

# Deltek Vision<sup>®</sup> Document Management

## Providing a Web-Based Document Collaboration Platform

### DELTEK VISION DOCUMENT MANAGEMENT:

- Full integration with Deltek Vision
- Collaboration and control
- Built using industry standard collaboration software
- Share documents with clients, partners and suppliers

Now more than ever, professional services firms are comprised of geographically dispersed team members. Employees are working 24/7 and relying on internet-based technologies to keep in sync. Effective collaboration is more challenging—and more important—than ever before. Deltek Vision Document Management fosters information sharing by providing a web-based document collaboration platform for your team. Team members from around the firm and around the world can upload, share, review and edit documents from within Vision, using a web browser.

### FULL INTEGRATION WITH DELTEK VISION

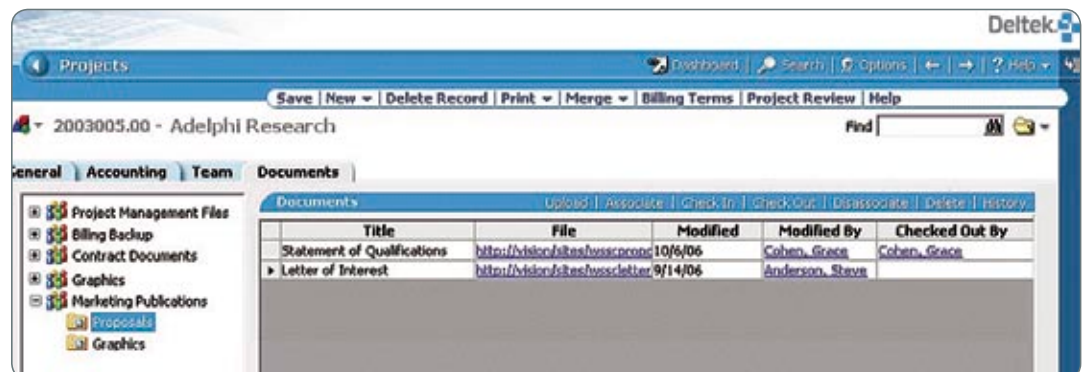
With Vision Document Management, you can store, share and collaborate on a set of documents for every project, employee, client, contact, opportunity or other key Vision record. You can link a single document to just one

record, or to multiple records in multiple Info Centers. Find documents easily using full text document searching capabilities, combined with powerful search options found within Vision.

### COLLABORATION AND CONTROL

Vision Document Management provides:

- Web-based access to all documents
- The ability to link documents to specific Info Center records
- The ability to organize documents into libraries and folders
- The ability to store photos, graphics and other digital assets
- Check-in/check-out capabilities, so that multiple users do not update a document at the same time



**Figure 1:** The Adelphi Research project's document workspace, with the Proposals folder open. From here you can check in, check out, add, delete or edit documents, review document history and associate documents with Vision records.

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Software, Inc. is a Deltek  
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SilverEdge, founded in 1988, was established to provide Business Consulting Services and Software Solutions to Professional Services Organizations. These include Architects, Engineers, Financial Consultants, Marketing Consultants, Public Relations Consultants, Pharmaceutical Consultants, Healthcare Consultants, Project Management Consultants, plus many more.

- Document changes that are tracked and assigned different version numbers for auditing and rollback
- Cross-document text searches spanning various formats, including Microsoft® Word, Excel and Adobe® PDF
- Security settings to control document access and editing
- The ability to share documents with clients, partners and suppliers by creating outward-facing portals

### BUILT USING INDUSTRY STANDARD COLLABORATION SOFTWARE

Vision Document Management employs Microsoft Windows® SharePoint™ Services, a leading collaboration platform in use by many professional services firms. To take advantage of the performance, stability and security features of the Microsoft .NET Framework, SharePoint is tightly integrated with Windows Server™ 2003. Documents are stored in a scalable Microsoft SQL Server™ 2000 or MSDE 2000 database. Furthermore, Vision Document Management was designed to integrate with existing deployments of Microsoft Windows SharePoint Services.

### SECURITY

Vision Document Management includes a flexible security model that is tied to the robust security system within Vision. This ensures that documents are accessible only to those who need them. You control which employee roles have access to which document libraries, and what document editing and management tasks each role can perform.

### SHARE DOCUMENTS WITH CLIENTS, PARTNERS AND SUPPLIERS

Documents stored through Vision reside outside of Vision, in a Windows SharePoint Services database. Your firm can develop as many portals into SharePoint as needed in order to facilitate collaboration within the organization and with outside clients, partners and suppliers. For example, create a portal solely for the team

working on a specific project and open up that portal to project team members at your firm, the client firm and at key consulting firms. Use these portals to share documents linked to records in Vision, providing a robust collaboration ecosystem in which all relevant parties share the same information.

### QUANTIFIABLE BENEFITS

Adopting Vision Document Management pays off in measurable benefits:

- **Increased Productivity**—all documents are captured and stored in a central repository associated with your key information sources, such as clients, contacts, employees, projects and opportunities
- **Improved Collaboration**—users are notified through integrated alerts of all new documents added to the system and of any changes made to existing documents
- **Stronger Audit Trail**—version control functionality guarantees document integrity while maintaining a complete history of all changes made to documents
- **Immediate Document Retrieval**—documents are stored in context with powerful searching across a variety of document formats

### TECHNOLOGY AHEAD OF THE CURVE

Any user with Microsoft Internet Explorer and an internet connection can enjoy global access to Deltek Vision, including Vision Document Management, 24 hours a day. Other than a web browser, the user needs no additional software installed on his or her workstation.

Document Management is one component of the Deltek VisionXtend™ platform, based on Microsoft .NET architecture. VisionXtend 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.