

Deltek Vision[®] Microsoft[®] Office Integration

Making Vision Work For You

FEATURES AND BENEFITS:

- Record Outlook[®] emails—both received and sent—as Vision activities
- Access your Vision contact and lead email lists from within Outlook
- Create Vision activity, client, contact and lead records from within Outlook
- Search all Vision Info Center records from your desktop, without launching Vision
- Create a new Vision client, contact or activity from your desktop, without launching Vision
- Search the Vision Text Library from within Microsoft Word and copy the text found into Word documents
- Create PowerPoint Templates and slides with Vision data

If you are familiar with Deltek Vision CRM, you know that it provides an airtight way to capture information about clients, contacts and related interactions. But what if interactions involve Microsoft Office? With Deltek Vision Microsoft Office Integration, these applications can “talk” to each other.

INTEGRATE VISION WITH YOUR OFFICE PROCESSES

For many business professionals, using Microsoft Office, including email, contact, calendar and word processing functions, is as simple as using a pencil and paper. Imagine the power of Vision CRM combined with this universal acceptance of Microsoft Office. Many times, the willingness to adopt Vision as a central information center may hinge on the ability to integrate Office and Vision processes.

With Office Integration, you can:

- Record Outlook[®] sent and received emails as Vision activities
- Access your Vision contact and lead email lists from within Outlook
- Create Vision activity, client, contact and lead records from within Outlook

- Search all Vision Info Center records from your desktop, without launching Vision
- Create a new Vision client, contact or activity from your desktop, without launching Vision
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DEVELOP A CENTRALIZED POOL OF CLIENT AND CONTACT EMAILS

Every day, critical communication with clients, contacts and prospects occurs through email and ends up in the Outlook folders of individual employees, becoming accessible to no one but the sender and recipient. With Vision Office Integration, users can associate these emails with the appropriate clients, contacts or leads, and save them as Vision activities. All interested parties, including the project team, your marketing group, sales personnel, accounting personnel, executives and other stakeholders in the firm, can review email activity associated with a client, contact or lead. The point? To coordinate efforts, avoid mixed messages and maximize client satisfaction by having all interactions captured in one, unified system.

RECORD INCOMING AND OUTGOING EMAIL WITHIN VISION

Create an e-mail in Outlook and select “Send and Create Vision Activity” to send the email, while simultaneously saving a copy in Vision as an activity. The new activity record tracks the email sender, recipient, date and time, subject line and body text. There is also an option to associate the activity with a project, opportunity, contact, client, lead, marketing campaign or other entity.

When an email is received, saving it within Vision is as easy as selecting “Create Activity” on your Outlook toolbar. Vision will check to see if the email came from a contact or lead already recorded in Vision. If not, the opportunity to create a new record for the email sender will appear. The email will then be saved as a Vision Activity.

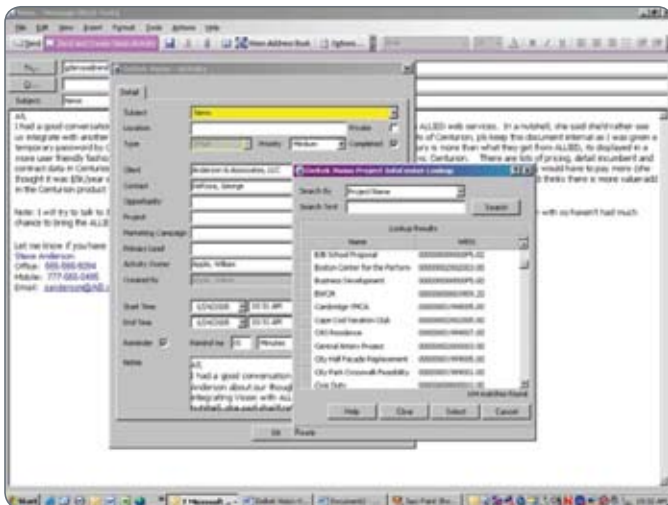


Figure 1: Store the original email as an activity in Vision using the new “Send and Create Vision Activity” option in Outlook. Associate the activity with a project, opportunity, contact, client, lead, marketing campaign or other entity.

ACCESS VISION ADDRESS BOOK FROM OUTLOOK

Need to send an email to one or more contacts or leads stored in the Vision database? Now you can, directly from Outlook. Simply click on “Vision Address Book” to display an address book made up of all Vision contacts and leads. Use the Vision address book to quickly populate the To, Cc and Bcc lines of the email.

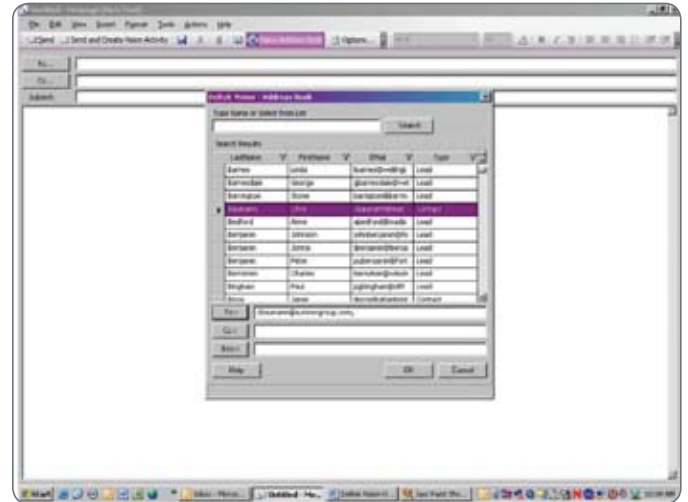


Figure 2: Access Vision Address Book from Outlook.

ADD ACTIVITIES, CLIENTS AND CONTACTS TO VISION FROM OUTLOOK

A Vision menu on the Outlook toolbar lets you create a new Vision activity, client or contact on the fly—without launching Vision. The menu gives you access to an abbreviated version of the Vision activity, client or contact screen, where you can quickly add a new record. Later, when within Vision, it's easy to add more details. All Vision security settings, including record-level security, apply to the Vision tasks you perform from Outlook.

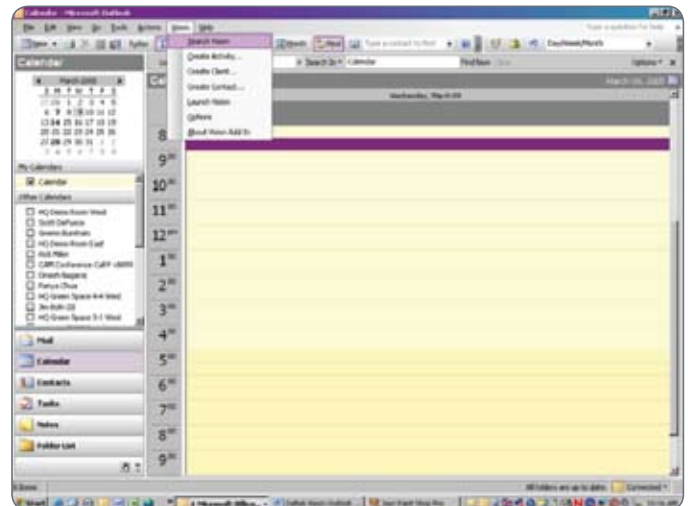


Figure 3: A new menu puts frequently used Vision tasks at your fingertips on all Outlook screens: “Search Vision” searches for a value across all Info Centers. “Create Activity (Client, Contract)” adds a new record within Vision. “Launch Vision” goes straight to the Vision login screen.

KEEP CONTACT INFORMATION CLEAN

Whenever you add a new contact to Vision through Outlook, you can validate the information using the "Validate Company" feature. If the new contact is associated with a firm that is already in Vision, no new information needs to be entered. The firm's address, phone number, website and more will be pulled directly from the Vision database and used to populate the contact record. In addition to saving time, this feature maintains accuracy and consistency among your Vision contact records.

SEARCH VISION FROM OUTLOOK

Search across all of your Vision Info Centers for a particular value, without leaving Outlook. For example, for an upcoming RFP from United Parcel Service (UPS), you will want to find all related projects performed for UPS, all contacts at UPS as well as copies of past UPS proposals. All of this information can be found by performing a single search on "UPS."

DESKTOP SHORTCUTS WITHIN VISION

With Vision Office Integration, a new "V" icon appears in the system tray at the bottom of the desktop. Simply right-click on the icon to display the same Vision menu that is found within Outlook. All Vision security settings, including record-level security, apply to tasks performed from your desktop.

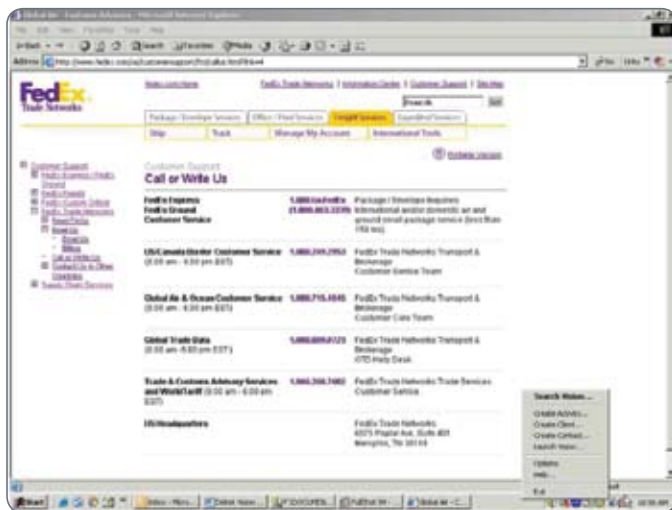


Figure 4: New "V" icon in the system tray lets you search Vision and add activities, clients and contracts to Vision from your desktop. Click on the "Launch Vision" option to go straight to the Vision login screen.

ADD ACTIVITIES, CLIENTS AND CONTACTS FROM YOUR DESKTOP

To create a new Vision activity, client or contact on the fly without launching Vision, just right-click on the "V" icon on the taskbar. No matter what you are doing, Vision is one click away. An address found on the FedEx® website is quickly added as a Vision contact. It's that easy.

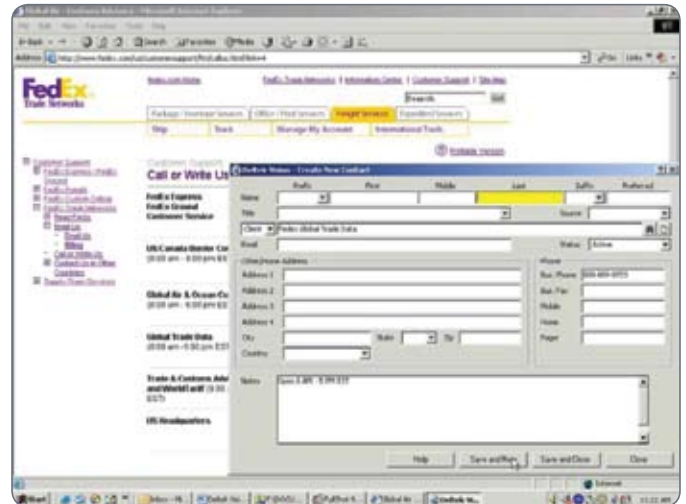


Figure 5: An address found on the FedEx® Web site is quickly added as a Vision contact. It's that easy.

TAP INTO THE VISION TEXT LIBRARY FROM MICROSOFT WORD

The Vision Text Library acts as a central repository for standard text that is used again and again, often in different contexts. Use this feature, to save and share your firm's latest boilerplate text, mission statement, past experience and key employee contacts. Anyone who needs this text can go to the Text Library and find the most up-to-date version. With Microsoft Office Integration, any information stored in the Text Library can be searched from within Word and copied directly into any Word document.

This feature is ideal for quickly building RFP responses from within Microsoft Word. Just highlight questions in the original Word document and select "Search Text Library" on the Word toolbar. Possible matches will be displayed in a Word dialog for review. Select the desired text and the results will be copied automatically into the document.

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Deltek (NASDAQ: PROJ) is the leading provider of enterprise applications software designed specifically for project-focused businesses. For more than two decades, our software applications have enabled organizations to automate mission-critical business processes around the engagement, execution and delivery of projects. More than 12,000 customers worldwide rely on Deltek to measure business results, optimize performance, streamline operations and win new business.

CREATE POWERPOINT TEMPLATES AND SLIDES QUICKLY AND EASILY

With Vision Office Integration you can easily move data from the Opportunity, Client and Contact Info Centers to create PowerPoint templates and slides. This time-saving feature makes it easy to prepare important opportunity and pursuit information to bring the team up to speed and to help validate go/no go decisions.

TECHNOLOGY AHEAD OF THE CURVE

Any user with Microsoft Internet Explorer and an internet connection can enjoy global access to Deltek Vision, 24 hours a day.

The Office Integration add-in is one component of the Deltek VisionXtend™ platform, based on Microsoft .NET architecture. It gives users the power to extend the reach of Deltek Vision by developing applications that integrate with Vision, calling web services from within Vision and communicating with Vision through mobile devices.

ENTERPRISE-WIDE SYNCHRONIZATION

Office Integration is an add-in that comes free with Vision 3 and later versions. If your firm needs to deploy Office Integration on an enterprise-wide basis, consider purchasing Vision Server-to-Server Synchronization. This module provides server-to-server bi-directional synchronization of contacts, appointments and tasks between Vision and a groupware server—either Microsoft Exchange or Lotus® Domino™. It also makes it possible to synchronize Vision data with a favorite hand-held device. Server-to-Server Synchronization is a completely automated server-side process requiring no intervention by the end-user.

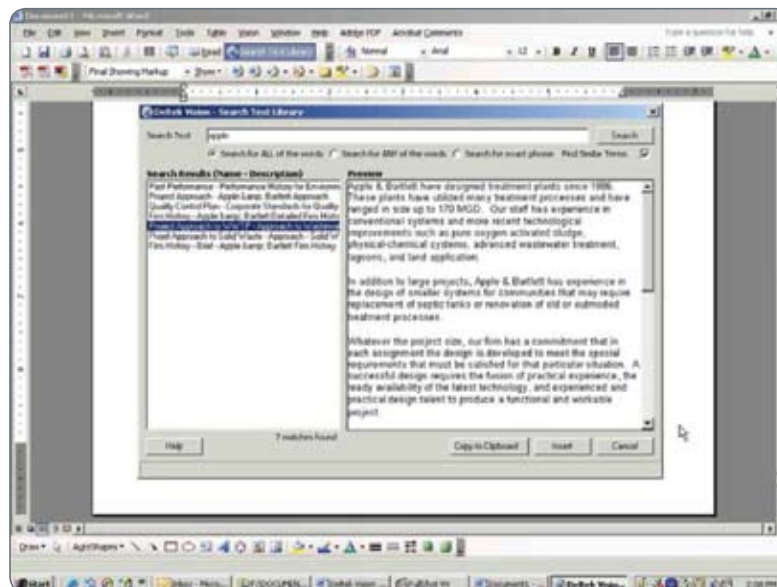


Figure 6: Use “Search Text Library” on the Word toolbar to search Vision for desired text. Then copy the text to the Word clipboard or insert it directly into the current document.