

# Deltek Vision® Navigator 1.8

## Installation Guide

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## Overview

This document describes the server prerequisites, client requirements, and installation information for Vision Navigator.

## For Additional Information

### Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Customer Care Connect site provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Access Cloud specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Use Quick Chat to submit a question to a Customer Care analyst online



For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

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### 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 forget your username or password, you can click the **Account Assistance** button on the login screen for help.

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## Available Documentation for this Release

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Customer Care Connect site.

Deltek Vision Navigator Guides	
<i>Deltek Vision Navigator Version 1.8 Technical Considerations Release Notes</i>	These release notes contain a summary of the pre-installation information and software issues resolved in Vision Navigator.
<i>Deltek Vision Navigator Version 1.8 Enhancements Release Notes</i>	This guide discusses the new features and enhancements available in this release.
<i>Deltek Vision Navigator Version 1.8 Frequently Asked Questions</i>	This document contains frequently asked questions about the use and configuration of the Vision Navigator product.

## Before You Begin

Review the server installation and client requirements before you install Vision Navigator.

### Server Installation Prerequisites

- Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, and Windows Server 2012 R2 are supported platforms.
- Deltek Vision 7.1 (Cumulative Update #18 or higher) or Deltek Vision 7.2 (Cumulative Update #8 or higher) must be installed.
- Microsoft .NET Framework 4.0 must be installed on the Deltek Vision web/application server.
- You must be a local administrator on the Deltek Vision web/application server to run the setup.
- Vision Navigator must be installed on your Deltek Vision web/application server.

### Client Requirements

#### Client Operating Systems

- Windows 7, 8, or 8.1
- Windows Vista (SP2)
- Windows XP (SP3) — Chrome only

#### Browser

- Internet Explorer 9, 10, or 11
- Chrome 18 or later
- Safari 5 or later
- Firefox 11 or later



Vision Navigator 1.8 does not support Internet Explorer 8 or Chrome Frame.

#### Device

- Android Tablets — Chrome only
- iPad

## Navigator and Supporting Documents

If using Vision Transactional Document Management (TDM) with Navigator for uploading documents, the following system requirements apply:

### Desktop Browsers

- Google Chrome
- Apple Safari 5.0+
- Mozilla Firefox 3.6+
- Opera 11.0+
- Microsoft Internet Explorer 10.0+

### Mobile Browsers

- Apple Safari Mobile on iOS 6.0+
- Google Chrome on iOS 6.0+
- Google Chrome on Android 4.0+



# Installation

When you install Vision Navigator, the setup log automatically defaults to **C:\Users\<User>\AppData\Local\Deltek** and creates a temporary shortcut on your desktop.

**To install Vision Navigator, complete the following steps:**

1. Download **VisionNavigator18.exe** from [Deltek Software Manager \(DSM\)](#).
2. Run **VisionNavigator18.exe**. This displays on your Deltek Vision web/application server Welcome dialog box.
3. On the Welcome page of the installation wizard, click **Next**.
4. On the License Agreement page, select **I accept the terms of the license agreement**, and click **Next**.
5. On the Choose Destination Location page, click **Change** if you need to change the default installation location. Deltek recommends that you use the default installation directory.
6. Click **Next** to continue.
7. On the Deltek Vision Site page, specify your Deltek Vision web services site. The URL must end with **VisionServices.asmx**. Setup will validate this site for connectivity. The URL that you specify is only accessed from the Vision Navigator product to connect to Deltek Vision. Because Vision Navigator and Deltek Vision must be installed on the same web server, use the default specified URL.
8. Click **Next** to continue (the next page may take up to 10 seconds to display).
9. On the Customer Experience Improvement Program page, select the **Send installation data to Deltek** option if you want to send technical installation data to help Deltek plan future releases. No business data will be included if you select this option.
10. Click **Next** to continue.
11. On the Start Copying Files page, review the current settings, and click **Next** to continue. The Setup Status dialog box displays. Setup installs the files and configures the web server. When finished, the Installation Complete page displays. This page lists the URL that you must provide to users to run Vision Navigator.
12. Click **Finish** to complete the installation.



A new Navigator tab was added to Vision Roles in Vision 7.1. When you install Vision 7.1 (CU5 or higher) and later versions, this tab is automatically configured to grant each role the same access rights to Navigator that the role had before the installation. These access rights are defined on the General and Record Access tabs in **Configuration » Security » Roles**. After the installation, use the Navigator tab to modify Navigator access rights.

In addition, prior versions of Vision required access to Project Planning for a role to have access to Navigator's planning. This is no longer true with Vision 7.1 (CU5 or higher) and later versions, so review and update the General and Planning tabs in **Configuration » Security » Roles**, as needed.

Refer to **Configuration » Security » Roles** for additional information.

## Installing Navigator in a Stand-Alone Environment

For certain installations, it may be necessary to implement Navigator without the Web/Application Server enabled. This is useful for running Navigator inside of a firewall.

### Requirements

- Windows Server 2008/2008R2/2012 with IIS Installed/Configured
- Microsoft .NET Framework 3.5 (SP1)
- Microsoft .NET Framework 4.0
- Network Connectivity between servers (Port 80 or 443 if using SSL)
- DMZ web server

### Installation

Complete this installation process on a stand-alone Navigator web server, presumably in a DMZ.

#### Install on a Stand-Alone Server

To install Vision Navigator on a stand-alone server, complete the following steps:

1. Run **DeltekNavigator18.exe /skipvisioncheck**. Navigator installs without the Vision-related checks.
2. Follow the prompts to complete the installation.

# Vision Installations Using Integrated Security and Document Management

For Vision installations that also use the Vision Document Management application, there are additional required steps that will create a Service Principal Name for the Vision Application Pool Identity. This allows domain-based delegation to work between Vision Document Management and SharePoint.

## Create a Server Principal Name

To create the Service Principal Name, complete the following steps:

1. Open IIS to change the Advanced Settings for Windows Integrated Authentication.
2. Select the **Vision Virtual Directory**.
3. Clear the check mark next to the **Enable Kernal Mode Authentication** option.

## Potential Problems

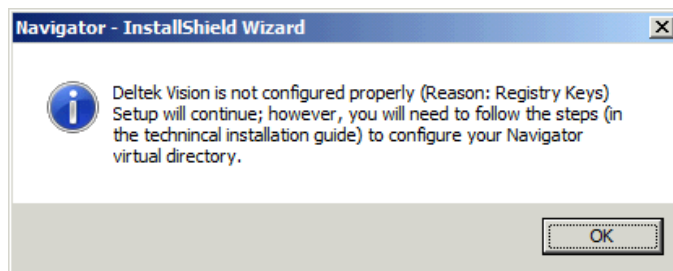
- The Navigator Application Pool identity defaults to a built-in ApplicationPoolIdentity account that does not have a valid SPN configured. This will cause you to receive a Windows Integrated Authentication prompt when accessing Navigator that will not accept any credentials, valid or not.
- If you are using a fully qualified custom DNS record for Vision (for example, <http://vision.company.com>), you may need to configure a Service Principal Name. This requires the same change to the Vision Application Pool as detailed in the "Create a Server Principal Name" procedure.

## Solution

Configure the Navigator Application Pool identity to be the same domain account that is used for the Vision Application Pool (DeltekVisionAppPool).

## Manually Set Up the Navigator Virtual Directory

If you receive the following Install Shield Wizard error during the installation process, complete the procedure in this section.

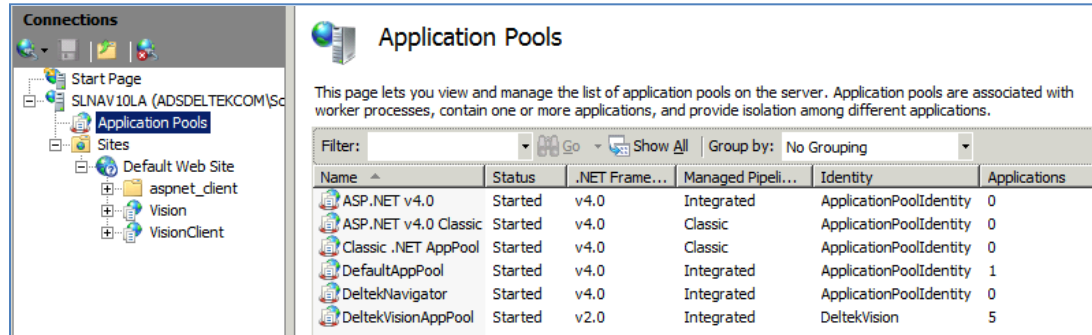


**Prerequisite:** For this procedure, you need to know your Navigator installation directory. The default installation directory is one of the following:

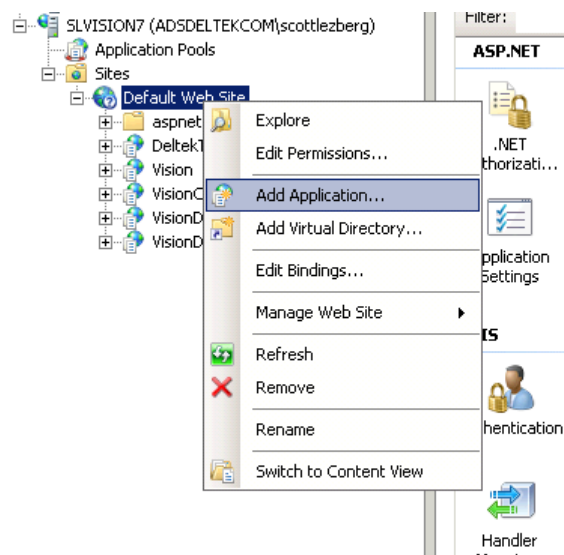
- C:\Program Files (x86)\Deltek\Navigator (on 64-bit servers)
- C:\Program Files\Deltek\Navigator (on 32-bit servers)

**To configure the Navigator virtual directory and finish the installation, complete the following steps:**

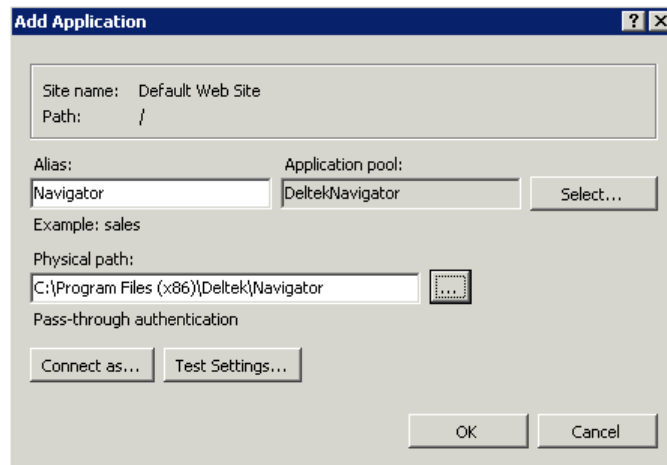
1. From the Navigator server, open Internet Information Services Manager.
2. Expand the Server and verify that a DeltekNavigator Application Pool was created and is using the v4.0 .NET Framework.



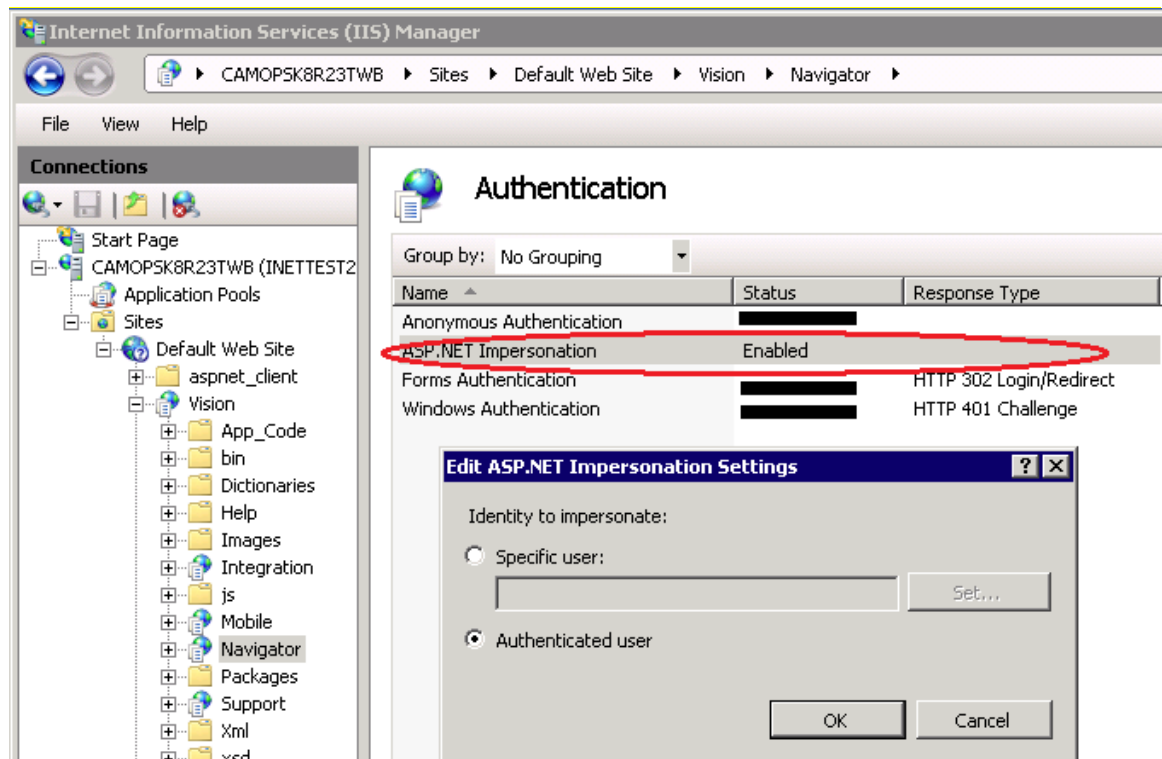
3. If the DeltekNavigator application pool does not exist, right-click **Application Pools** (under your server), and click **Add Application Pool** on the shortcut menu.
  - **Name** — DeltekNavigator
  - **.NET Framework Version** — NET Framework v4.0.30319
  - **Managed Pipeline Mode** — Integrated
4. Expand the Default Web Site, and check for the Navigator virtual directory. If it does not exist, continue to Step 5.



5. Right-click **Default Web Site**, and click **Add Application** on the shortcut menu. The Add Application dialog box displays.



6. On the Add Application dialog box, complete the fields as follows:
  - **Alias** — Navigator
  - **Application Pool** — Click the **Select** button, and select **DeltekNavigator** from the drop-down list.
  - **Physical Path** — Enter your installation directory for Navigator (for example, C:\Program Files (x86)\Deltek\Navigator).
7. Click **OK** to create the IIS Application.
8. Check the Authentication mode for your Vision virtual directory, and set it to the same for Navigator virtual directory. These must match for you to use the same security model in Vision.



Ensure that **ASP.NET Impersonation** is enabled:

- a. Select Navigator.
  - b. Select Authentication.
  - c. Review ASP.NET Impersonation status.
9. Test Navigator by launching <http://localhost/Navigator>. The Vision Navigator logon dialog box displays.



If the Vision Navigator logon dialog box does not display, contact Deltek Customer Care.

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## Select the Type of Online Help System


Deltek now offers hosted online help as an alternative to the local online help that is installed on your server when you install Navigator. Hosted online help is stored on a Deltek server. This allows you to access to the most current help as it is enhanced and updated by Deltek in between releases.



Selecting the **Type of Help** within Vision automatically applies to the Navigator help. If you use hosted help in Vision, Navigator will use hosted help as well.

**To configure the type of online help for all Navigator users, complete the following steps:**

1. In Vision, open the Miscellaneous tab in **Configuration » General » System Settings**.
2. In the **Type of Help** field, select one of the following:
  - **Hosted** — Select this option for online help that is updated automatically to match the version or release updates that apply. When you select the hosted help, a system administrator must designate a Deltek Customer Care Connect site username and password on the Miscellaneous tab in General System Settings. All users must enter this same username and password when they access online help in Vision for the first time after installing Vision.
  - **Local** — Select this option to use online help that is installed locally as part of the Vision installation.
3. Enter the **Support Username**.  
This is the Deltek Customer Care Connect site username that the system administrator supplies for the user to access the hosted help. This entry allows any user to access the hosted help for the version of Vision and Navigator that your firm is using.
4. Enter the **Support Password**.  
This is the associated Deltek Customer Care Connect site password that the system administrator supplies for the user to access the hosted help. This entry allows any user to access the hosted help for the version of Vision and Navigator that your firm is using.
5. Click **Save**.



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