality checks on the data and merges new and updated information into Project Server.

Resource Integration

The second option provides the ability to create and update Plans in Vision based on projects available in Project Server. The workflow will automatically create or update the Vision Plan based on whether the project has previously been initialized within Deltek Vision as a Plan.



Vision Plan Integration



The third option provides the ability to update Projects in Project Server based on current plan and project actual hours information available within Vision. The workflow will automatically update resource assignments, actual hours and task information.

Microsoft Project Integration

Integrate Resources

Selecting the “Integrate Resources from Vision to Microsoft Project Server” option and pressing the “Next” button immediately launches the Resource master data management integration process. There is nothing else for you to do at this point other than wait for the process to complete and to review the results.

Microsoft Project Resource Integration

When the integration process is finished, the workflow displays the results screen with details about the operation.

Resource Integration Results

Vision Plan Information Management

Selecting the “Create or Update a Vision plan from an external project.” option and pressing the “Next” button will initiate the workflow process for managing incoming Project information to Vision.

Vision Plan Integration

The next screen of the workflow allows you to select a project from Microsoft Project Server to create or update in Vision. This list of projects you are presented with is live data from Microsoft Project and reflects the current list of projects available for integration management.

Vision Plan Selection

Depending on whether the selected project has a corresponding plan in Vision, the integration process with either create a new Vision plan for the project, or update the existing one with any qualifying modified data in the project.

To transfer the Project data to Vision, click the radio button of the corresponding project row in the “Action” column and press the “Create plan in Deltek Vision” button.

Once the integration process has been completed, the workflow returns a results screen with details of the operation.

Your request has completed. The results are shown below, and are also available from the **Audit** interface.

Search:

Object ↑↓	Id ↑↓	Value ↑↓	Type ↑↓	Description ↑↓
DeltekPlan	57ea6b72ce664f0fbecd80eb2bb6fec2	Demo- Project Scenario 1	Info	Deltek Plan created successfully

[Restart Workflow](#)

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Vision Plan Integration Results

The product creates a Deltek Vision plan of the same name as the Microsoft Project name.

Apple & Bartlett, PC - Period ending Friday, October 31, 2008 (ADMIN) - Deltek Vision

Project Planning

Save Save Baseline New Delete Actions Options Help

Demo- Project Scenario 1
Retrieve Mode: All Data * ETC/JTD Date: 10/5/2008

General Labor Rates Top-Down Plan Summary Analysis Financial* Expenses

Plan Name Demo- Project Scenario 1

Plan Number Start Date 9/5/2008 End Date 9/17/2008

Top Project

Opportunity Probability

Company

Principal-In-Charge Target Multipliers: Cost

Project Manager

Supervisor

Organization

%Complete Formula User-Entered % Complete

Planned Revenue

Labor Multiplier Type User Entered (Cost)

Multiplier

Reimbursable Method Cost

☒ Include in Utilization and Project Reports

☒ Show Unposted Actual Labor

☐ Show Committed PO Expenses

Deltek Vision Plan Created or Updated

Microsoft Project Information Management

Perform data integration between Deltek Vision and Microsoft Project Server.

What would you like to do?

☐ Integrate Resources from Vision to Microsoft Project Server.
☐ Create or Update a Vision plan from an external project.
☒ Update an external project from Vision plan.

Next

Restart Workflow

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Selecting the “Update an external project from Vision plan.” option and clicking the “Next” button will initiate the workflow process for managing information flow to Microsoft Project from a Vision plan, including resource assignments and labor actual data.

MS Project Update

The next screen of the workflow allows you to select a Deltek Vision plan that is being managed with an external project.

Project Server/Vision Plan Management

VISION PROJECT CONNECT / PROJECT INTEGRATION / UPDATE PROJECT FROM VISION

Select a plan from which to update an external project.

Search: Reset Filter

Action	Name
<input type="radio"/>	121_Test
<input type="radio"/>	1QA_Project
<input type="radio"/>	2QA_Desktop
<input type="radio"/>	2QA_Project

Update Microsoft project

Restart Workflow

Plan Selection



Only plans that were created using the Vision Project Connect integration process from an external project will be available for selection. Plans that are created manually in Deltek Vision are not eligible for providing updated project data.

To send the updated information to the external project, select the radio button in the “Action” column of the corresponding row to the Deltek plan and press the “Update Microsoft project” button.

Once the integration process completes, the workflow will return a results screen with details of the operation.

Your request has completed. The results are shown below, and are also available from the **Audit** interface.

Search:

Object ↑↓	Id ↑↓	Value ↑↓	Type ↑↓	Description ↑↓
Assignment	d6b9eae0-a8ad-4b87-9e1e-1b8f0e30cc5a		Info	Assignment created successfully
Assignment	4484bb6a-c36b-4088-a5dd-addf5b04400a		Info	Assignment created successfully
Assignment	f9564c0b-a917-4c7e-81aa-37974327a501		Info	Assignment created successfully
Assignment	4485e4e4-9442-4821-8090-baebac589913		Info	Assignment created successfully

[Restart Workflow](#)

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MS Project Integration Results

Project 2007 Desktop Interfaces

If your company uses Project Desktop 2007, then you should be presented with the workflows relevant to integrating with Microsoft Project via the Vision Project Connect Toolbar Add-In.

The Project Connect toolbar provides a user interface that allows you to select the type of integration process simply by clicking the toolbar items from within MS Project.



While the bulk of the integration processes for 2007 MS Project Desktop is surfaced via the Add-In, the user will be required to access the Portal interface to manage the WBS Mapping.

Vision Project Connect Toolbar

The Vision Project Connect Toolbar provides all the functionality you need to keep your resources and projects in sync with your Vision data. The various buttons provide the ability to configure the add-in to communicate with Project Connect, manage certain behaviors during your MS Project sessions or select the type of integration process to execute.



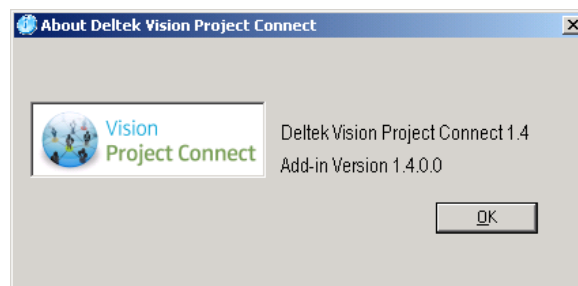
For information on how to install and configure the Vision Project Connect Add-In for Microsoft Project 2007, see the *Vision Project Connect 1.5 Client Installation Guide*.

About Project Connect



About Deltek Vision Project Connect

The About button provides Version information about your Deltek Vision Project Connect Add-In.



MS Project Add-in About box

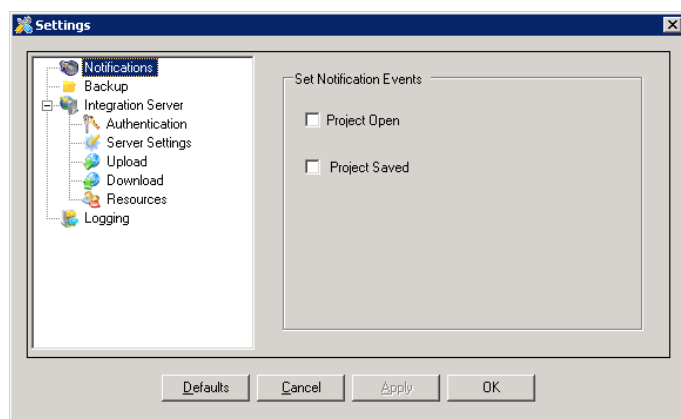
Configuration Settings



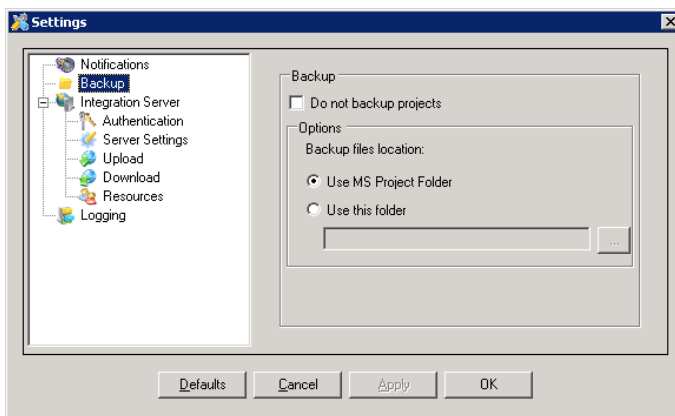
Configure Deltek Vision Project Connect Add-In for Microsoft Project

The Configuration button provides setup functionality to manage the connection to Project Connect, as well as user determined management of your MS Project desktop environment.

The option, 'Notification', provides the ability to trigger a notification during your MS Project session if you either 'Open' or 'Save' a Project. If you check the option box, a window will present itself offering you the ability to update the associated Vision Plan.



MS Add in Notification Settings

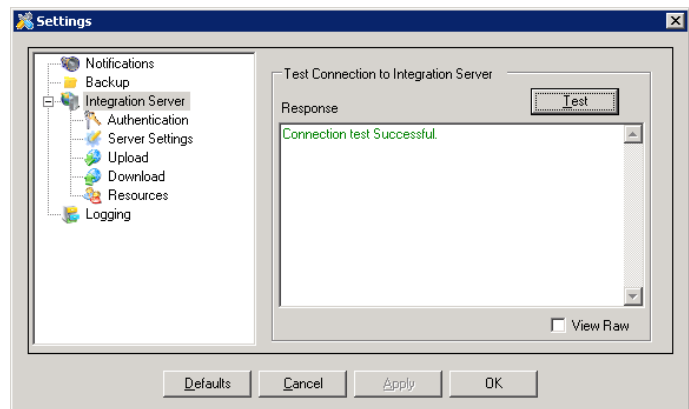


MS Add in Backup Settings

The option, 'Backup', provides the ability to backup your project each time Project Connect performs an update.

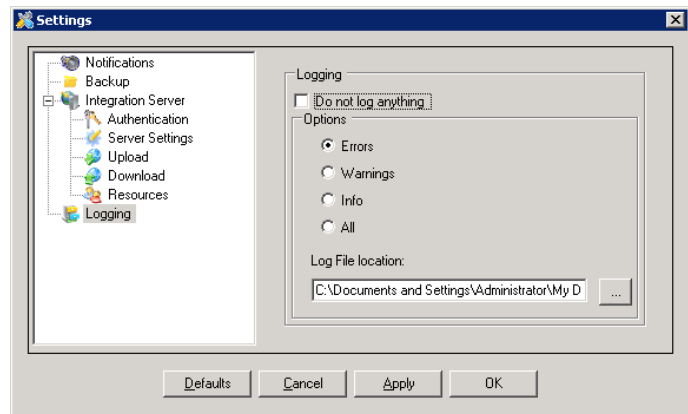
By default, it will save to a defined MS Project folder or you can direct the system to save to another location

The option, 'Integration Server', provides the ability to Test your connection to Project Connect. Clicking the Test button will provide information regarding your connection. *The sub-options within the Integration Server settings are covered in the Client Installation Guide.*



MS Add Integration Server

The option, 'Logging', provides you the ability to set options, parameters and location for logging.



MS Add Logging

Integrate Resources

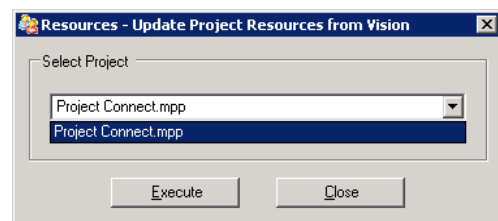


Retrieve Resource data from Deltek Vision Plan

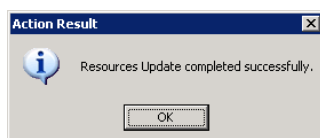
The 'Retrieve Resource data from Deltek Vision Plan' add-in button provides the ability to maintain the MS Project resource dictionary based on the current employee data defined within Vision. The integration process performs a set of discrepancy and quality checks on the data and merges new and updated information into the selected Project.

Clicking the "Retrieve Resource data from Deltek Vision Plan" button launches the Resource master data management integration process. The workflow will prompt you to select an existing Project and then click the

Execute button.



Project Selection Dialog Box



When the integration process is finished, the workflow displays a dialog box indicating the status of the update. Once the process has completed, you can then use the Resources within your MS Project.

The resource integration process creates or updates the resource dictionary within the targeted Project. These resources are then available for assignment within the Microsoft project and can be with the additional Project Connect workflows.

Microsoft Project - Project Connect.mpp

File Edit View Insert Format Tools Project Report Collaborate Window Help

Type a question for help

Show Arial 8 B I U All Resources Y=

Edward Terrence O'Leary

	Inactive	Generic	Resource Name	Type	Initials	Group	Code	Max. Units	Std. Rate	Ovt. Rate	Accrue At
1	No	No	Peter Martin O'Leary	Work	PMO	SF:EN	01416	100%	\$40.00/hr	\$0.00/hr	Prorated
2	Yes	No	Cheryl L. Morgan	Work	CLM	CO:00	SF890	100%	\$0.00/hr	\$0.00/hr	Prorated
3	No	No	Laura Anne Baugh	Work	LAB	BO:AR	00013	80%	\$12.00/hr	\$12.00/hr	Prorated
4	No	No	Tina Marie Barrett	Work	TMB	SF:AR	00014	70%	\$16.00/hr	\$16.00/hr	Prorated
5	No	No	Stephen Wade Willis	Work	SWW	BO:AR	00015	75%	\$15.00/hr	\$15.00/hr	Prorated
6	No	No	Charles Robert Turner	Work	CRT	BO:AR	00016	80%	\$22.00/hr	\$22.00/hr	Prorated
7	No	No	Edward Terrence O'Leary	Work	ETO	SF:EV	00017	80%	\$19.00/hr	\$19.00/hr	Prorated
8	No	Yes	Principals	Work	P		GENERIC1	100%	\$0.00/hr	\$0.00/hr	Prorated
9	No	Yes	Project Manager	Work	P		GENERIC2	100%	\$0.00/hr	\$0.00/hr	Prorated
10	No	Yes	Senior Consultant	Work	S		GENERIC3	100%	\$0.00/hr	\$0.00/hr	Prorated
11	No	Yes	Senior Architect	Work	S		GENERIC4	100%	\$0.00/hr	\$0.00/hr	Prorated
12	No	Yes	Senior Engineer	Work	S		GENERIC5	100%	\$0.00/hr	\$0.00/hr	Prorated
13	No	Yes	Engineer	Work	E		GENERIC6	100%	\$0.00/hr	\$0.00/hr	Prorated
14	No	Yes	Architect	Work	A		GENERIC7	100%	\$0.00/hr	\$0.00/hr	Prorated
15	No	Yes	Designer	Work	D		GENERIC8	100%	\$0.00/hr	\$0.00/hr	Prorated

Ready

MS Project 2007 Resource View

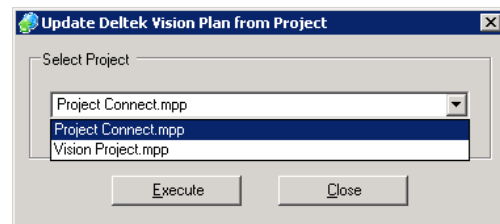
Vision Plan Information Management



Send Project Changes to Deltek Vision Plan

Selecting the “Send Project Changes to Deltek Vision Plan” add-in button will initiate the workflow process for managing incoming Project information to Vision.

The next screen of the workflow allows you to select a project from Microsoft Project to create or update in Vision. The projects that you are presented are ‘open’ projects from your Microsoft Project session and reflects the current list of projects available for integration management.



Project Selection Dialog Box

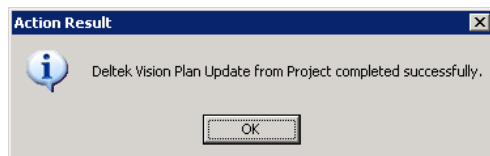
Depending on whether the selected project has a corresponding plan in Vision, the integration process will either create a new Vision plan for the project, or update the existing one with any qualifying modified data in the project.



WBS Mapping is managed via the Portal. See section below ‘WBS Management Interface’ for instructions.

To transfer the Project data to Vision, select the corresponding project row in the drop down and click the “Execute” button.

Once the integration process has been completed, the workflow returns a results screen with details of the operation.



When the integration process is finished, the workflow displays a dialog box indicating the status of the Vision Plan update or create.

The product creates a Deltek Vision plan of the same name as the Microsoft Project name.

Project Planning - Apple & Bartlett, PC - Period Ending 6/30/2005 - v6.0

Applications Back Forward Dashboard Search Options Help

Project Planning Find

Save Save Baseline New Delete Actions Options Print Help

Project Connect Retrieve Mode: All Data *ETC/JTD Date: 6/16/2009

General Labor Rates Top-down Plan Summary Analysis Financial* Expenses Consultants Units

Plan Name Project Connect

Plan Number Start Date 6/16/2009 End Date 6/16/2009

Top Project

Opportunity Probability

Companies

Principal-In-Charge Target Multipliers Cost

Project Manager

Supervisor

Organization

% Complete Formula User-Entered % Complete

Planned Revenue

Labor Multiplier Type User Entered (Cost)

Multiplier

Reimbursable Method Cost Refresh

Include in Utilization and Project Reports

Show Unposted Actual Labor

Show Committed PO Expenses

Available to Other Users

Created By Vision Proj Connect On 6/16/2009 3:01 PM Status Active

Modified By Vision Proj Connect On 6/16/2009 3:01 PM

Ready

Vision Plan General Tab – after creation from MS Project

Project Planning - Apple & Bartlett, PC - Period Ending 6/30/2005 - v6.0

Applications Back Forward Dashboard Search Options Help

Project Planning Find

Save Save Baseline New Delete Actions Options Print Help

Project Connect Retrieve Mode: All Data *ETC/JTD Date: 6/16/2009

General Labor Rates Top-down Plan Summary Analysis Financial* Expenses Consultants Units

Labor New Row Delete Insert Employee Generic Search Indent Outdent Shift

Description	Start	Finish	Planned Hrs	WBS Level	Subrow	Jun 2009 6/16 - 6/21
Project Connect	4/6/2009	6/12/2009	400	Project	Planned Hrs	400
					Planned Cost	
					Actual Hrs	
					EV Pct	
Research and Discovery	4/6/2009	4/17/2009	80	Phase	Planned Hrs	80
					Planned Cost	
					Actual Hrs	
					EV Pct	
Target Audience Research	4/6/2009	4/10/2009	40	Task	Planned Hrs	40
					Planned Cost	
					Actual Hrs	
					EV Pct	
Brady, Richard	4/6/2009	4/10/2009	40		Planned Hrs	40
					Planned Cost	
					Actual Hrs	
					EV Pct	

Ready

Vision Plan Labor Tab – after creation from MS Project

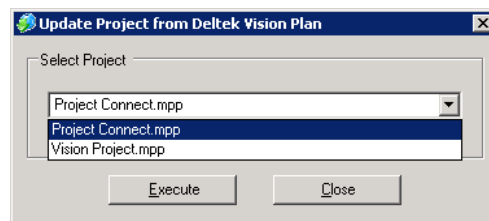
Microsoft Project Information Management



Retrieve Project changes from Deltek Vision Plan

Selecting the “Retrieve Project Changes from Vision Plan” add-in button will initiate the workflow process for managing information flow to Microsoft Project from a Vision plan, including resource assignments and labor actual data.

The next screen of the workflow allows you to select a Deltek Vision plan that is being managed with an external project. The projects that you are presented are ‘open’ projects from your Microsoft Project session and reflects the current list of projects available for integration management.



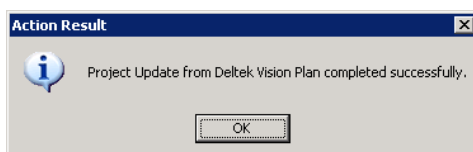
Project Selection Dialog Box



Only plans that were created using the Vision Project Connect integration process from an external project will be available for selection. Plans that are created manually in Deltek Vision are not eligible for providing updated project data.

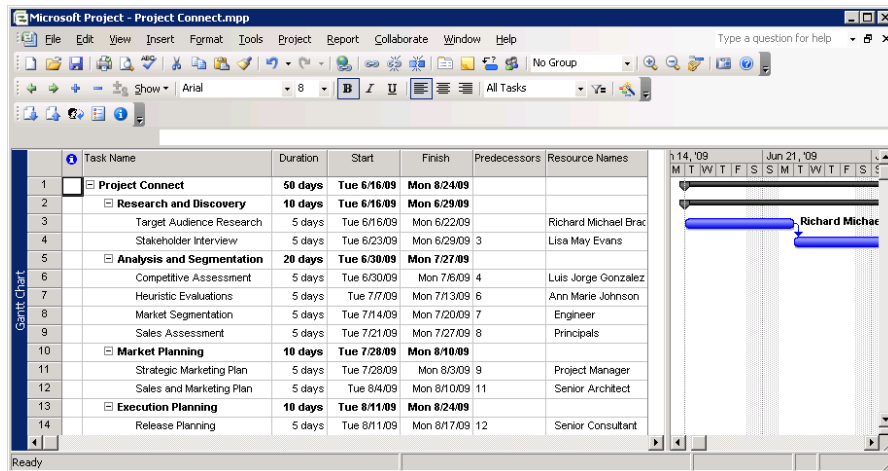
To send the updated information to the external project, select the corresponding project row in the drop down and click the “Execute” button.

Once the integration process completes, the workflow will return a results screen with details of the operation.



When the integration process is finished, the workflow displays a dialog box indicating the status of the Microsoft Project update.

The updated plan information has now been populated into your Microsoft Project for use in resource assignments, cost estimating and other project based functions.



Updated Microsoft Project

WBS Management Interface

Vision Project Connect provides the ability to map the levels of a Microsoft Project to the levels of a Vision Plan that correspond to WBS elements defined within Vision.

This is accomplished from within the Vision Project Connect Portal and you must have permissions to access this portlet.

All projects must have a map defined before they can be integrated with Deltek Vision.

The WBS Management user interface is designed as a “wizard” style workflow that allows you to align MS Project Outline structures with Deltek Vision Planning WBS Mapping settings. This offers the flexibility to build projects via MS Project as needed to support your scheduling or project management requirements and associate the levels required to support accounting, planning and resource management functions of Deltek Vision.



Once the WBS Mapping has been established, it is highly recommended that the defined map be adhered to throughout the lifecycle of the project. Modifying the map during the execution phase of the Vision Plan is not recommended.

Integration Administration

By accessing the Vision Project Connect Web Portal page, Vision Project Connect Integration Administration, clicking the Next button will initiate the WBS Mapping integration process.

WBS Integration Selection Screen

The first step in the workflow provides the ability to view or delete existing WBS Maps as well as create new maps. To view or delete an existing map, select the map and click the related map button in the upper section of the screen. To create a new map, type the Microsoft Project Name in the section provided and type the number of WBS levels required for your Vision Connect Project.

Specify Project Name for WBS Management

Specify Company Code

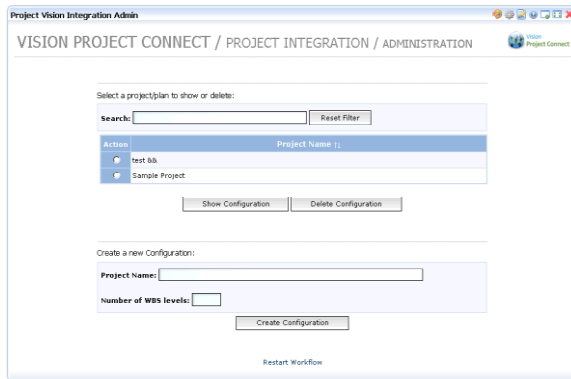
The third step in the workflow provides the WBS Mapping screen. Based on the defined WBS Levels from Step 1, the screen will

The second step in the workflow requires the user to target the Project to the Vision Company. After selecting the Company, click Save Company Code

WBS Mapping

Vision Project Connect
Release 1.5
SAP

present the Outline Levels of your Microsoft Project on the left and Vision Plan levels to associate. After associating the two systems, click the Save Map button to establish the WBS Mapping

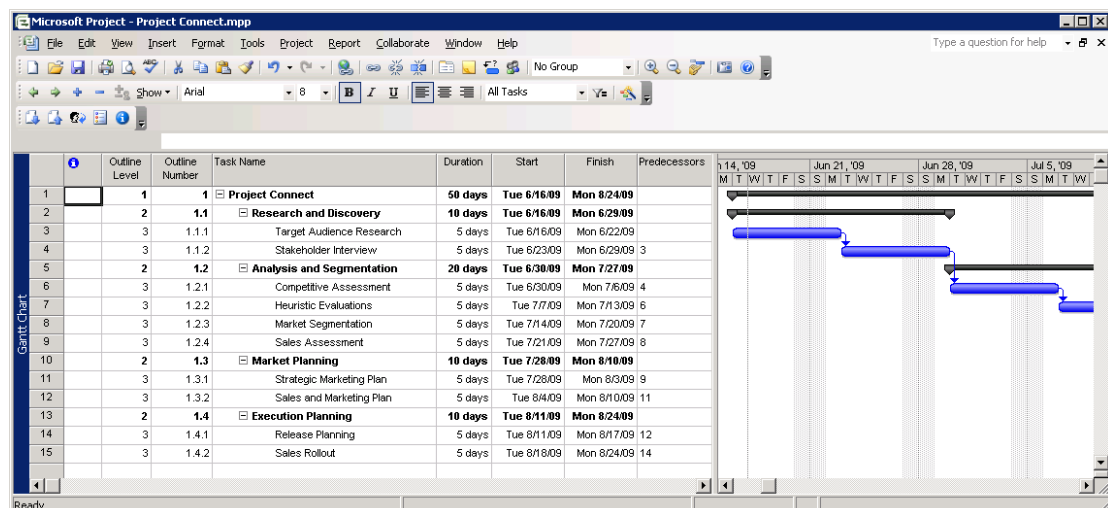


WBS Integrated Projects

The workflow will then return you to the WBS Mapping page. Your newly created map will be shown in the Project Name and will be available for integration.

Microsoft Project Outline Structure

Project Connect associates Microsoft Project Outline Levels with Deltek Vision WBS to enable the bi-directional integration. The screen shot below provides an example of how Microsoft Project structures the project in outline form and the values in the outline coding.



Microsoft Project WBS/Outline Example

Deltek Vision Plan Setting

Deltek Vision Plan Settings determines the structure within the Project Planning module that is applied during the creation and management of a Deltek Vision Plan. The screen shot below illustrates the Default WBS Mapping that Project Connect uses to define the integration.

Plan Settings - Apple & Bartlett, PC - Period Ending 6/30/2005 - v6.0

Applications Back Forward Dashboard Search Options Help

Applications

- Accounting
- Human Resources
- Time & Expense
- Purchasing
- Inventory
- Reporting
- Utilities
- Configuration**
 - General
 - Workflow
 - Security
 - Organization
 - Planning
 - Plan Settings**
 - Resource Settings
 - Planning Grids
 - Summary Grids
 - Accounting Calendar
 - Billing
 - Accounting
 - Payroll
 - Time & Expense
 - Purchasing & Inventory

Plan Settings

Save Help

General Rates

Planning Tabs

- ☒ Enable Expense Planning
- ☒ Enable Consultant Planning
- ☒ Enable Unit Planning

Decimal Digits

Hour: No Decimal

Quantity: 3 Digits

Amount: No Decimal

Create Plan from Project

Copy Down To: Project

- ☒ Compensation Values By Row & Period
- ☐ Synchronize fees from Plan to Project

Default Settings for Creating New Plan

Starting Day of Week: Monday

Planned Revenue

Labor Multiplier Type: User Entered (Cost)

Multiplier: 3.20

Reimbursable Method: Cost

%Complete Formula: User-Entered % Complete

Overhead %: 165

Default WBS Mapping

WBS Element	Plan Level	Match JTD
Project	1	<input checked="" type="checkbox"/>
Phase	2	<input checked="" type="checkbox"/>
Task	3	<input checked="" type="checkbox"/>
Activity Code	4	<input checked="" type="checkbox"/>

Ready

Deltek Vision WBS Mapping Example

Audit Interface

Vision Project Connect provides an audit record for all integration processes. As a user, you may browse and view your own audit history and audit details.



Administrators can browse and view audit history across all users. It is also possible to configure additional user roles for global audit history access. For more information, see the Vision Project Connect 1.5 Administrator Guide.

The portlet displays a list of the integration processes that have been run by your user account and allows drill-down to the audit record details.

Action	ID	Report Name	User Name	TimeStamp
31	Vision_to_MSP: 2QA_Desktop	DELTEK-QA2\Administrator	2009-12-04 16:11:23.343	
30	MSP_to_Vision: 2QA_Desktop	DELTEK-QA2\Administrator	2009-12-04 16:10:32.515	
29	Vision_to_MSP: Resources	DELTEK-QA2\Administrator	2009-12-04 16:09:11.89	
28	MSP_to_Vision: Deltek PRST	admin@deltek.com	2009-12-04 14:51:10.687	
27	Vision_to_MSP: Deltek PRST	admin@deltek.com	2009-12-04 14:44:46.593	
26	Vision_to_MSP: Deltek PRST	admin@deltek.com	2009-12-04 14:42:16.531	
25	Vision_to_MSP: Deltek PRST	admin@deltek.com	2009-12-04 14:35:31.218	
24	Vision_to_MSP: Deltek PRST	admin@deltek.com	2009-12-04 14:31:27.359	
23	MSP_to_Vision: Deltek PRST	admin@deltek.com	2009-12-04 14:18:32.796	
22	MSP_to_Vision: Deltek PRST	admin@deltek.com	2009-12-04 14:07:22.593	

Project Connect Audit Report List

Clicking on the document icon in the “Action” column will display the audit detail for the record.

Object	Id	Value	Type	Description
ProjectTeam	deaa3794-62a6-4d14-94a4-fb8acd9b2c04		Info	ProjectTeam created successfully
ProjectTeam	dfbf36f4-170e-450c-afab-d5c3e467adec		Info	ProjectTeam created successfully
Assignment	fbf570d4-9a06-4666-a811-29e5f10a5bb7		Info	Updated value for `Assignment(RES_UID)`. New value: `Milestone w/duration w/assignment/Lisa May Evans`. Old value: `Milestone w/duration w/assignment/Steve Anderson`
Assignment	3095924a-4d21-4122-b6d8-af2dd76c76c4	SLIM OPS Resource Requirements/Richard Michael Brady	Warning	Assignment is missing in Microsoft Project server -- no update to Project server.

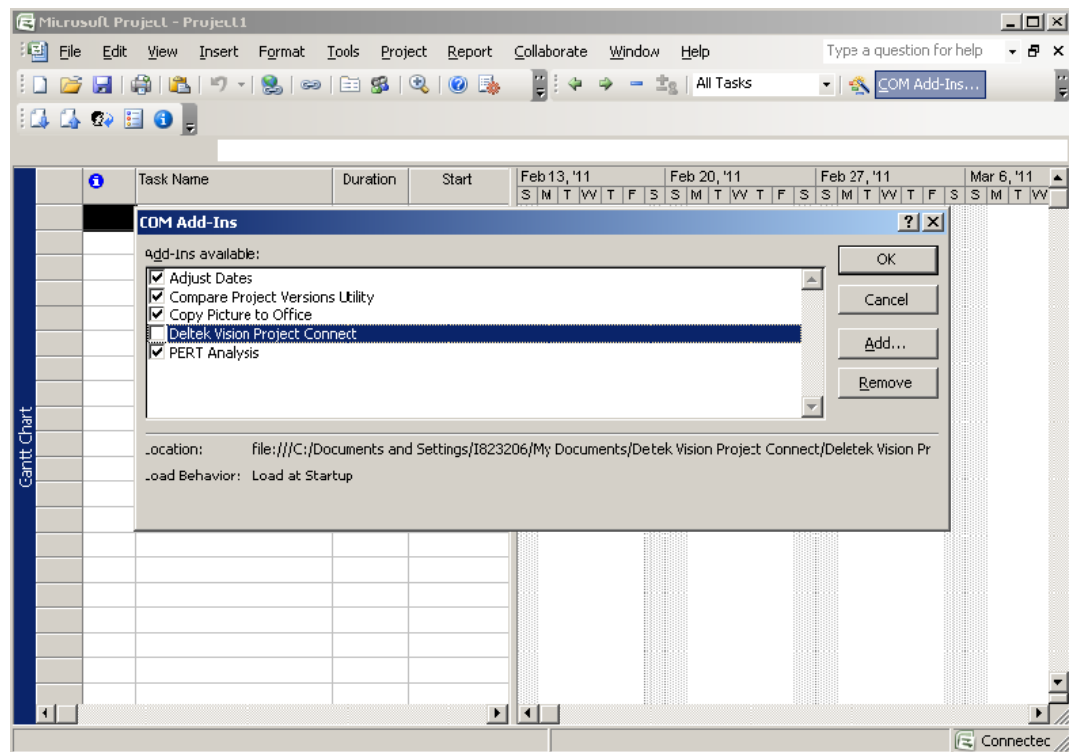
Project Connect Audit Report Detail

Upgrade Vision Project Connect Toolbar to Newer Version

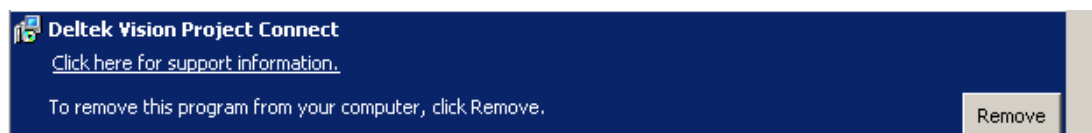
To upgrade to a new version of Vision Project Connect Toolbar (Add-In) the user has to follow the below steps to properly uninstall the old version before installing the new version.

Steps as follow:

- 1- In MS Project under the Com Add Ins tab on toolbar - Uncheck Deltek Project Connect.



- 2- Remove Deltek Vision Project Connect software through the Control Panel(add/remove software)



- 3- Delete 2.0 folder from the user machine. (Below the location based on the user OS.
 - Windows XP location: ([SystemDrive]:\Documents and Settings\User\Local Settings\Apps\2.0)
 - Windows 7 location
[SystemDrive]:\Users\[UserProfile]\AppData\Local\Apps\2.0
- 4- Re-install the Add In for Project Connect.



For information on how to install the Vision Project Connect Add-In for Microsoft Project 2007 SP2, see the *Vision Project Connect 1.5 Client Installation Guide*.