Deltek Vision® 6.1 SP3
Technical Installation Guide

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Overview

This guide contains technical installation and setup information for the staff at your company who maintain the hardware and software required to install Deltek Vision 6.1.

About This Guide

This guide contains the information that you need to install Deltek Vision 6.1. We revise this document regularly to provide the most up-to-date technical information and instructions. Visit the Knowledge Center tab of the Deltek Customer Care Connect site, https://support.deltek.com, to determine if your copy is the latest copy, and to download the most recent copy if necessary.

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 https://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 System Administrator.

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

Additional Installation Documentation

The following table lists the additional Deltek installation 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.

Document Name	Description
Deltek Vision Document Management Technical Installation Guide	This guide contains detailed information on the necessary prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.
Deltek Vision Mobile Application Suite (MAS) Installation Guide	This guide explains how to configure MAS on your Vision server, install prerequisite software components, and install and configure the MAS software. This guide also provides a list of all the mobile devices that can be used with the Deltek Vision Mobile Application Suite.
Deltek Vision Synchronization Server Installation and Maintenance for Nokia Intellisync	This guide contains an overview of the Vision Synchronization Server feature, as well as technical installation, setup, and maintenance information.
Deltek Vision 6.1 Custom Reports and Microsoft SQL Server® Reporting Services	This guide provides information for performing the tasks that are necessary to create, deliver, and generate Vision custom reports. You must use SQL 2005 Reporting Services design tools to modify existing Deltek Vision reports or to display your custom reports within the Vision framework. To obtain the SQL 2005 Reporting Services design tools (BIDS), you must download SQL 2005 Express Tools (http://www.microsoft.com/Sqlserver/2005/en/us/express-down.aspx#tool).
Deltek Vision® 6.0 Creating a Reverse Proxy for SQL Reporting Services Using IIS 7.0 Application Request Routing (ARR)	This guide contains instructions for configuring a reverse proxy that utilizes Microsoft's Application Request Routing (ARR) extension for IIS 7.0. This allows the direct forwarding of requests through the Vision Web server to the reporting services Web service with responses back to your Internet clients.

About This Guide

This guide contains information you need to install the various components of Vision. We revise this document regularly to provide the most up-to-date technical information and instructions. Visit the Knowledge Center tab of the Deltek Customer Care Connect site to download the most recent copy, if necessary.

Guide Contents and Organization

The contents of this guide cover the following areas:

- Planning and Deployment
- Installation
- Troubleshooting and Post Installation

Planning and Deployment

Review this information before you begin installing Vision components. This chapter includes overview information about the Vision architecture and requirements, deployment models, and available Deltek services. Specific steps for performing the installation for the deployment model that you choose are listed in the Installation chapters.

Installation

The installation steps will guide you through the various deployment models of the Vision installation. If you have previously deployed a Vision 6.x installation, this section does not apply. Instead, review the next section titled “Install Vision Upgrades.”

Select the chapter or chapters that correspond to your deployment model, and perform the steps as directed in the chapter. At the start of each deployment model chapter, a chart lists all of the prerequisites that are required for the server on which you are performing your installation. You can use the chart to verify that you have all the prerequisites installed, which reduces the likelihood of any unexpected events during the installation.

The appendices table provides specific instructions on configuring prerequisites that are required before Vision can be installed, or when making specific configuration changes after Vision is installed.

- The account used to perform the installation needs the following rights and privileges for installations on the tiers below:
  - Local Administrator on the Server (All Tiers)
  - Member of sysadmin role in SQL Server (Web\Application Tier, Database Tier)
  - Member of System Administrator and Content Manager Roles in SQL Server Reporting Services (Web\Application Tier, Reporting Tier)

Install Vision Upgrades

- You cannot upgrade any Vision database from version 4.1 or older to Vision 6.1.
- You must uninstall Actuate Report Server before installing this Deltek Vision 6.1 release.
- You must uninstall all previous versions of Deltek Vision 5.1 or older before installing this Deltek Vision 6.1 release.
- Before uninstalling previous versions of Deltek Vision, ensure that your hardware and software meet the minimum requirements for running Vision.

During the installation, if Setup detects a previous 6.x version of Vision, it automatically upgrades the entire installation to the current release. The Web tier and Database tier automatically detect existing 6.x databases and offer the option to upgrade the databases during the installation.

Database and Web Server installations create a deltekvisionxx.sql (where xx is your version of Vision) file in the \program files\Deltek\Vision\Databases\Scripts folder that can be used to

manually upgrade a 5.x or 6.x database to the existing version. To convert your database manually, create a backup of your database before you run the database conversion using the Deltekvisionxx.sql script file (where xx is your version of Vision). Do not run the UnicodeDeltekVisionxx.sql or other script files unless directed to by Customer Care. If you plan to convert your Vision database to Unicode, refer to the Vision Help documentation for the appropriate steps.

Troubleshooting and Post-Installation

This chapter provides information about the files to send when contacting Deltek if problems occur during installation, as well as common installation errors and suggested solutions. It also provides information about how to verify a successful Vision installation by logging on to and launching Vision successfully.

Appendices

This guide contains the following appendices. Refer to these appendices for detailed installation information for specific application prerequisites or for changes to the Vision configuration after setup.

Appendix	Title	Description
A	Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows 2008	Instructions for enabling IIS on Windows Server 2003 (IIS6) or Windows Server 2008 (IIS7).
B	Options When Converting a Database During Installation	Instructions for additional database upgrade options that may occur during the Database Server or Web Server installations.
C	How to Identify your Reporting Service Web Service Connection Information	Instructions for identifying the Reporting Service Web Service URLs for SQL Server 2008 Reporting Services when setup is unable to identify them automatically.
D	Microsoft SQL Server 2008 Reporting Services Configuration Steps	Instructions for configuring Microsoft SQL Server 2008 Reporting Services (prerequisite before Vision can be installed on the Web or Report Servers).
E	Printing in Deltek Vision 6.x	Discusses the various methods for printing in Vision. This includes steps for: ▪ Saving printout to PDF files ▪ Printing to local printers on end-user computers without printing to PDF ▪ Printing to network printers that are installed directly on the Web Server.

Appendix	Title	Description
		This appendix also includes instructions for modifying the Deltek Vision weblink entries from the default DeltekVision local accounts to domain accounts in order to use network printers for Vision Batch jobs. Steps include creating accounts, assigning local policies, and adding role memberships.
F	How to Pre-Deploy Deltek Vision Smart Client to User Workstations	Instructions for pre-deploying the Deltek Vision Smart Client application files to end-user workstations.

Chapter 1: Before You Begin Deployment

Before you begin deployment, it is important to understand the following:

- Reporting Services
- Deployment Decisions
- Hardware Requirements
- Supported Databases
- Platform Virtualization
- .NET Architecture

Questions to Ask Before You Begin

Before you begin to install Vision, you should understand the Vision architecture, your deployment options, and the Vision recommended hardware requirements. Please see the Deltek Product Support Compatibility Matrix Guide and the Deltek Vision\GovWin 6.x Technical Overview and System Requirements documents for additional information. These documents are available from the Knowledge Center tab of the Deltek Customer Care Connect site (http://support.deltek.com).

You should also answer the following questions before you install Vision:

- How many concurrent users do you expect to use Vision?
- Do your servers meet the recommended hardware and software requirements?
  - Do you have the correct versions and Service Packs of Microsoft SQL Server and Reporting Services installed and configured for Vision?
  - Do you have the prerequisites installed on each of your Deltek Vision servers?
  - Have you reviewed the prerequisite steps in the Appendices for reporting services and IIS?
- Do your client workstations meet the recommended hardware and software requirements?
- Will you be deploying Vision in an intranet or Internet scenario?
- Will Vision be accessed from a single location, or from multiple locations?
- Will you be converting an existing Deltek Advantage, Deltek Award, Deltek CRM and Proposals, or Deltek Sema4 database to Vision?
- Does your technical staff need additional training on Microsoft Internet Explorer, Microsoft Windows Server 2003, Microsoft Windows Server 2008, Microsoft Internet Information Server or Microsoft SQL Server 2008?

If you have Vision 6.0 or 6.1 LA already installed, do not uninstall. Run the current Vision 6.x installation to perform an in-place upgrade from 6.0/6.1 (LA) to 6.1.

Changes to Reporting Tier and Introduction of Reporting Services

Deltek Vision 6.1 uses Microsoft SQL Server Reporting Services as the new Report Management and delivery platform. With this change, there are several things to consider when you are planning migrating to Vision 6.1.

- SQL Server Reporting Services is not installed as part of the Deltek Vision installation (as Actuate was). Therefore, setup requires that SQL Server Reporting Services be already installed and configured in order to connect to the Report Server. The next section provides links to Microsoft documentation that you can use in addition to the Microsoft documentation installed with your SQL Server installation. Refer to Appendix C: Connect to Reporting Service Web Service, page 126, for basic information on configuring the SQL Server 2008 versions of Microsoft SQL Server Reporting Services.
- SQL 2008 Reporting Services is the optimal and often required platform for full printing capability with Deltek Vision 6.0 and later versions.
- You must use SQL 2005 Reporting Services design tools to modify existing Deltek Vision reports or display your custom reports within the Vision framework. To use SQL 2005 Reporting Services design tools (BIDS), you must download SQL 2005 Express Tools (http://www.microsoft.com/Sqlserver/2005/en/us/express-down.aspx#tool).
- The Microsoft SQL Server Edition and type of licensing purchased may impact your SQL Server Reporting Services deployment options.
- If you previously used a two server deployment model (web\application and report server installed on one server and the database installed on another server) with Vision 5.0/5.1, you now have two options for deploying a two server deployment.

Overview of Reporting Services

Microsoft SQL Server 2008 Reporting Services is a server-based reporting platform that you can use to create and manage tabular, matrix, graphical, and free-form reports that contain data from relational and multidimensional data sources. The reports that you create can be viewed and managed over a World Wide Web-based connection. Reporting Services includes the following core components

- A complete set of tools that you can use to create, manage, and view reports.
- A Report Server component that hosts and processes reports in a variety of formats. Output formats include HTML, PDF, TIFF, Excel, CSV, and more.
- An API that allows developers to integrate or extend data and report processing in custom applications, or create custom tools to build and manage reports.

The reports that you build can be based on relational or multidimensional data from SQL Server, Analysis Services, Oracle, or any Microsoft .NET data provider such as ODBC or OLE DB. You can create tabular, matrix, and free-form reports. You can also create ad hoc reports that use predefined models and data sources.

In Reporting Services, URLs are used to access the Report Server Web service and Report Manager. Before you can use either application, you must configure at least one URL each for the Web service and Report Manager. Reporting Services provides default values for both application URLs that work well in most deployment scenarios, including side-by-side deployments with other Web services and applications.

Reporting Services uses a SQL Server database for internal storage. The database is a required component; it is used to store reports, session data, resources, and server metadata.

The migration to this new tool includes such benefits as:

- Ease of Deployment and Management – SSRS is embedded in SQL Server, the database clients already use. This streamlines deployment and updates and provides a platform for delivery of new functionality for years to come.
- Industry Leading Platform – SSRS is fast becoming one of the leading Business Intelligence (BI) platforms in the market.
- Better Technology Alignment with Vision – SSRS aligns well with the rest of the Microsoft centric technology strategy for Vision.

How to Obtain Information about Reporting Services

The best way to learn about Reporting Services and how to configure it is through your Microsoft documentation included with your SQL Server (Books Online, Microsoft Labs, and so on). The following links provide steps for configuring Reporting Services if necessary:

Configuring SQL Server 2008 Reporting Services (How-to Topics)

- http://msdn.microsoft.com/en-us/library/bb934490.aspx
- http://msdn.microsoft.com/en-us/library/ms157412.aspx

The following links provide additional information for anyone who wishes to be more familiar with Reporting Services:

- Reporting Services Overview and Tutorials

  http://msdn.microsoft.com/en-us/library/ms159106.aspx
- Demos, Videos, Virtual Labs, Webcasts

  http://msdn.microsoft.com/sqlserver/2008/en/us/learning.aspx

Microsoft SQL Server Edition Important Notes

Owners of SQL Server Workgroup Edition and SQL Server 2008 Express Edition with Advanced Services (SQL Server Express) should note the following:

- The report server database must be hosted on the local Machine running the SQL Server Database Engine instance. You cannot use a remote SQL Server instance to host the report server database.
- Data sources used in a report must also be SQL Server databases that run on the local machine running the SQL Server Database Engine instance. You cannot use remote data sources or other data source types. To use additional data source types, you must use a different edition of Reporting Services. This means that your Vision database must reside on the same machine where you Report Server databases reside.
- You will either use the Single Server Deployment Model or Configuration 1 of the Two Server Deployment Model.

Owners of SQL Server Standard or Enterprise Edition should note the following:

- If you decide to split the Report Server (web service) from the database server hosting the report server database, you will need an additional Microsoft SQL Server license. Refer to the next section for links to Microsoft SQL Server licensing related to SQL Server Reporting Services.

- Report Server scale-out deployment is only available in Microsoft SQL Server Enterprise Edition. A scale-out deployment refers to an installation configuration that has multiple report server instances sharing a single report server database.

The following Microsoft link list the features supported by the editions of SQL Server 2008:

http://msdn.microsoft.com/en-us/library/cc645993.aspx

Report Server Licensing Requirements

The method you use to deploy your Report Server depends on the edition and licenses you own for your Microsoft SQL Server Database. If you plan to host your Reporting Services Web Service on a separate machine from the Reporting Services Report Server Database, you must determine whether your SQL Server edition and licenses purchased can support this deployment.

The following Microsoft link describes the licensing options available with SQL Server and Reporting Services:

Microsoft SQL Server 2008 licensing page

http://www.microsoft.com/sqlserver/2008/en/us/licensing.aspx

Deployment Decisions

Review the following details about the Deployment Models and Logical Tiers available for Deltek Vision.

Deltek Vision Deployment Models

There are three different models used to deploy Vision. The model you choose depends on your firm's needs in regard to size, cost considerations, security requirements, and fault tolerance. See the following table for details on each model.

Model	Description
One Server	Install all tiers on a single server. Firms choose this model if all users are at a single location and will only be accessing Vision in the office or over a Virtual Private Network (VPN) connection into the corporate network. Infrastructure security is not a concern with this model because all application use is internal to the organization. This model is designed for small firms (less than 20 employees) without technical staff or plans to use Vision Server-to-Server Synchronization. Begin with Chapter 3 for steps for downloading and launching the Deltek Vision installation. Detailed installation steps for this deployment model are listed in Chapter 4.
Two Servers	Install onto at least two physical tiers. Your purchased licenses and edition of SQL Server determines your two-server deployment configuration. Typically, one server will have the Report Server tier and Database Server tier residing on the same server and the web, application, and process server on another server (Configuration 1). Some firms may also have the database server as the dedicated

Model	Description
	server and the other server acts as the report, application, and Web servers (Configuration 2). Based on these variations, this model suits firms where all users are at a single location and will only be accessing Vision in the office or over a Virtual Private Network (VPN) connection into the corporate network. Configuration 1 may be the recommended method for firms with a single SQL Server license. Infrastructure security is not necessarily a concern in this model, because all application use is internal to the organization. This model is designed for small to medium-sized firms (20 – 150 employees) that may or may not have in-house IT staff and do not plan to use Vision Server-to-Server Synchronization. Begin with Chapter 3 for steps for downloading and launching the Deltek Vision installation. Detailed installation steps for this deployment model are listed in Chapter 5.
Three or More Servers	You install onto three or more physical tiers. This scenario offers a database server, one or more report servers, one or more Web/application servers, and possibly one or more Process servers. This model is designed for large firms (150 or more employees) with multiple locations that will be using Vision on an internal Wide Area Network (WAN). There might be additional report, Web/application, or Process servers required for load balancing, performance, security, or fault tolerance. This model is designed for firms having complex deployment requirements. Firms deploying this model should have in-house technical staff proficient in firewall management. Begin with Chapter 3 for steps for downloading and launching the Deltek Vision installation. Detailed installation steps for this deployment model are listed in Chapter 6.

Changes to your Existing Deltek Vision Deployment Models

If your firm previously deployed a two-tier deployment with the Database Server on one machine, and the Web\Application\Report Tier on another machine, you now have the option of two alternative configurations for deploying a two tier installation.

- Your SQL Server Edition and purchased licenses will determine your two-server deployment configuration.
- WorkGroup and SQL Server Express Editions require that the Report Server database used by Reporting Services and any external data sources (Vision database) (reside on the same machine. If you have either of these editions a single server deployment model or the two server model, Configuration 2 is the option you will migrate to. See page 43 for more information.
- Standard and Enterprise Edition support having the Vision Database on a separate database server than the server hosting the Reporting Services Report Server Database. This will allow deployments on two or more tiers. For these editions, review the license information and links above to determine if you have the appropriate number of SQL Server licenses.

- Deltek Vision 6.1 uses the Microsoft SQL Reporting Services WinForm report viewer control to render reports. This control requires a direct connection to the server running the SQL Reporting Services web service (http://<server>/reportserver) over Port 80. This means that your report server (and possibly your database server if they are installed on the same machine) will be directly exposed to the internet, which poses a security risk to your data. It also requires an external FQDN so that the report server can be resolved by the external users.

  A reverse proxy that uses Microsoft's Application Request Routing (ARR) extension for IIS 7.0 allows the direct forwarding of requests through the Vision web server to the reporting services web service with responses back to your Internet clients. This configuration resolves all of the issues identified in the previous paragraph but does require that the server hosting the Vision web/application server be running Windows Server 2008 with IIS 7.0. Refer to the Deltek Vision® 6.0 Creating a Reverse Proxy for SQL Reporting Services Using IIS 7.0 Application Request Routing (ARR) documentation for configuration steps.

Deltek Vision Logical Tiers Requirements

Various parts of the Vision application are distributed to logical tiers for performance, scalability, and security purposes. These logical tiers are distinct technologies required to run Vision, such as report server software, or Web server software. They may or may not be hosted on the same machine. The method you use to distribute Vision's logical tiers across physical tiers, or actual machines, depends on your firm's needs.

The next chapter provides brief technical description and requirements for each logical tier. For the most up to date hardware and software requirements, please see the Deltek Product Support Compatibility Matrix document. This document is available from the Knowledge Center tab of the Deltek Customer Care Connect site (http://support.deltek.com).

Scenarios That Are Not Supported

Deltek does not support the following scenarios because they cause significant issues in the performance, reliability, and functionality of your Vision application as well as other applications on your network.

- Deltek Vision 6.1 does not support using Windows XP, Widows Vista, or Windows 7 for production server installation.
- Deltek Vision 6.1 is not compatible with Microsoft Windows 95, 98, ME, 2000, or NT 4.0 as a client or server Operating System.
- Vision no longer supports Microsoft SQL Server 2000 or Windows 2000 Server.
- Vision no longer supports Actuate.
- You cannot perform a Single Server deployment on the Microsoft Small Business Server 2000/2003. Only the Vision database tier and/or report tier can be installed on this server.
- You cannot install any Deltek Vision tier on the Microsoft ISA server, or any other software-based firewall (except Windows firewall).
- You cannot install any Deltek Vision tier on any server with Microsoft Terminal Services (Application Mode Only) running. Terminal Services in remote administration is fully supported.
- You cannot install any Deltek Vision tier on a Domain Controller.
- You cannot install any Deltek Vision tier on a Microsoft Exchange 5.5/2000/2003/2007 Server.

- Platform Virtualization is a new technology that allows multiple operating systems and platforms to run simultaneously as separate virtual machines on a single set of server hardware. Please refer to Deltek's Virtualization Statement available on the Deltek Customer Care Connect site for limitations of support for virtualized deployments.

Technical Considerations

- Deltek Vision 6.1 SP3 and previous versions cannot be run at the same time on the same Web/Application server.
- Deltek Vision 6.1 SP3 supports Microsoft SQL Server 2005 (SP3) *Database Engine.*
- Microsoft .NET Framework 3.5 SP1 must be installed on all client workstations running Deltek Vision 6.1 SP3 and also on the servers hosting the Vision Application and Process servers.
- Deltek Vision 6.1 SP3 supports Windows Server 2008 and Windows Server 2008 R2 (only available in x64).
- Deltek Vision 6.1 SP3 now supports the following**:**
  - Web/application tier installations (including single server installations and 2-tier web/application report tiers) on x64 operating systems, including Windows Server 2003 x64, Windows Server 2008 x64, and Windows Server 2008 R2 (only available in x64).

Deltek Vision 6.1 SP3 supports Windows Server 2003 x64 for the web/application tier. Windows Server 2003 is also supported as a stand-alone Document Management (SharePoint Server). However, it is not possible to have Windows Server 2003 x64 host both the Vision web/application tier and the Document Management tier. For this configuration you must use Windows Server 2008 x64 or Windows Server 2008 R2.

- Deltek Vision 6.1 SP3 supports Microsoft SQL Server 2005 Database Engine and Microsoft SQL Server 2008 Reporting Services and Database Engine.
  - SP3 of Microsoft SQL Server 2005 Database Engine is recommended.
  - SP1 CU1 of Microsoft SQL Server 2008 Reporting Services and Database Engine is recommended.
  - Microsoft SQL Server 2008 Reporting Services must be installed and configured prior to running the Vision 6.1 SP3 installation. Follow the Microsoft documentation for your installation.
  - Microsoft SQL Server 2008 Reporting Services are supported in Native Mode configuration only. The SharePoint Integrated Mode is not supported.

Deltek recommends using SP1 CU1 of Microsoft SQL Server 2008 Reporting Services for your Reporting Services tier. (Your database tier can be 2005 or 2008.)

- Deltek Vision 6.1 SP3 supports Windows Server 2003 with IIS 6.0, Windows Server 2008 with IIS 7.0, and Windows Server 2008 R2 with IIS 7.5.
- Deltek Vision 6.1 SP3 can be run, as a client, on Microsoft Windows XP (SP3), Microsoft Windows Vista (SP2), and Windows 7.
- Deltek Vision 6.1 SP3 can be run with Microsoft Internet Explorer 6.0, 7.0, or 8.0.

- Deltek Vision 6.1 SP3 supports 64-bit processing for all Deltek Vision logical tiers, including the web/application, database and report tiers, and for the client tier (Windows XP, Windows Vista, and Windows 7).

Supported Databases

Microsoft SQL Server 2005 or 2008 database engine is required to run Deltek Vision. The Microsoft SQL Server edition you choose to install is dependent on the number of employees who will use Vision.

For firms with fewer than 50 employees (five concurrent users), Vision supports Microsoft SQL Server 2008 Express Edition with Advanced Services.

For firms with more than 50 employees (six or more concurrent users), Vision supports Microsoft SQL Server.

Microsoft SQL Server 2008 Express Edition with Advanced Services will ship with the Deltek Vision 6.1 release but Microsoft SQL Server must be purchased separately.

The machine on which you install Microsoft SQL Server depends on your firm's deployment model.

Windows Server 2008 R2

If you deploy Deltek Vision 6.1 SP3 with Windows Server 2008 R2, you must complete the following to configure server-side printing:

- Install HotFix #010.
- Configure the DeltekVisionAppPool and the Report Server Windows Username (Report Server tab of Weblink) identities to be the same domain account. This must also match the domain account installed for your Windows printers on the Vision web/application server.

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions.

.NET Architecture

Vision's server-side architecture uses Microsoft's .NET framework. .NET is Microsoft's name for a set of software technologies developed to connect information, people, systems, and devices. See http://www.microsoft.com/net/ for more information.

.NET allows Deltek developers and your in-house IT staff to extend Vision's workflow capabilities by calling outside Web services from within Vision. For example, you might send real-time, updated project information from Vision to an external collaboration Web site so that your clients can view current project information. Or you might automatically update your employee self-service system when employee information is changed in Vision.

The .NET framework gives users the power to extend Vision's reach—by developing applications that integrate with Vision, calling Web services from within Vision, and communicating with Vision through mobile devices.

The Vision download manager requires that you install at least Microsoft .NET Framework 2.0 on the Vision tier before you begin the Vision installation. The download is available at: http://www.microsoft.com/downloads/details.aspx?familyid=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en . If Microsoft .NET Framework 2.0 is not detected, the installation will halt and you will be required to install it before you can run the Vision installation. Since all of the tiers require at least Microsoft .NET Framework 2.0 or 3.5 (SP1), if your installation prompts to download Microsoft .NET Framework 2.0, confirm that all the prerequisites for that tier are correctly installed.

Deltek's main client application is deployed using the ClickOnce technology, which requires Microsoft .NET Framework 3.5 SP1. You can download the Microsoft .NET Framework 3.5 SP1 from this link: http://www.microsoft.com/downloads/details.aspx?familyid=ab99342f-5d1a-413d-8319-81da479ab0d7&displaylang=en .

Platform Virtualization

Deltek recognizes the growing use of virtual environments by our customers. Virtual environment software, such as VMware®, resides in the hardware layer underneath the operating system and is used by customers to partition a single server into a multiple server/multiple operating system environment. Deltek's product development makes limited use of virtualized environments at this time. See Deltek's "Virtual Environments Statement" on the Deltek Customer Care Connect site for additional information.

Multiple Languages

Deltek Vision 6.1 allows you to run Vision in either English (United States) or English (International).

The Vision installation routine now includes options for selecting the version of English in which you plan to run the Vision application.

- **New Installations** — For customers installing Vision for the first time, the installation routine now includes a step in which you select the English language database version you want to use for the installation— English (United States) or English (International). The database you select will determine the version of English that will subsequently display in the Vision application user interface.
- **Upgrades from Previous Versions of Vision** — For customers upgrading from a previous version of Vision (other than 6.0), the database conversion routine now checks the pre-6.0 custom label spellings for the words labor and check, and then converts the database as English (United States) or English (International), as applicable, based on the custom label spellings.

Chapter 2: Installation Information and Deployment Model Checklists

Overview

This chapter contains installation checklists to help you properly set up the machine or machines where you will install Vision software.

About the Deltek Vision Installation Programs

The Vision installation program downloaded from the Deltek Distribution site is used to install the Vision software and any of the following deployment models:

- One Server Deployment Model
- Two Server Deployment Model
  - One database/report server and one web/application/process server; OR
  - One database server and one web/application/process/report server
- Three or More Server Deployment Model - Any supported combination of web/application, report, process server, and database tier.
- Additional Vision Process Server tiers

Download Manager

The Deltek Vision installation uses a Download Manager to manage the size of the installation download file. The Download Manager only allows those prerequisite third party applications and required 'additional' Deltek Vision files to be downloaded and installed on the Vision tier when necessary. These files are not part of the Deltek Vision download file but are called from a remote FTP server when they are required for successful completion of the installation. Examples of these third party applications are Microsoft XML 4.0 (SP2), Microsoft SQL XML 3.0 (SP3), Microsoft SQLDMO 2005 and Solid PDF Converter. Examples of additional Deltek Vision files are the Blank Database, the Sample Database, and the help files.

The Download Manager is a Winform application that requires previous installation of the Microsoft .NET Framework 2.0 on the Vision tier. Review the requirements for the tier where you will perform the installation. If any of the tiers require Microsoft .NET 3.5SP1, then you can download and install the .NET 3.5SP1 instead of .NET 2.0 since the .NET 3.5SP1 installation also installs .NET 2.0 and .NET 3.0. The download for Microsoft .NET Framework 2.0 is available at:

http://www.microsoft.com/downloads/details.aspx?familyid=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en

You can download the Microsoft .NET Framework 3.5 SP1 from this link:

http://www.microsoft.com/downloads/details.aspx?familyid=ab99342f-5d1a-413d-8319-81da479ab0d7&displaylang=en

If your Vision tier has internet connectivity, proceed to the Prerequisite Installation Checklists. If your Vision tier does not have internet connectivity, refer to the following procedures to download your Deltek Vision installation and prerequisite files.

Deltek Install Prepare Utility

The Deltek Vision Install Prepare Utility (DeltekVisionInstallPrepareUtility.exe) can be used for the following scenarios:

- The Deltek Vision Server does not have access to the internet
- Setup is unable to finish because the download manager is unable to download prerequisites needed for the installation to continue.

The Deltek Install Prepare Utility is a self-extracting tool that downloads the prerequisites that are required for use by the installation from a machine other than the installation server. Once downloaded, the files must be placed into the folder where the Deltek Vision 61 compressed setup files were extracted. This occurs when you choose the option to save the extracted files. When you are ready to install Vision, you will launch the extracted setup.exe file and it will automatically find the downloaded files in the root of the folder where the setup.exe is located and will not try to download the prerequisites.

To use the Deltek Install Prepare Utility, complete the following steps:

1. On a machine that has access to the Internet, launch the Deltek Vision 61 compressed setup downloaded from the Deltek Vision distribution site. Choose the option to save the extracted files. By default, the setup files extracted from the Deltek Vision 61 compressed setup file are saved into the C:\Program Files\Deltek\Vision\Setup61SP1 folder.
2. Obtain the DeltekVisioninstallPrepareUtility.exe from a Deltek Vision Technical Services support representative.
3. Launch the DeltekVisioninstallPrepareUtility.exe on the same machine and it will automatically extract its contents into the folder you saved it into.
4. Launch the DeltekInstallPrepareUtility.exe file that was extracted.
5. The **Path to Save/Extract** defaults to the location where the Vision installation will automatically extract. The default location is configured to match the default location where the Deltek Vision 61 compressed setup files are configured to extract.
6. Select the type of installation you plan to perform in the **Download all components for** drop-down list. The utility will automatically select the prerequisites required for the installation you have selected.
7. Click the **Download Components** button to download the files into the Vision Setup folder.
8. On the Vision web servers, follow the steps for your deployment model running the extracted setup.exe file.

Prerequisite Installation Checklists

One Server Deployment Model

Because the one server deployment model involves installing all Vision tiers on one server, you install all prerequisite software listed below on that same server. Check off each step as completed. A summary table of the prerequisites is included at the start of each section during the installation steps.

To deploy on one server, complete the following steps:

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install the latest version and service pack of Microsoft Internet Explorer, or at least Internet Explorer 6.0 (SP2).
3. If you are running on Windows Server 2003, you must remove the Internet Explorer Enhanced Security Configuration (from Add/Remove Programs). Internet Explorer Enhanced Security Configuration is installed by default on Windows 2003.
4. If your operating system is Windows Server 2003 (SP2), install Microsoft Internet Information Services (IIS) 6.0 with ASP .NET enabled. See Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008 for procedural information.
5. If your operating system is Windows Server 2008, install Microsoft Internet Information Services (IIS) 7.0 with ASP .NET enabled. See Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008 for procedural information.
6. Complete one of the following:

   - If you are using SQL Server 2005 for your database engine, install Microsoft SQL Server 2005 SP3 and install SQL Server 2008 Reporting Services SP1 with CU1 for your report server.

   OR

   - If you are using SQL Server 2008, Install Microsoft SQL Server 2008 (SP1) with the cumulative update package 1 (CU1) for SQL Server 2008 SP1 from the Microsoft website: http://support.microsoft.com/kb/969099

     Click the **View and request hotfix downloads** URL in the upper left corner of the Cumulative Update KB article to obtain the download.

   OR

   - If your firm profile is small enough to support using Microsoft SQL Server Express Edition, Deltek will provide SQL Server 2008 Express Edition with Advanced Services with Deltek Vision 6.1.

     Install SQL Server 2008 SP1, then download and install the cumulative update package 1 (CU1) for SQL Server 2008 SP1 from the Microsoft website: http://support.microsoft.com/kb/969099

7. Configure Reporting Services. (To configure printing to network printers for Vision batch jobs after Vision is installed, see Appendix E: Printing in Deltek Vision 6.xfor procedural information.)

8. Install Microsoft .NET Framework 3.5 (SP1). You can download the Microsoft .NET Framework 3.5 SP1 from this link: http://www.microsoft.com/downloads/details.aspx?familyid=ab99342f-5d1a-413d-8319-81da479ab0d7&displaylang=en

Two Server Deployment Model

Since the two server deployment model involves two possible configurations (Configuration 1) the report server and database server reside on the same server and the web, application, and process server on another server or (Configuration 2) installing the Web, application, and report tier on one server, and the database tier on a separate server, you perform a different set of steps for each server. A summary table of the prerequisites is included at the start of each section during the installation steps.

- Refer to the Web, Application, and Report Tier Checklist to install prerequisites on your Web, application, and report server machine.
- Refer to the Database Tier checklist (the second checklist below) to install prerequisites on your database server.

Check off each step as completed.

Configuration 2 - Database Tier Checklist

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install the latest version and service pack of Microsoft Internet Explorer, or at least Internet Explorer 6.0 (SP2).
3. Complete one of the following:
   - If you are using SQL Server 2005, install Microsoft SQL Server 2005 SP3.

   OR

   - If you are using SQL Server 2008, Install Microsoft SQL Server 2008 (SP1) with the cumulative update package 1 (CU1) for SQL Server 2008 SP1 from the Microsoft website: http://support.microsoft.com/kb/969099

     Click the **View and request hotfix downloads** URL in the upper left corner of the Cumulative Update KB article to obtain the download.

   OR

   - If your firm profile is small enough to support using Microsoft SQL Server Express Edition, Deltek will provide SQL Server 2008 Express Edition with Advanced Services with Deltek Vision 6.1.

     Install SQL Server 2008 SP1, then download and install the cumulative update package 1 (CU1) for SQL Server 2008 SP1 from the Microsoft website: http://support.microsoft.com/kb/969099

Configuration 2 - Web Application and Report Tier Checklist

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install the latest version and service pack of Microsoft Internet Explorer, or at least Internet Explorer 6.0 (SP2).

If you are running on Windows Server 2003, you must remove the Internet Explorer Enhanced Security Configuration (from Add/Remove Programs). Internet Explorer Enhanced Security Configuration is installed by default on Windows Server 2003.

3. Complete one of the following:

   - If your operating system is Windows Server 2003 (SP2), install Microsoft Internet Information Services (IIS) 6.0 with ASP .NET enabled. See Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008 for procedural information.

   OR

   - If your operating system is Windows Server 2008, install Microsoft Internet Information Services (IIS) 7.0 with ASP .NET enabled. See Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008 for procedural information.

4. Install and configure Microsoft SQL Server 2008 (SP1) Reporting Services Component and the cumulative update package 1 (CU1) for SP1 from the Microsoft website:

   http://support.microsoft.com/kb/969099

   *Click the **View and request hotfix downloads** URL in the upper left corner of the Cumulative Update KB article to obtain the download.

5. Configure Reporting Services. (To configure printing to network printers for Vision batch jobs after Vision is installed, see Appendix E: Printing in Deltek Vision 6.x for procedural information.)

6. Install Microsoft .NET Framework 3.5 (SP1). You can download the Microsoft .NET Framework 3.5 SP1 from this link: http://www.microsoft.com/downloads/details.aspx?familyid=ab99342f-5d1a-413d-8319-81da479ab0d7&displaylang=en

Configuration 1 –Database and Report Tier Checklist

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install the latest version and service pack of Microsoft Internet Explorer, or at least Internet Explorer 6.0 (SP2).
3. Complete one of the following:

   - If you are using SQL Server 2005, install Microsoft SQL Server 2005 SP3.
   - If you are using SQL Server 2008, Install Microsoft SQL Server 2008 (SP1) with the cumulative update package 1 (CU1) for SQL Server 2008 SP1 from the Microsoft website: http://support.microsoft.com/kb/969099

     Click the **View and request hotfix downloads** URL in the upper left corner of the Cumulative Update KB article to obtain the download.

   OR

   - If your firm profile is small enough to support using Microsoft SQL Server Express Edition, Deltek will provide SQL Server 2008 Express Edition with Advanced Services with Deltek Vision 6.1.

Install SQL Server 2008 SP1, then download and Install the cumulative update package 1 (CU1) for SQL Server 2008 SP1 from the Microsoft website: http://support.microsoft.com/kb/969099

4. Configure Reporting Services. To configure printing to network printers for Vision batch jobs, see Appendix E: Printing in Deltek Vision 6.x for procedural information.

Configuration 1 - Web Application and Process Tier Checklist

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install the latest version and service pack of Microsoft Internet Explorer, or at least Internet Explorer 6.0 (SP2).

If you are running on Windows Server 2003, you must remove the Internet Explorer Enhanced Security Configuration (from Add/Remove Programs). Internet Explorer Enhanced Security Configuration is installed by default on Windows Server 2003.

3. Complete one of the following:

- If your operating system is Windows Server 2003 (SP2), install Microsoft Internet Information Services (IIS) 6.0 with ASP .NET enabled. See Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008 for procedural information.

  OR

- If your operating system is Windows Server 2008, install Microsoft Internet Information Services (IIS) 7.0 with ASP .NET enabled. See Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008 for procedural information.

4. Install Microsoft .NET Framework 3.5 (SP1). You can download the Microsoft .NET Framework 3.5 SP1 from this link: http://www.microsoft.com/downloads/details.aspx?familyid=ab99342f-5d1a-413d-8319-81da479ab0d7&displaylang=en

5. Configure Reporting Services. (To configure printing to network printers for Vision batch jobs after Vision is installed, see Appendix E: Printing in Deltek Vision 6.x for procedural information.)

Three or More Server Installation Checklist

Because the three or more servers deployment model involves installing the Web and application tier on one server, the report tier on a second server, and the database tier on a third server, you perform a different set of steps to install prerequisites on each server. A summary table of the prerequisites is included at the start of each section during the installation steps.

- Refer to the Web and Application Tier Checklist to install prerequisites on your Web and application servers.
- Refer to the Report Tier Checklist to install prerequisites on your report server.
- Refer to the Database Tier Checklist to install prerequisites on your database server.
- Refer to the Process Server Tier Checklist to install prerequisites on your database server.

Check off each step as completed.

Web and Application Tier

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install the latest version and service pack of Microsoft Internet Explorer, or at least Internet Explorer 6.0 (SP2).

   If you are running on Windows Server 2003, you must remove the Internet Explorer Enhanced Security Configuration (from Add/Remove Programs). Internet Explorer Enhanced Security Configuration is installed by default on Windows 2003.
3. Complete one of the following:

   - If your operating system is Windows Server 2003 (SP2), install Microsoft Internet Information Services (IIS) 6.0 with ASP .NET enabled. See Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008 for procedural information.

   OR

   - If your operating system is Windows Server 2008, install Microsoft Internet Information Services (IIS) 7.0 with ASP .NET enabled. See Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008 for procedural information.
4. Install Microsoft .NET Framework 3.5 (SP1). You can download the Microsoft .NET Framework 3.5 SP1 from this link:
   http://www.microsoft.com/downloads/details.aspx?familyid=ab99342f-5d1a-413d-8319-81da479ab0d7&displaylang=en
5. Configure Reporting Services. (To configure printing to network printers for Vision batch jobs after Vision is installed, see Appendix E: Printing in Deltek Vision 6.x for procedural information.)

Report Tier

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install the latest version and service pack of Microsoft Internet Explorer, or at least Internet Explorer 6.0 (SP2).
3. Install and configure Microsoft SQL Server 2008 (SP1) Reporting Services Component and the cumulative update package 1 (CU1) for SQL Server 2008 (SP1) from the Microsoft website:

   http://support.microsoft.com/kb/969099

   *Click the **View and request hotfix downloads** URL in the upper left corner of the Cumulative Update KB article to obtain the download.
4. Configure Reporting Services. (To configure printing to network printers for Vision batch jobs after Vision is installed, see Appendix E: Printing in Deltek Vision 6.x for procedural information.)

Database Tier

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install the latest version and service pack of Microsoft Internet Explorer, or at least Internet Explorer 6.0 (SP2).
3. Complete one of the following:

   - If you are using SQL Server 2005, install Microsoft SQL Server 2005 SP3.

   OR

   - If you are using SQL Server 2008, install Microsoft SQL Server 2008 or Microsoft SQL Server 2008 Express Edition with Advanced Services if your firm profile is small enough to support using this edition and the cumulative update package 1 (CU1) from the Microsoft website
     http://support.microsoft.com/kb/956717

     *Click the **View and request hotfix downloads** URL in the upper left corner of the Cumulative Update KB article to obtain the download.

Process Server Tier

1. Install Windows Server 2003 (SP2) or Windows Server 2008.
2. Install Microsoft .NET Framework 3.5 (SP1). You can download the Microsoft .NET Framework 3.5 SP1 from this link: http://www.microsoft.com/downloads/details.aspx?familyid=ab99342f-5d1a-413d-8319-81da479ab0d7&displaylang=en

Chapter 3: Download Deltek Vision and Initiate Setup

Overview

This chapter provides informational and procedural details about the process to download Deltek Vision and initiate setup.

Before You Begin

Review the following information before you begin the download process.

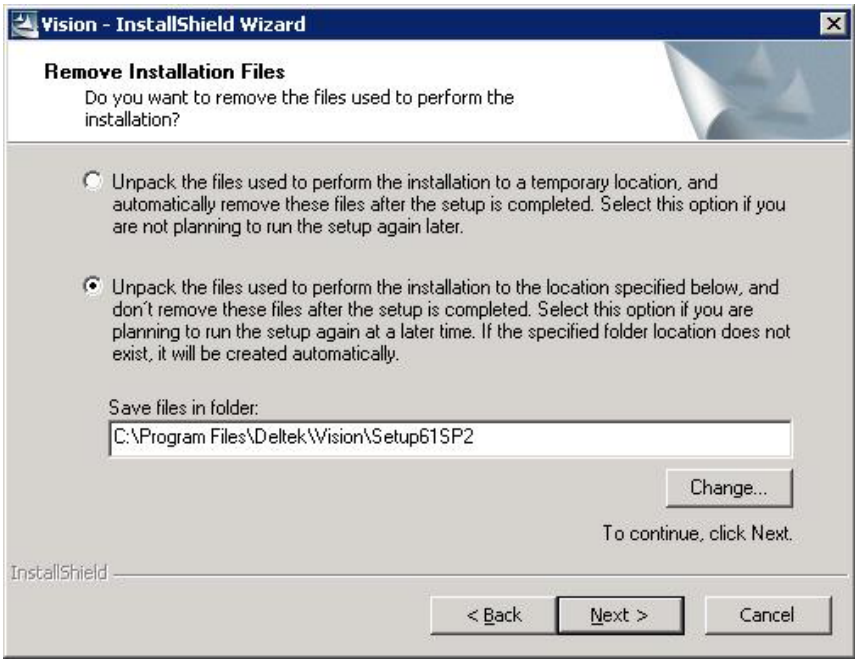
- Deltek Vision 6.1 cannot be installed side by side on the same Web/application or report servers as any previous version.
- Deltek Vision does not install on a server that has Actuate installed. If Actuate is detected, Deltek Vision will cancel the installation. Before installing Deltek Vision 6.1, you must uninstall all previous versions of Actuate.
- If you are upgrading from a prior version of Deltek Vision 6.x, the installation process will detect the existence of the previous 6.x version and will launch the Upgrade Wizard to upgrade the existing version. If you have a Deltek Vision 5.1 or prior installation, you must remove that installation and Actuate before you install Deltek Vision 6.1.
- If you are running live on Vision 5.x or 6.x and want to test Vision 6.1, do not convert your live database. Make a backup of your database, restore it as **Vision61** (or any name you choose), and run the conversion utility on that database. Your database version must already be at Vision 5.0 or newer to convert it to Vision 6.1. The Deltek Vision 5.x/6.x to Deltek Vision 6.1 conversion is an in-place conversion.
- If you are using a database version that is lower than Vision 5.0, you must obtain the necessary conversion script from Deltek Customer Care and update your database to at least version 5.0 before upgrading to Vision 6.1.
- Deltek Vision 6.1 is not compatible with Microsoft Windows 95, 98, Me, NT 4.0 or Windows 2000.
- Although previous versions of Deltek Vision allowed installations unto Windows 2003 Service Pack 1, Deltek Vision requires at least Windows 2003 Service Pack 2 or setup will cancel.
- Deltek Vision 6.1 is not compatible with Internet Explorer 5.5 or earlier. You must be running Internet Explorer 6.1 (SP2) or later.
- Internet Explorer 7.0 is supported with Vision 6.1.

Download the Deltek Vision 6.1 Installation Files and Initiate Setup

To download the Deltek Vision 6.1 installation files, complete the following steps:

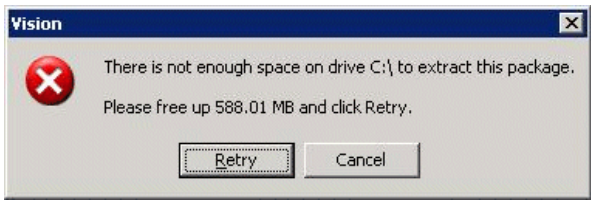
1. Go to the Deltek Vision 6.1 site at http://support.deltek.com/Distribution/DeltekVision.aspx
2. Enter your Customer Care Connect **User ID** and **Password,** and click **Login.**
3. Select **Vision 6.1** from the **Select Product** drop-down.

4. Click the **Go** button. The Deltek Vision Electronic Software Distribution utility opens.
5. Click **Proceed to Downloads**.
6. Click the **Deltek Vision 6.1** button. The file opens in the Open/Save as dialog box. This is a single file download for all Vision installations.
7. Save the file to a location you specify.
8. Double-click the **Deltek Vision 61 Compressed Setup** that you downloaded to run the installation. The Prerequisite screen will display. This screen shows the items that the installation checks. If the criteria is not met for the particular tier the installation is installing on, setup may exit or display a warning.
9. Click **Next.**



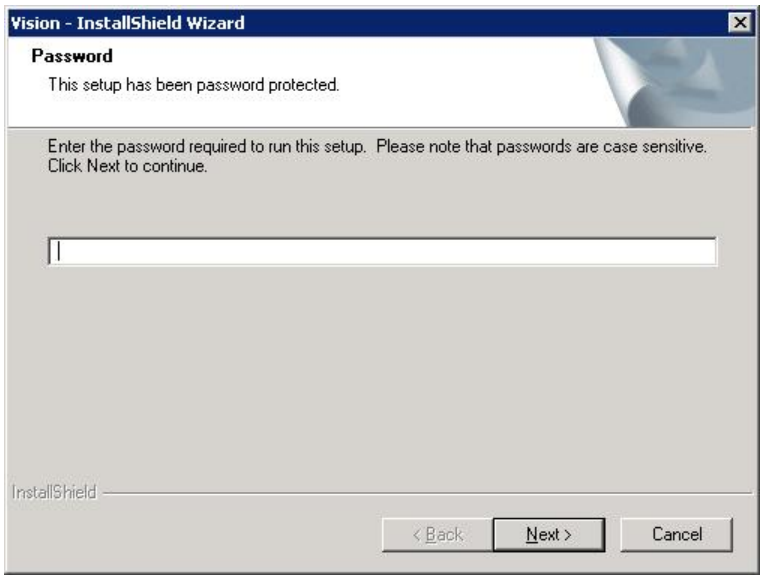
10. For a single tier installation, select the first option. This unpacks the files to a temporary location and removes the files after setup.
11. For a two or more tier installation, select the second option. You can then specify a path the folder in which to save the files. This unpacks the files to that location.

    When you are installing from the other servers, launch the setup.exe from the extracted location and setup will display the Password form.
12. If the directory where you save the files does not have 1GB of free disk space, Vision will display the following error message.



13. Select a different location that contains at least 1GB of free space and click **Retry** to extract the package again.

14. The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.



15. Enter the password provided by Deltek. If you have not received your password, please contact Deltek Customer Care Connect (email VisionSupport@deltek.com).

> If you have any custom applications installed, you will be prompted for your Deltek Custom password first and then prompted for the Deltek Vision installation password.

16. Click **Next**.

17. Proceed to the chapter that describes the type of installation you are performing:

    - One Server Installation – When you select the One Server option from the Number of Deltek Vision Servers form, you install all servers (database, Web/application, and report) on a single machine. See Chapter 4: One Server Installation for information.
    - Two Server Installation – Because the two server deployment model involves two sets of configurations (configuration 1), Installing the DB and Report Server on one machine and the Web/Application on another machine or (Configuration 2), installing the Web, application, and report tier on one server, and the database tier on a separate server, you perform a different set of steps for each server. See Chapter 5: Two Server Installation for more information.

- Three or More Servers Installation – When you select the Three or more Servers option from the Number of Deltek Vision Servers form, you install any combination of a database server, one or more report servers, one or more Web/application servers and one or more process servers, each on its own machine. See Chapter 5: Two Server Installation for more information.

Chapter 4: One Server Installation

Overview

This chapter provides instructions for installing all Vision tiers on one server for firms who have chosen the One Server deployment model. One server deployment is suitable for demonstration purposes or for small firms.

When you choose the One Server deployment model, you install all Vision tiers (Web, Application, Process Server, Report, and Database) on the same machine. You may want to install all Vision tiers on the same server if your deployment needs are simple; for example, if you are installing Vision on a test machine. For more information about the various deployment options available, see Vision Deployment Models on page 10 for more information.

Prerequisites

The following prerequisites are required before performing the Single Server (All Tiers) Installation. Setup will not complete without the following:

Software Prerequisites	Database Server	Report Server (Reporting Services)	Web/Application Server	Process Server
Microsoft Windows Server 2003 (SP2)	**Yes**	**Yes**	**Yes**[1]	**Yes**[2]
Microsoft Windows Server 2008	**Yes**	**Yes**	**Yes**[1]	**Yes**[2]
Microsoft SQL Server 2005 (SP3)	**Yes**	**Yes**[1,3]		
Microsoft SQL Server 2008	**Yes**	**Yes**[4]		
Microsoft SQL Server 2008 (SP1 with CU1 for SQL Server 2008 SP1)		**Yes**[4]		
Microsoft .NET Framework 3.5 (SP1)			**Yes**	**Yes**

The following prerequisites are optional before performing the Single Server (All Tiers) Installation. They are supplied by the Deltek Download Manager during software installation:

Software Prerequisites	Database Server	Report Server (Reporting Services)	Web/Application Server	Process Server
Microsoft .NET Framework 2.0	**Yes**	**Yes**		
Microsoft .NET Framework 2.0 SP2		**Yes**[5]		
Microsoft XML 4.0 (SP2) Services	**Yes**		**Yes**	**Yes**
Microsoft SQLDMO 2005 Components	**Yes**		**Yes**	**Yes**
Microsoft SQLXML 3.0 (SP3)	**Yes**		**Yes**	

[1]IIS is required with ASP.NET enabled.
[2]IIS is not required on the Process Server Only Machine.
[3]Microsoft SQL Server 2008 Reporting Services is recommended and must be installed and configured.
[4]Microsoft Internet Information Services (IIS) is not required for SQL Server 2008 Reporting Services.
[5]Microsoft .NET Framework 2.0 SP2 is required for SQL Server 2008 (SP1) Reporting Services

About Your Deltek Vision Database

The steps in this chapter explain how to install all tiers, including the database tier. The method you use to create your Deltek Vision database file during installation depends on whether you are installing Vision for the first time or upgrading from a previous Deltek product.

See the following for information about creating or locating your Deltek Vision database:

Installing Vision for the First Time

During installation, you must select the Blank Database option. Do not select the Restore from converted database option.

Migrating from Deltek Advantage, Award, or CRM and Proposals

- Install the Deltek Advantage to Deltek Vision, Deltek Award to Deltek Vision, or Deltek CRM and Proposals to Deltek Vision migration utility.
- Install the Deltek Vision software. Do not select the Restore database or Blank Database options during database tier installation. During Deltek Vision database tier installation, you will need your Microsoft SQL Server, or Microsoft SQL Server 2005 Express Edition username and password.

- Run the Deltek Advantage to Deltek Vision migration utility, Deltek Award to Deltek Vision migration utility, or the Deltek CRM and Proposals to Deltek Vision migration utility.

Migrating from Sema4

Deltek's Data Migration group converts your Sema4 data to create your database backup file (.BAK). For instructions on migrating from Deltek Sema4 to Deltek Vision, contact your Deltek consultant.

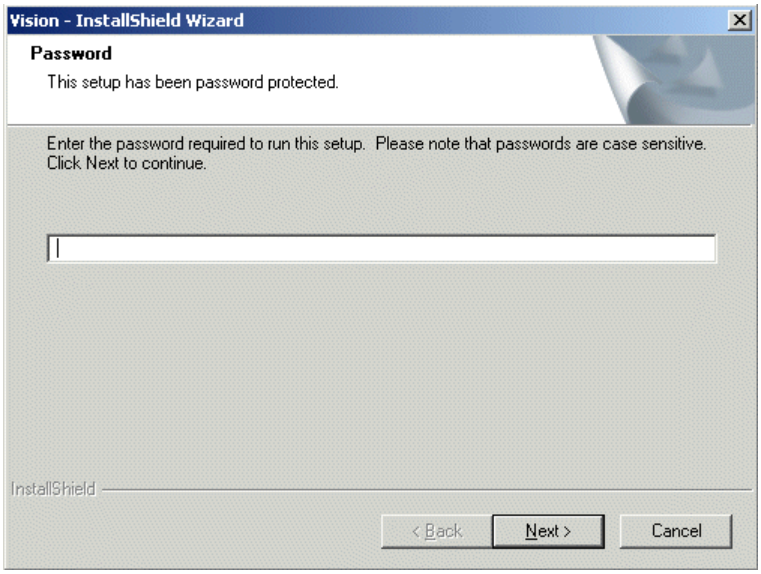
In all of the preceding scenarios, you can install a **Sample Database** along with your new or converted database.

Procedure

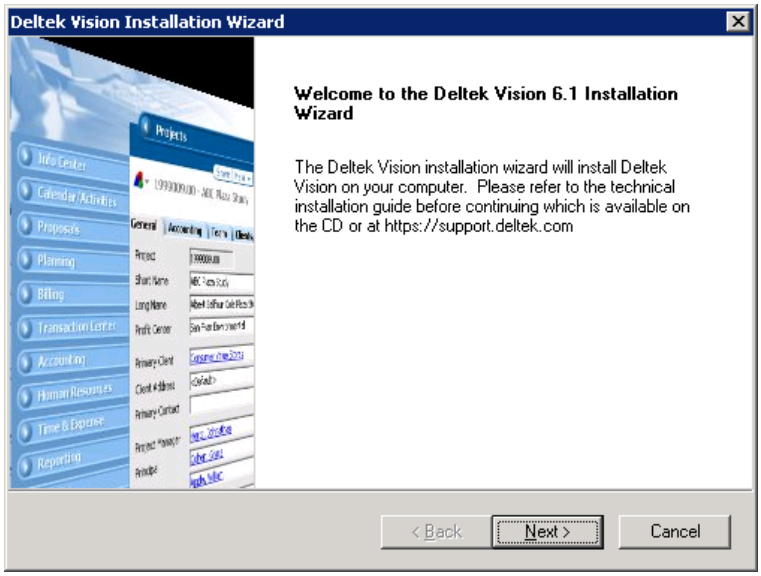
Follow the steps in this section to install Deltek Vision tiers on one server.

1. Follow the steps on page 26 to download and launch the setup file.
2. The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

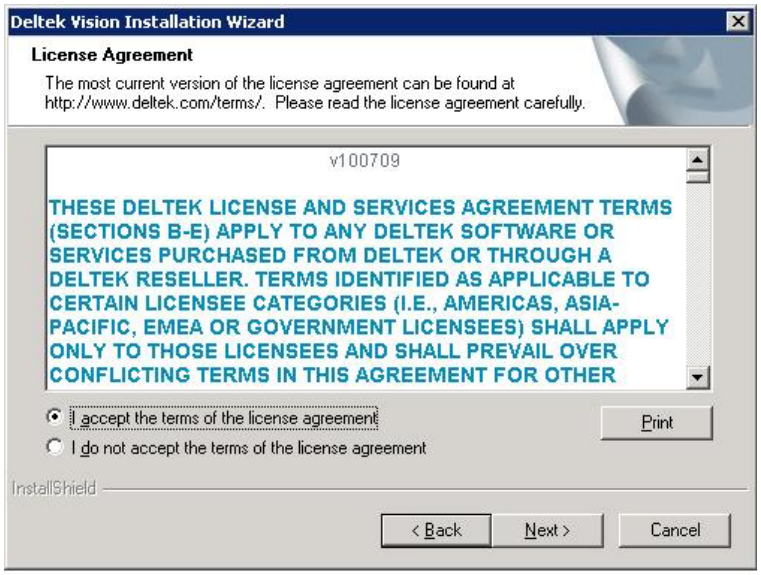
   The Password form displays.



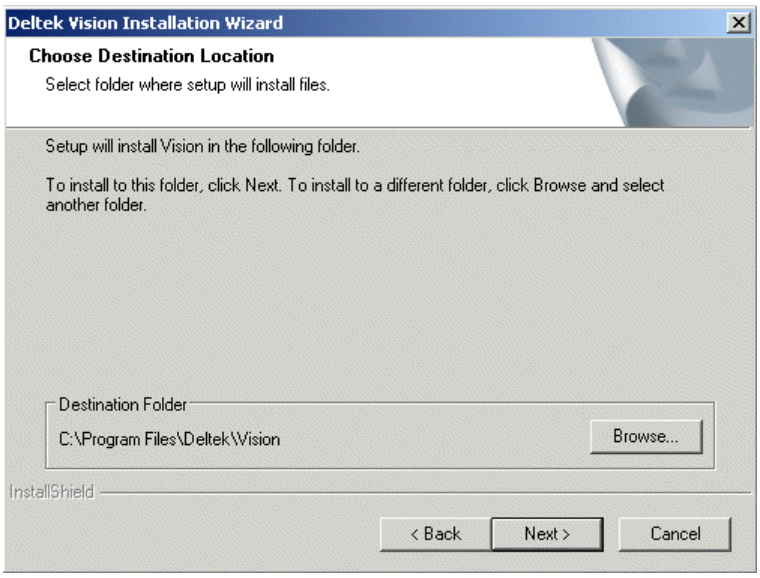
3. Enter the password provided by Deltek and click **Next**. To obtain the password, contact Deltek Customer Care Connect (email VisionSupport@deltek.com). The Welcome form displays:



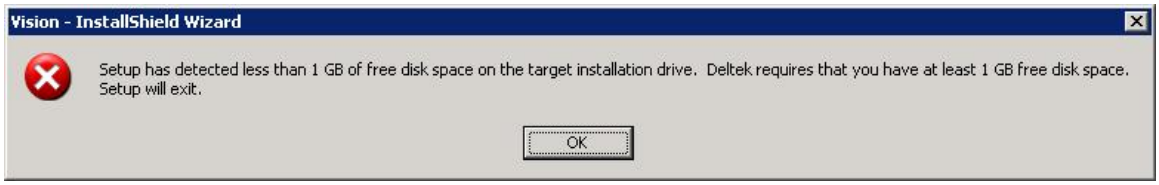
4. Click **Next**. The License Agreement form displays:



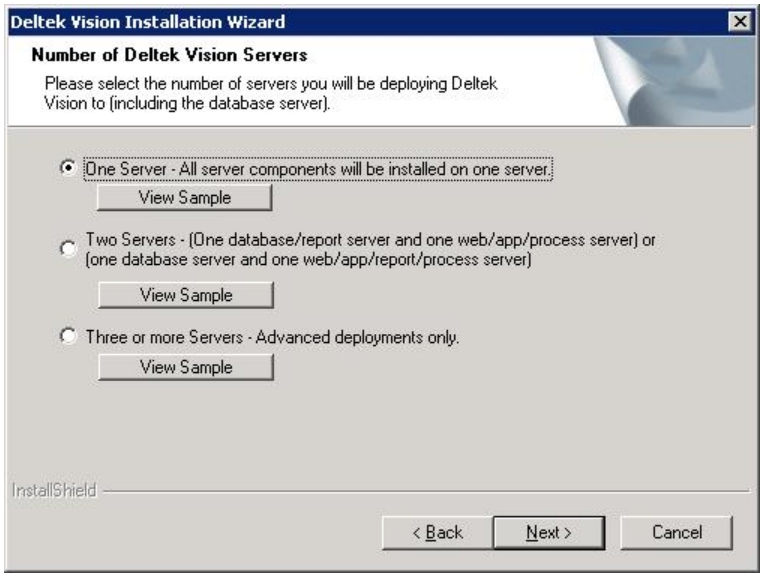
5. Read the agreement and select **I accept the terms of the license agreement** if you agree. Click **Next**. The Choose Destination Location form displays:



6. Do one of the following:
   - Click **Next** to accept the destination displayed on the form.
   - Click **Browse…**, select an alternate destination, and click **Next**.
7. If you do not have at least 1GB of free space in the Destination location, Vision displays an error message. Change the path to select a folder with over 1GB of free space and click **Retry**.

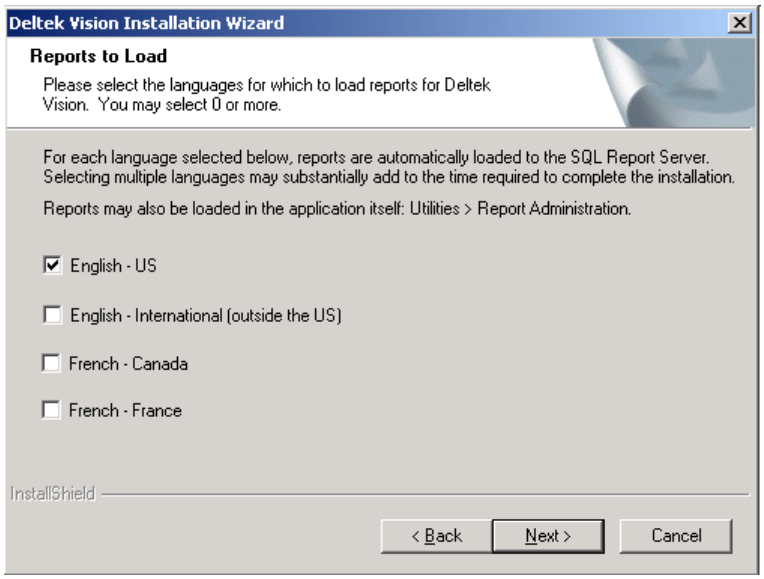


The Number of Deltek Vision Servers form displays:



8. Select **One Server**. All server components (database, web/application process and report) will be installed on one server.

9. Click **Next** to continue. Vision displays the Reports to Load form.

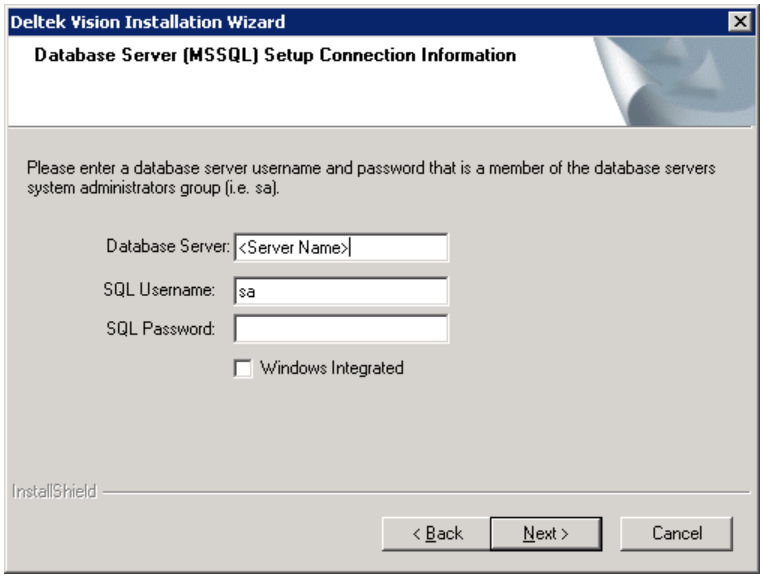


10. The Vision installation routine includes options for selecting the version of English or French in which you plan to run the Vision reports. Select the language for the reports to load. English – US is the default.

11. Click **Next** to continue. Setup checks your Microsoft SQL Server Reporting Services configuration.

Setup uses the default Report Server URL when it first checks the configuration of Microsoft SQL Reporting Services on the Web Server to the Reporting Services Web Service. If it is unable to make a connection to the Reporting Service Web Service page, setup will return an error message with the reason it is unable to make the connection and will display the Specify Report Server and Report Server URL Information form. See Appendix B: for additional information. Continue to the next step when the connection is complete.

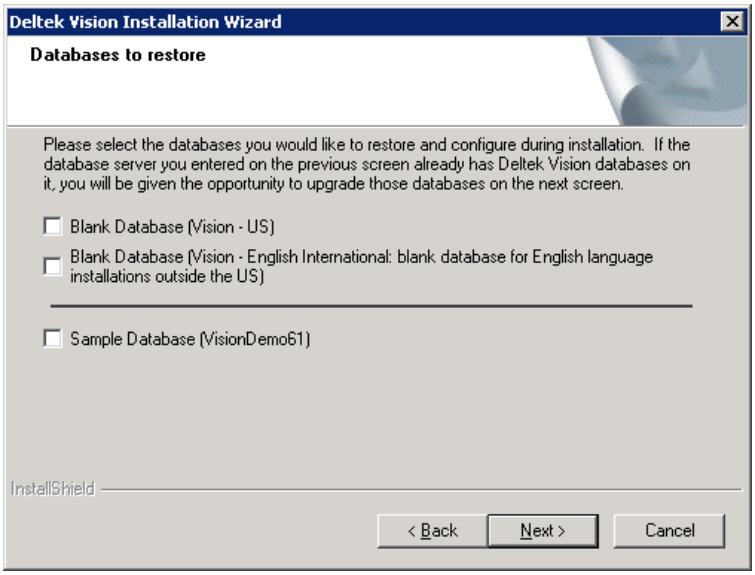
When your configuration is verified, the Database Server (MSSQL) Setup Connection form displays.



12. Enter the following:

    - Database Server — Enter the name of the database server.
    - SQL Username — Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is **sa**. If you use the SQL Server Username and Password, ensure that the server security is configured to support Mixed Mode Security as described in the Deltek Microsoft SQL Server 2005 Administrator's Guide.
    - SQL Password — Enter the password associated with this SQL Username.
    - Windows Integrated – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows Account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation. If you are using integrated authentication, ensure that your current logged in account is a member of the sysadmin role in SQL Server. SQL Server 2008 installed onto Windows Server 2008 and Vista Operating Systems do not add members of the local administrator's group into the SQL Server Sysadmin role by default.

13. Click **Next**. The Databases to Restore form displays:



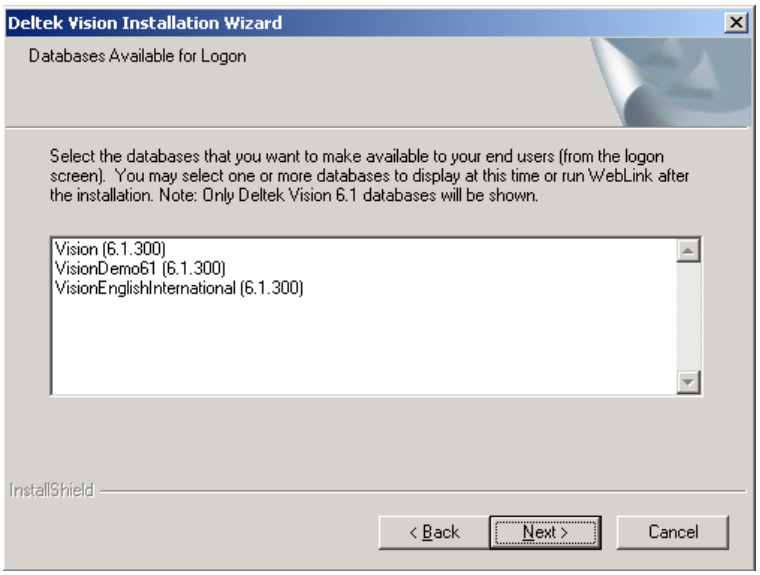
14. Select the database you would like to restore, if any. The database that you select determines the version of English that displays in the Vision user interface.

    - No Selection (No Boxes checked)– If you already have a Vision database or previous Sample database, you can click on **Next** without making a selection to get to the next form of choosing the database to upgrade if the setup detects it.
    - Blank Database (Vision - US) – If there are any existing Vision 5.x or 6.x databases that you would like to upgrade to 6.1 on the database server you specified in step 10, do not select Blank Database. You can upgrade an existing 5.x or 6.x database in the next step. If you don't have an existing Vision database, select this option to start a new Vision database.
    - Blank Database (Vision – English International) – Blank database for English Language installations outside of the United States. Select this option to start a new Vision database if you are using an English Language installation and are outside the United States.
    - Sample Database (VisionDemo61) – Select this option to install the Vision sample database. It is helpful to have this database installed for troubleshooting purposes. If you already have a 5.x or 6.x version of the Sample Database, the following options are available:
        - Do not select Sample Database. The setup will detect supported previous versions of databases (including the Sample database) and give you the opportunity to upgrade your Sample database.
        - In most cases any previous versions of the Sample database may have the Vision database version number in its name (For example, VisionDemo51). If that is the case, when you convert a 5.x or 6.x database to Vision 6.1 the version it is upgraded to will no longer match the version number in its name. You can perform one of the following:
            - Rename the database on the SQL Server and in Weblink after the installation to reflect the correct version number or

- Delete the previous version's Sample database on your SQL Server before continuing, and then choose to restore the Sample database.

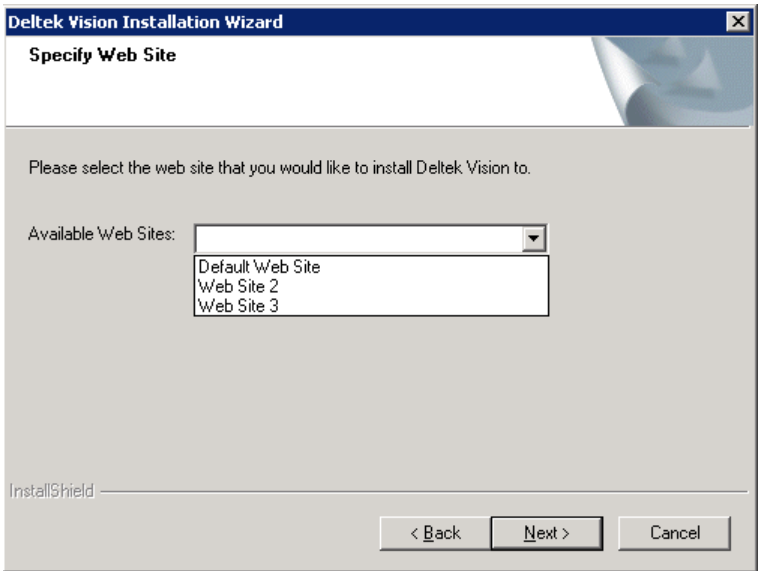
If the installation program cannot connect to the database using the username/password you entered, a message asking you to try again displays when you click **Next**. Resolve this connection issue before continuing with the installation.

15. Click **Next**. If Vision detects an existing database, the Database to Upgrade form displays. See Appendix B: Options When Converting a Database during Installation, for additional information. If Vision does not detect an existing database, the Databases Available for Logon form displays:

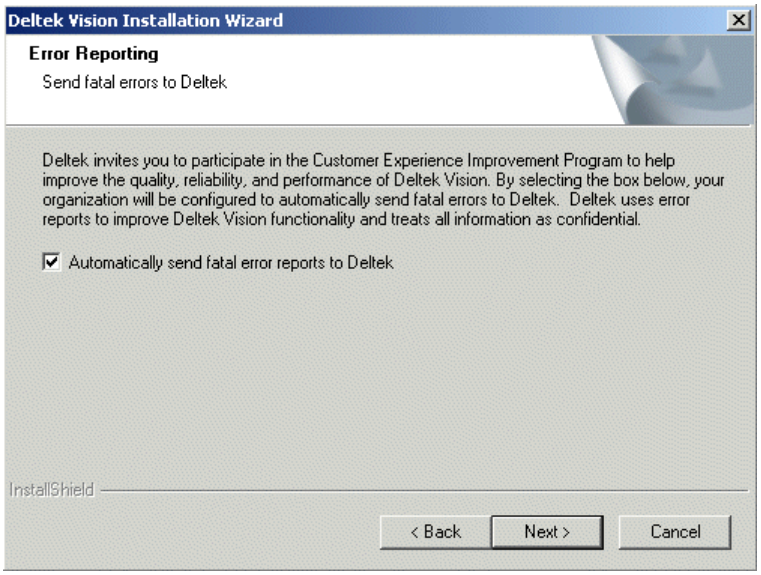


16. Click **Next** to continue. The Specify Web Site form displays.

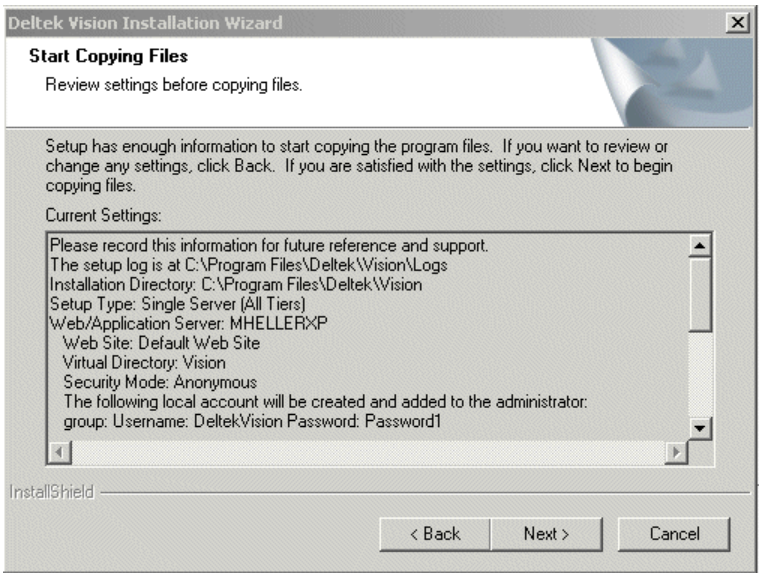
This form displays only if your Web server contains multiple Web sites. If you do not have multiple Web sites on your Web server, proceed to step 19.



17. Select the Web site to which you will install Deltek Vision, and then click **Next**. The Error Reporting form displays.

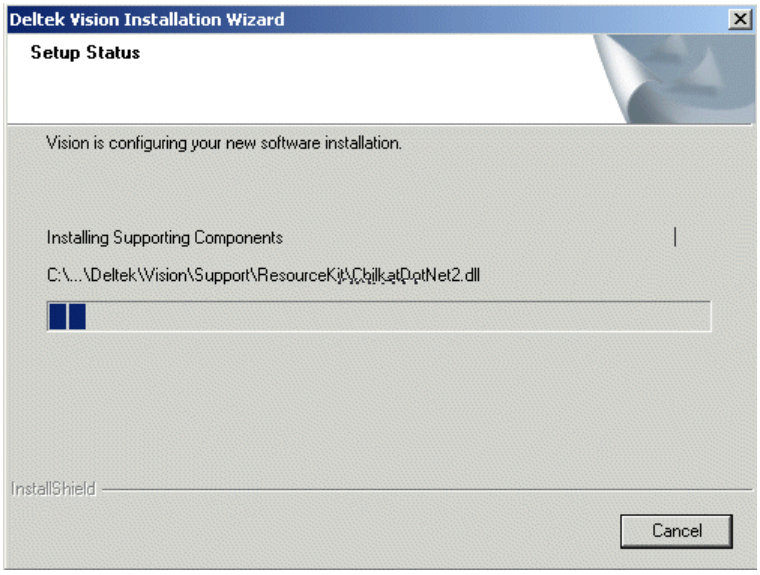


18. Select **Automatically send fatal error reports to Deltek**, then click **Next**. The Start Copying Files form displays:



19. Review the installation settings and click **Next** to begin installation.

    - The location of the installation Log that tracks all the steps performed during the installation.
    - The installation directory – where you installed Vision.
    - The Setup Type and the option chosen – if you are performing a multi server installation, this information is handy to use to know what your next option to choose when performing the installation on your other servers.
    - Information about the Database Server such as:
        - Database Server Name
        - Database Login used to perform the installation on the database server
        - Any Deltek Vision logins and passwords created in SQL Server during the installation. This information can be used when configuring Weblink. It is recommended that you change at least the passwords from their defaults and/or the login name as well.
        - Any databases that you will be restoring or upgrading will be listed



When finished, the Installation Wizard displays a success notice.

20. Click **Finish** to complete the installation.

Review the installation log to check for errors in the installation. The installation creates a logs subfolder located in the Deltek Vision installation location that contains the installation log as well as conversion log files created for each database that may have been upgraded during the installation. If you upgraded any databases during the installation process, verify that a conversion log for that database (filename contains the database name) was created and it does not contain any errors (search for the word “msg” without the quotes in the log file”. If errors are found, contact Deltek Customer Care Connect with the contents of the log file.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to \ProgramFiles\Deltek\Vision\Logs folder and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if they are not in the log file.

Chapter 5: Two Server Installation

Overview

This model is designed for small to medium-sized firms who may not have a technical staff. For more information about the various deployment options available, see Deltek Vision Deployment Models on page 19.

There are two different methods for installing Vision across two servers:

- **Configuration 1**: Install the database and report components on one server machine and the Web/application and process server components on a separate server machine. Firms with one SQL Server license will use this configuration. Firms typically use Method 2 if all users are at a single location and will only access Vision in the office or over a VPN connection into the corporate network. Infrastructure security is not necessarily a concern in this model, because all application use is internal to the organization. This method is designed for small to medium-sized firms who may not have a technical staff. For more information about the various deployment options available, see Deltek Vision Deployment Models in Chapter 1, on page 10.
- **Configuration 2**: Install the database component on one server machine and the Web/application, process server and report components on a separate server machine. Configuration 1 has the Reporting Services installed on a separate server from the Database Engine. If you decide to split the Report Server (web service) from the database server hosting the report server database, you will need an additional Microsoft SQL Server license. Refer to the licensing section of this document for links to Microsoft SQL Server licensing related to SQL Server Reporting Services.

Important Information to Know Before You Begin

- Before installing Vision tiers across two servers, you must install a certain set of prerequisite software required for the tiers being installed on the Vision servers. Refer to Chapters 1 and 2 for a list of non-supported environments, technical considerations for information on installing prerequisite software on two servers. The table below lists the prerequisite requirements for the installation to begin, and a list of the components that are downloaded and installed during the installation process by the installer. You cannot install the Web, application or report server tiers on the Microsoft Small Business Server 2000/2003. Only the Deltek Vision database and or Report tier can be installed on this server.
- You cannot install any Vision tier on the Microsoft ISA server, or any other software-based firewall.
- You cannot install any Vision tier on any server with Microsoft Terminal Services (Application Mode Only) running. Terminal Services in remote administration is fully supported.
- You cannot install any Vision tier on a domain controller.
- You cannot install any Vision tier on a Microsoft Exchange 5.5/2000/2003 Server.
- You cannot install any Vision tier on a SharePoint Portal Server 2001.
- Microsoft .NET Framework 3.5 SP1 is required prior to running the Deltek Vision installation on any machine running the Vision Web/Application or the Process Server Tiers
- Microsoft .NET Framework 2.0 is required prior to running the Deltek Vision installation on the Database or Report Server Tiers. If the setup does not detect Microsoft .NET Framework 2.0,

then setup will exit. See the Download Manager section on page 17 if you have not yet installed Download Manager.

- Generally, Microsoft .NET Framework 2.0 is already installed on all tiers since it is installed with Microsoft .NET 3.5SP1 (a prerequisite requirement for the Web\Application and Process Server machines), and is also installed as part of the Microsoft SQL Server 2008 Setup routine when the Database Server and Report Server components are installed.
- Microsoft .NET Framework 2.0 is required on any machine that you will be running the DeltekVisionInstallPrepareUtility.exe for those scenarios where the Deltek Vision Server does not have access to the internet and setup is unable to finish. This happens because the Download Manager is unable to download prerequisites needed for the installation to continue. This is required by the DeltekVisionInstallPrepareUtility.exe.

Configuration 1, Part 1: Database and Report Installation

Prerequisites

Refer to the following prerequisites before installing the database and report servers.

	Software Prerequisites	Database Server	Report Server (Reporting Services)
REQUIRED **Setup will not complete if these are not detected**	Microsoft Windows Server 2003 (SP2)	**Yes**	**Yes**
	Microsoft Windows Server 2008	**Yes**	**Yes**
	Microsoft SQL Server 2005 (SP3)	**Yes**	**Yes**[1,3]
	Microsoft SQL Server 2008 (SP1,CU1)	**Yes**	**Yes**[4,5]
	Microsoft .NET Framework 3.5 (SP1)		
OPTIONAL **Supplied by Deltek Download Manager during Installation**	Microsoft .NET Framework 2.0	**Yes**	**Yes**
	Microsoft XML 4.0 (SP2) Services	**Yes**	
	Microsoft SQLDMO 2005 Components	**Yes**	
	Microsoft SQLXML 3.0 (SP3)	**Yes**	

[1]IIS is required with ASP.NET enabled.
[2]IIS is not required on the Process Server Only Machine.
[3]Microsoft SQL Server 2008 Reporting Services is recommended and must be installed and configured.
[4]Microsoft Internet Information Services (IIS) is not required for SQL Server 2008 Reporting
[5]Microsoft SQL Server 2008 SP1, CU1 is required for SQL Server 2008 Reporting Services.

Deltek recommends always installing the database server first. In this configuration, because the Database and Report Server Tiers are on the same machine, this step must be performed before the installation of Deltek Vision on your Vision Web Server.

Installing Vision for the First Time

During installation, you must select the Blank Database option. Do not choose the Restore from converted database option.

Migrating from Deltek Advantage, Award, or CRM and Proposals

- Install the Deltek Advantage to Deltek Vision, Deltek Award to Deltek Vision, or Deltek CRM and Proposals to Deltek Vision migration utility.
- Install the Deltek Vision software. Do not select the Restore database or Blank Database options during database tier installation. During Deltek Vision database tier installation, you will need your Microsoft SQL Server, or Microsoft SQL Server 2005 Express Edition username and password.
- Run the Deltek Advantage to Deltek Vision migration utility, Deltek Award to Deltek Vision migration utility, or the Deltek CRM and Proposals to Deltek Vision migration utility.

Migrating from Sema4

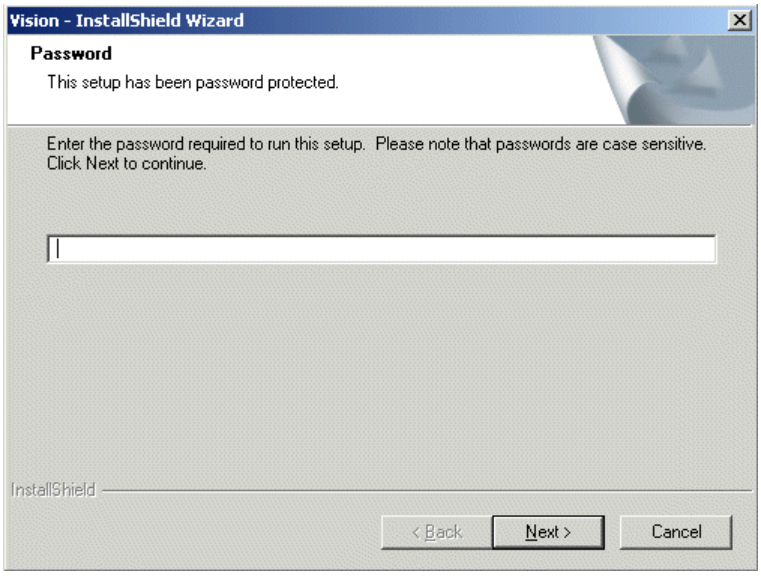
Deltek's Data Migration group converts your Sema4 data to create your database backup file (.BAK). For instructions on migrating from Deltek Sema4 to Deltek Vision, contact your Deltek consultant.

Procedure to Install the Database and Report Server

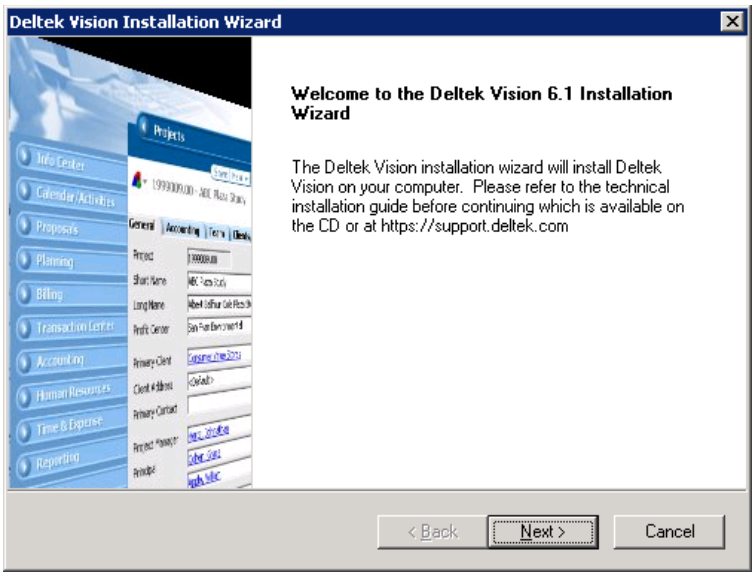
1. Follow the steps on page 26 to download and launch the setup file. The setup routine extracts the files to the desired location. You must have 1GB of free disk space in this location.

   The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

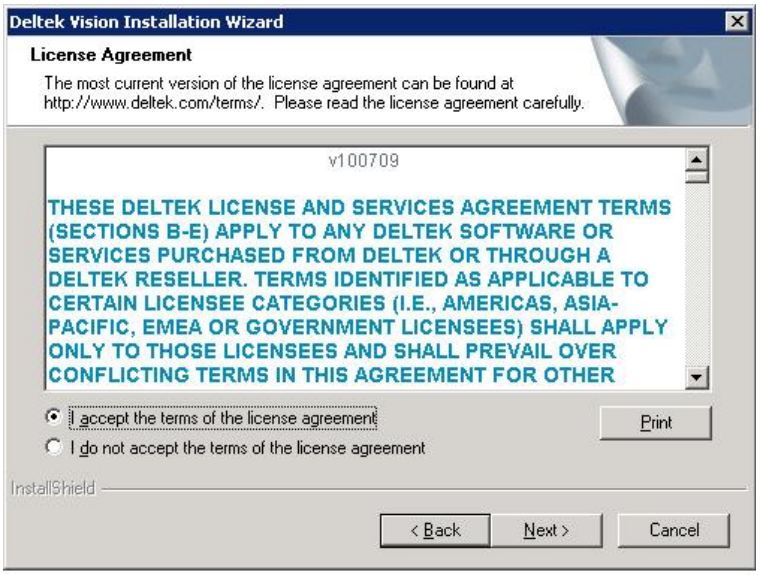
   The Password form displays.



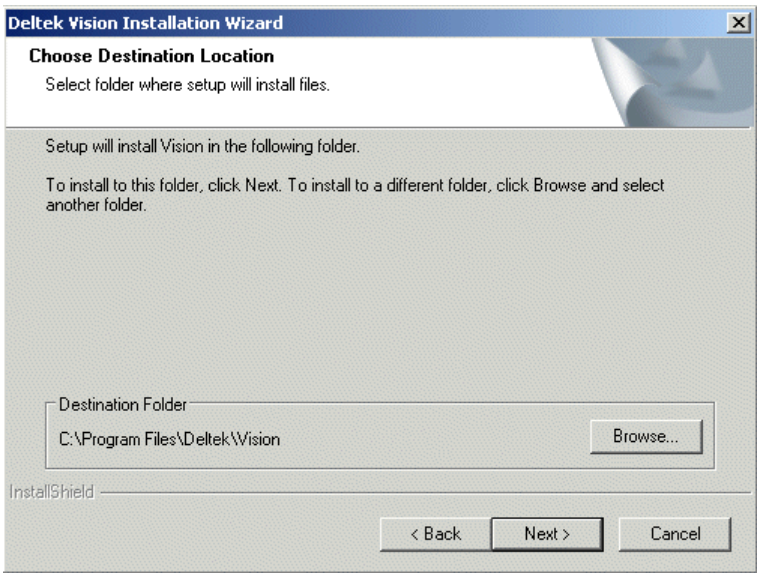
2. Enter the password provided by Deltek and click **Next**. To obtain the password, contact Deltek Customer Care Connect at VisionSupport@deltek.com. The Welcome form displays:



3. Click **Next**. The License Agreement form displays.

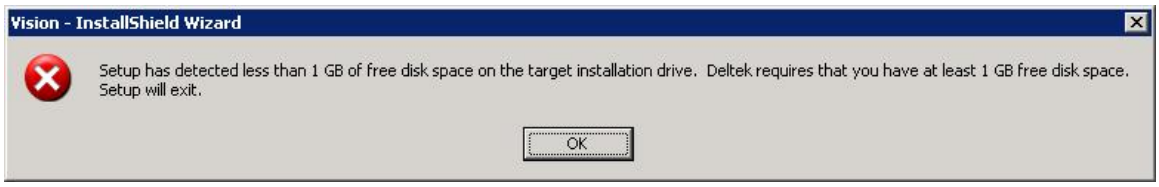


4. Review the agreement and click the **I accept the terms of the license agreement** option if you agree. Click **Next** to proceed. The Choose Destination Location form displays.

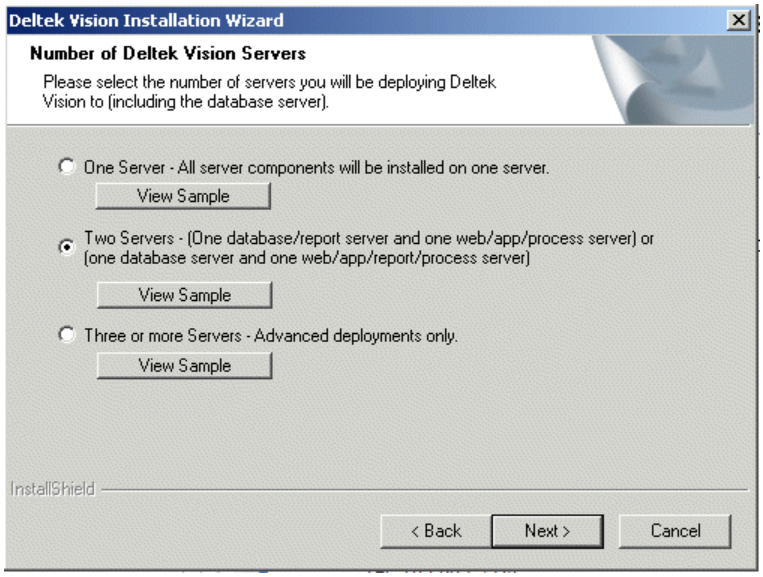


5. Complete one of the following:

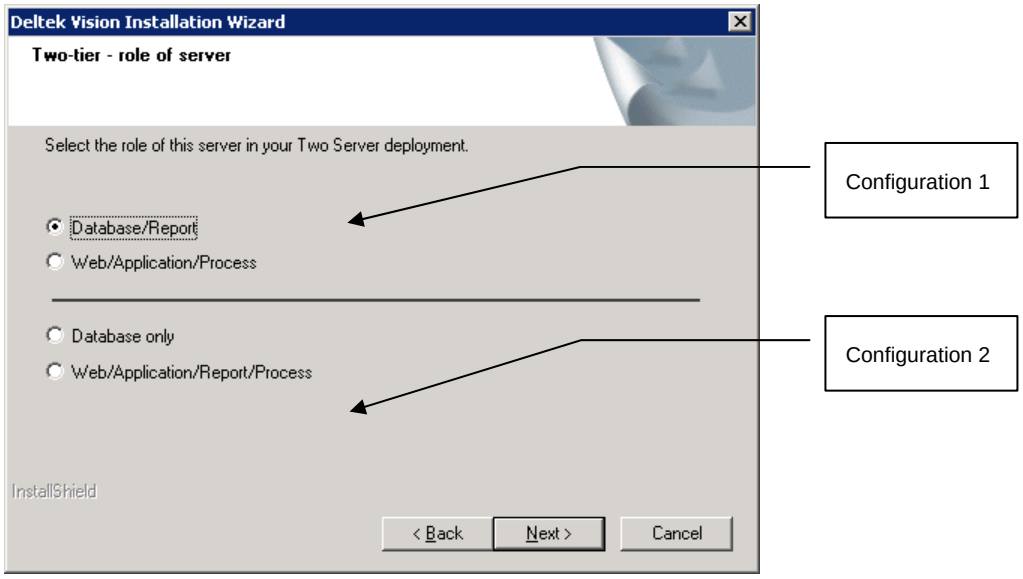
   - Click **Next** to accept the destination displayed on the form.
   - Click **Browse…**, select an alternate destination, and click **Next**.
   - If you do not have at least 1GB of free space in the Destination location, Vision displays an error message. Change the path to select a folder with over 1GB of free space and click **Retry**.



The Number of Vision Servers form displays.

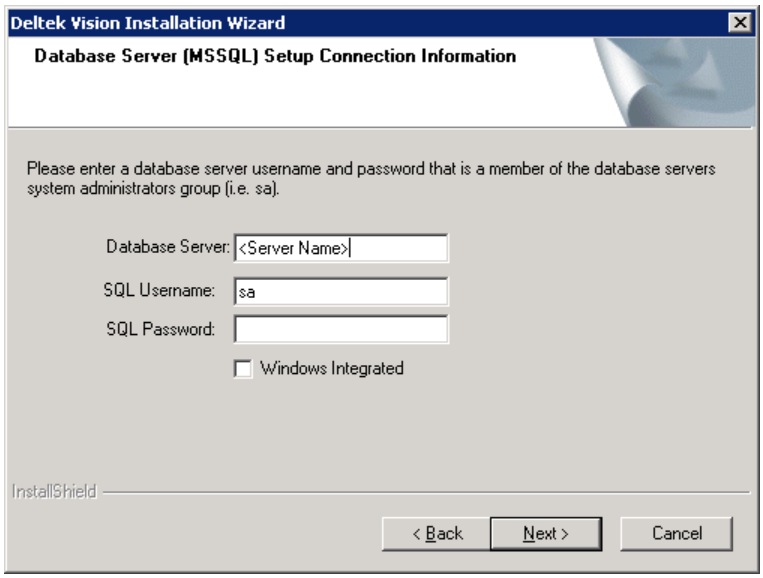


6. Select Two Servers and click **Next**. The Two tier – role of server form displays.



7. Select the Database/Report option and click **Next**. The Database Server (MSSQL) Setup Connection form displays.

> Setup will check for Microsoft .NET Framework 3.5 (SP1) before displaying the Database Server Setup Connection form. If it does not detect it, then setup will exit.



8. Enter the following:

   - **Database Server** — Enter the name of the database server.
   - **SQL Username** — Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is **sa**. If you use the SQL Server Username and Password, ensure that the

server security is configured to support Mixed Mode Security as described in the Deltek Microsoft SQL Server 2005 Administrator's Guide.

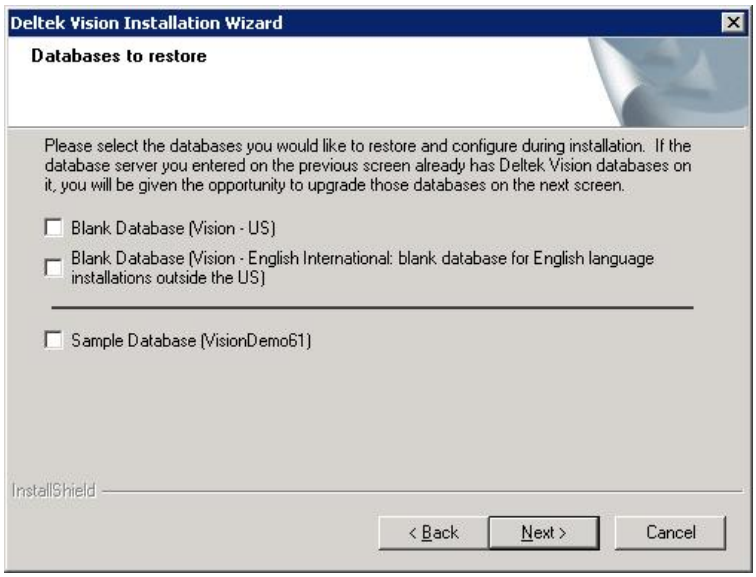
- **SQL Password** — Enter the password associated with this SQL Username.
- **Windows Integrated** – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows Account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation.

SQL Server 2008 installed on Windows Server 2008 and Vista Operating Systems does not add members of the local administrator's group into the SQL Server Sysadmin role by default. If you are using integrated authentication, ensure that your current logged in account is a member of the sysadmin role in SQL Server.

You must make sure your connection is configured correctly before you can continue. If the installation program cannot connect to the database using the username/password you entered, when you click **Next**, the following message displays asking you to try again.

9. Click **OK**, correct the problem, and continue.

10. Click **Next**. The Databases to Restore form displays:



11. Select the database you would like to restore, if any. The database that you select determines the version of English that displays in the Vision user interface.

    - No Selection (No Boxes checked) – If you already have a Vision database or previous Sample database, you can click on Next without making a selection to get to the next form of choosing the database to upgrade if the setup detects it.

- Blank Database (Vision - US) – If there are any existing Vision 5.x or 6.x databases that you would like to upgrade to 6.1 on the database server you specified in step 10, do not select Blank Database – You can upgrade an existing 5.x or 6.x database in the next step. If you don't have an existing Vision database, select this option to start a new Vision database.
- Blank Database (Vision – English International) – Blank database for English Language installations outside of the United States. Select this option to start a new Vision database if you are using an English Language installation and are outside the United States.
- Sample Database (VisionDemo61) – Select this option to install the Vision sample database. It is helpful to have this database installed for troubleshooting purposes. If you already have a 5.x or 6.x version of the Sample Database, the following options are available:
  - Do not select **Sample Database**. The setup will detect supported previous versions of databases (including the Sample database) and give you the opportunity to upgrade your Sample database.
  - In most cases any previous versions of the Sample database may have the Vision database version number in its name (For example, VisionDemo51). If that is the case, when you convert a 5.x or 6.x database to Vision 6.1 the version it is upgraded to will no longer match the version number in its name. You can perform one of the following:
    - Rename the database on the SQL Server and in Weblink after the installation to reflect the correct version number or
    - Delete the previous version's Sample database on your SQL Server before continuing, then choose to restore the Sample database.

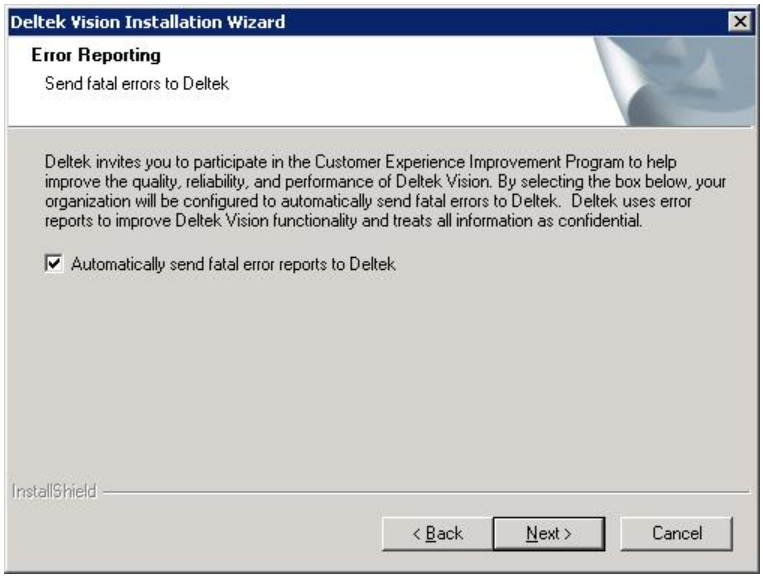
12. Click **Next** to continue. The Checking configuration of Microsoft SQL Reporting Services form displays.

Setup uses the default Report Server URL when it first checks the configuration of Microsoft SQL Reporting Services on the Web Server to the Reporting Services Web Service. If it is unable to make a connection to the Reporting Service Web Service page, setup will return an error message with the reason it is unable to make the connection and will display the Specify Report Server and Report Server URL Information form. See Appendix C: Connect to Reporting Service Web Service for additional information. Continue to the next step when the connection is complete.

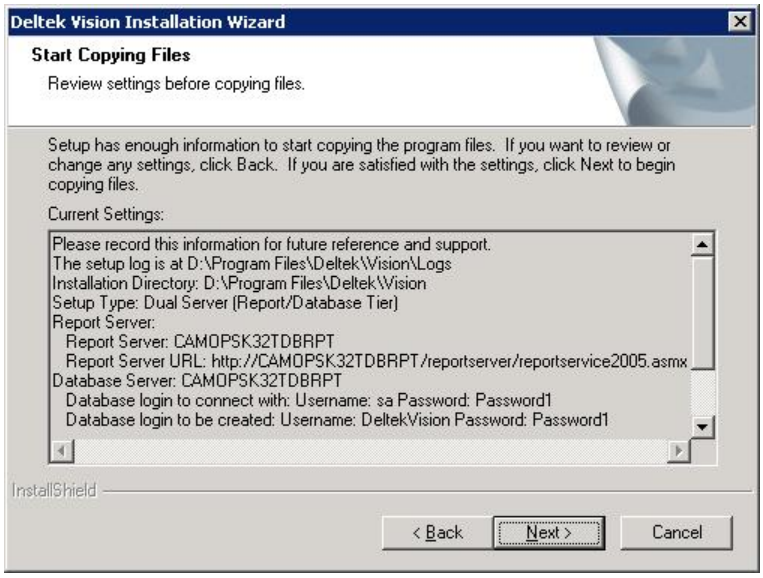
13. Setup now checks for Vision databases.

- If you migrated from another product and restored and/or upgraded your database to this release version prior to running setup, the setup process will detect the versions of your database and will skip to the Databases Available for Logon displayed in Step 16 of this procedure.
- Otherwise, the setup process checks your SQL Server for Vision Databases version 5.0 or higher that is available for upgrade. See Appendix B: for additional information.

14. Click **Next**. The Error Reporting form displays:



15. Select **Automatically send fatal error reports to Deltek**, then click **Next**. The Start Copying Files form displays.



16. Review the installation settings. The information in the form is also logged into the Installation Log but can be saved for a quick reference of what was performed. It contains information such as:

    - The location of the installation Log that tracks all the steps performed during the installation.
    - The installation directory – where you installed Vision.
    - The Setup Type and the option chosen – if you are performing a multi server installation, this information is handy to use to know what options were chosen when performing the installation on your other servers. In this Scenario, Dual Server with the (Web/Application/Report Tier) Options were selected.

- Information about the Web/Application/Report Server Configurations such as:
  - Web Site, Virtual Directory, Virtual Directory Security Mode
  - Any Local accounts that were created for the setup including their Password.
  - Report Server Name and Report Server URL.
  - List of Databases that will be converted.
  - List of databases that will appear in the weblink after the installation.

17. Click **Next.**

18. Review the installation log to check for errors in the installation. The installation creates a logs subfolder located in the Deltek Vision installation location that contains the installation log as well as conversion log files created for each database that may have been upgraded during the installation. If you upgraded any databases during the installation process, verify that a conversion log for that database (filename contains the database name) was created and it does not contain any errors (search for the word "msg" without the quotes in the log file". If errors are found, contact Deltek Customer Care Connect with the contents of the log files.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to \ProgramFiles\Deltek\Vision\Logs folder and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if they are not in the log file.

19. You have successfully installed the Database and Report Server tiers on the current server. Proceed to the next section to install the Web/Application and Process Servers on a second server machine.

Important Information about Setting up the Vision Database Tier

During installation of the database tier, the Deltek Vision backup device is created on the database server to allow end users to perform *ad hoc* database backups before major data changes or processes take place. To back up the database, select **Utilities » Backup Database** from the Vision Applications menu.

Configuration 1, Part 2: Web/Application and Process Server Installation of Two Server Installation

Follow these steps to install the Vision Web\Application\Process Server tier on one server. During installation, you will be prompted for database information, such as database host name or IP address and Report Server information such as the Report Server Name, and Report Server URL. You must have this information to perform the following installation.

Prerequisites

Refer to the following prerequisites before installing the web/application and process servers.

	Software Prerequisites	Web/Application Server	Process Server
REQUIRED **Setup will not complete if these are not detected**	Microsoft Windows Server 2003 (SP2)	**Yes**[1]	**Yes**[2]
	Microsoft Windows Server 2008	**Yes**[1]	**Yes**[2]
	Microsoft SQL Server 2005 (SP3)		
	Microsoft SQL Server 2008 (SP1, CU1)		
	Microsoft .NET Framework 3.5 (SP1)	**Yes**	**Yes**
OPTIONAL **Supplied by Deltek Download Manager during Installation**	Microsoft .NET Framework 2.0		
	Microsoft XML 4.0 (SP2) Services	**Yes**	**Yes**
	Microsoft SQLDMO 2005 Components	**Yes**	**Yes**
	Microsoft SQLXML 3.0 (SP3)	**Yes**	

[1]IIS is required with ASP.NET enabled.
[2]IIS is not required on the Process Server Only Machine.
[3]Microsoft SQL Server 2008 Reporting Services is recommended and must be installed and configured.
[4]Microsoft Internet Information Services (IIS) is not required for SQL Server 2008 Reporting Services.

Important Vision Setup Information

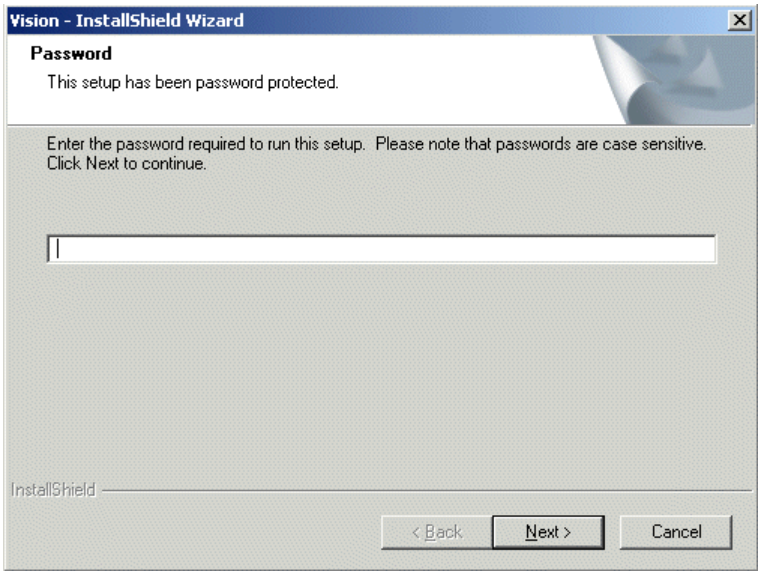
Microsoft .NET Framework 3.5 SP1 is required prior to running the Vision installation in this configuration.

Procedure for Web/Application and Process Server Installation of Two Server Installation

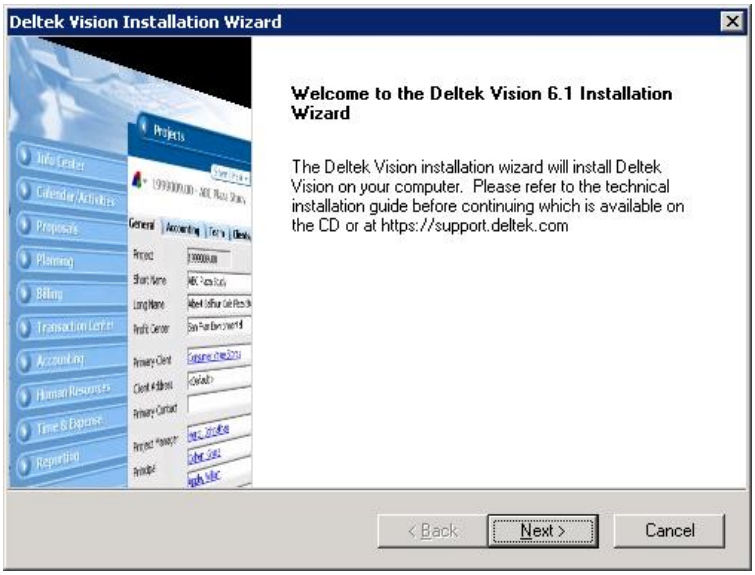
1. Follow the steps on page 26 to download and launch the setup file. The setup routine extracts the files to the desired location. You must have 1GB of free disk space in this location.

   The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

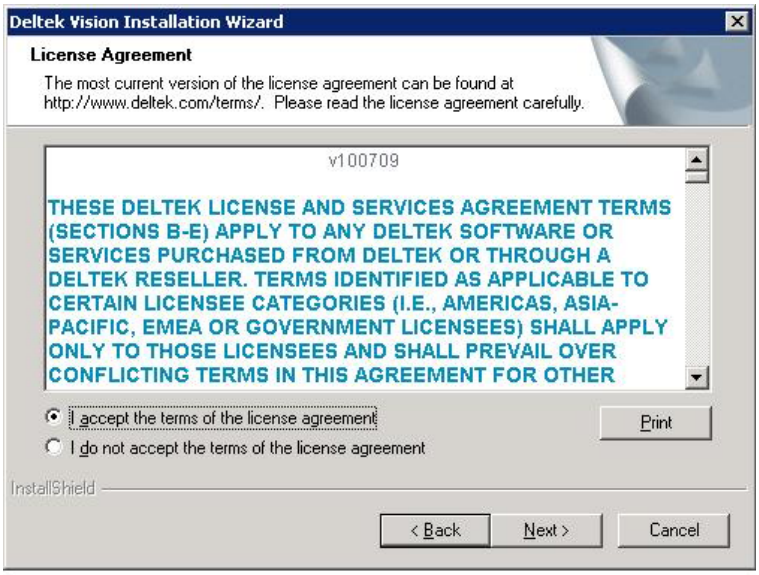
The Password form displays.



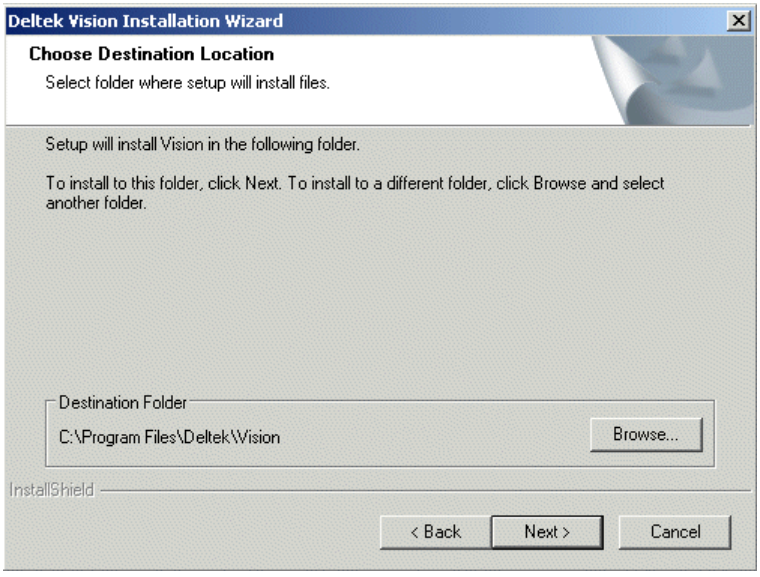
2. Enter the password provided by Deltek and click Next. To obtain the password, contact Deltek Customer Care Connect at VisionSupport@deltek.com. The Welcome form displays:



3. Click **Next**. The License Agreement form displays.

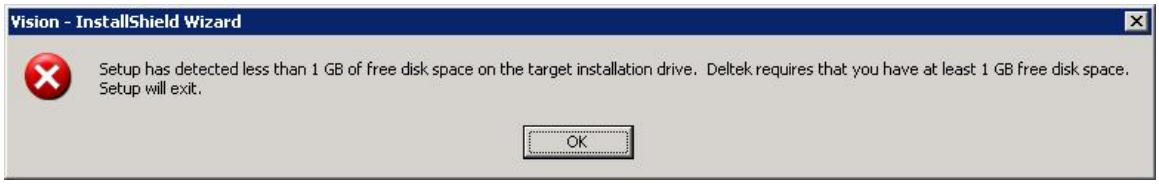


4. Review the agreement and click the **I accept the terms of the license agreement** option if you agree. Click **Next** to proceed. The Choose Destination Location form displays.

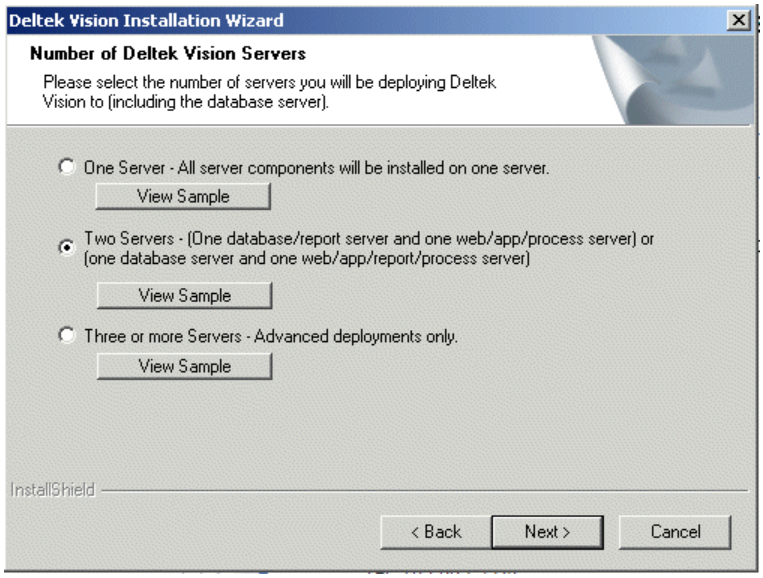


5. Complete one of the following:

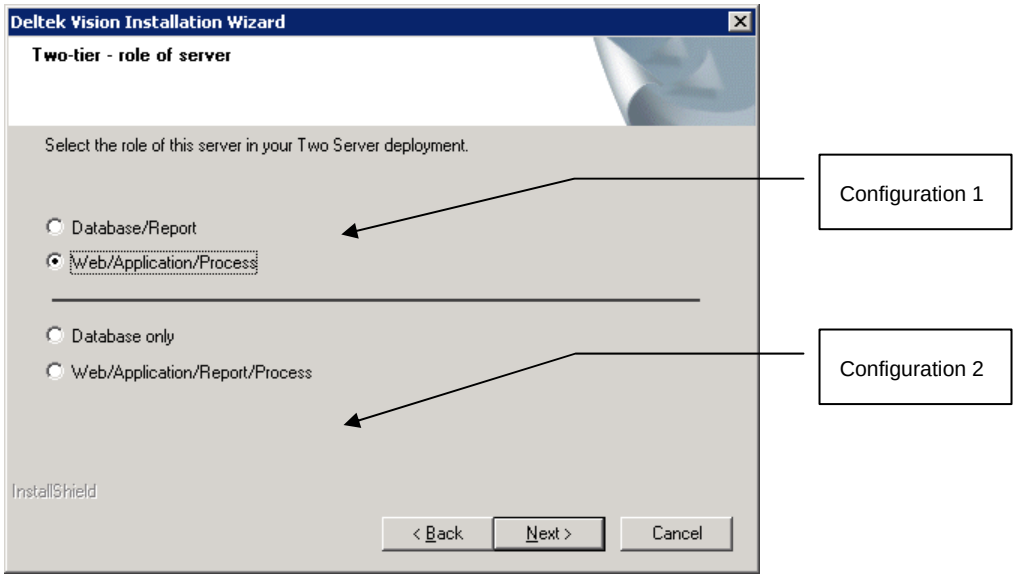
   - Click **Next** to accept the destination displayed on the form.
   - Click **Browse,** select an alternate destination, and click **Next**.
   - If you do not have at least 1GB of free space in the Destination location, Vision displays an error message. Change the path to select a folder with over 1GB of free space and click **Retry**.



The Number of Vision Servers form displays.

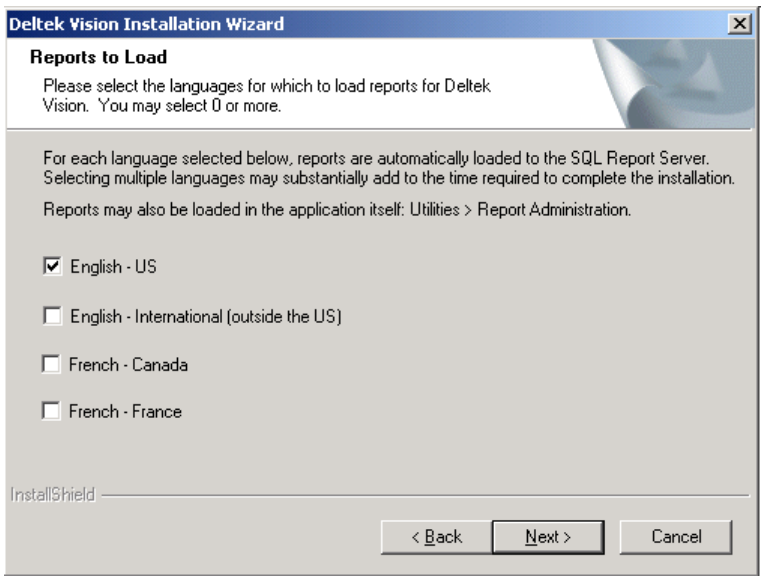


6. Select **Two Servers** and click **Next**. The **Two tier – role of server** form displays.



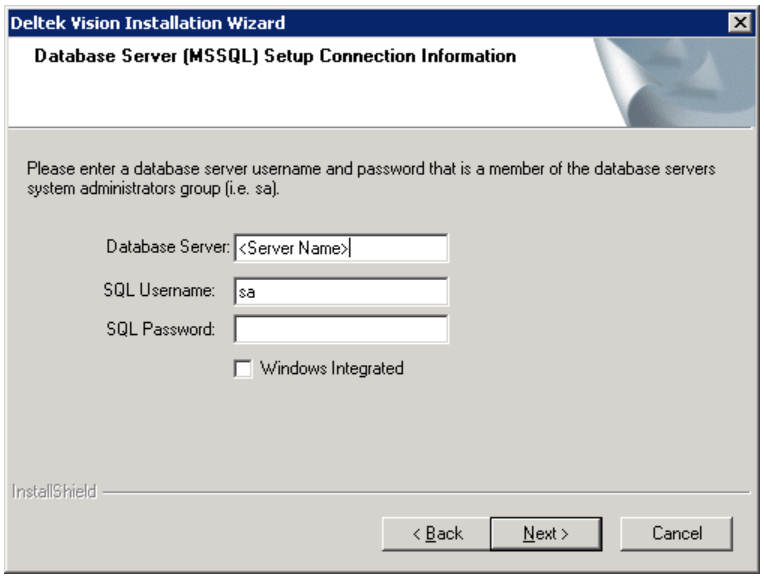
7. Click the **Web/Application/Process** option for Configuration 2.

8. The Reports to Load Screen displays.



9. The Vision installation routine includes options for selecting the version of English or French in which you plan to run the Vision reports. Select the language for the reports to load. **English – US** is the default. The Database Server (MSSQL) Setup Connection form displays.

> Setup will check for Microsoft .NET Framework 3.5 (SP1) before displaying the Database Server Setup Connection form. If it does not detect it, then setup will exit.



10. Enter the following:

- **Database Server** – Enter the name of the database server.
- **SQL Username** – Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is **sa**. If you use the SQL Server Username and Password, ensure that the

server security is configured to support Mixed Mode Security as described in the Deltek Microsoft SQL Server 2005 Administrator's Guide.

- **SQL Password** – Enter the password associated with this SQL Username.
- **Windows Integrated** – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows Account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation.

SQL Server 2005 or 2008 installed on Windows Server 2008 and Vista Operating Systems do not add members of the local administrator's group into the SQL Server Sysadmin role by default. If you are using integrated authentication, ensure that your current logged in account is a member of the Sysadmin role in SQL Server.

11. You must make sure your connection is configured correctly before you can continue. If the installation program cannot connect to the database using the username/password you entered, when you click **Next**, the following message displays asking you to try again.

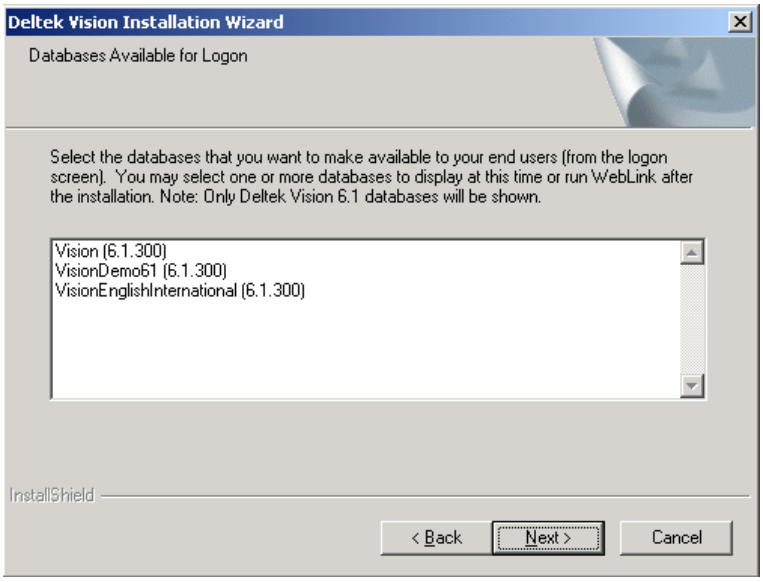
12. Click **OK**, correct the problem, and continue.

    The Checking configuration of Microsoft SQL Reporting Services form displays.

13. Setup uses the default Report Server URL when it first checks the configuration of Microsoft SQL Reporting Services on the Web Server to the Reporting Services Web Service. If it is unable to make a connection to the Reporting Service Web Service page, setup will return an error message with the reason it is unable to make the connection and will display the Specify Report Server and Report Server URL Information form. See Appendix C: Connect to Reporting Service Web Service for additional information. Continue to the next step when the connection is complete.

    - Setup now checks for Vision databases.
    - If you migrated from another product and restored and/or upgraded your database to this release version prior to running setup, the setup process will detect the versions of your database and will skip to the Databases Available for Logon displayed in Step 12 of this procedure.
    - Otherwise, the setup process checks your SQL Server for Vision Databases version 5.0 or higher that are available for upgrade. See Appendix B: for additional information.

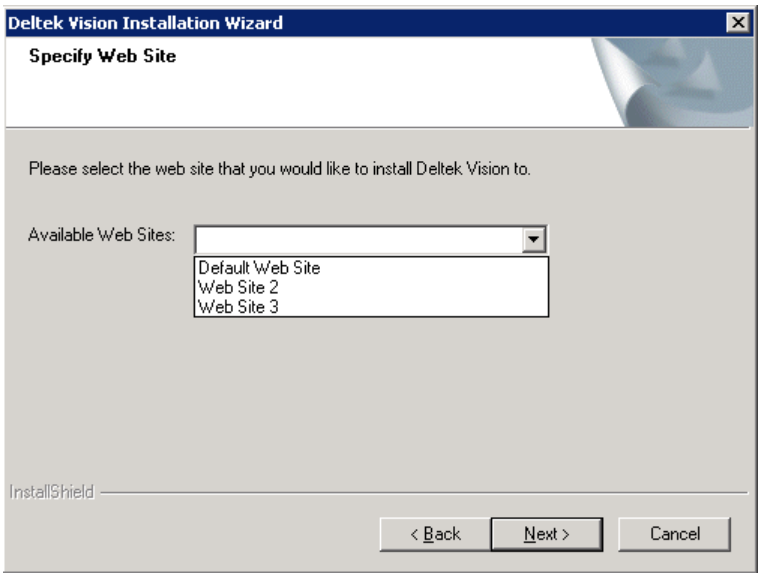
14. Click **Next**. The Databases Available for Logon screen displays.



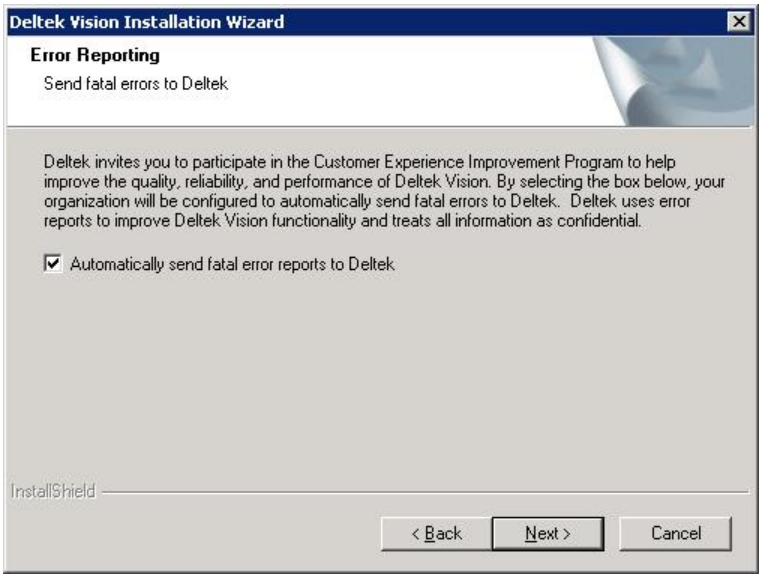
15. Select the databases you want to make available to your end users on the Deltek Vision logon form. The list displayed here includes:

    - The databases you have selected to upgrade, along with their current version number (if any were selected).
    - The sample database (if restored or upgraded).
    - The blank database (if you restored).
    - Any Vision 6.1 databases already previously restored or converted on your database server.
    - You must select at least one database. You can use WebLink after installation to add or remove new databases.
    - This form does not display if you did not choose to upgrade any databases and there is only one existing Deltek Vision 6.1 database.

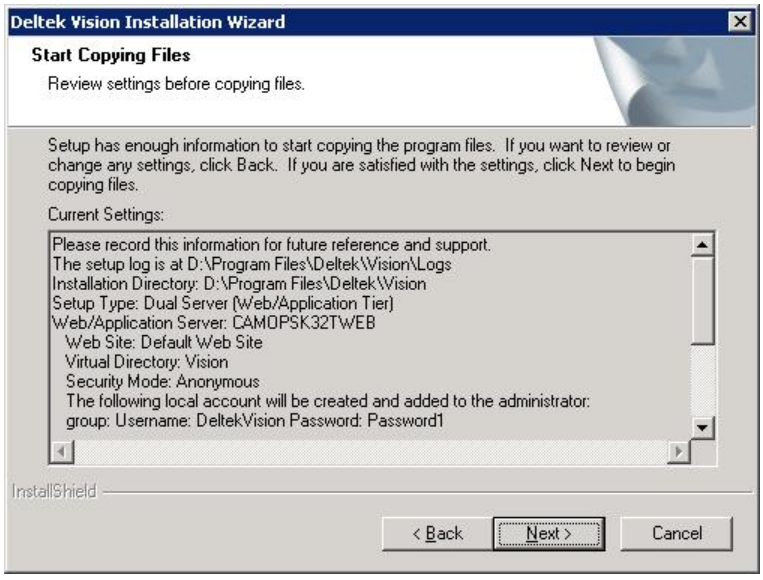
16. Click **Next** to continue. If your Web server contains multiple Web sites, the Specify Web Site form displays. If you do not have multiple Web sites on your server, continue to step 16.



17. Select the Web site to which you will install Deltek Vision, Click **Next**. The Error Reporting form displays:



18. Select **Automatically send fatal error reports to Deltek**, then click **Next**. The Start Copying Files form displays.



19. Review the installation settings. The information in the form is also logged into the Installation Log but can be saved for a quick reference of what was performed. It contains information such as:

    - The location of the installation Log that tracks all the steps performed during the installation.
    - The installation directory – where you installed Vision.
    - The Setup Type and the option chosen – if you are performing a multi server installation, this information is handy to use to know what options were chosen when performing the installation on your other servers. In this Scenario, Dual Server with the (Web/Application/Report Tier) Options were selected.
    - Information about the Web/Application/Report Server Configurations such as:
    - Web Site, Virtual Directory, Virtual Directory Security Mode
    - Any Local accounts that were created for the setup including their Password.
    - Report Server Name and Report Server URL.
    - List of Databases that will be converted.
    - List of databases that will appear in the weblink after the installation.

20. Click **Next.**

21. Review the installation log to check for errors in the installation. The installation creates a logs subfolder located in the Deltek Vision installation location that contains the installation log as well as conversion log files created for each database that may have been upgraded during the installation. If you upgraded any databases during the installation process, verify that a conversion log for that database (filename contains the database name) was created and it does not contain any errors (search for the word “msg” without the quotes in the log file”. If errors are found, contact Deltek Customer Care Connect with the contents of the log files.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to \ProgramFiles\Deltek\Vision\Logs folder and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if they are not in the log file.

22. You have successfully installed the Web/Application and Process Server tiers on the current server.

Configuration 2, Part 1: Database Server Installation

Deltek recommends installing the database server first. If you do not want to install the database server first and prefer to install the other tiers first, the setup for the other tiers will require that you know the database server host name or IP address, and have the Microsoft SQL Server user name and password, before you can begin installing the other tiers.

Prerequisites

Refer to the following prerequisites before performing the Database Server Only Installation:

	Software Prerequisites	Database Server
REQUIRED **Setup will not complete if these are not detected**	Microsoft Windows Server 2003 (SP2)	**Yes**
	Microsoft Windows Server 2008	**Yes**
	Microsoft SQL Server 2005 (SP3)	**Yes**
	Microsoft SQL Server 2008	**Yes**
OPTIONAL **Supplied by Deltek Download Manager during Installation**	Microsoft .NET Framework 2.0	**Yes**
	Microsoft XML 4.0 (SP2) Services	**Yes**
	Microsoft SQLDMO 2005 Components	**Yes**
	Microsoft SQLXML 3.0 (SP3)	**Yes**

During the Deltek Vision database tier installation, you must be logged on the database server with an account that has local administrator privileges to perform the installation. In addition, the account must either be a member of the sysadmin role in SQL Server or you will need your Microsoft SQL Server, or Microsoft SQL Server 2005/2008 Express Edition “SA” account and password or another SQL Server Login account username and password that is a member of the sysadmin role. This is required because the installation checks for existing Vision databases, creates and assigns a SQL Server Security login with access to the Vision database and creates a SQL Server agent job that performs a nightly backup and maintenance of the Vision database.

If you have not yet enabled SQL Server to allow remote connections, Deltek recommends that you run the Microsoft SQL Server Configuration Manager and verify that the SQL Server Network Configuration properties has at least TCP/IP enabled. This is required to allow connections to the SQL Server. If you are unfamiliar with these steps, please consult your Microsoft SQL Server documentation or the Deltek Vision SQL Server 2005 Administrator’s guide for guidance.

About Your Vision Database

The method you use to create your Vision database depends on if you are installing Vision for the first time or if you are migrating from another product. Refer to the scenario below that most closely matches your business model. Note that in each of these scenarios you can also install a sample database along with your new or converted database.

Install Vision for the First Time

During installation, you must select the Blank Database option. Do not choose the Restore from converted database option.

Migrate from Deltek Advantage, Award, or CRM and Proposals

1. Install the Deltek Advantage to Deltek Vision, Deltek Award to Deltek Vision, or Deltek CRM and Proposals to Deltek Vision migration utility.
2. Install the Deltek Vision software. Do not select the Restore database or Blank Database options during database tier installation. During Deltek Vision database tier installation, you will need your Microsoft SQL Server, or Microsoft SQL Server 2005 Express Edition username and password.
3. Run the Deltek Advantage to Deltek Vision migration utility, Deltek Award to Deltek Vision migration utility, or the Deltek CRM and Proposals to Deltek Vision migration utility.

Migrate from Sema4

Deltek’s Data Migration group converts your Sema4 data to create your database backup file (.BAK). For instructions on migrating from Deltek Sema4 to Deltek Vision, contact your Deltek consultant.

Important Information about Setting up the Vision Database Tier

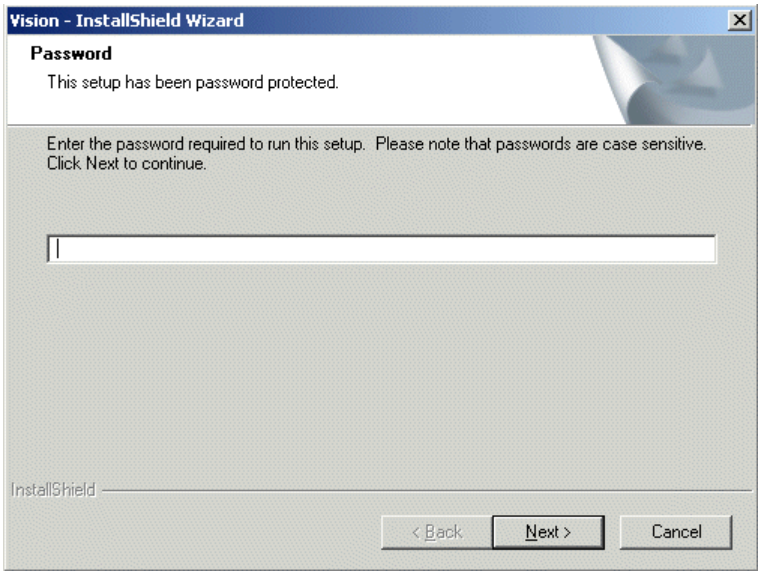
During installation of the database tier, the Deltek Vision backup device is created on the database server to allow end users to perform *ad hoc* database backups before major data changes or processes take place. To back up the database, select **Utilities » Backup Database** from the Vision main menu.

Procedure to Install the Database Server for a Two Server Vision Installation

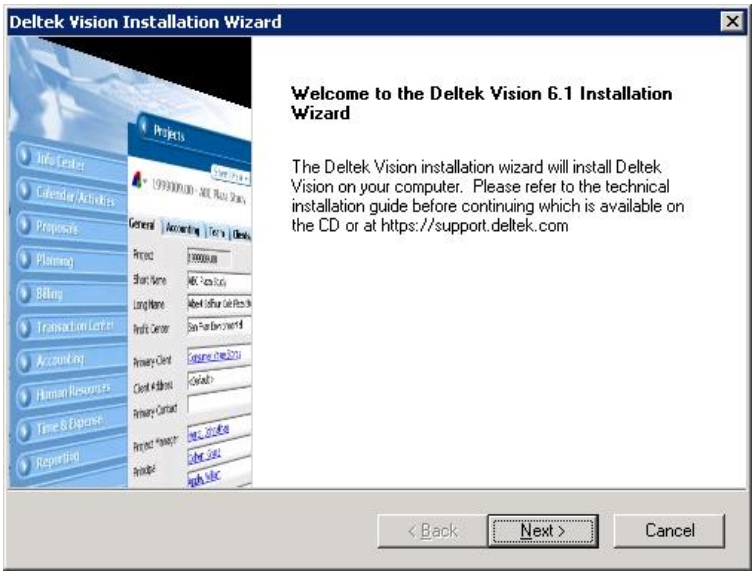
1. Follow the steps on page 26 to download and launch the setup file. The setup routine extracts the files to the desired location. You must have 1GB of free disk space in this location.

   The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

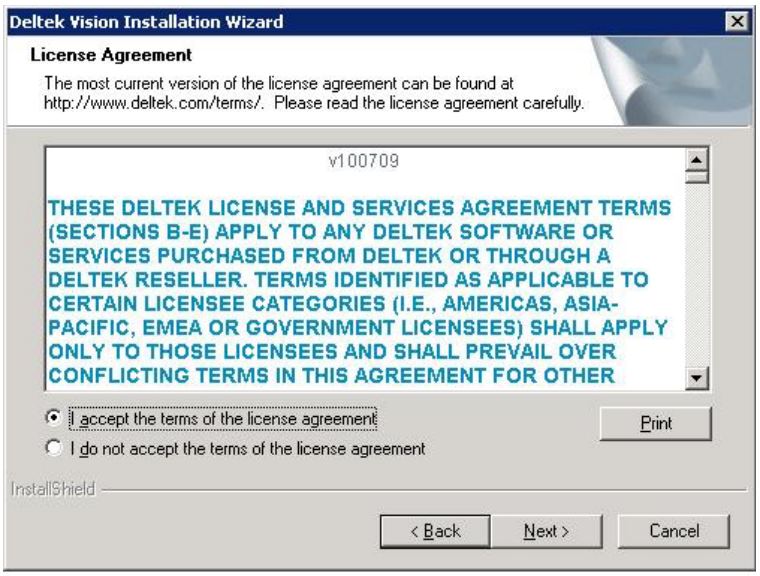
   The Password form displays.



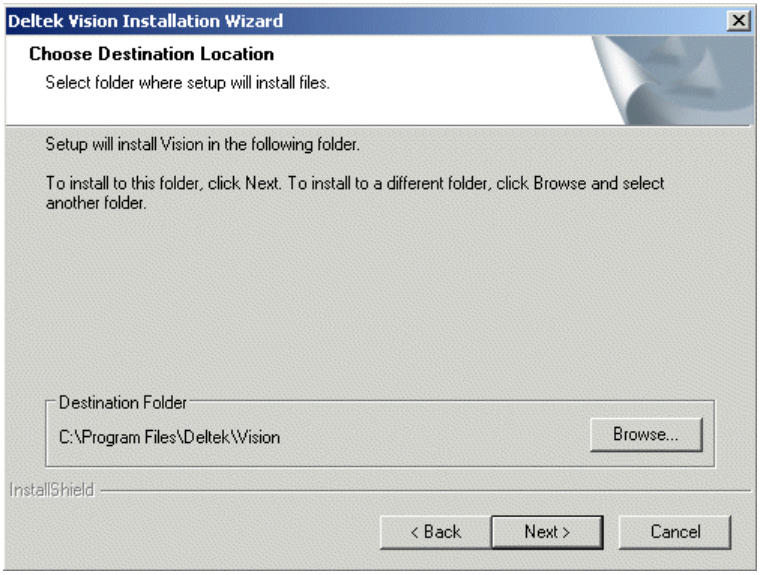
2. Enter the password provided by Deltek and click **Next**. To obtain the password, contact Deltek Customer Care Connect at VisionSupport@deltek.com. The Welcome form displays:



3. Click **Next**. The License Agreement form displays.

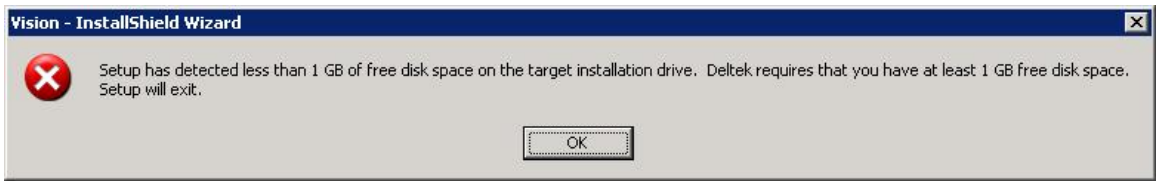


4. Review the agreement and click the **I accept the terms of the license agreement** option if you agree. Click **Next** to proceed. The Choose Destination Location form displays.

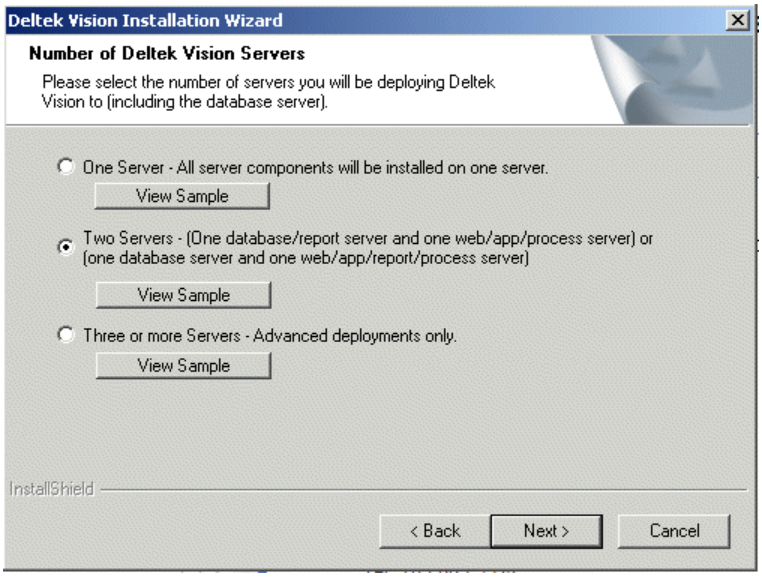


5. Click **Next** to accept the default destination folder for the installation, or click **Browse** to browse to and select a different location.

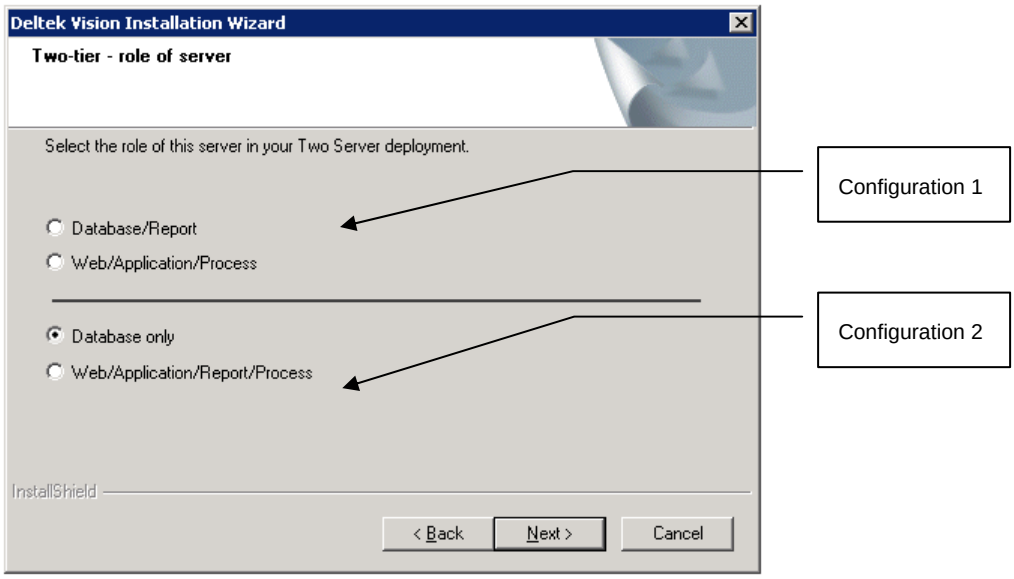
6. If you do not have at least 1GB of free space in the Destination location, Vision displays an error message. Change the path to select a folder with over 1GB of free space and click **Retry.**



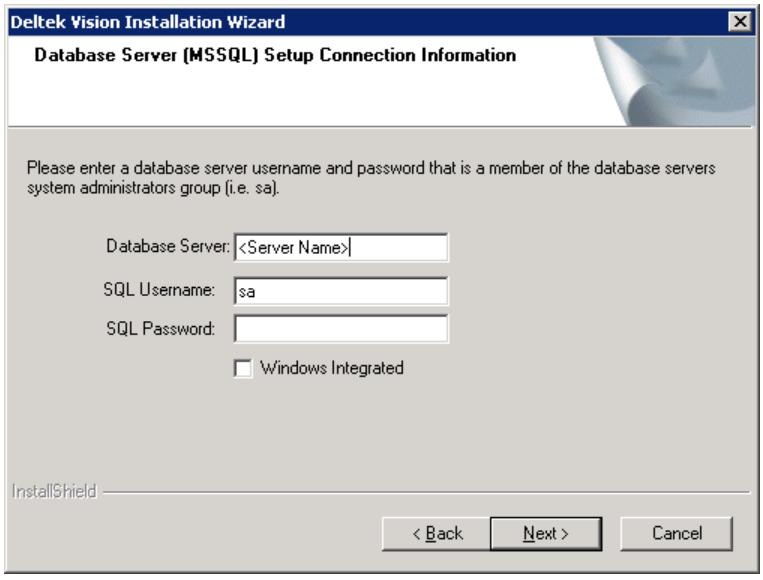
7. Click **Next**. The Number of Vision Servers form displays.



8. Select **Two Servers** and click **Next**. The **Two tier – role of server** form displays.



9. Select the **Database only** option and click **Next**. The Database Server (MSSQL) Setup Connection form displays.

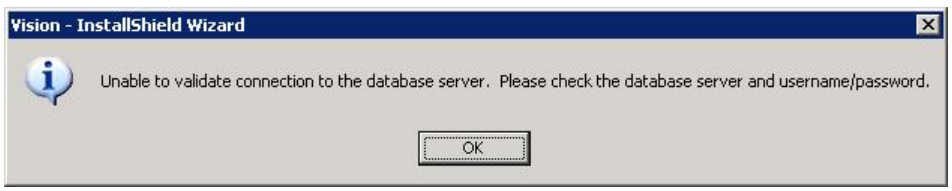


10. Enter the following:

    - **Database Server** – Enter the name of the database server.
    - **SQL Username** – Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is **sa**. If you use the SQL Server Username and Password, ensure that the server security is configured to support Mixed Mode Security as described in the Deltek Microsoft SQL Server 2005 Administrator's Guide.
    - **SQL Password** – Enter the password associated with this SQL Username.
    - **Windows Integrated** – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows Account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation.

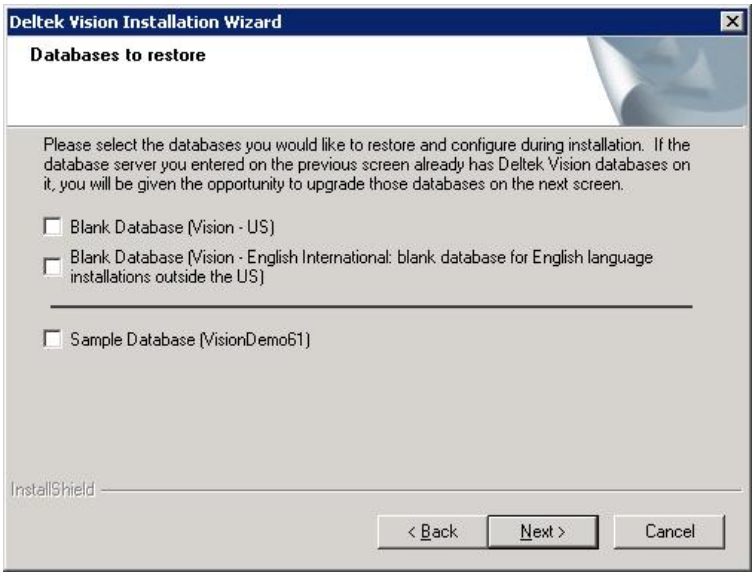
    SQL Server 2005 or 2008 installed on Windows Server 2008 and Vista Operating Systems do not add members of the local administrator's group into the SQL Server Sysadmin role by default. If you are using integrated authentication, ensure that your current logged in account is a member of the Sysadmin role in SQL Server.

11. You must make sure your connection is configured correctly before you can continue. If the installation program cannot connect to the database using the username/password you entered, when you click **Next**, the following message displays asking you to try again.



12. Click **OK**, correct the issue, and continue.

13. Click **Next**. The Databases to Restore form displays.



14. Select the database you would like to restore, if any. The database that you select determines the version of English that displays in the Vision user interface.

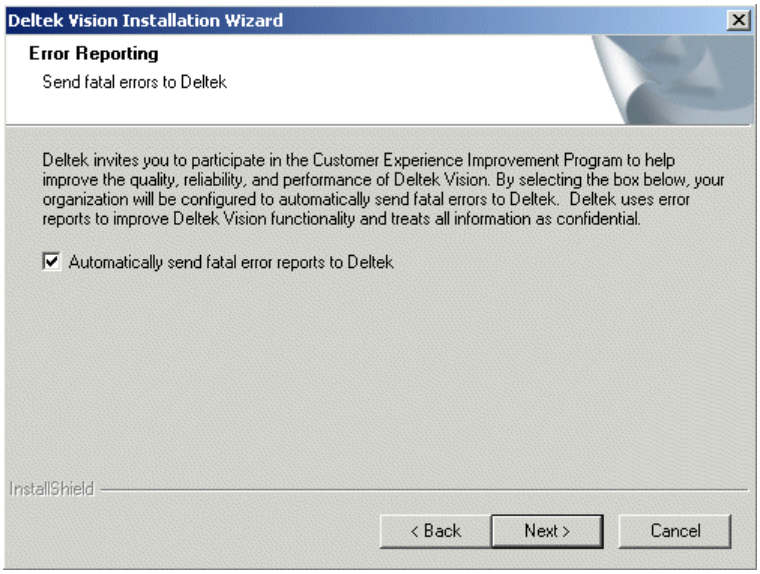
    - **No Selection (No Boxes checked**)– If you already have a Vision database or previous Sample database, you can click on Next without making a selection to get to the next form of choosing the database to upgrade if the setup detects it.
    - **Blank Database (Vision – US)** – If there are any existing Vision 5.x or 6.x databases that you would like to upgrade to 6.1 on the database server you specified in step 9, do not select Blank Database. You can upgrade an existing 5.x or 6.x database in the next step. If you don't have an existing Vision database, select this option to start a new Vision database.
    - **Blank Database (Vision – English International)** – Blank database for English Language installations outside the United States of America. Select this option to start a new Vision database if you are using an English Language installation and are outside the United States.
    - **Sample Database (VisionDemo61)** – Select this option to install the Vision sample database. It is sometimes helpful to have this database installed for troubleshooting purposes. If you already have a 5.x or 6.x version of the Sample Database, the following options are available:
    - Do not select **Sample Database**. The setup will detect supported previous versions of databases (including the Sample database) and give you the opportunity to upgrade your Sample database.

      In most cases any previous versions of the Sample database may have the Vision database version number in its name (For example, VisionDemo51). If that is the case, when you convert a 5.x or 6.x database to Vision 6.1 the version it is upgraded to will no longer match the version number in its name. You can perform one of the following:

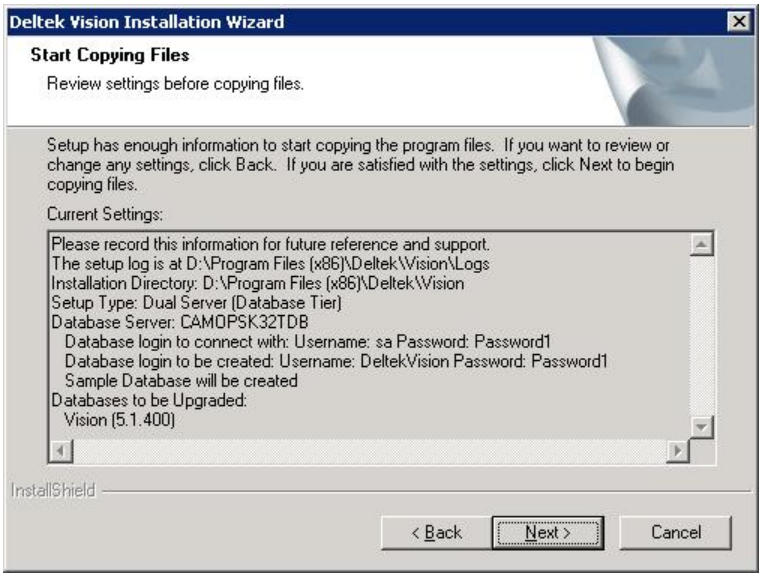
      - Rename the database on the SQL Server and in Weblink after the installation to reflect the correct version number or
      - Delete the previous version's Sample database on your SQL Server before continuing, then choose to restore the Sample database.

15. Click **Next**. If Vision detects an existing database, the Database to Upgrade form displays. See Appendix B: for additional information. If Vision does not detect an existing database, the Databases Available for Logon form displays:

16. Click **Next**. The Error Reporting form displays.



17. Select **Automatically send fatal error reports to Deltek**, then click **Next**. The Start Copying Files form displays.



18. Review and save the installation settings. This form contains the following information:
    - The location of the installation Log that tracks all the steps performed during the installation.
    - The installation directory – where you installed Vision.

- The Setup Type and the option chosen – if you are performing a multi server installation, this information is handy to use to know what your next option to choose when performing the installation on your other servers.
- Information about the Database Server such as:
  - Database Server Name
  - Database Login used to perform the installation on the database server
  - Any Deltek Vision logins and passwords created in SQL Server during the installation. This information can be used when configuring Weblink. It is recommended that you change at least the passwords from their defaults and/or the login name as well.
  - Any databases that you will be restoring or upgrading will be listed

19. Click **Next** to begin installation of the database server as part of a two server installation.

20. Review the installation log to check for errors in the installation. The installation creates a logs subfolder located in the Deltek Vision installation location that contains the installation log as well as conversion log files created for each database that may have been upgraded during the installation. If you upgraded any databases during the installation process, verify that a conversion log for that database (filename contains the database name) was created and it does not contain any errors (search for the word “msg” without the quotes in the log file.” If errors are found, contact Deltek Customer Care Connect with the contents of the log files.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to \ProgramFiles\Deltek\Vision\Logs folder and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if they are not in the log file.

21. Install the Web/Application, Report, and Process Servers on a second server machine. See Configuration 1: Step 2 - Web/Application, Report, and Process Server Installation of Two Server Installation.

Configuration 2, Part 2: Web/Application, Report, and Process Server Installation of Two Server Installation

Prerequisites

Refer to the following prerequisites before performing the Web/Application, Report, and Process Server Installation:

	Software Prerequisites	Report Server (Reporting Services)	Web/Application Server	Process Server
REQUIRED **Setup will not complete if these are not detected**	Microsoft Windows Server 2003 (SP2)	**Yes**	**Yes**[1]	**Yes**[2]
	Microsoft Windows Server 2008	**Yes**	**Yes**[1]	**Yes**[2]
	Microsoft SQL Server 2005 (SP3)	**Yes**[1,3]		
	Microsoft SQL Server 2008 (SP1, CU1)	**Yes**[4]		
	Microsoft .NET Framework 3.5 (SP1)		**Yes**	**Yes**
OPTIONAL **Supplied by Deltek Download Manager during Installation**	Microsoft .NET Framework 2.0	**Yes**		
	Microsoft XML 4.0 (SP2) Services		**Yes**	**Yes**
	Microsoft SQLDMO 2005 Components		**Yes**	**Yes**
	Microsoft SQLXML 3.0 (SP3)		**Yes**	

[1]IIS is required with ASP.NET enabled.
[2]IIS is not required on the Process Server Only Machine.
[3]Microsoft SQL Server 2008 Reporting Services is recommended and must be installed and configured.
[4]Microsoft Internet Information Services (IIS) is not required for SQL Server 2008 Reporting Services.

Follow these steps to install the Vision Web\Application\Report\Process Server Tiers on one server. During installation, you will be prompted for database information, such as database host name or IP address. You must have this information to perform the following installation.

Important Vision Setup Information

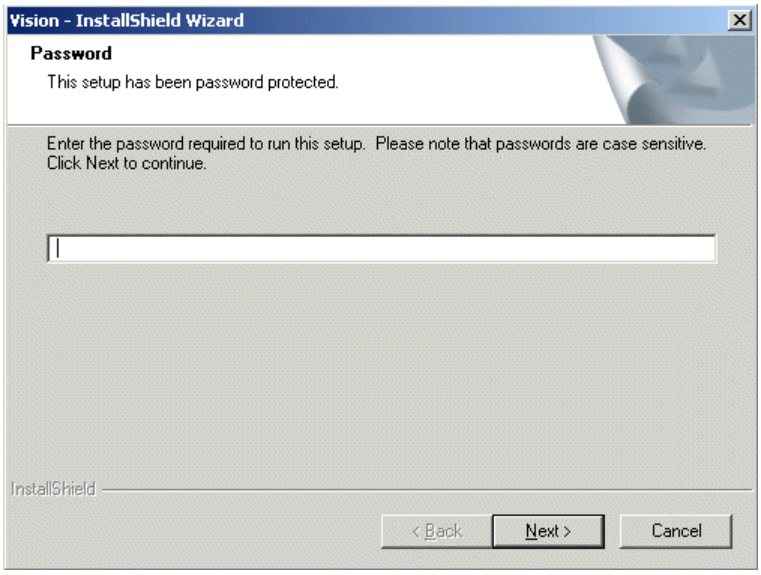
Microsoft .NET Framework 3.5 (SP1) is required prior to running the Vision installation in this configuration. Setup will not continue if it is unable to detect this.

Procedure to Install the Web\Application\Report\Process Server

1. Follow the steps on page 26 to download and launch the setup file. The setup routine extracts the files to the desired location. You must have 1GB of free disk space in this location.

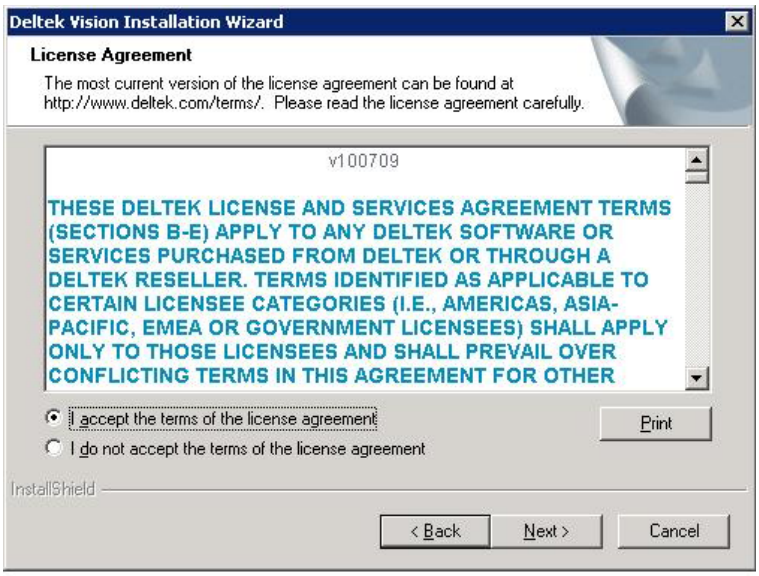
   The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

   The Password form displays.

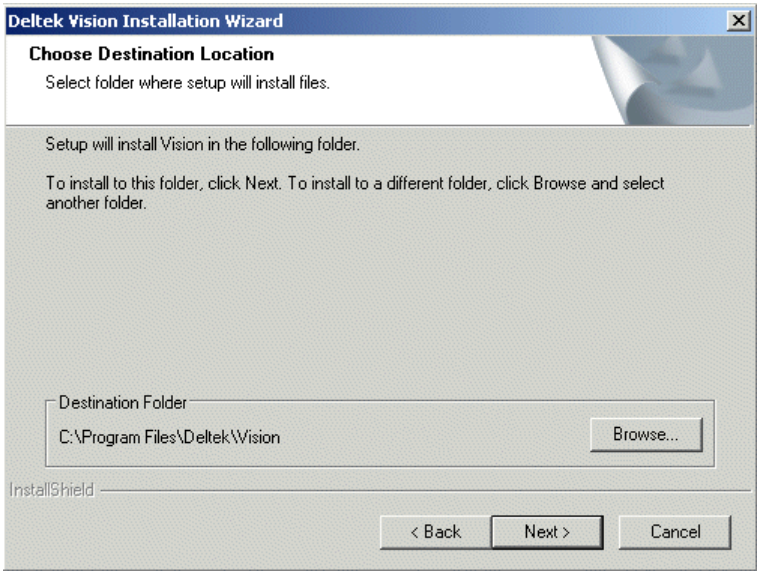


2. Enter the password provided by Deltek and click **Next**. To obtain the password, contact Deltek Customer Care Connect at VisionSupport@deltek.com. The Welcome form displays:

3. Click **Next**. The License Agreement form displays.

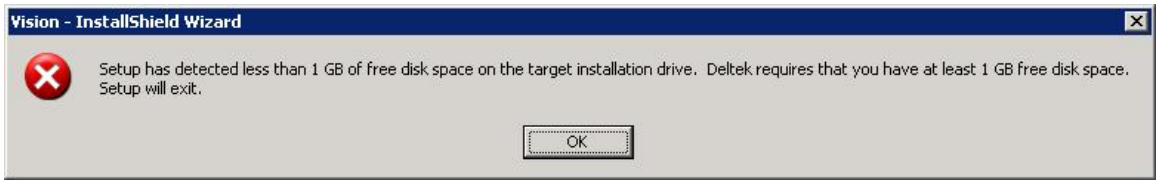


4. Review the agreement and click the **I accept the terms of the license agreement** option if you agree. Click **Next** to proceed. The Choose Destination Location form displays.

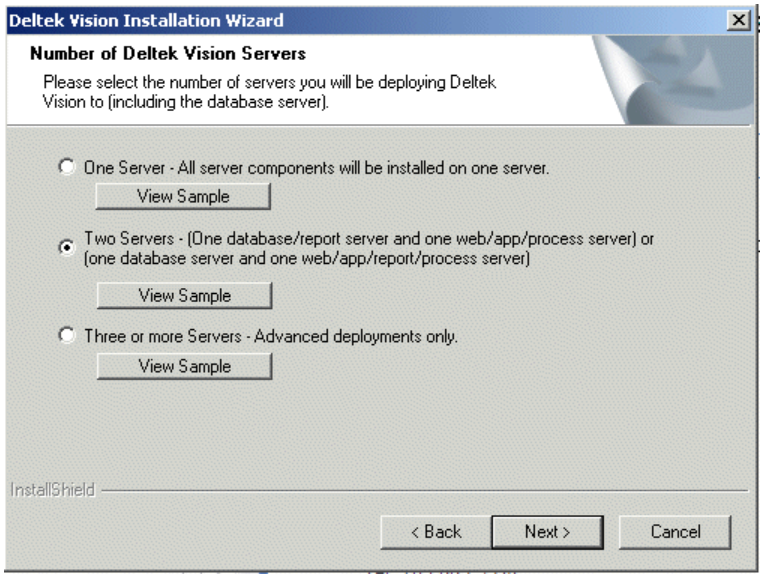


5. Do one of the following:

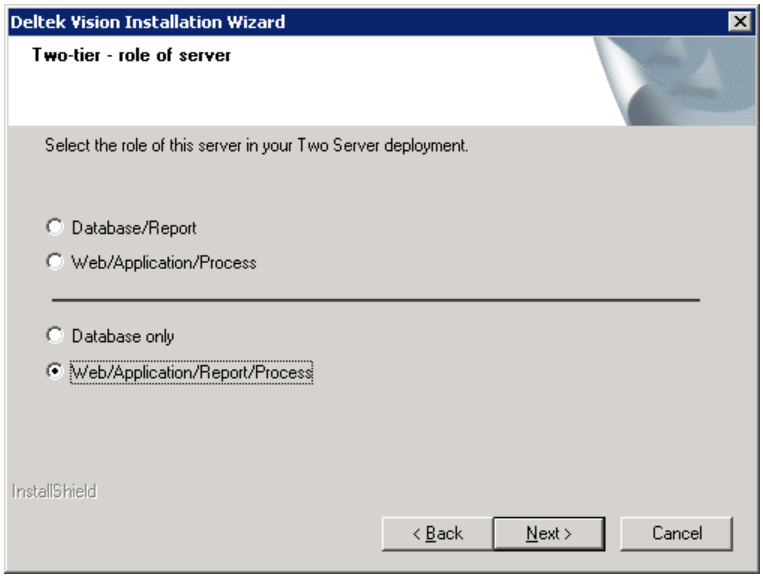
   - Click **Next** to accept the destination displayed on the form.
   - Click **Browse,** select an alternate destination, and click **Next**.
   - If you do not have at least 1GB of free space in the Destination location, Vision displays an error message. Change the path to select a folder with over 1GB of free space and click **Retry**.



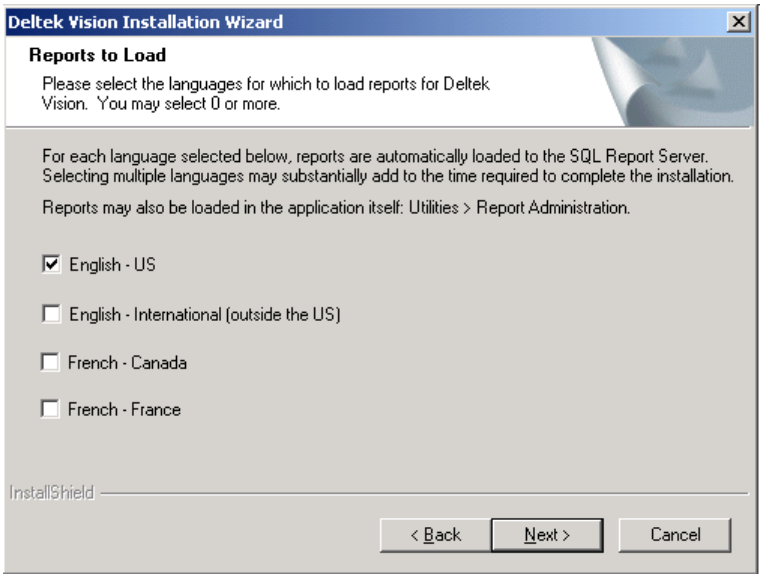
The Number of Vision Servers form displays.



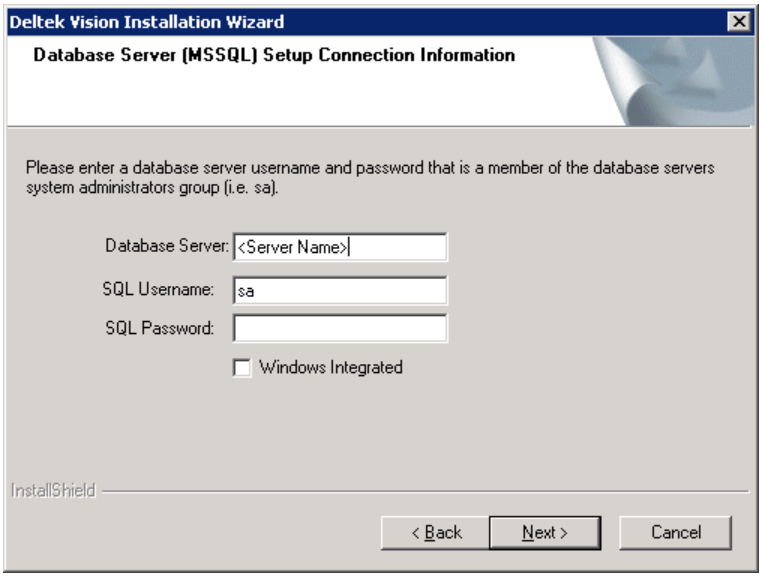
6. Select **Two Servers** and click **Next**. The **Two tier – role of server** form displays.



7. Click the **Web/Application Report Process** option. The Reports to Load form displays.



8. The Vision installation routine includes options for selecting the version of English or French in which you plan to run the Vision reports. Select the language for the reports to load. English – US is the default.
9. Click **Next** to continue**.** The Database Server (MSSQL) Setup Connection form displays.



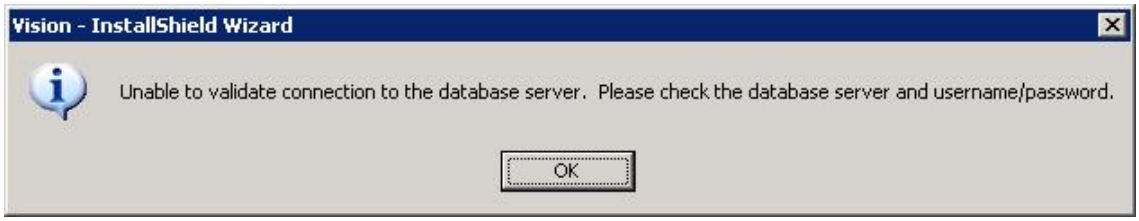
10. Enter the following:

- Database Server – Enter the name of the database server.
- SQL Username – Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is sa. If you use the SQL Server Username and Password, ensure that the server security is configured to support Mixed Mode Security as described in the Deltek Microsoft SQL Server 2005 Administrator's Guide.

- SQL Password – Enter the password associated with this SQL Username.
- Windows Integrated – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows Account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation.

SQL Server 2005 or 2008 installed on Windows Server 2008 and Vista Operating Systems do not add members of the local administrator's group into the SQL Server Sysadmin role by default. If you are using integrated authentication, ensure that your current logged in account is a member of the Sysadmin role in SQL Server.

11. You must make sure your connection is configured correctly before you can continue. If the installation program cannot connect to the database using the username/password you entered, when you click **Next**, the following message displays asking you to try again.



12. Click **OK**, correct the issue, and continue.

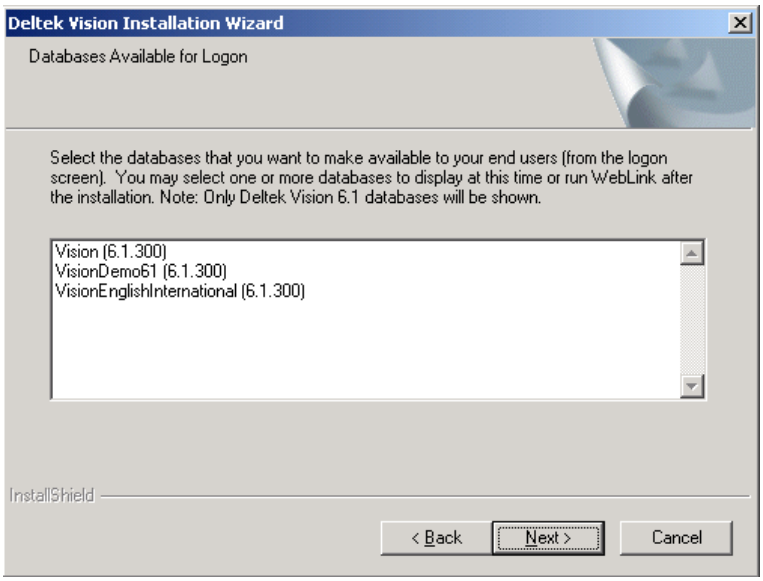
13. Click **Next** to continue. The Checking configuration of Microsoft SQL Reporting Services form displays.

14. Setup uses the default Report Server URL when it first checks the configuration of Microsoft SQL Reporting Services on the Web Server to the Reporting Services Web Service. If it is unable to make a connection to the Reporting Service Web Service page, setup will return an error message with the reason it is unable to make the connection and will display the Specify Report Server and Report Server URL Information form. See Appendix C: Connect to Reporting Service Web Service for additional information. Continue to the next step when the connection is complete.

15. Setup now checks for Vision databases.

- If you migrated from another product and restored and/or upgraded your database to this release version prior to running setup, the setup process will detect the versions of your database and will skip to the Databases Available for Logon displayed in Step 12 of this procedure.
- Otherwise, the setup process checks your SQL Server for Vision Databases version 5.0 or higher that are available for upgrade. See Appendix B: for additional information.

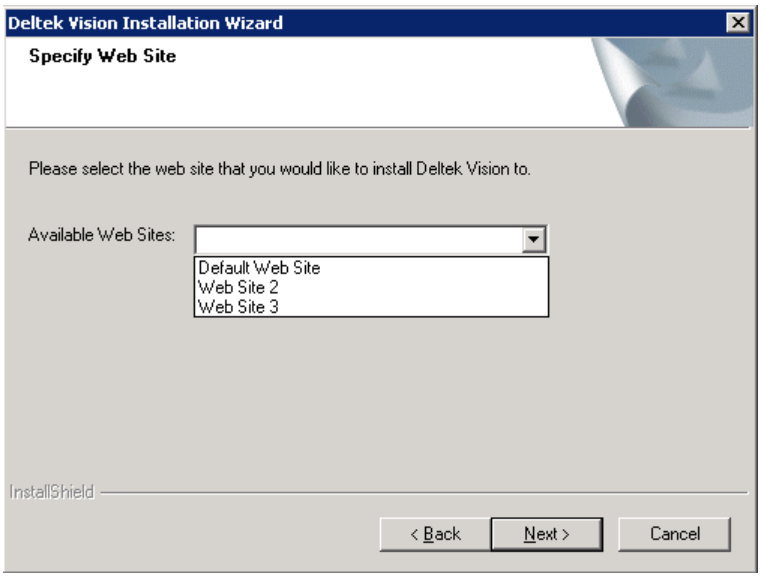
- If you want to upgrade a database, select the database and click **Next**. The setup process will display the **Databases Available for Logon** form.



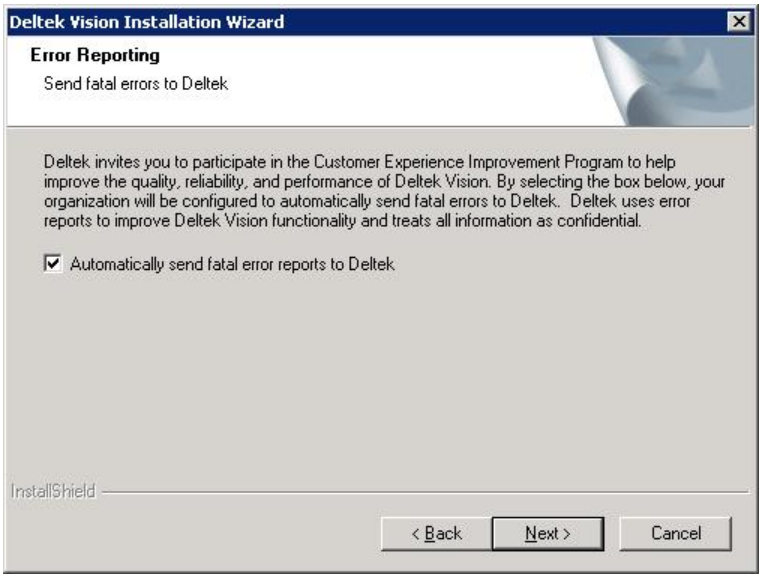
16. Select the databases you want to make available to your end users on the Deltek Vision logon form. The list displayed here includes:

    - The databases you have selected to upgrade, along with their current version number (if any were selected).
    - The sample database (if restored or upgraded).
    - The blank database (if you restored).
    - Any Vision 6.1 databases already previously restored or converted on your database server.
    - You must select at least one database. You can use WebLink after installation to add or remove new databases. This form does not display if you did not choose to upgrade any databases and there is only one existing Deltek Vision 6.1 database.

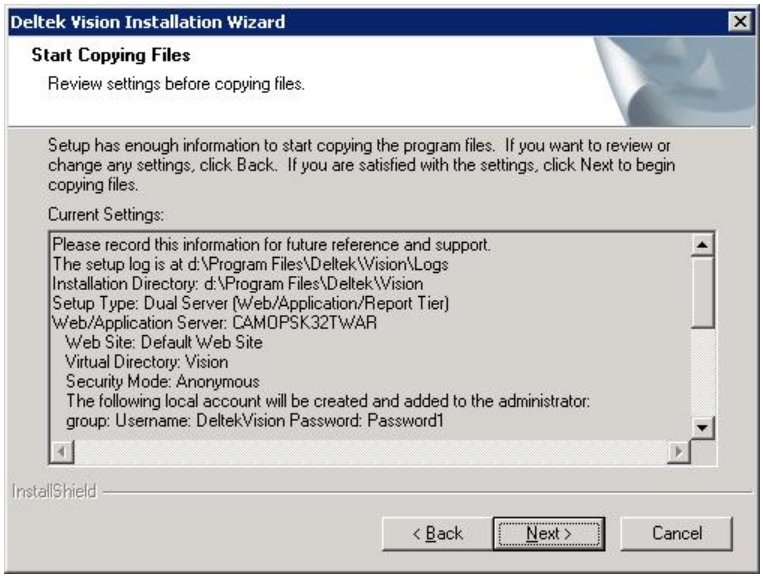
17. Click **Next** to continue. The Specify Web Site form displays only if your Web server contains multiple Web sites. If you do not have multiple Web sites on your server, continue to Step 16.



18. Select the Web site on which you will install Deltek Vision, Click **Next**. The Error Reporting form displays:



19. Select **Automatically send fatal error reports to Deltek**, then click **Next**. The Start Copying Files form displays.



20. Review the installation settings. The information in the form is also logged into the Installation Log but can be saved for a quick reference of what was performed. It contains information such as:

    - The location of the installation Log that tracks all the steps performed during the installation.
    - The installation directory – where you installed Vision.
    - The Setup Type and the option chosen – if you are performing a multi server installation, this information is handy to use to know what options were chosen when performing the installation on your other servers. In this Scenario, Dual Server with the (Web/Application/Report Tier) Options were selected.
    - Information about the Web/Application/Report Server Configurations such as:
        - Web Site, Virtual Directory, Virtual Directory Security Mode
        - Any Local accounts that were created for the setup including their Password.
        - Report Server Name and Report Server URL.
        - List of Databases that will be converted.
        - List of databases that will appear in the weblink after the installation.

21. Click **Next.**

22. Review the installation log to check for errors in the installation. The installation creates a logs subfolder located in the Deltek Vision installation location that contains the installation log as well as conversion log files created for each database that may have been upgraded during the installation. If you upgraded any databases during the installation process, verify that a conversion log for that database (filename contains the database name) was created and it does not contain any errors (search for the word “msg” without the quotes in the log file”. If errors are found, contact Deltek Customer Care Connect with the contents of the log files.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to \ProgramFiles\Deltek\Vision\Logs folder and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if they are not in the log file.

23. You have successfully installed the Web/Application, Report and Process Server tiers on the current server. If you have not yet installed your database tier, return to page 61 and follow the instructions for installing your database tier.

Chapter 6: Install on Three or More Servers

Overview

The three or more servers installation model is designed for large firms who have multiple locations and will use Vision on an internal Wide Area Network (WAN). There might be additional report, application, or Web servers required for load balancing, performance, security, or fault tolerance reasons.

This model best suits firms with complex deployment requirements. Firms deploying this model must have proficient firewall management. For more information about the various deployment options available, see Deltek Vision Deployment Models on page 17 for more information.

For an installation that uses three or more servers, you can install any combination of the following:

- A single database server
- One or more report servers
- One or more Web/application servers
- One or more process servers, each on its own machine.

You must also select the appropriate tier or tiers on each individual server. To install these items, complete the following steps in order as they are listed below:

1. Set up your database server.
2. Set up your report server.
3. Set up your Web/application server.
4. Set up a separate process server (if desired). When you install a Web/application server, a process server is also installed by default. You can, optionally, install as many stand-alone process servers as you would like, on separate machines.

This chapter is divided into three sections:

- Install the Database Tier
- Install the Report Tier on a Second Server
- Install the Web and Primary Application Tiers on a Third Server – You must install the Web/Application tier as the last step. The installation program needs to validate report server credentials and configuration as part of the Web/application tier installation. When you install the Web/application tier, a process server is also installed. If your firm wants to run multiple report, application, or Web servers on additional machines, contact your Deltek Technical Services representative for instructions.

Refer to the following prerequisites before installing each of the servers.

	Software Prerequisites	Database Server	Report Server (Reporting Services)	Web/Application Server	Process Server
REQUIRED **Setup will not complete if these are not detected**	Microsoft Windows Server 2003 (SP2)	**Yes**	**Yes**	**Yes**[1]	**Yes**[2]
	Microsoft Windows Server 2008	**Yes**	**Yes**	**Yes**[1]	**Yes**[2]
	Microsoft SQL Server 2005 (SP3)	**Yes**	**Yes**[1,3]		
	Microsoft SQL Server 2008 (SP1,CU1)	**Yes**	**Yes**		
	Microsoft .NET Framework 3.5 (SP1)			**Yes**	**Yes**
OPTIONAL **Supplied by Deltek Download Manager during Installation**	Microsoft .NET Framework 2.0	**Yes**	**Yes**		
	Microsoft XML 4.0 (SP2) Services	**Yes**		**Yes**	**Yes**
	Microsoft SQLDMO 2005 Components	**Yes**		**Yes**	**Yes**
	Microsoft SQLXML 3.0 (SP3)	**Yes**		**Yes**	

[1]IIS is required with ASP.NET enabled.
[2]IIS is not required on the Process Server Only Machine.
[3]Microsoft SQL Server 2008 Reporting Services is recommended and must be installed and configured.
[4]Microsoft Internet Information Services (IIS) is not required for SQL Server 2008 Reporting Services.

Step 1: Install the Database Tier

Deltek recommends that you first install the database server. If you do not want to install the database server first, but you know the database server host name or IP address, and the Microsoft SQL Server username and password, you can start by installing the report tier. Follow the instructions in Step 2: Install the Report Server on page 90. You must install the Web/Application tier last, because that installation program validates database and report tier information during installation.

About Your Database

The method you use to install your Vision database server depends on whether you are installing Vision for the first time, or upgrading from a previous Deltek product.

- **Install Vision for the first time** — During installation, you choose the Blank Database option.
- **Migrate from Deltek Advantage, Award, or CRM and Proposals**
  - Install the Deltek Advantage to Deltek Vision, Deltek Award to Deltek Vision, or Deltek CRM and Proposals to Deltek Vision migration utility.
  - Install the Deltek Vision software. Do not select the Restore database or Blank Database options during database tier installation. During Deltek Vision database tier installation, you will need your Microsoft SQL Server, or Microsoft SQL Server 2005 Express Edition username and password.
  - Run the Deltek Advantage to Deltek Vision migration utility, Deltek Award to Deltek Vision migration utility, or the Deltek CRM and Proposals to Deltek Vision migration utility.
- **Migrate from Sema4**
  - Deltek's Data Migration group converts your Sema4 data to create your database backup file (.BAK). For instructions on migrating from Deltek Sema4 to Deltek Vision, contact your Deltek consultant.

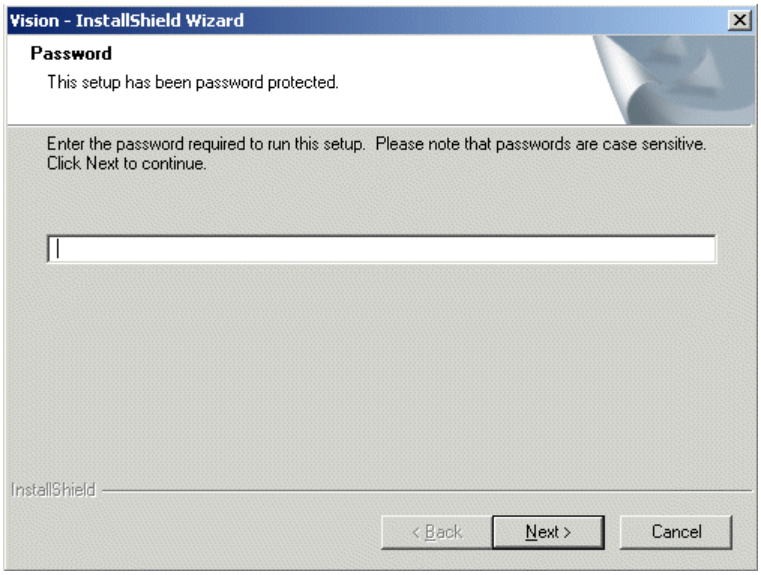
Procedure

Follow the steps in this section to install the database server for a three or more server installation.

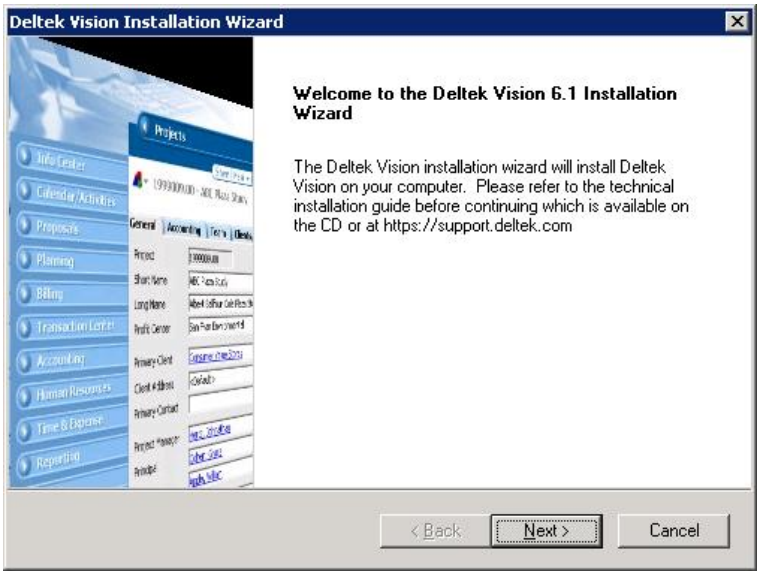
1. Follow the steps on page 26 to download and launch the setup file. The setup routine extracts the files to the desired location. You must have 1GB of free disk space in this location.

   The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

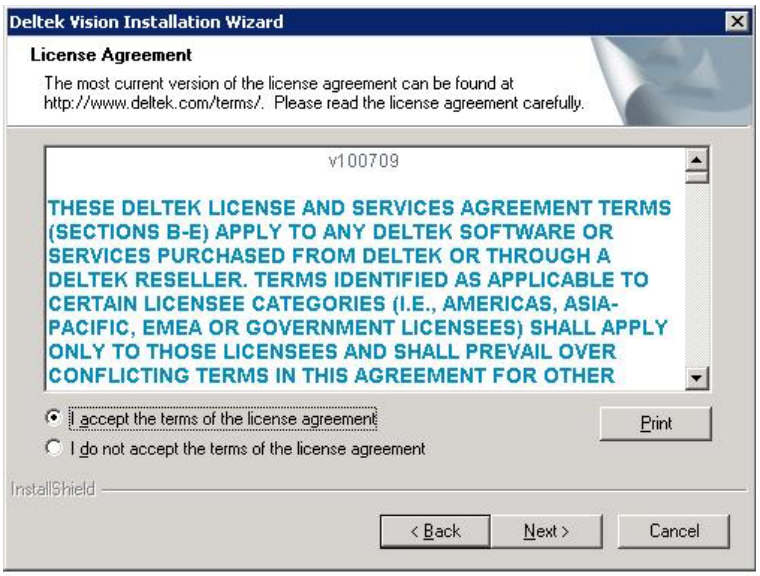
   The Password form displays.



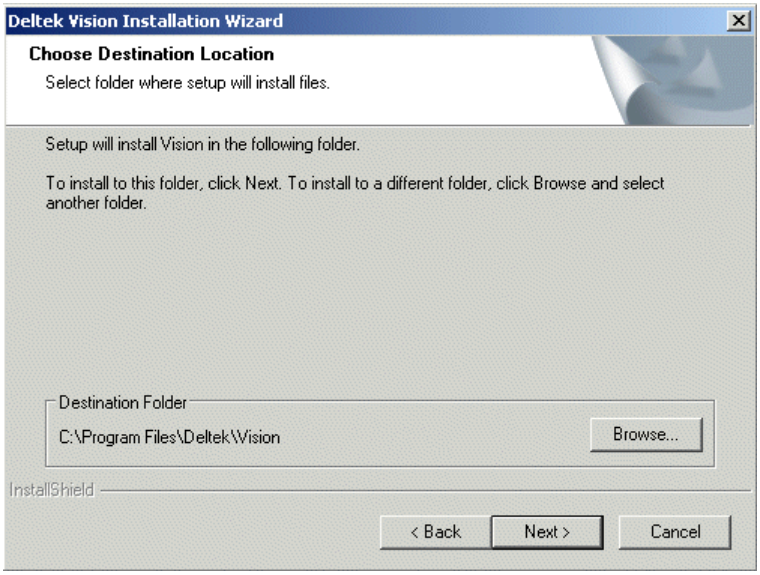
2. Enter the password provided by Deltek and click **Next**. To obtain the password, contact Deltek Customer Care Connect at VisionSupport@deltek.com. The Welcome form displays:



3. Click **Next**. The License Agreement form displays.

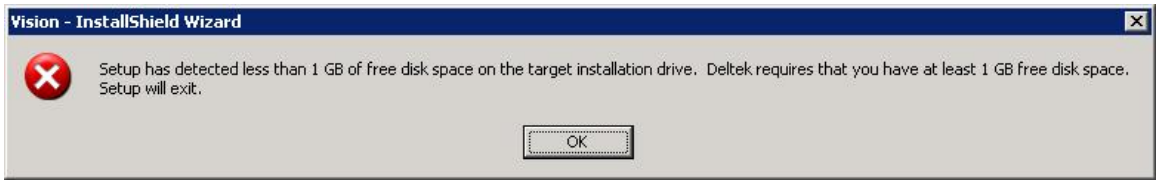


4. Review the agreement and click the **I accept the terms of the license agreement** option if you agree. Click **Next** to proceed. The Choose Destination Location form displays.

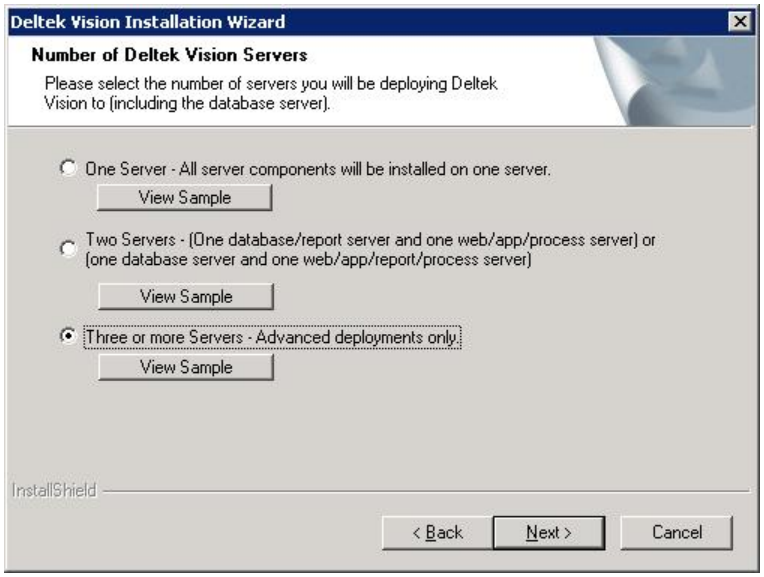


5. Complete one of the following:

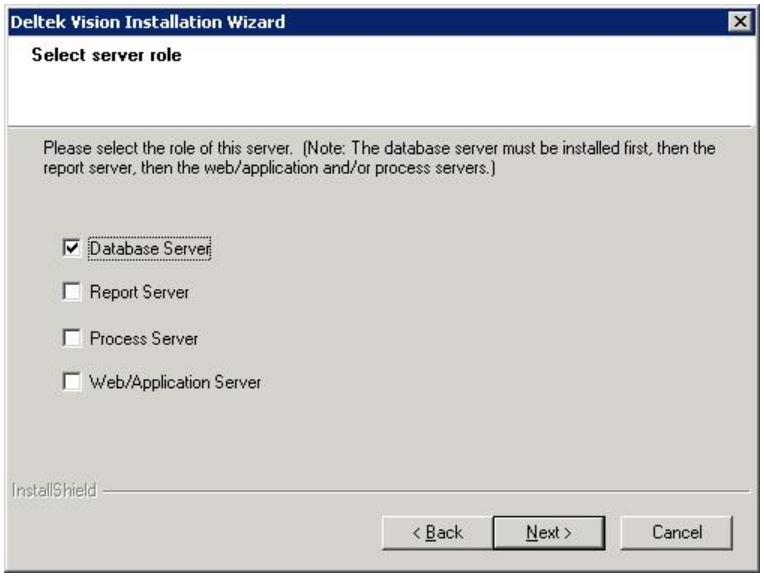
   - Click **Next** to accept the destination displayed on the form.
   - Click **Browse**, select an alternate destination, and click **Next**.
   - If you do not have at least 1GB of free space in the Destination location, Vision displays an error message. Change the path to select a folder with over 1GB of free space and click **Retry.**



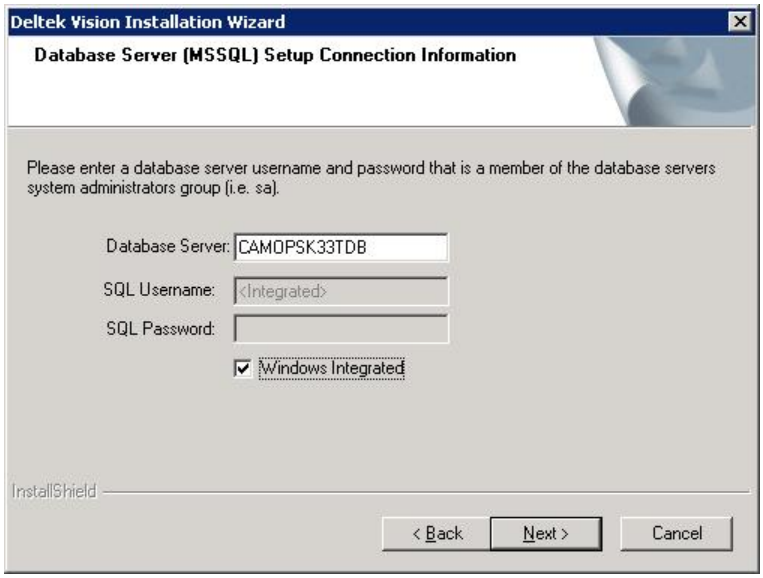
6. The Number of Vision Servers form displays.



7. Select **Three or more Servers** and click **Next**. The Select Server role form displays:



8. Select **Database Server** and click **Next**. The Database Server (MSSQL) Setup Connection form displays.

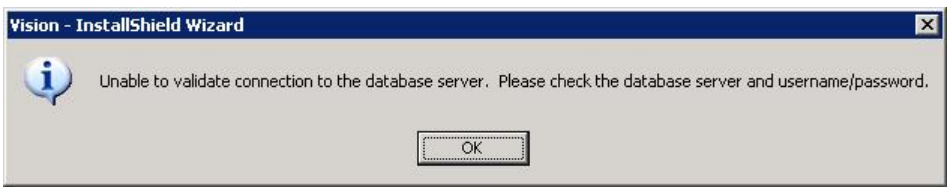


9. Enter the following:

   - **Database Server** – Enter the name of the database server.
   - **SQL Username** – Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is **sa**. If you use the SQL Server Username and Password, ensure that the server security is configured to support Mixed Mode Security as described in the Deltek Microsoft SQL Server 2005 Administrator's Guide.
   - **SQL Password** – Enter the password associated with this SQL Username.
   - **Windows Integrated** – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows Account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation.

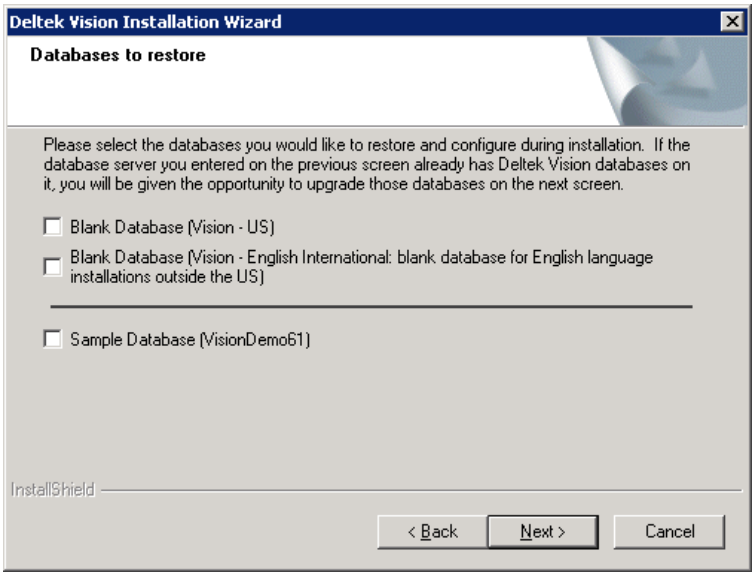
   SQL Server 2005 or 2008 installed on Windows Server 2008 and Vista Operating Systems do not add members of the local administrator's group into the SQL Server Sysadmin role by default. If you are using integrated authentication, ensure that your current logged in account is a member of the Sysadmin role in SQL Server.

10. You must make sure your connection is configured correctly before you can continue. If the installation program cannot connect to the database using the username/password you entered, when you click **Next**, the following message displays asking you to try again.



11. Click **OK**, correct the problem, and continue.

12. Click **Next** to continue. The Databases to Restore form displays:



21. Select the database you would like to restore, if any. The database that you select determines the version of English that displays in the Vision user interface.

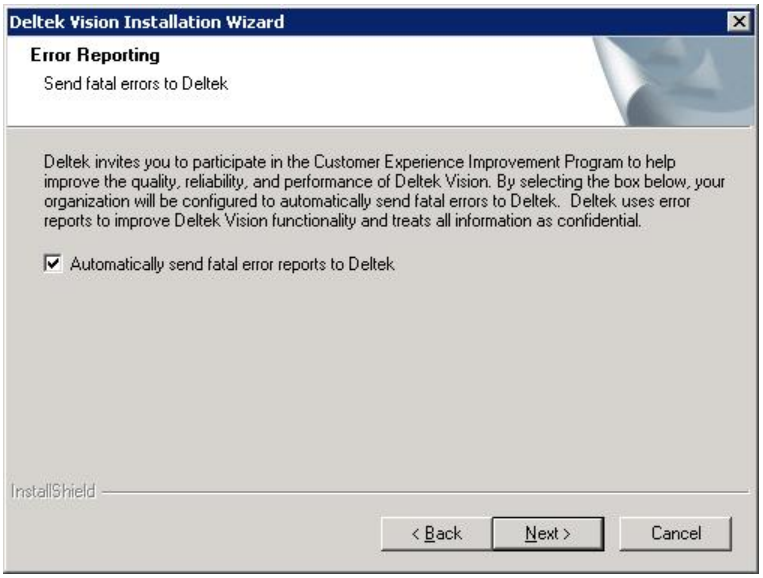
    - **No Selection (No Boxes checked)**– If you already have a Vision database or previous Sample database, you can click on Next without making a selection to get to the next form of choosing the database to upgrade if the setup detects it.
    - **Blank Database (Vision – US) –** If there are any existing Vision 5.x or 6.x databases that you would like to upgrade to 6.1 on the database server you specified in step 8, do not select **Blank Database**. You can upgrade an existing 5.x or 6.x database in the next step. If you don't have an existing Vision database, select this option to start a new Vision database.
    - **Blank Database (Vision – English International) –** Blank database for English Language installations outside the US. Select this option to start a new Vision database if you are using an English Language installation and are outside the US.
    - **Sample Database (VisionDemo61) –** Select this option to install the Vision sample database. It is sometimes helpful to have this database installed for troubleshooting purposes. If you already have a 5.x or 6.x version of the Sample Database, the following options are available:
    - Do not select **Sample Database**. The setup will detect supported previous versions of databases (including the Sample database) and give you the opportunity to upgrade your Sample database.
    - In most cases any previous versions of the Sample database may have the Vision database version number in its name (For example, VisionDemo51). If that is the case, when you convert a 5.x or 6.x database to Vision 6.1 the version it is upgraded to will no longer match the version number in its name. You can perform one of the following:
        - Rename the database on the SQL Server and in Weblink after the installation to reflect the correct version number or
        - Delete the previous version's Sample database on your SQL Server before continuing, then choose to restore the Sample database.

13. Click **Next** to continue.

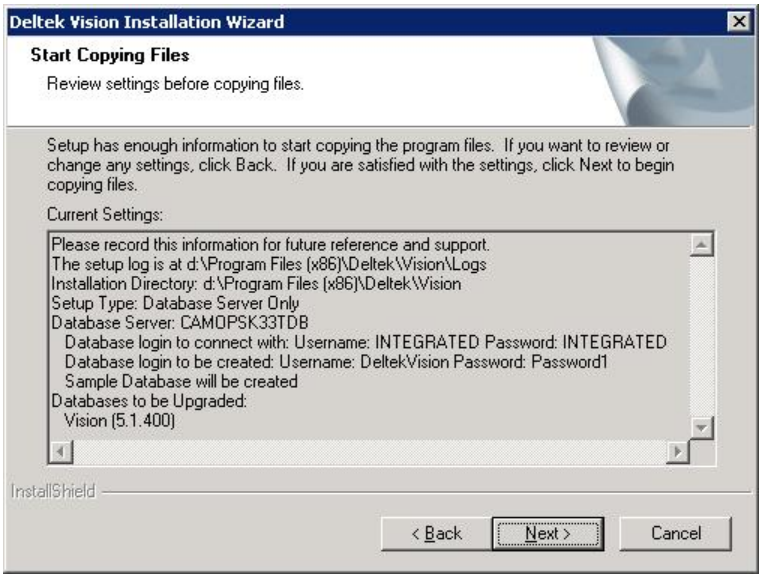
14. Setup now checks for Vision databases.

    - If you migrated from another product and restored and/or upgraded your database to this release version prior to running setup, the setup process will detect the versions of your database.
    - Otherwise, the setup process checks your SQL Server for Vision Databases version 5.0 or higher that is available for upgrade. See Appendix B: for additional information.

15. Click **Next**. The Error Reporting form displays.



16. Select **Automatically send fatal error reports to Deltek**, then click **Next**. The Start Copying Files form displays.



17. Review the installation settings. The information in the form should be saved. It contains information such as:

- The location of the installation Log that tracks all the steps performed during the installation.
- The installation directory – where you installed Vision.
- The Setup Type and the option chosen – if you are performing a multi server installation, this information is handy to use to know what your next option to choose when performing the installation on your other servers.
- Information about the Database Server such as:
  - Database Server Name
  - Database Login used to perform the installation on the database server
  - Any Deltek Vision logins and passwords created in SQL Server during the installation. This information can be used when configuring Weblink. It is recommended that you change at least the passwords from their defaults and/or the login name as well.
  - Any databases that you will be restoring or upgrading will be listed

18. Click **Next** to begin installation of the database server as part of a three or more server installation.

19. Review the installation log to check for errors in the installation. The installation creates a logs subfolder located in the Deltek Vision installation location that contains the installation log as well as conversion log files created for each database that may have been upgraded during the installation. If you upgraded any databases during the installation process, verify that a conversion log for that database (filename contains the database name) was created and it does not contain any errors (search for the word "msg" without the quotes in the log file." If errors are found, contact Deltek Customer Care Connect with the contents of the log files.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to \ProgramFiles\Deltek\Vision\Logs folder and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if they are not in the log file.

20. Proceed to the next section to perform Step 2: Install the Report Server on page 90.

Important Information about Setting up the Vision Database Tier

During installation of the database tier, the Deltek Vision backup device is created on the database server to allow end users to perform *ad hoc* database backups before major data changes or processes take place. To back up the database, select **Utilities » Backup Database** from the Vision Applications menu.

Proceed to the next section to install your report server onto a separate machine.

Step 2: Install the Report Server

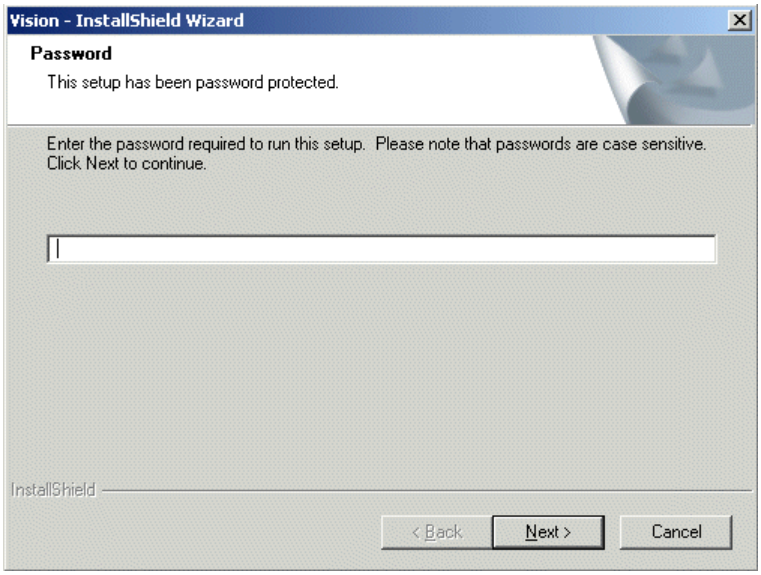
Procedure

Follow the steps in this section to install the report server for a three or more server installation.

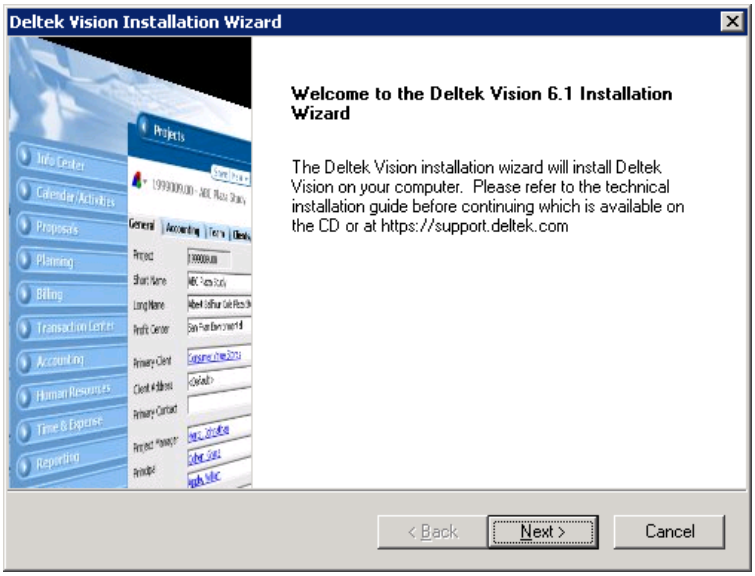
1. Follow the steps on page 26 to download and launch the setup file. The setup routine extracts the files to the desired location. You must have 1GB of free disk space in this location.

   The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

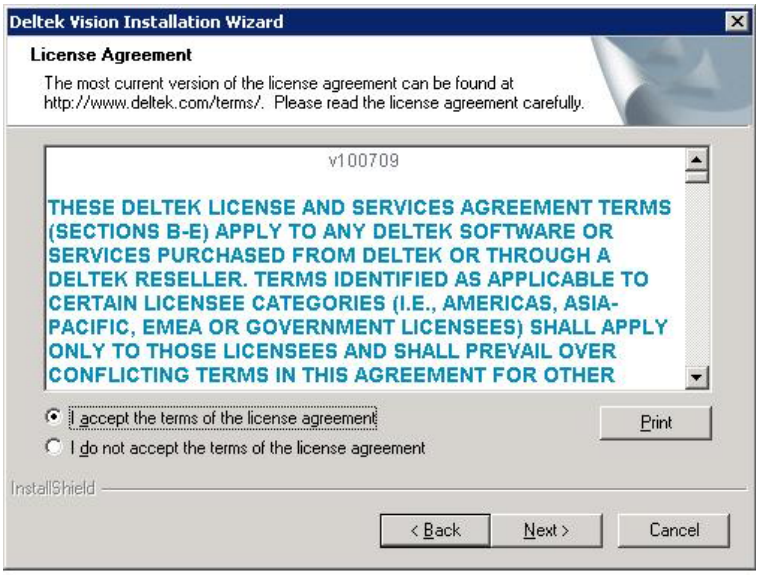
   The Password form displays.



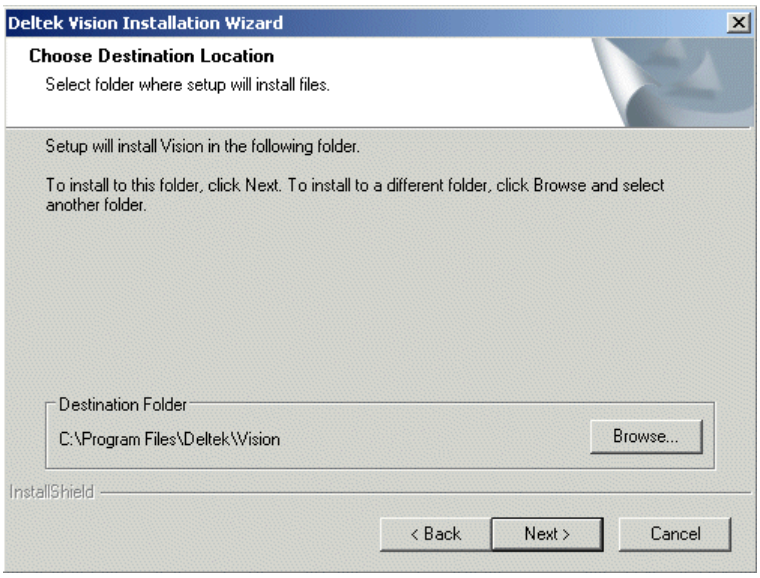
2. Enter the password provided by Deltek and click **Next**. To obtain the password, contact Deltek Customer Care Connect at VisionSupport@deltek.com. The Welcome form displays:



3. Click **Next**. The License Agreement form displays.



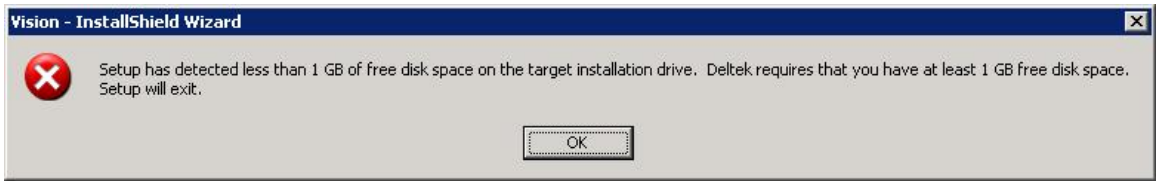
4. Review the agreement and click the **I accept the terms of the license agreement** option if you agree. Click **Next** to proceed. The Choose Destination Location form displays.



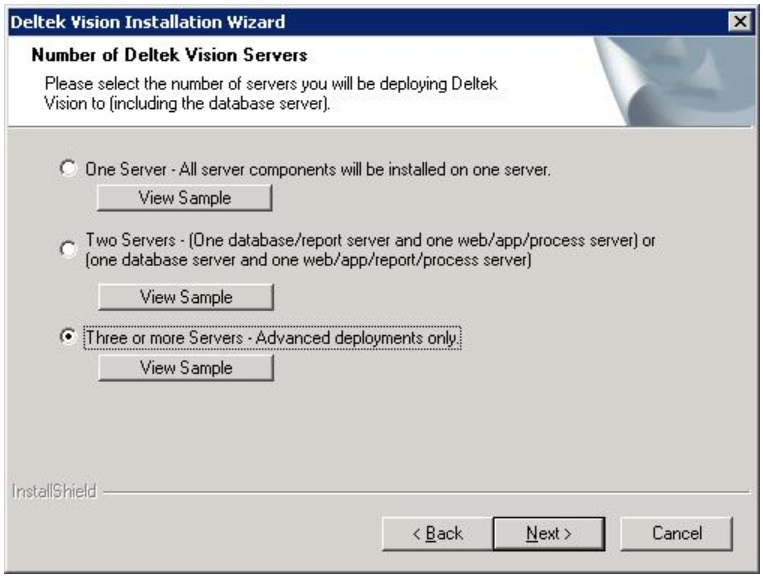
5. Complete one of the following:

   - Click **Next** to accept the destination displayed on the form.
   - Click **Browse**, select an alternate destination, and click **Next**.

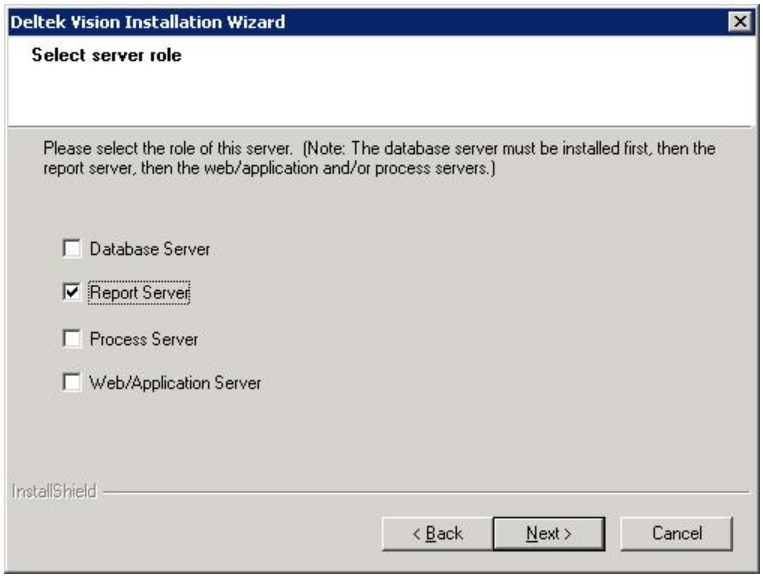
6. If you do not have at least 1GB of free space in the Destination location, Vision displays an error message. Change the path to select a folder with over 1GB of free space and click **Retry**.



7. The Number of Vision Servers form displays.



8. Select **Three or more Servers** and click **Next**. The Select Server role form displays:



9. Select **Report Server** and click **Next**.

   The Checking configuration of Microsoft SQL Reporting Services form displays.

10. Setup uses the default Report Server URL when it first checks the configuration of Microsoft SQL Reporting Services on the Web Server to the Reporting Services Web Service. If it is unable to make a connection to the Reporting Service Web Service page, setup will return an error message with the reason it is unable to make the connection and will display the Specify Report Server and Report Server URL Information form. See

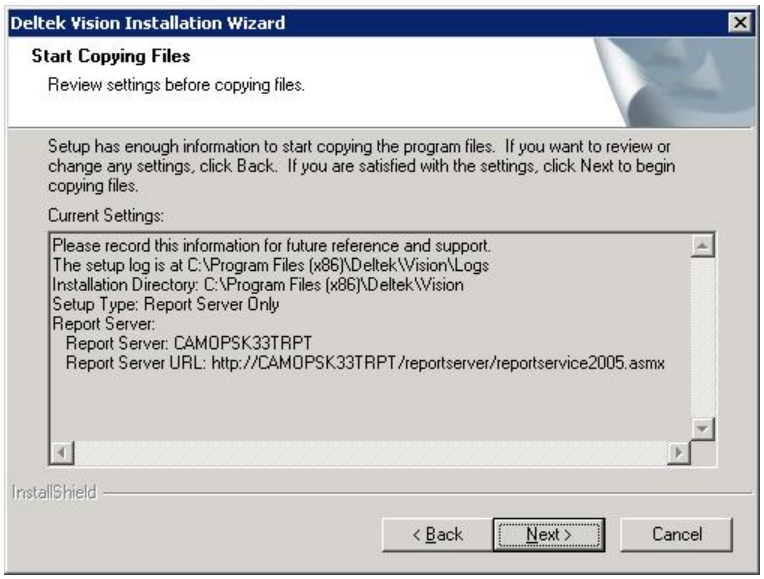
Appendix C: Connect to Reporting Service Web Service for additional information. Setup will continue to the next step when the connection is complete.

11. The Start Copying Files form displays.

IMPORTANT!

Important Information about Configuring Report Services

- If you will be using the server-side printing functionality of Deltek Vision, see Appendix E: Printing in Deltek Vision 6.x for instructions on where and how to configure the account.
- If you have configured the Report Server Service Account to be a domain account, Reporting Services will use Kerberos Authentication by default. You must ensure that you have created an SPN for the account. To configure an SPN, complete the steps in this Microsoft link: http://msdn.microsoft.com/en-us/library/cc281382.aspx
- Alternatively, you can configure the RSReportServer.config file with the following XML structure that specifies NTLM only. This is for deployments that do not support Kerberos or to work around Kerberos authentication errors (HTTP 401 errors) :
- <AuthenticationTypes>
- <RSWindowsNTLM/>
- </AuthenticationTypes>
- Details related to Kerberos related authentication issues can be found in the following Microsoft Reporting Services documentation:
- http://msdn.microsoft.com/en-us/library/cc281253.aspx



12. Review the installation settings and click **Next** to begin installation of a report server, as part of a three or more server installation.
13. If you want to install additional report servers, repeat these steps on any machine where you want to install additional report servers. Ensure that your SQL Server Edition and number of licenses support multiple report servers.

14. Proceed to the next section to install your Web/Application server on a separate machine.

15. You must install the Vision tiers in this order when performing a three or more servers installation: Install your database server first (instructions: page 82). Then install your report server (instructions: page 90), and finally, install your Web/application server (instructions: page 95) and stand-alone process servers (optional - instructions: page 103).

Step 3: Install the Web/Application Server

Procedure

Follow the steps in this section to install the web\application server for a three or more server installation.

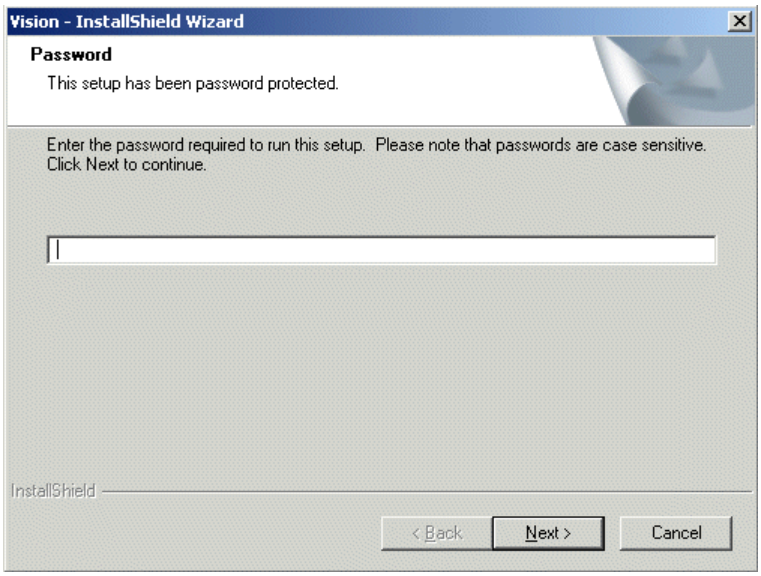
1. Complete one of the following:

   - Follow the steps on page 26 to download and launch the setup file. The setup routine extracts the files to the desired location. You must have 1GB of free disk space in this location.

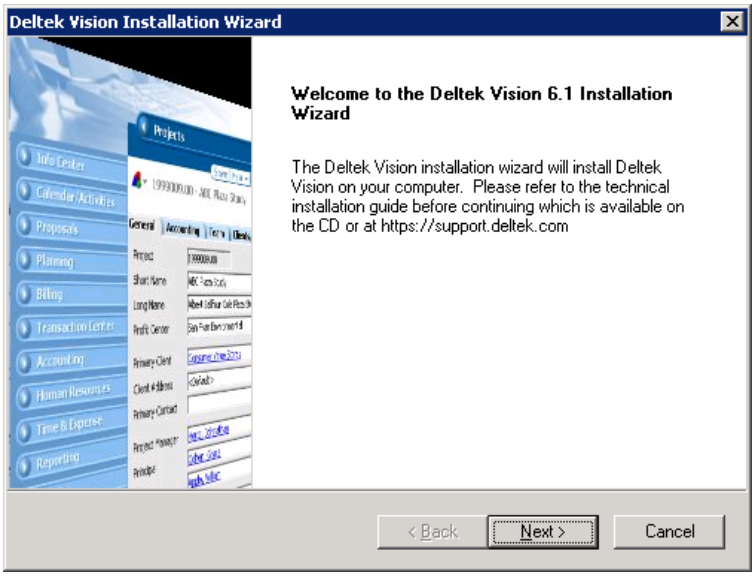
   OR

   - Run the setup.exe from the extracted files, if you saved them earlier to run the installation. The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

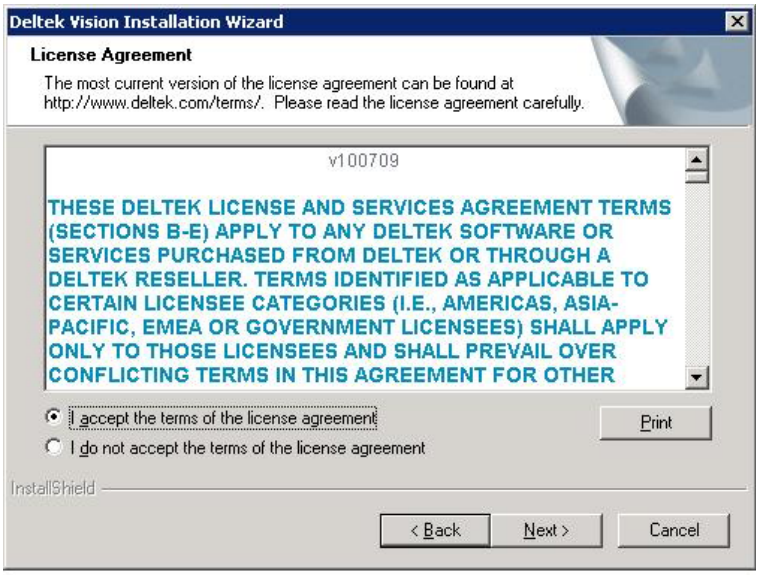
   The Password form displays.



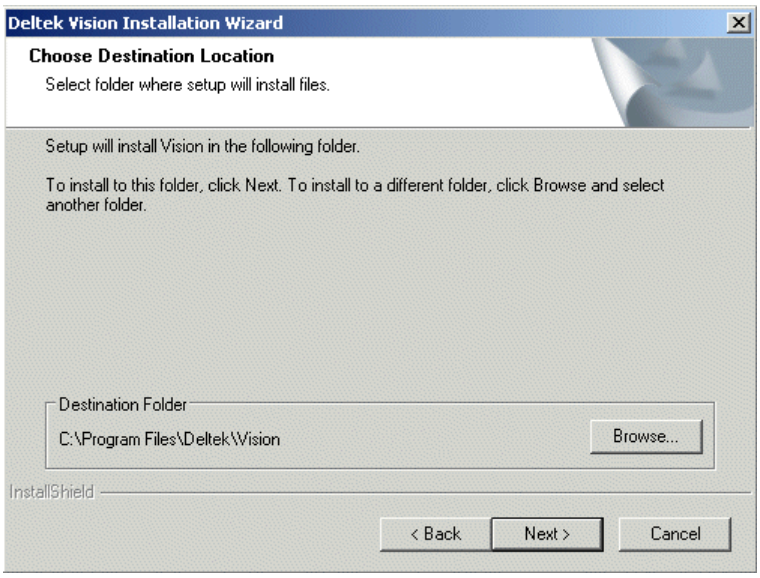
2. Enter the password provided by Deltek and click **Next**. To obtain the password, contact Deltek Customer Care Connect at VisionSupport@deltek.com. The Welcome form displays:



3. Click **Next**. The License Agreement form displays.

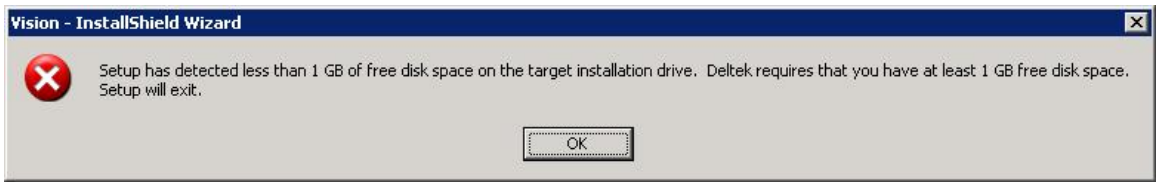


4. Review the agreement and click the **I accept the terms of the license agreement** option if you agree. Click **Next** to proceed. The Choose Destination Location form displays.

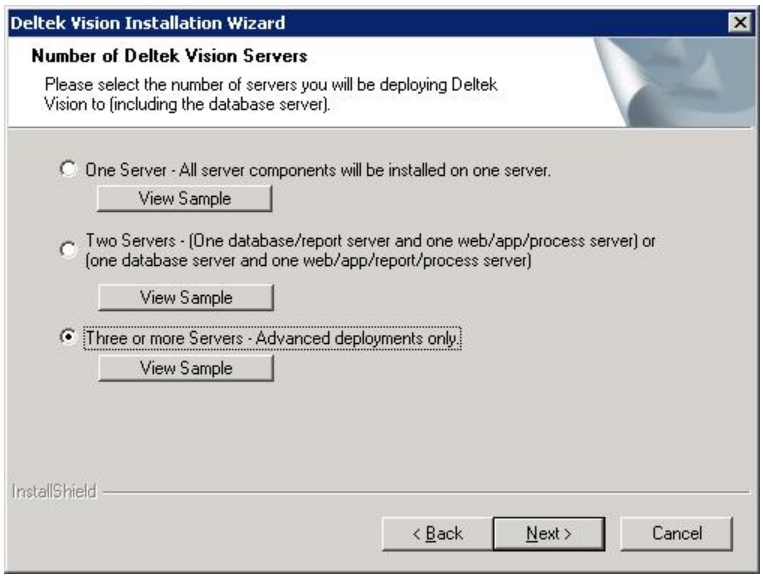


5. Complete one of the following:

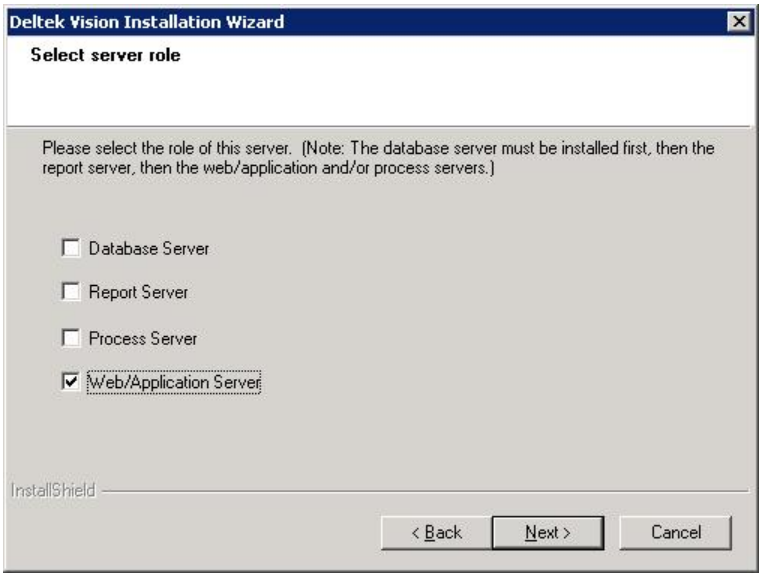
   - Click **Next** to accept the destination displayed on the form.
   - Click **Browse**, select an alternate destination, and click **Next**.
   - If you do not have at least 1GB of free space in the Destination location, Vision displays an error message. Change the path to select a folder with over 1GB of free space and click **Retry**.



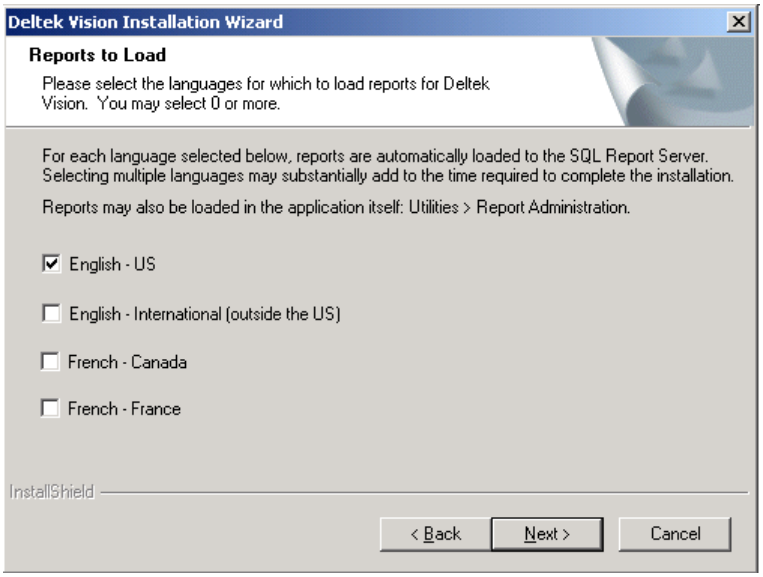
The Number of Vision Servers form displays.



6. Select **Three or more Servers** and click **Next**. The Select Server role form displays:

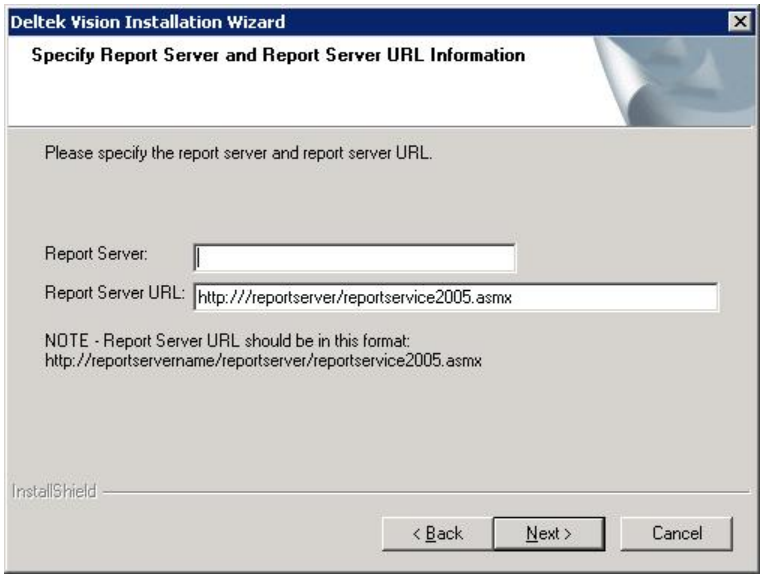


7. Select **Web/Application Server** and click **Next**. The Reports to Load form displays:



8. The Vision installation routine includes options for selecting the version of English or French in which you plan to run the Vision reports. Select the language for the reports to load. **English – US** is the default.

9. Click **Next** to continue. The Specify Report Server and Port Information form displays:



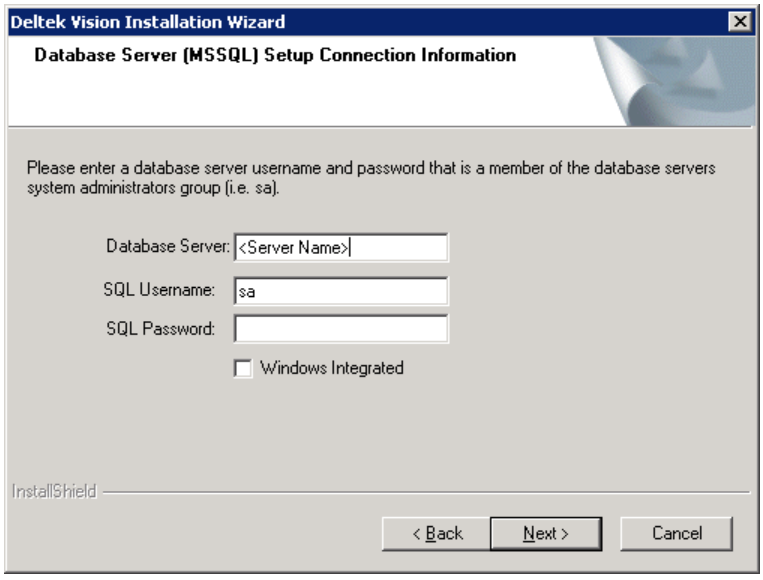
10. Enter the following report server information:

    - **Report Server** – Enter the host name of the server where you installed your Vision report server.
    - **Report Server URL** – Enter the URL where the report server was installed during report server installation.

    Setup uses the default Report Server URL when it first checks the configuration of Microsoft SQL Reporting Services on the Web Server to the Reporting Services Web Service. If it is unable to make a connection to the Reporting Service Web Service page, setup will return an error message with the reason it is unable to make the connection and will display the Specify Report Server and Report Server URL Information form. See Appendix C: Connect to Reporting Service Web Service for additional information. Continue to the next step when the connection is complete.

    When your configuration is verified, the Database Server (MSSQL) Setup Connection form displays.

11. When you are finished, click **Next**. The Database Server Setup Connection form displays.



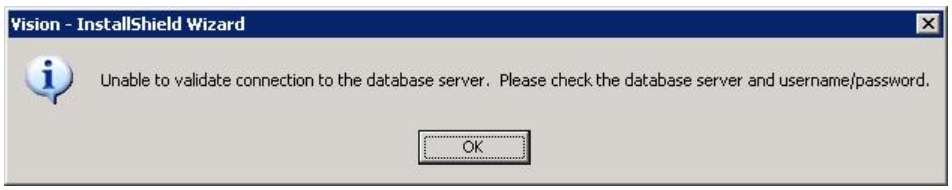
12. Enter the following:

    - **Database Server** – Enter the name of the database server.
    - **SQL Username** – Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is **sa**. If you use the SQL Server Username and Password, ensure that the server security is configured to support Mixed Mode Security as described in the Deltek Microsoft SQL Server 2005 Administrator's Guide.
    - **SQL Password** — Enter the password associated with this SQL Username.
    - **Windows Integrated** – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows Account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation.

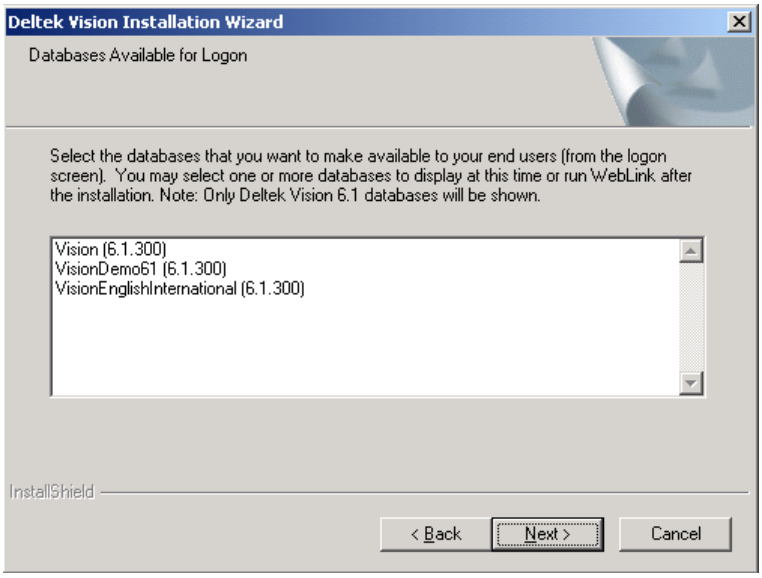
    SQL Server 2005 or 2008 installed on Windows Server 2008 and Vista Operating Systems do not add members of the local administrator's group into the SQL Server Sysadmin role by default. If you are using integrated authentication, ensure that your current logged in account is a member of the sysadmin role in SQL Server.

13. You must make sure your connection is configured correctly before you can continue. If the installation program cannot connect to the database using the username/password you entered, when you click **Next**, the following message displays asking you to try again.

14. Click **Next** to continue. The Databases Available for Logon form displays.



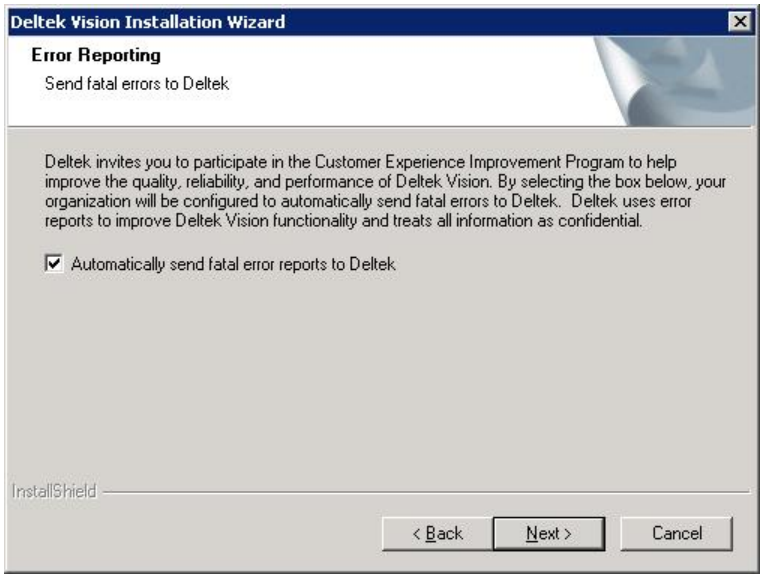
15. Click **OK**, correct the problem, and continue. The Databases Available for Logon form displays.



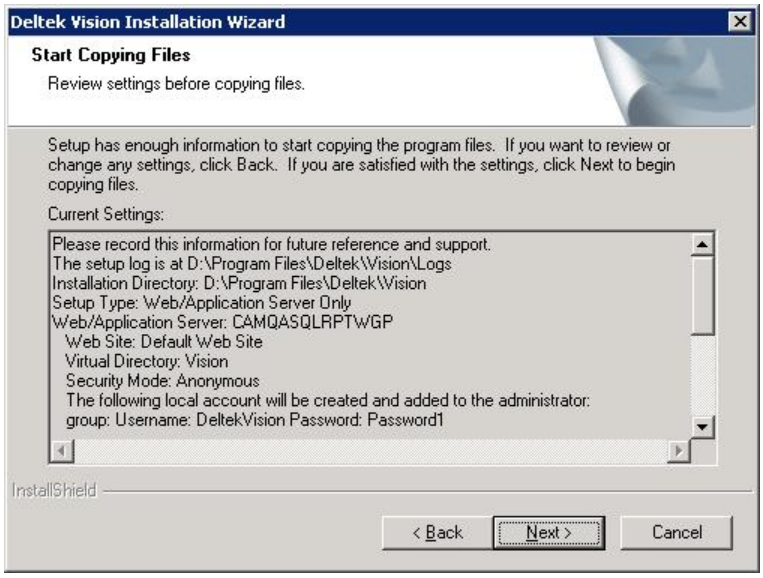
16. Select the databases you want to make available to your end users on the Deltek Vision logon form. The list displayed here includes:

    - Databases you have selected to upgrade
    - The sample database (if you chose to restore that)
    - The blank database (if you chose to restore that)
    - Any Deltek Vision 6.1 databases already previously restored on your database server.
    - You must select at least one database. New databases can be added and databases can be removed via WebLink after installation.
    - This form does not display if you did not choose to upgrade any databases and there is only one existing Deltek Vision 6.1 database.

17. Click **Next**. The Error Reporting form displays:



18. Select **Automatically send fatal error reports to Deltek**, then click **Next.** The Start Copying Files form displays:



19. Review the installation settings and click **Next** to begin installation of a Web/application server, as part of a three or more servers installation.

20. Review the installation log to check for errors in the installation. The installation creates a logs subfolder located in the Deltek Vision installation location that contains the installation log as well as conversion log files created for each database that may have been upgraded during the installation. If you upgraded any databases during the installation process, verify that a conversion log for that database (filename contains the database name) was created and it does not contain any errors (search for the word “msg” without the quotes in the log file.” If errors are found, contact Deltek Customer Care with the contents of the log files.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to \ProgramFiles\Deltek\Vision\Logs folder and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if they are not in the log file.

21. Repeat the steps in this section on any machine where you would like to install additional Web/application servers, or proceed to the next section to install a stand-alone process server onto a separate machine.

22. You must install the Vision tiers in this order when performing a three or more servers installation: Install your database server first (instructions: page 82). Then, install your report server (instructions: page 90), and finally, install your Web/application server (instructions: page 95) and stand-alone process servers (optional - instructions: page 103).

Step 4: Install the Process Server

Procedure

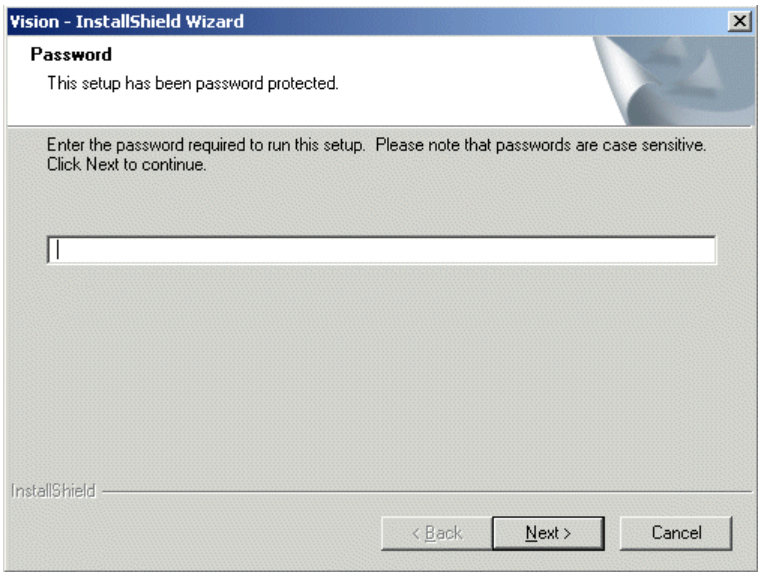
Follow the steps in this section to install the process server for a three or more server installation.

1. Follow the steps on page 26 to download and launch the setup file.

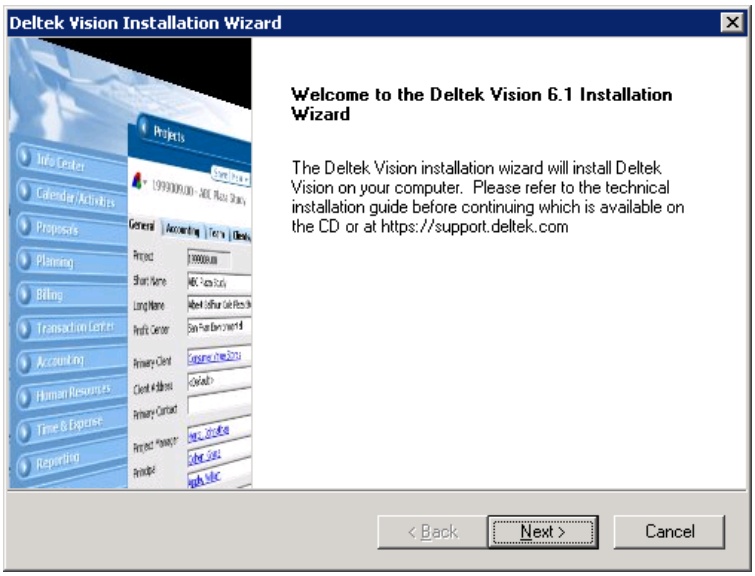
   The Download Manager checks to determine if any third-party applications are required. Refer to page 17 for details about the Download Manager.

   The setup routine extracts the files to the desired location. You must have 1GB of free disk space in this location.

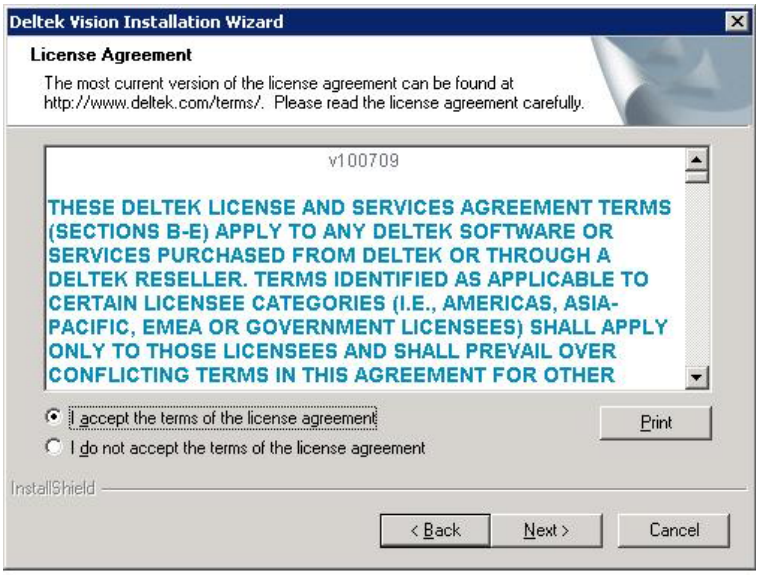
   The Password form displays.



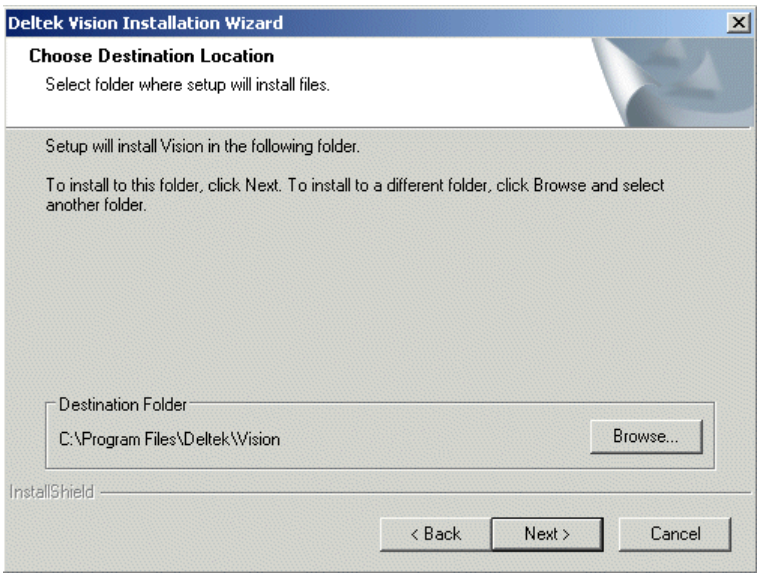
2. Enter the password provided by Deltek and click **Next**. To obtain the password, contact Deltek Customer Care Connect at VisionSupport@deltek.com. The Deltek Vision Installation Wizard prepares files for installation, indicating the progress on the form. When complete, the Welcome form displays:



3. Click **Next**. The License Agreement form displays.



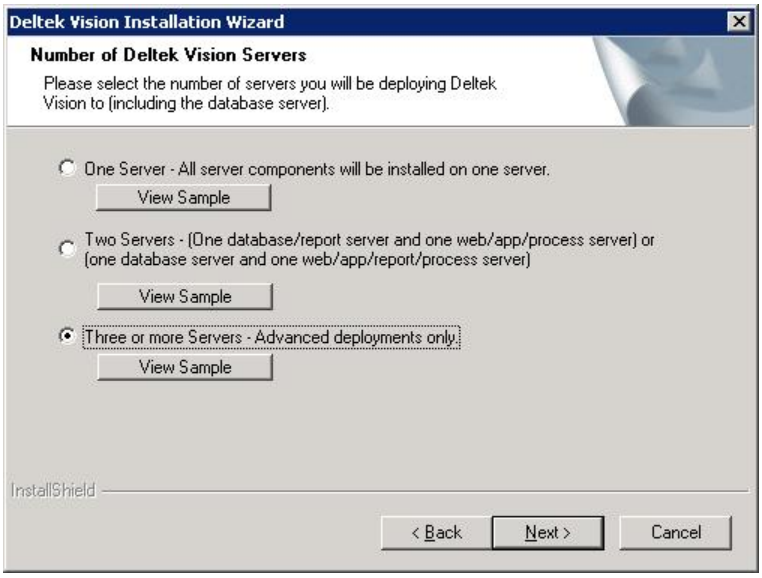
4. Review the agreement and click the **I accept the terms of the license agreement** option if you agree. Click **Next** to proceed. The Choose Destination Location form displays.



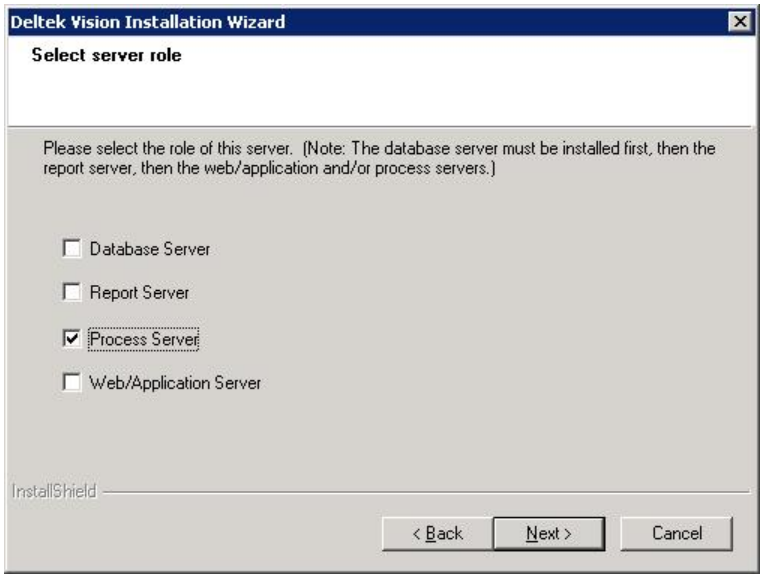
5. Complete one of the following:

   - Click **Next** to accept the destination displayed on the form.
   - Click **Browse**, select an alternate destination, and click **Next**.

   The Number of Vision Servers form displays.

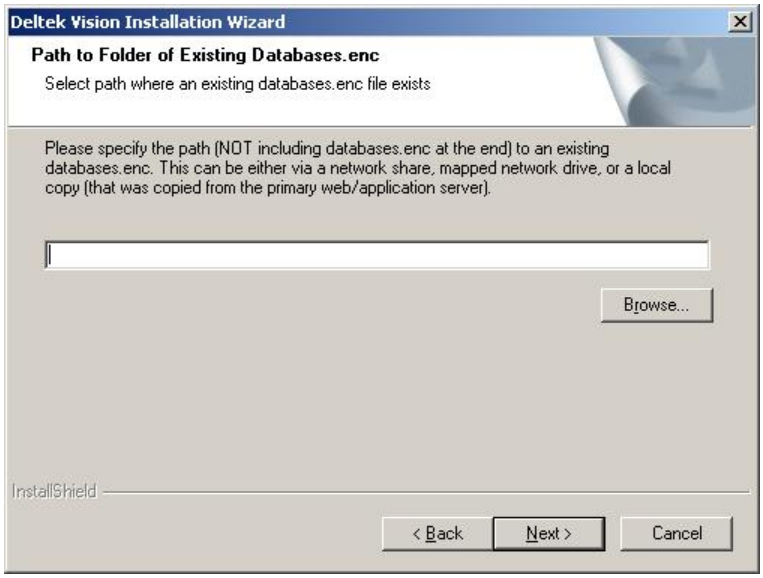


6. Select **Three or more Servers** and click **Next**. The Select Server role form displays:



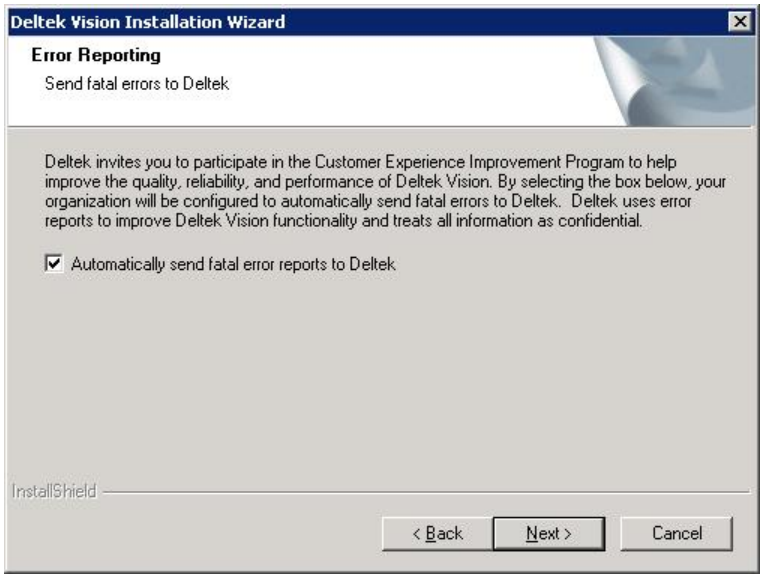
7. Click **Next** to continue.
8. If IIS is enabled on the server, the following message displays. Click **OK** to continue

9. Browse to the databases.enc file (located on the Web Server) and click **Next**

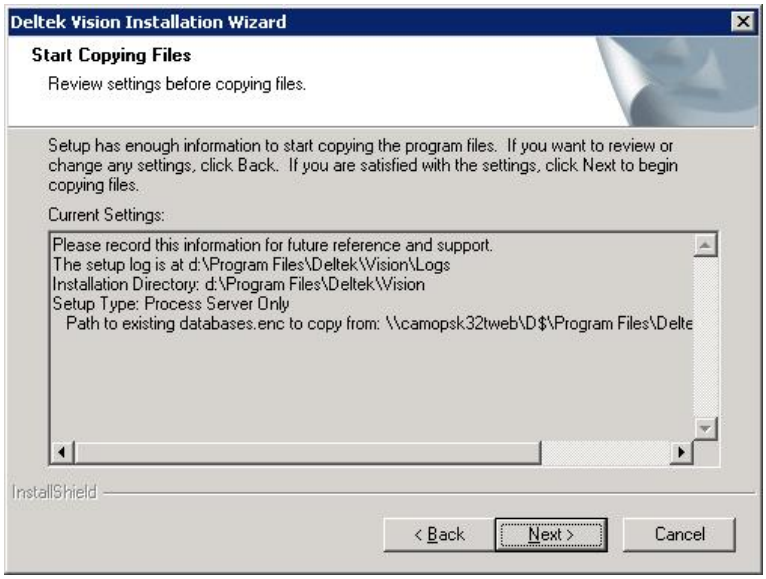


10. Setup displays the warning message that the Process Server should be updated if you change your entries in Weblink on the Web Server. Click **OK** to continue.

The Error Reporting form displays:



11. Select **Automatically send fatal error reports to Deltek**, then click **Next.** The Start Copying Files form displays:



12. Review the installation log to check for errors in the installation. The installation creates a log subfolder located in the Deltek Vision installation location that contains the installation log. If errors are found, contact Deltek Customer Care Connect with the contents of the log files.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to \ProgramFiles\Deltek\Vision\Logs folder and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if they are not in the log file.

Install Secondary/Backup Servers on Additional Machines

If your firm requires additional Web, application, report, or process servers to handle user load, you can install additional servers on as many machines as needed.

Contact Deltek Customer Care for information about installing additional Web/application or report servers.

Chapter 7: Upgrade from a Prior Version of Deltek Vision 6.x

If you are upgrading from a prior version of Deltek Vision 6.x, the installation process will detect the existence of the previous 6.x version and will launch the Upgrade Wizard to upgrade the existing version. Also, the Web tier and Database tier will automatically detect existing 6.x databases and offer the option to upgrade the databases during the installation.

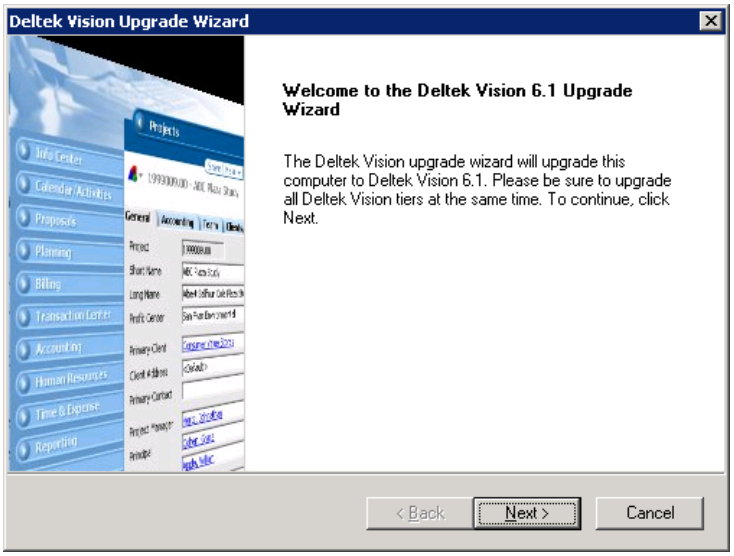
During the installation process, setup will attempt to automatically connect to the report server to load the Vision reports. If it is unable to make a connection, see Appendix C: Connect to Reporting Service Web Service for troubleshooting steps.

Perform the following steps to update your Vision 6.x . Setup will perform an in-place upgrade to the existing installation and databases. Depending on your deployment model, Deltek recommends performing the installation on the tiers in the following order:

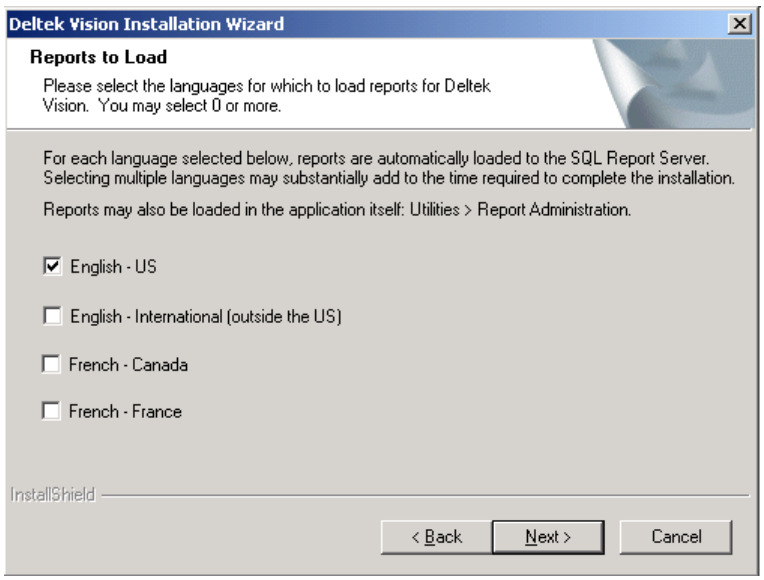
1. Database Server
2. Report Server
3. Web Server
4. Process Server

To launch the setup process, complete the following steps:

1. Perform the steps in Chapter 3: Download Deltek Vision and Initiate Setup to download and initiate setup. Setup will detect the existing installation and will launch the upgrade wizard.
2. When the Welcome Screen displays, click **Next** to continue.

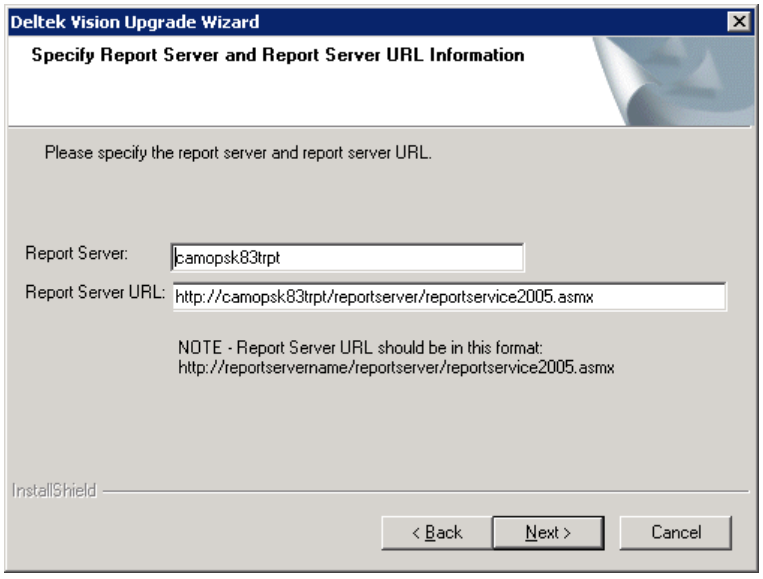


3. If you are deploying on a web tier installation, the Reports to Load form displays. Select the reports to load and click **Next** to continue. Otherwise, proceed to the next step.



4. Complete one of the following:

   - If you are installing on the database server tier only, skip this step.
   - If you are installing on the process server only, proceed to step 10.
   - If you are installing in a deployment that has either the Web or Report Server or both, the Report Server connection screen displays. The screen populates with the report server and report server URL connection information. Update the information as needed and click **Next** to continue.

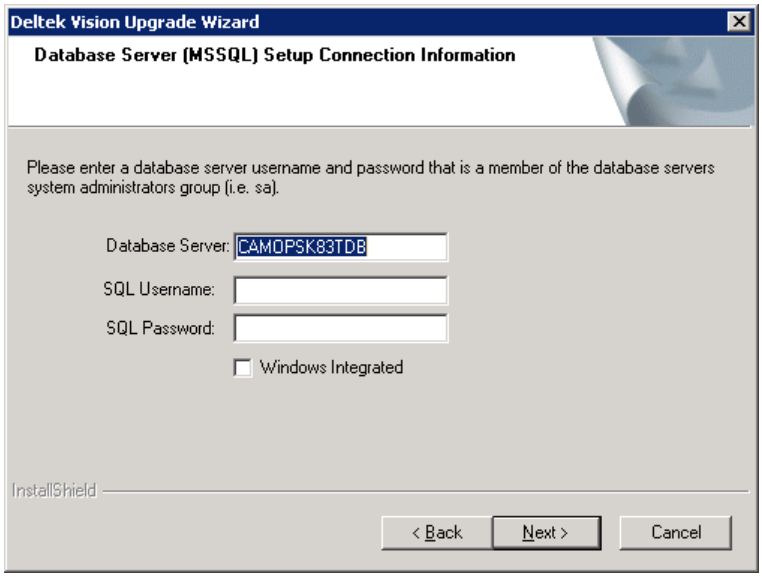


5. Setup verifies that your server meets the recommended prerequisite requirements for Deltek Vision. If your report or database server tier does not have all the recommended requirements, the installation displays a warning message but will allow you to continue.

Click **OK** to continue.

If you are installing on a Report Server Tier only, proceed to Step 10 to begin the upgrade and file installation process; otherwise, setup continues to the next step.

6. The Database Server connection screen displays. Enter the Database Credentials and click **Next** to continue.



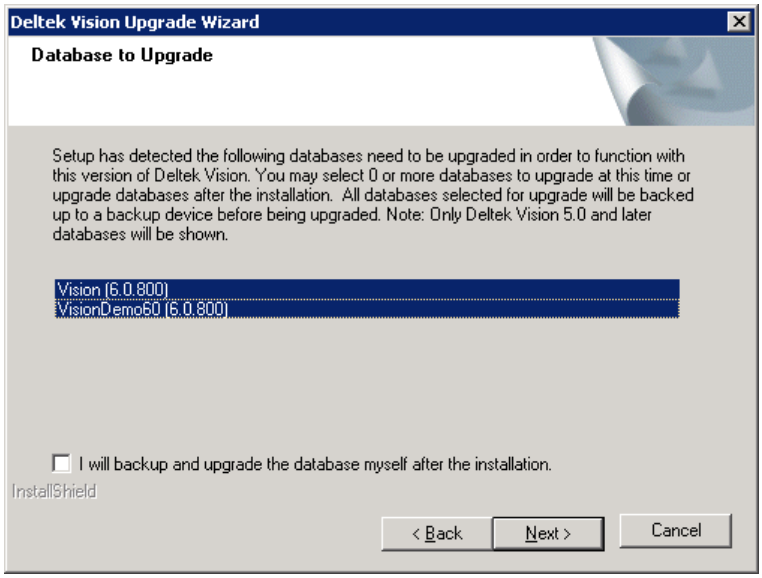
7. Enter the following:

   - **Database Server** — Enter the name of the database server.
   - SQL Username — Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is **SA**. If you use the SQL Server Username and Password, ensure that the server security is configured to support Mixed Mode Security as described in the Deltek Microsoft SQL Server 2005 Administrator's Guide.
   - **SQL Password** — Enter the password associated with this SQL Username.
   - **Windows Integrated** – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows Account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation.

SQL Server 2005 or 2008 installed on Windows Server 2008 and Vista Operating Systems do not add members of the local administrator's group into the SQL Server Sysadmin role by default. If you are using integrated authentication, ensure that your current logged in account is a member of the sysadmin role in SQL Server.

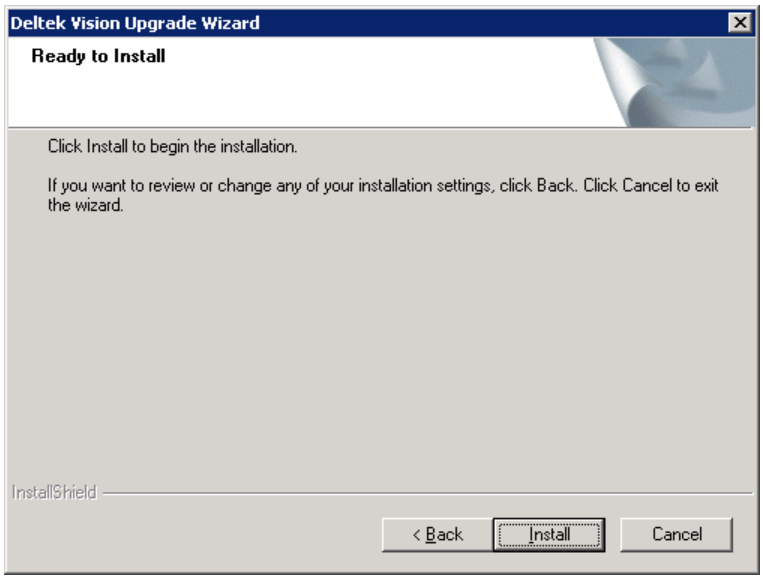
You must make sure your connection is configured correctly before you can continue.

The Databases to Upgrade screen displays.



8. Select the Databases to Upgrade. Click **Next** to continue.

9. Click **Install** to begin the upgrade process.



10. Click **Finish** to complete the installation.

Deltek Vision Upgrade Wizard
Deltek Vision 6.1 Upgrade Wizard Complete
The Deltek Vision upgrade wizard has successfully upgraded this computer to Deltek Vision 6.1. Please remember to upgrade all Deltek Vision tiers at the same time.
< Back
Finish
Cancel

Chapter 8: Troubleshoot Deltek Vision

This chapter provides information about contacting Deltek if problems occur during installation. This chapter also includes a list of errors that may occur during installation, and possible solutions.

Sending Files to Deltek

During the Deltek Vision installation, if you encounter any problems, you should contact Deltek Customer Care for assistance. To help us resolve your installation issues as quickly as possible, please send the following files to Deltek when requesting assistance with troubleshooting an installation:

Note any error messages that display when errors occur, take screenshots if possible, and send the screenshot files to Deltek.

WinMSD Log file

To save this file, complete the following steps:

1. Click **Start » Run**.
2. In the Run dialog box, type **winmsd**.
3. Click **Enter**.
4. In the top left-hand corner, click **System Information** to highlight it.
5. Click **Action** and choose **Save As Text File**.
6. Email the text file to Deltek.

   Installation Log File – Please email all files saved in this folder: C:\Program Files\Deltek\Vision\Logs**.**

A log file called DeltekVisionSetupLogMMDDYY.log is created during all installations.

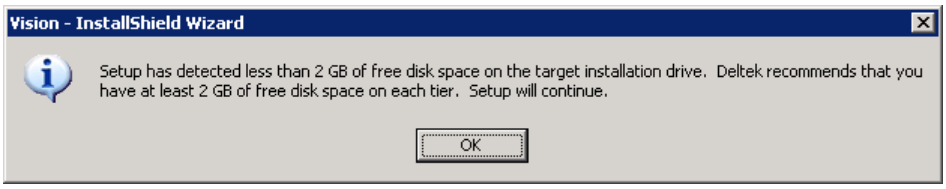
Troubleshoot Deltek Vision Tier Installation Messages

This section documents messages that may display during installation of Vision tiers, with brief explanations and tips how to proceed if you receive these messages. The following sections correspond to Vision tiers.

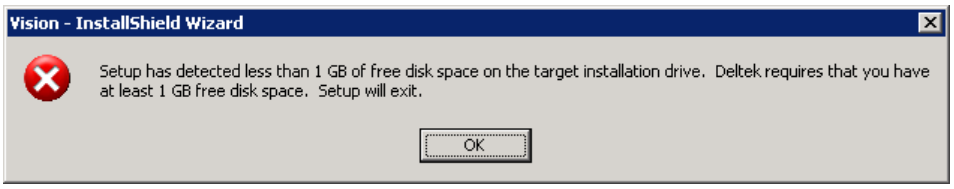
All Tiers

Free Space Error

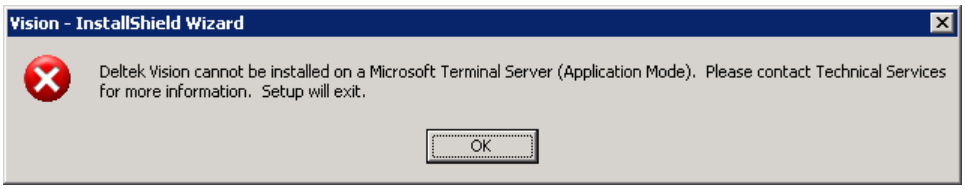
The following warning can display during installation of any Vision Tier, if you have less than 1 GB free on the drive. Deltek recommends having at least 1 GB of free disk space on the drive for any Vision Tier. However, if you choose to continue with setup, you can.



The following message displays when any Vision Tier has less than 1 GB free on the drive. The installation will halt and you will need to remove unneeded files so that there is a minimum of 1 GB free.



The following message displays when Terminal Services is installed. Note that you cannot install Deltek Vision on a Windows Server with Terminal Services enabled.

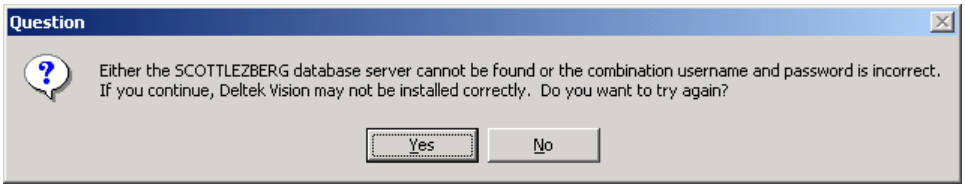


Database Tier

The following messages may display when installing the database tier, whether you install the database alone, or in conjunction with all other tiers.

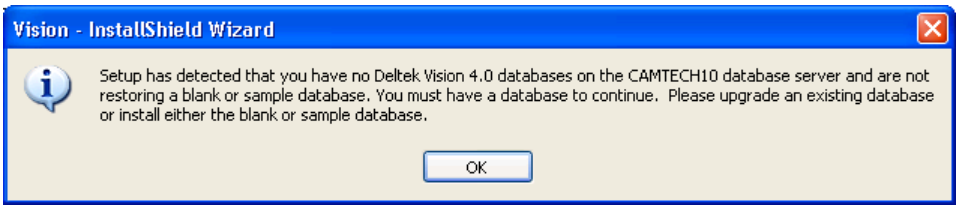
Cannot Connect to Database

The following message can display after you click **Next** from the database form that contains the **Database Server**, **Database Username**, and **Database Password** fields. This message occurs if setup cannot successfully connect to the database server using that username and password you entered. Setup will exit.



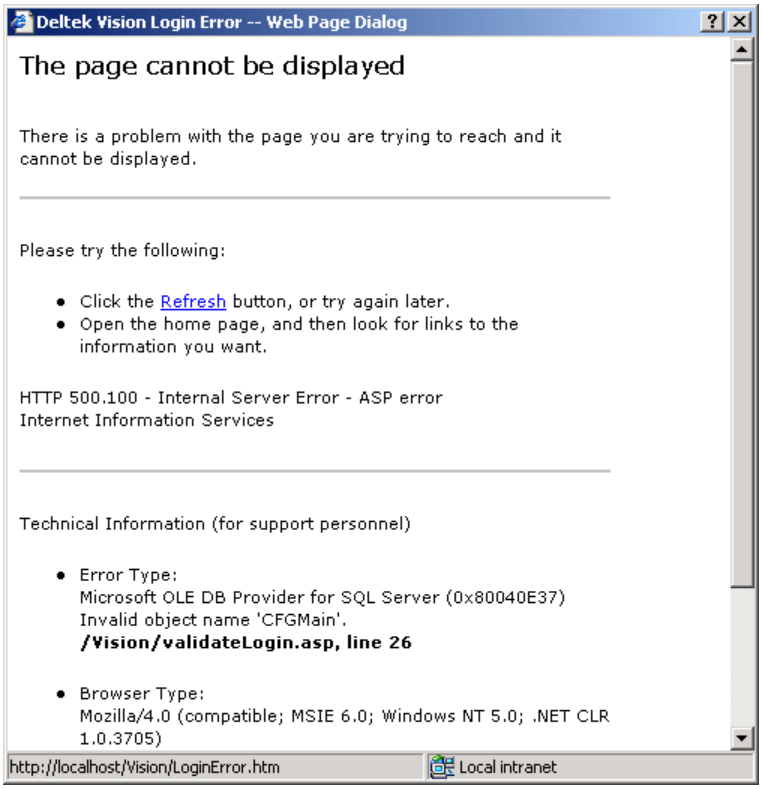
No Database Selected

This form displays if you have no valid Deltek Vision 6.1 databases to upgrade and you do not select to restore a blank or demo database. Click **OK** to return to the restore window. You must either choose to restore a blank or demo database or click the **Back** button and select a database to upgrade to Deltek Vision 6.1.



Database Has No Vision Tables

This form may display if you attempt to log on to a database that has no Vision tables.



Report Tier

If you experience errors connecting to the report server during installation, review the steps in Appendix C: Connect to Reporting Service Web Service.

If you have configured the Report Server service account to be a domain account, Reporting Services will use Kerberos Authentication by default. To prevent HTTP 401 errors when you install the Vision Web Tier, to test the Vision Weblink connections to Reporting Services, or to load reports in Vision, you must perform one of the following:

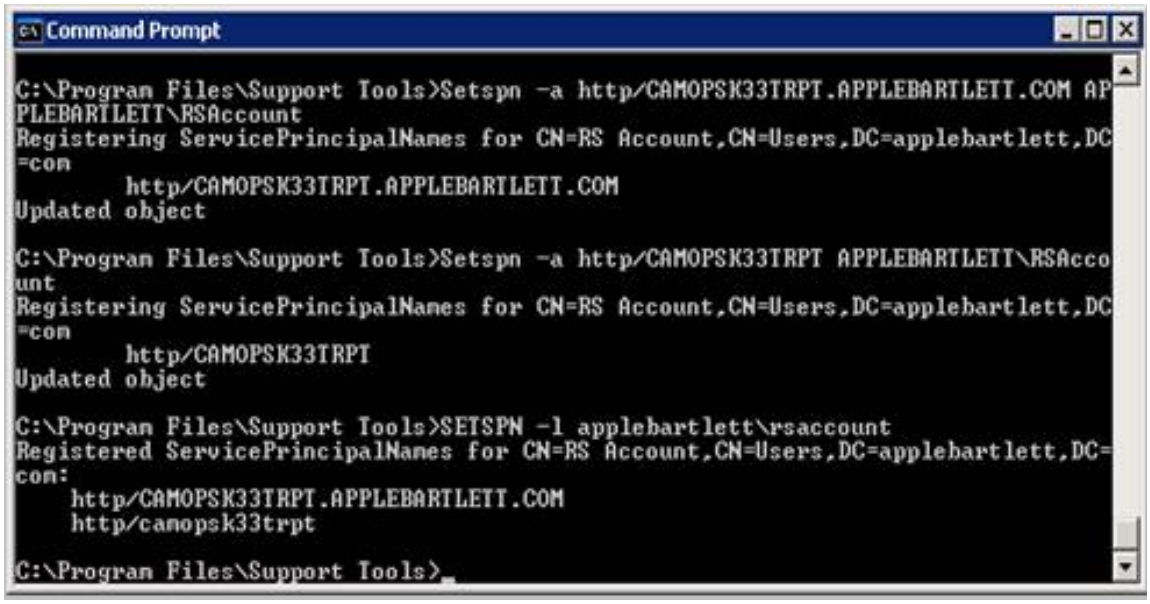
- Create an SPN for the account.
- Turn off Kerberos authentication in the rsreportserver.config file on the report server.

Complete one of the following steps:

- To configure an SPN, logon to a domain controller as a domain administrator and complete the steps in the following Microsoft link: http://msdn.microsoft.com/en-us/library/cc281382.aspx.

Do not specify a port in the command syntax as suggested from the Microsoft link.

The screen shot below is an example of the syntax used to add an SPN (setspn -a) for the Report Server's NETBIOS and FQDN names with a Domain account as well as the syntax to show a list (setspn -l) of the registered SPNs for the domain account. In the screenshot example below, the domain=applebartlett.com, report server name=CAMOPSK33TRPT and the account name=RSAccount.



- Alternatively, instead of setting an SPN, you can configure the RSReportServer.config file with the following XML structure that specifies NTLM only. This is for deployments that do not support Kerberos or to work around Kerberos authentication errors (HTTP 401 errors). By default this file is located in the Reporting Services Installation folder in a "\Reporting Services\ReportServer" subdirectory:

  <AuthenticationTypes>

  <RSWindowsNTLM />

  </AuthenticationTypes>

  You can find details related to Kerberos-related authentication issues and additional steps on how to edit the RSReportServer.config file in the following Microsoft Reporting Services documentation: http://msdn.microsoft.com/en-us/library/cc281253.aspx.

Client Tier

Workstation Reboots when Printing

When printing from Vision on an XP workstation, the workstation will reboot or experience an Operating System STOP Error message requiring a reboot.

This is caused by a Microsoft GDI Security update that affects certain PCL printers and is resolved by downloading and installing the hotfix from the following Microsoft article unto the workstation. http://support.microsoft.com/kb/935843/.

Chapter 9: Verify Post Installation

After you complete the installation process, you can verify the installation. This is useful to confirm that all prerequisite software is installed and all installation steps were complete.

To verify that your installation was successful, you must log on to Vision:

1. Open Internet Explorer and enter in the URL to the Deltek Vision application. For example, **http:\\<Web Server>\Vision**.
2. Click **Deltek Vision**, or wait while the application loads. Vision displays the Deltek Vision logon form.
3. Enter your **User ID**. If you are unsure of your user ID, enter **admin**.
4. Enter your **Password.** If you are unsure of your password, leave this field blank.

   If you do not have a user ID and password, and a user ID of admin and a blank password do not work, please contact Deltek Customer Care.
5. Use the drop-down list to select the **Database** you want to log on to.
6. Click **Login**. If the Vision application opens, displaying the Welcome page, your installation is successful.

If there are any errors during the installation process, you must confirm that your reports were loaded successfully. Go to the Deltek Vision installation location folder (\ProgramFiles\Deltek\Vision\Logs) and review the latest **DeltekVision61CMD_xx-XX.log** (xx-XX represents the language of your loaded reports). Reload your reports if the log file indicates there were errors during the loading of the reports into Vision.

Chapter 10: Utilities Installation

You can install the following Vision utilities: the Advantage to Vision conversion utility, and/or the Deltek CRM and Proposals to Vision conversion utility, and the SDK.

Follow the steps in Download the Vision Installation Files and Initiate Setup to download the Deltek Vision 61 Utilities executable file. Then follow the steps in this section to install one or more utilities.

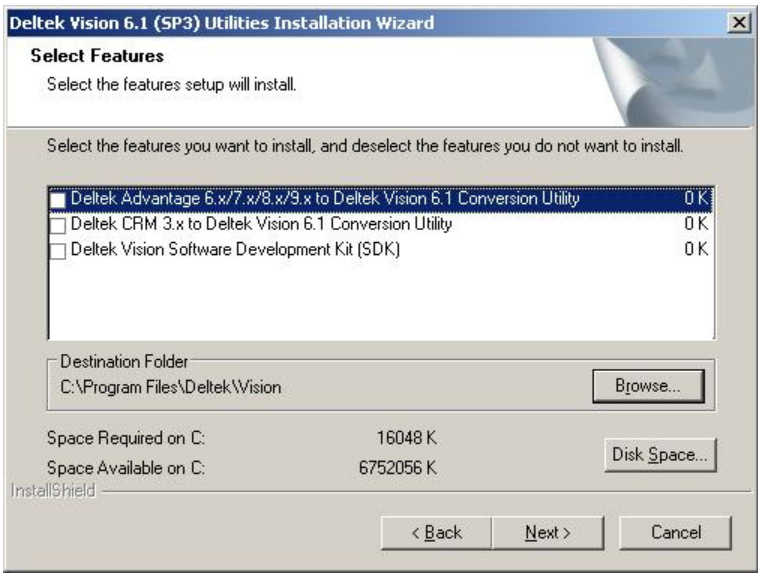
To install the Vision utilities, complete the following steps:

1. Double-click Deltek Vision 61 Utilities executable file. The confirmation screen displays.

2. Click **Yes** to continue. The Welcome screen displays.

3. Click **Next** to continue. The License Screen displays.

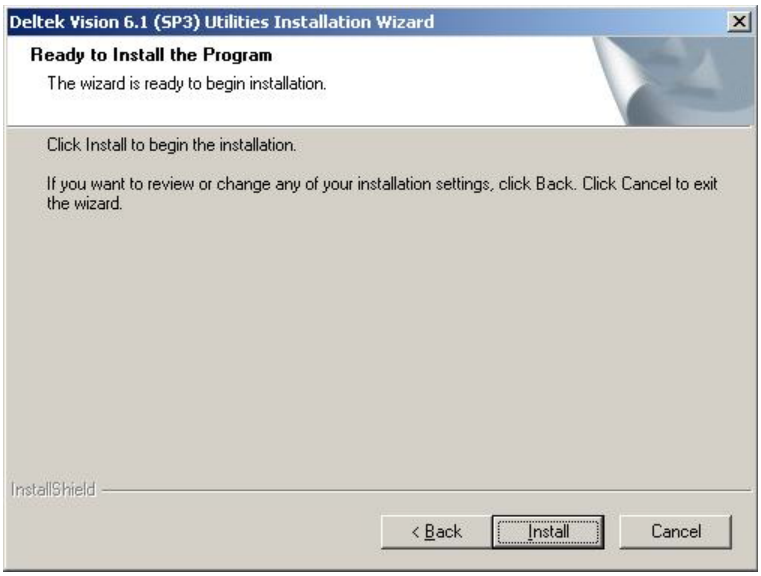
4. Click **I accept the terms of the license agreement** and click **Next**. The Select Features screen displays.



5. Select the utility you want to install, then do either of the following:

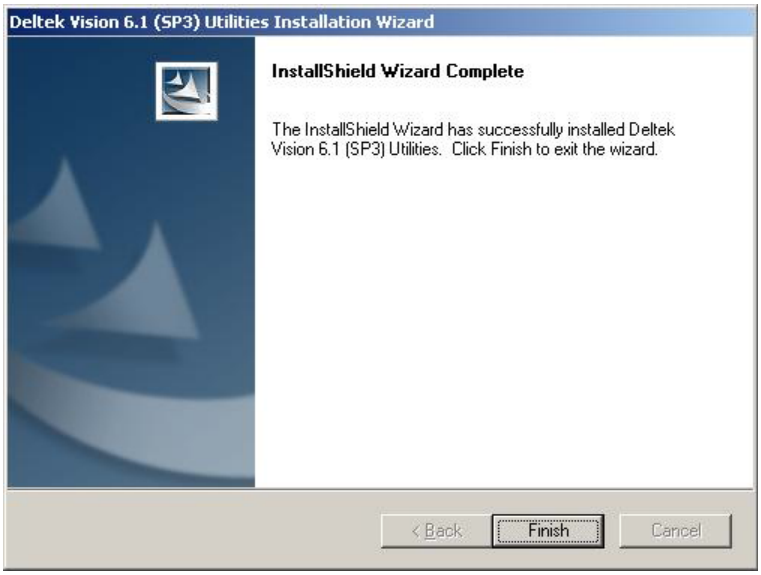
   - Click **Next** to have Vision copy files for that utility to the destination folder shown, or
   - Click **Browse**, select a different destination, then click **Next**.

   The Ready to Install screen displays.



6. Click **Install** to begin the installation. Vision begins copying files for the utility you selected, to the location you selected.

7. When complete, the Installation Complete screen displays. Click **Finish** to finish the installation and exit the wizard.



For instructions on building Vision reports, please see the Vision online help system, available from within the Vision user interface, or contact Deltek Customer Care.

For instructions on using the conversion utilities to convert an Advantage, Award, or Deltek CRM and Proposals database to Vision, please contact Deltek Customer Care.

Appendix A: Microsoft Internet Information Server (IIS) Installation on Windows Server 2003 or Windows Server 2008

Windows Server 2003

If your Web/application tier is Windows Server 2003, you must follow these instructions to install Microsoft IIS 6.0. These steps are necessary for proper detection of ASP.NET.

To install Microsoft IIS on Windows Server 2003:

1. Log onto your Microsoft Windows Server 2003 server as a domain or local administrator.
2. Click **Start » Control Panel » Add/Remove Programs**.
3. Click Add/Remove Windows Components.
4. Select **Application Server** and click **Details.**
5. Select **ASP .NET**.
6. Select **Internet Information Services (IIS)** and click **Details**.
7. Select **World Wide Web Service** and click **Details**.
8. Select **World Wide Web Service**.
9. Click **OK** three times to open the Windows Components Wizard.
10. Click **Next** on the Windows Component Wizard to run the installation.

You may need to supply the wizard with your Microsoft Windows Server 2003 media to install the necessary files.

Windows Server 2008

If your Web/application tier is Windows Server 2008, you must follow these instructions to install Microsoft IIS 7.0. These steps are necessary for proper detection of ASP.NET.

To install Microsoft IIS on Windows Server 2008:

1. Log onto your Microsoft Windows Server 2008 server as a domain or local administrator.
2. Click **Start » Control Panel » Administrative Tools » Launch Server Manager.**
3. Choose **Add Roles** if IIS is not yet enabled. If IIS is already enabled, select **Add Role Services** (if you need to add any additional components).
4. On the Select Server Roles screen, enable Web Server (IIS) if it is not already enabled. Enable the following sub-options from beneath the Internet Information Services option:

Component	Folder
Static Content	Common HTTP Features
Default Document	Common HTTP Features

Component	Folder
HTTP Redirection	Common HTTP Features
Directory Browsing	Common HTTP Features
ASP .Net	Application Development
ISAPI Extension	Application Development
ISAPI Filters	Application Development
.Net Extensibility	Application Development
Windows Authentication	Security
HTTP Monitoring	Health and Diagnostics
Request Monitor	Health and Diagnostics
IIS Management Console	Management Tools
IIS Management Scripts and Tools	Management Tools
Management Service	Management Tools

5. After enabling the components, on the Confirm Installation Instructions Screen, click **Install** to begin the process.
6. At the Installation Results screen, click **Close**.

For detailed steps on installing IIS 7.0 on Windows Vista and Server 2008, see the URLs below:

IIS 7.0 or the IIS 7.0 components in Windows Vista:
http://www.iis.net/default.aspx?tabid=2&subtabid=25&i=957http://www.iis.net/default.aspx?tabid=2&subtabid=25&i=957

IIS 7.0 or the IIS 7.0 components in a Server Core installation of Windows Server 2008:
http://www.iis.net/default.aspx?tabid=2&subtabid=25&i=956

Appendix B: Options When Converting a Database during Installation

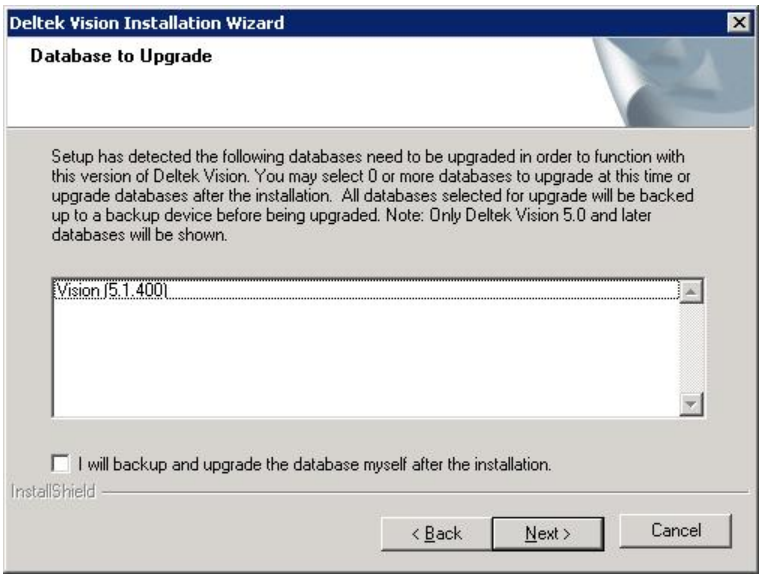
When completing the database portion of the installation process, Vision checks to see if there are any existing 5.x or 6.x databases. If so, the Database to Upgrade form will display.

If you have any Vision databases that are versions prior to 5.0, the Database to Upgrade form will not display. Those databases must be manually converted to at least version 5.0 in order to be converted to 6.x. Contact Vision Technical Support to obtain the conversion scripts if you have a Vision database version prior to 5.0.

> If you have Vision 6.x already installed, do not uninstall that version. Perform an in-place upgrade from 6.x to the current version.

To complete the Upgrade a Database process for database versions 5.x or 6.x:

1. If there are any existing Vision 5.x or 6.x databases on your database server, setup will detect and display them in the Database to Upgrade form. This form lists the database and associated version number.



2. Complete one of the following:

   - Select a database to upgrade. If you upgrade a database, the setup process will make a backup of the database on your SQL Server in the default Backup location before converting the database. If setup is unable to make the backup because of insufficient space or any other reason, the database will not be converted and an error message will display during the installation. This error will be logged in the log file so that you can convert the database manually.
   - Click **Next** to bypass this form.
   - If you are installing on a Database Tier Only, setup will return a message that you will need to convert the database manually.

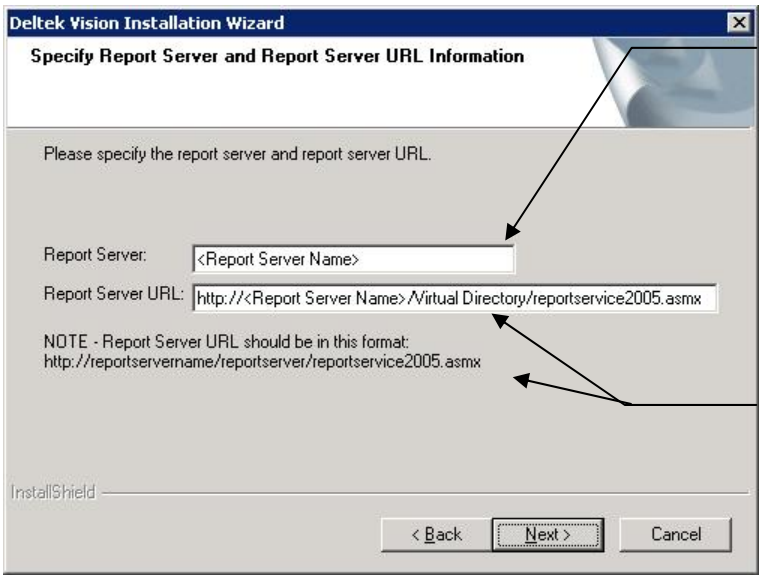
- If you are installing any Tier that included the Web/Application Tier and did not restore or upgrade a database that is already at the current released version and setup does not detect any existing Vision 5.x or 6.x databases on your database server, Setup will display a message window directing you to the upgrade script location.

3. Manually create a backup of your database before you run the database conversion using the Deltekvisionxx.sql (where xx is your version of Vision) script file located in the \program files\Deltek\Vision\Databases\Scripts folder. Do not run the UnicodeDeltekvisionxx.sql (where xx is your version of Vision) or other script files unless directed to by Deltek Customer Care. If you plan to convert your Vision database to Unicode, refer to the Vision Help documentation for the appropriate steps.

Appendix C: Connect to Reporting Service Web Service

SQL Server Reporting Services provides access to the full functionality of the report server through the Report Server Web Service. The Report Server Web Service is an XML Web service with a SOAP API. It uses SOAP over HTTP and acts as a communications interface between client programs and the report server. The Web service provides two endpoints - one for report execution and one for report management. Setup connects to the report execution endpoint.

If it is unable to make a connection to the Reporting Service Web Service page, setup will return an error message with the reason it cannot make the connection and will display the **Specify Report Server and Report Server URL Information form**.



The **Report Server** name is the name of your report server machine. Make sure the Virtual Directory value matches the **Virtual Directory** of the report server displayed on the Reporting Services Configuration Manager form for SQL Server 2008.

For proper connectivity, the Report Server URL must match the format shown on this form.

Complete one of the following actions:

- Verify that the information on the form is correct and click **Next.**
- Update the fields with the correct values.

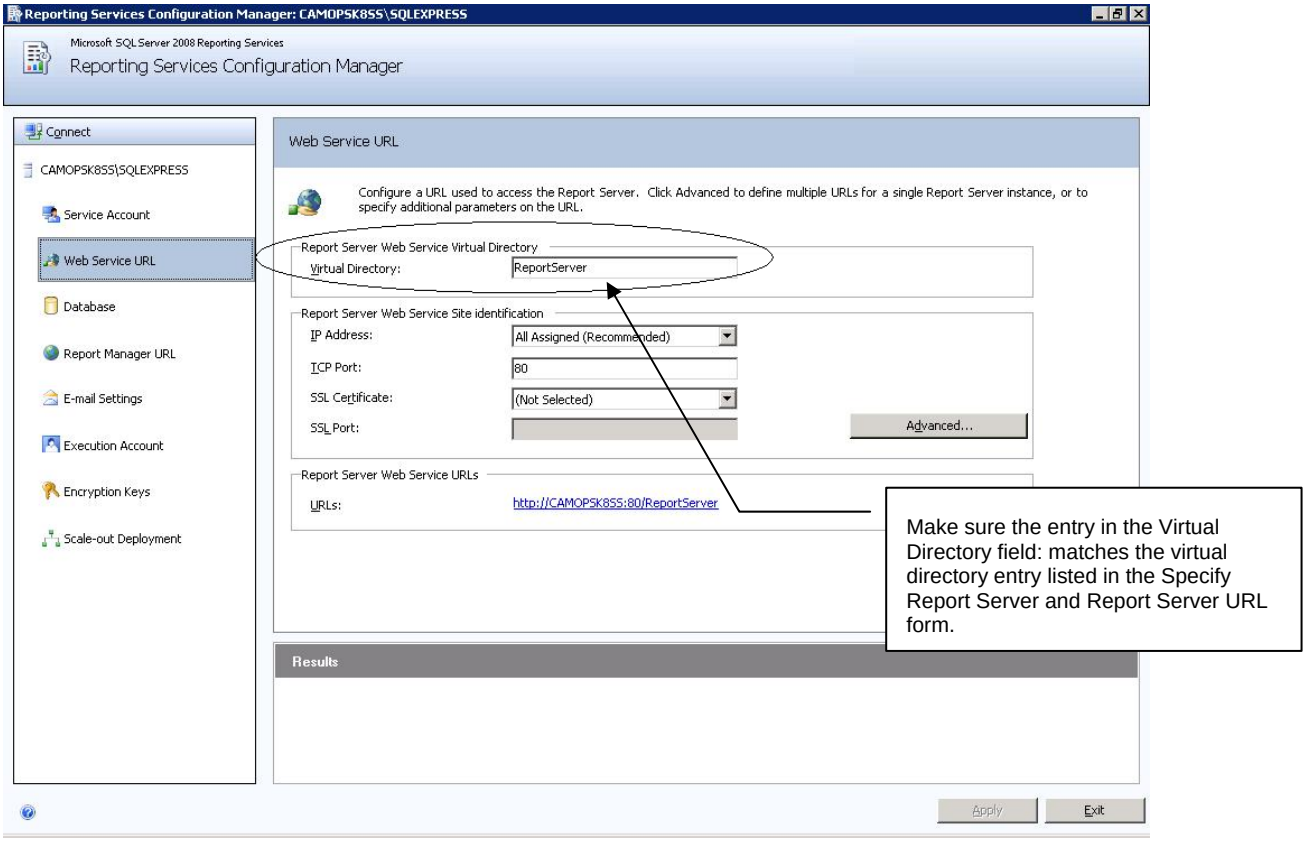
The following example shows the format of the URL required for the connection to the Reporting Services Web Service on the Report Server.

http://<Report Server Name>/Virtual Directory/reportservice2005.asmx

The following table describes each element in the URL.

URL Element	Description
Server	The name of the server on which the report server is deployed.
Virtual Directory	The name of the folder that contains the XML Web Service for report execution. This is configured during setup or when you run the Microsoft SQL Server Reporting Services Configuration tool. The default name//virtual directory is named **reportserver.** If you are unsure of the name of your report server virtual directory, launch the Reporting Services Configuration tool on the Report Server. In SQL Server 2008, select the Web Service URL on the left, then get the entry from the Virtual Directory field on the right. If you install Reporting Services as an instance, the name of the virtual directory may also include the instance name. (For example reportserver_INSTANCENAME) See the following SQL Server 2008 example for more information.
<endpointname>.asmx	The name of the web service endpoint is **reportservice2005.asmx** This is required in the URL for Vision to confirm the Report Server configuration.

SQL Server 2008 Report Server Configuration Tool

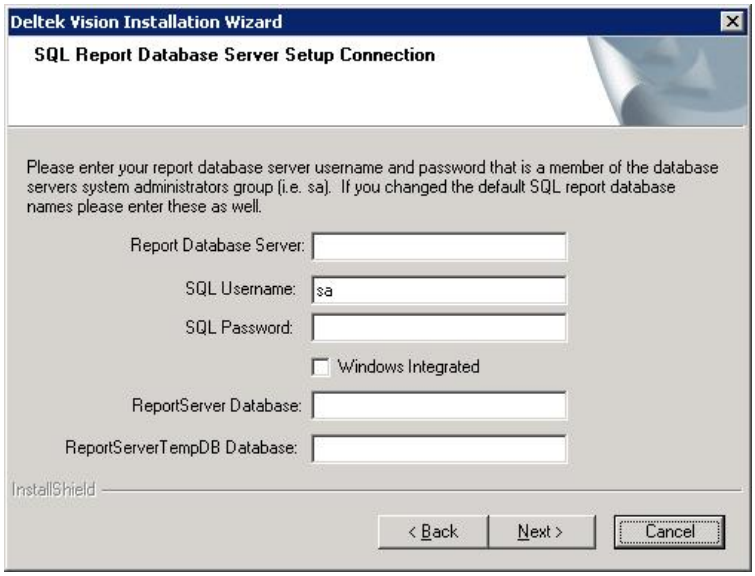


To identify the virtual directory that is required for setup to detect Reporting Services for SQL Server 2008, complete the following steps:

1. Click **Start » All Programs » Microsoft SQL Server 2008 » Configuration Tools » Reporting Services Configuration Manager**.
2. Connect to the Report Server Web Service URL on the left menu pane.
3. Check the **Virtual Directory** field on the right.

If you have not configured SQL Reporting Services, click the Help button icon (question mark icon) in the lower left of the Reporting Services Configuration Manager to access Microsoft documentation for configuring Reporting Services.

If setup is unable to connect to the ReportServer Database Server or to identify the Reporting Services databases, then it will display the following form:



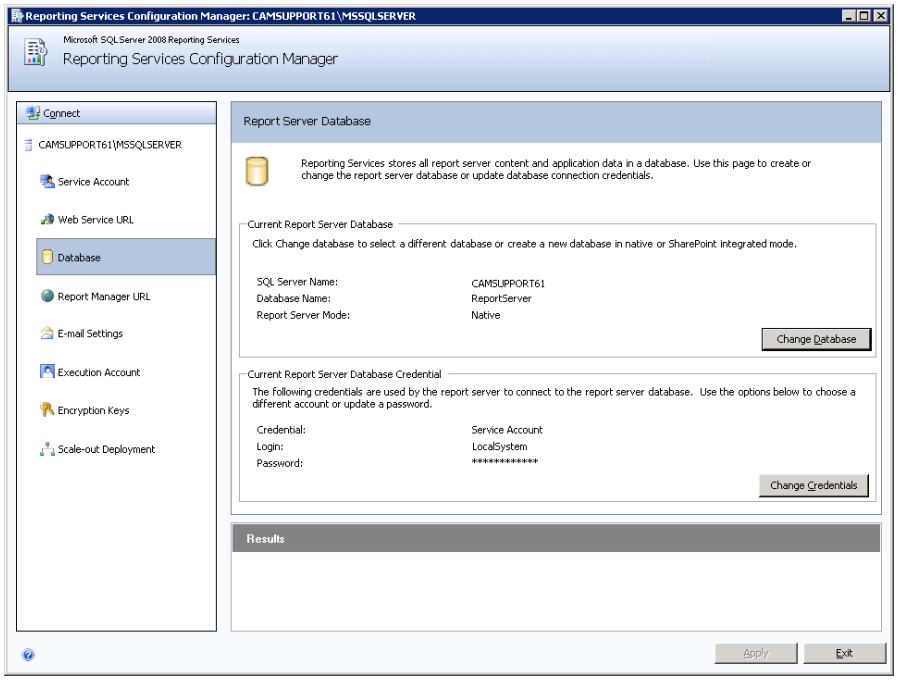
Enter the following:

- **Report Database Server** — Enter the name of the database server that has the Report Server databases.
- **SQL Username** — Enter a Microsoft SQL database server Login/username that is a member of the SQL Server SysAdmin Role. The default sysadmin account for SQL Server is **sa**. If you use the SQL Server Username and Password, ensure that the server security is configured to support Mixed Mode Security as described in the *Deltek Microsoft SQL Server 2005 Administrator's Guide*.
- **SQL Password** — Enter the password associated with this SQL Username.
- **Windows Integrated** – Selecting this option means that if you are logged onto the server with the appropriate administrative rights, you can be authenticated to your SQL server via your Windows account. Your current Windows account must also be a member of the sysadmin role in the Microsoft SQL Server to perform the installation. If you are using integrated authentication, ensure that your current logged in account is a member of the sysadmin role in SQL Server. SQL Server 2008 installed on Windows Server 2008 and Vista operating systems do not add members of the local administrator's group to the SQL Server Sysadmin role by default.
- **ReportServer Database** — Enter the name of your ReportServer Database. Typically, the default name for this database is **ReportServer**.
- **ReportServerTempDB Database** — Enter the name of your ReportServerTempDB Database. Typically, the default name for this database is **ReportServerTempDB**.

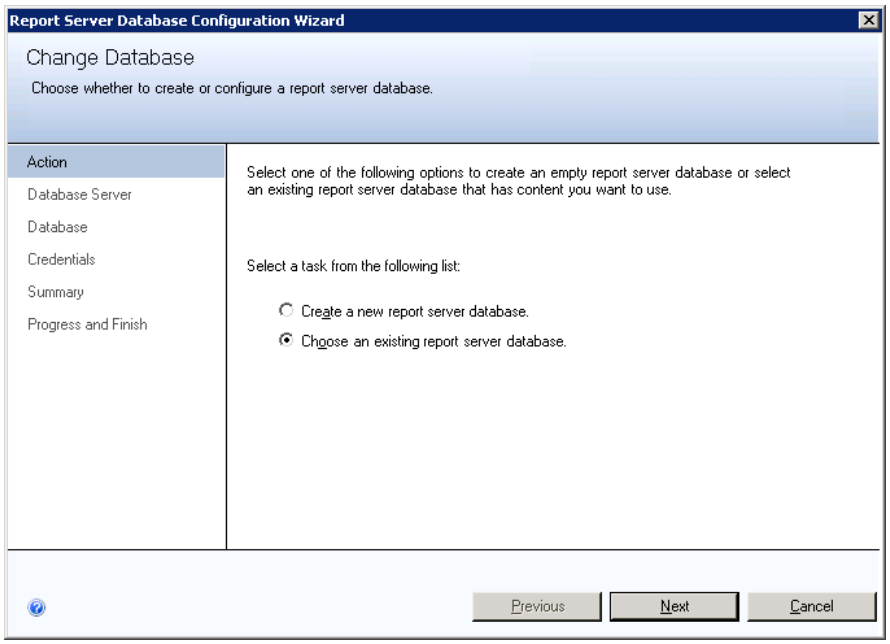
  If you did not choose the default names or you are unable to recall the name of your ReportServer databases, follow the steps below to identify them.

To identify the names of the ReportServer and ReportServer TempDB databases that are required for setup to detect Reporting Services for SQL Server 2008, complete the following steps:

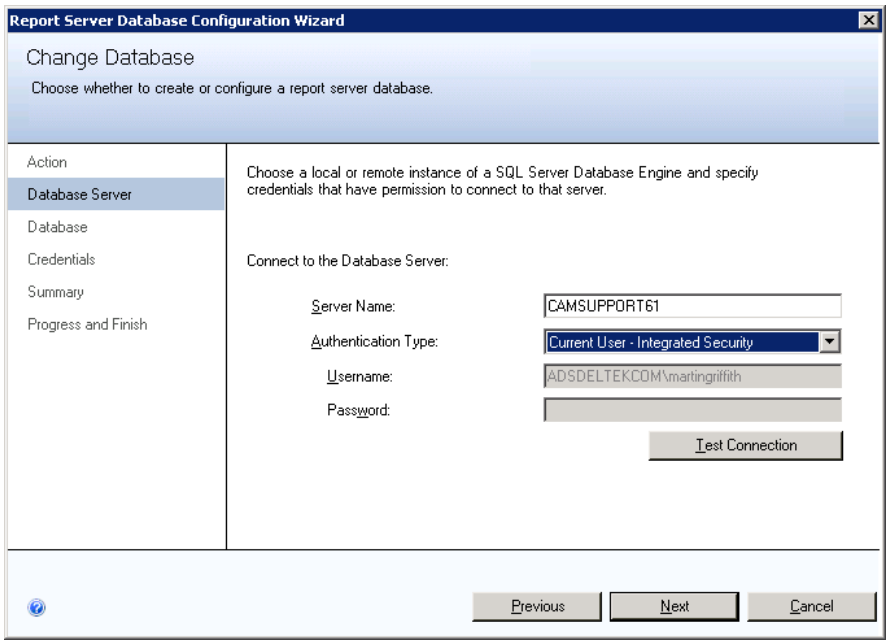
1. Click **Start » All Programs » Microsoft SQL Server 2008 » Configuration Tools » Reporting Services Configuration Manager**.
2. Select the **Database** icon on the left menu pane.



3. Click the **Change Database** button on the right. The Change Database page displays.

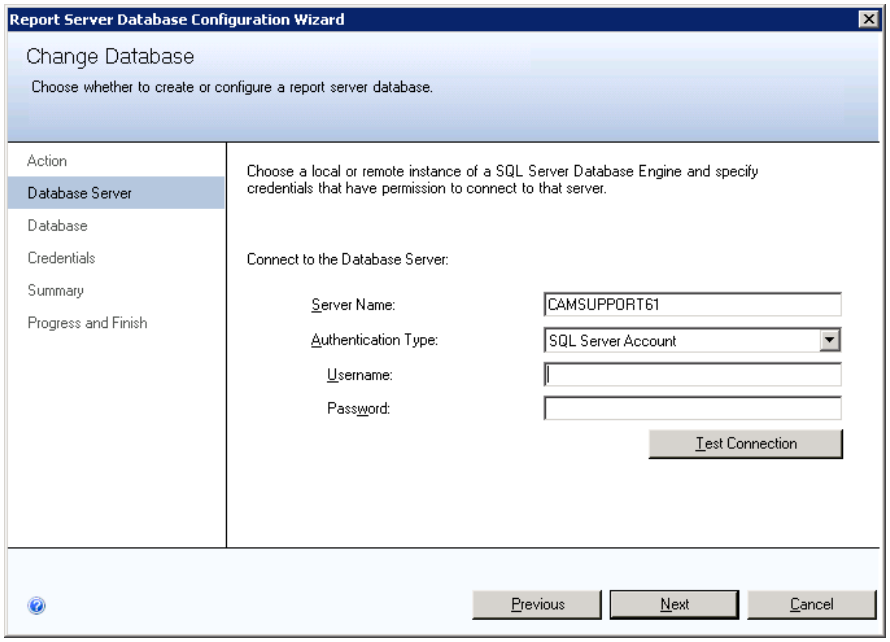


4. Select the **Choose an existing report server database** option and click **Next**. The Change Database/Database Server page displays.



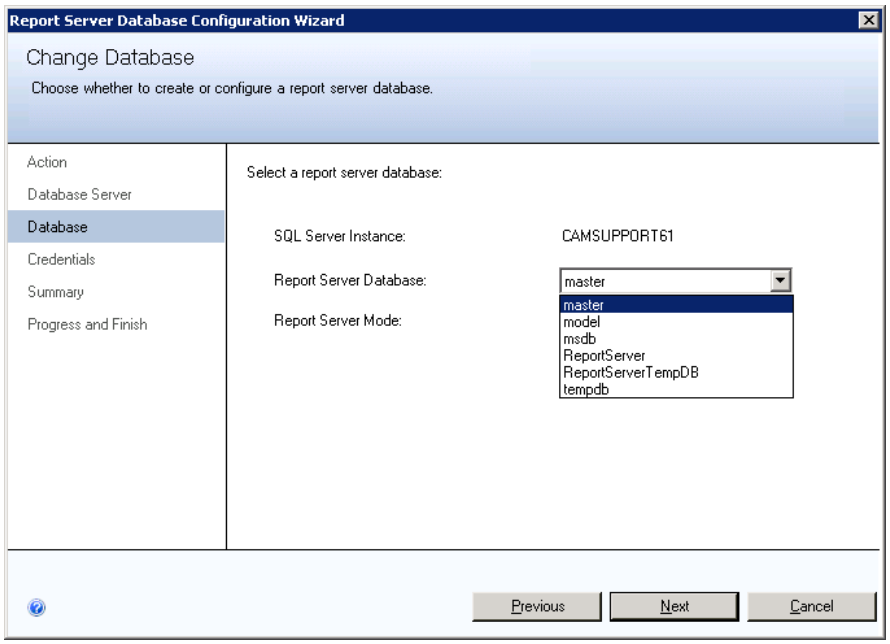
5. If you are logged in as an Administrator, accept the defaults to connect using Integrated Authentication. Continue to step 6.

   If you are not logged in as an Administrator, select **SQL Server Account** from the **Authentication Type** drop-down list. Enter the System Administrator (SA) credentials in the **Username** and **Password** fields.



6. Click **Next**.

7. Use the **Report Server Database** drop-down list to view the names of **the ReportServer** and **ReportServerTempDB** databases.

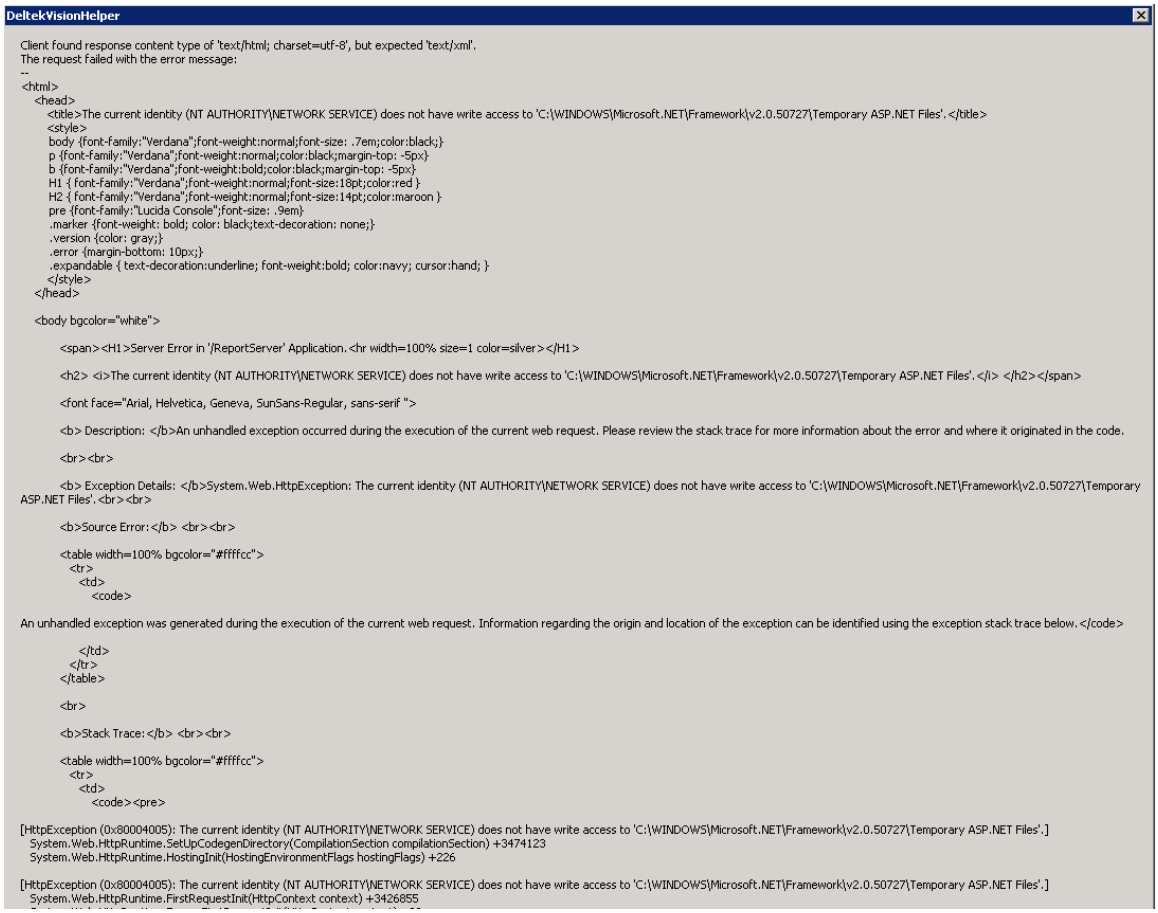


8. Note the name of the ReportServer and ReportServerTempDB databases.
9. Click **Cancel**.
10. Use the name of the ReportServer and ReportServerTempDB databases to populate the **SQL Report Database Server Setup Connection** form that the installation process displays if it cannot identify your Report Server databases. See the procedure on page 128 for additional information.

Error Connecting to Reporting Services

Problem

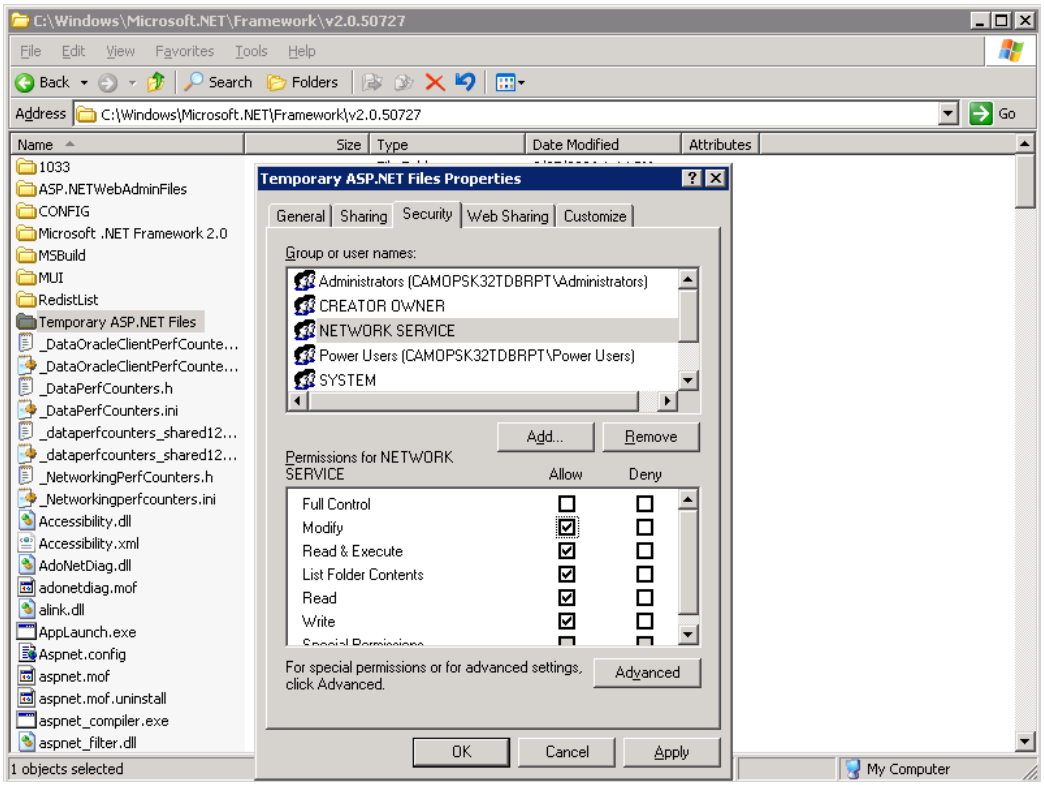
When connecting to the Reporting Services URL, the page below displays the following error message: “The current identity {NT AUTHORITY\NETWORK SERVICE} does not have write access to "C:\Windows\Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files"



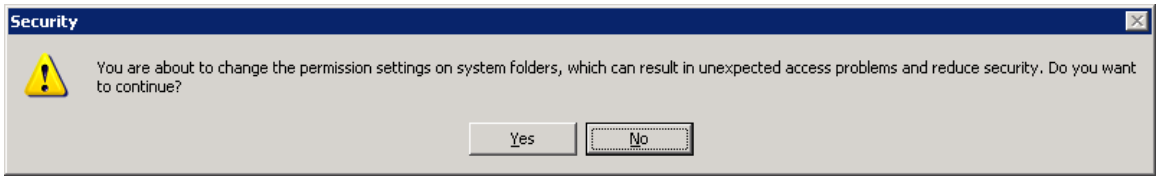
Solution

To fix the connection, complete the following steps:

1. Browse to the C:\Windows\Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files folder and give the Network Service account write rights to it:



2. On the Warning message dialog box, click **Yes** to continue.



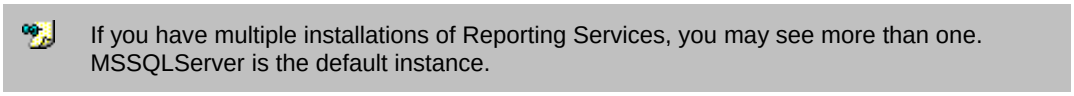
3. Retry the connection to Reporting Services.

Appendix D: Microsoft SQL Server 2008 Reporting Services Configuration Steps

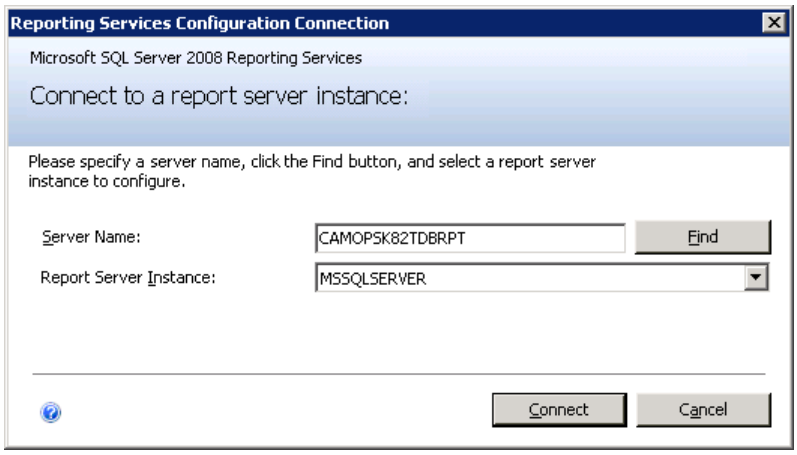
These steps can be used to configure your SQL Server Reporting Services Initial Setup. This only needs to be done for Vision to verify SQL Server Reporting Services. However, Vision will use the accounts specified in the Report Server tab of Weblink to make connections to Reporting Services.

To configure your initial setup, complete the following steps:

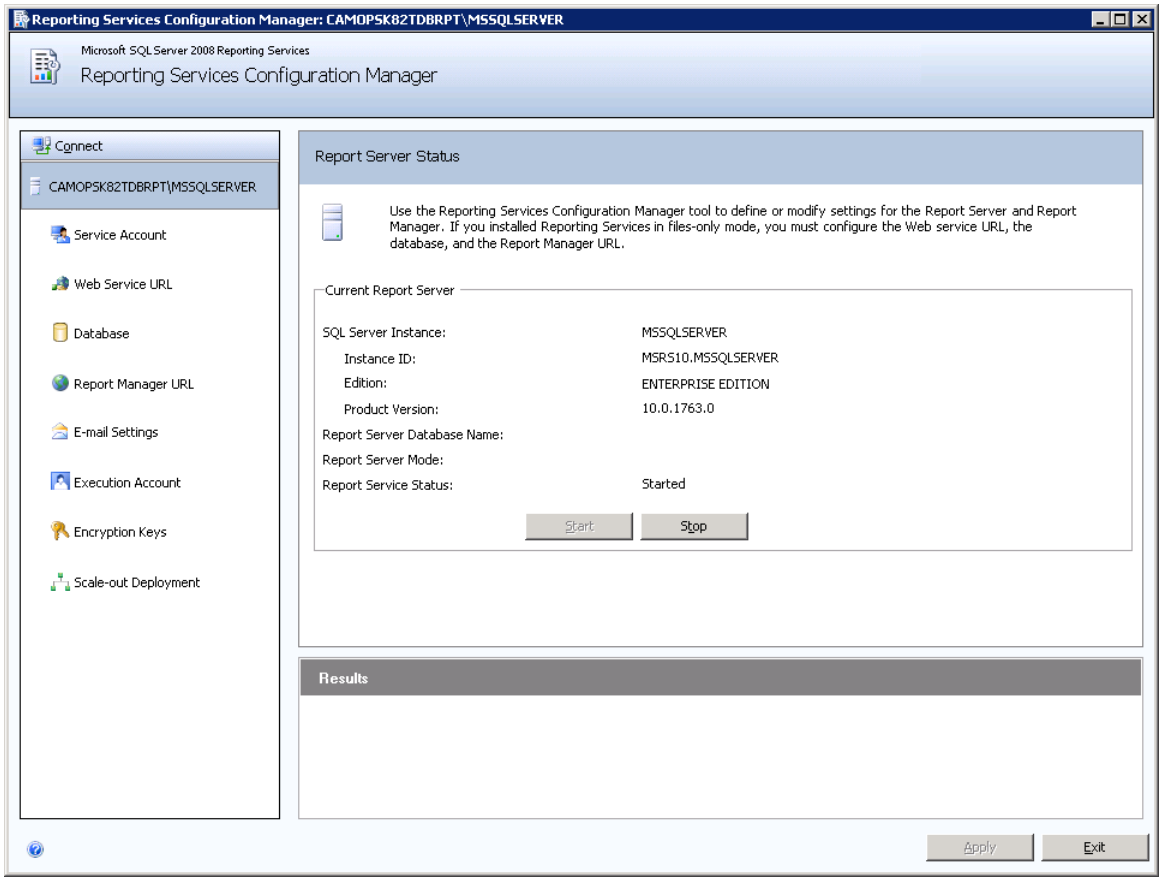
1. Click **Start » All Programs » Microsoft SQL Server 2008 » Configuration Tools » Reporting Services Configuration Manager** to launch the Reporting Services Configuration Wizard.
2. On the Reporting Services Configuration Connection screen, select your SQL Reporting Services Instance Name and click **Connect**.



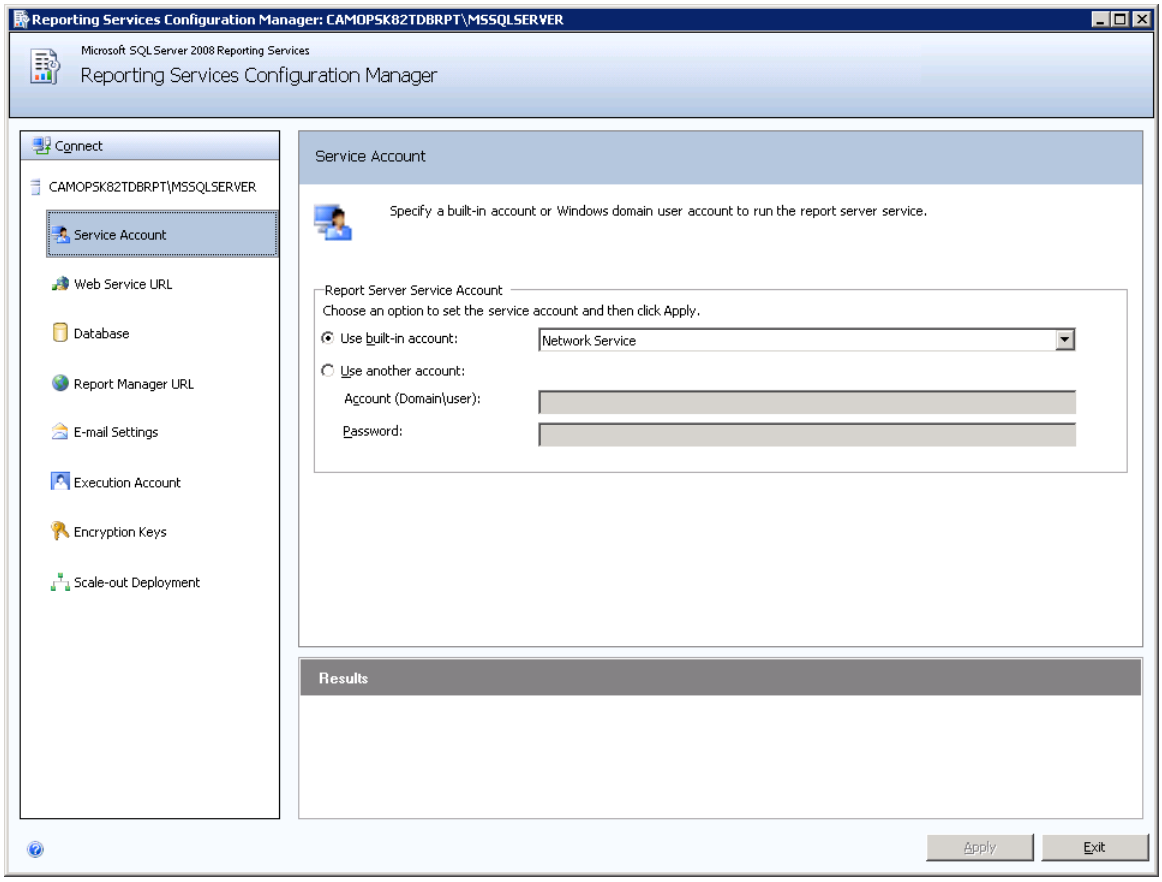
If you have multiple installations of Reporting Services, you may see more than one. MSSQLServer is the default instance.



3. At the Report Server Status Screen, start your Instance if it is not started. If it is already running, click **Service Account** on the left.



The Service Account screen displays.



4. Choose the appropriate account and click **Apply**. Microsoft recommends using Network Service Account. For additional information on choosing a service account, see the "Service Account (Reporting Services Configuration)" topic in SQL Server 2008 Books Online.

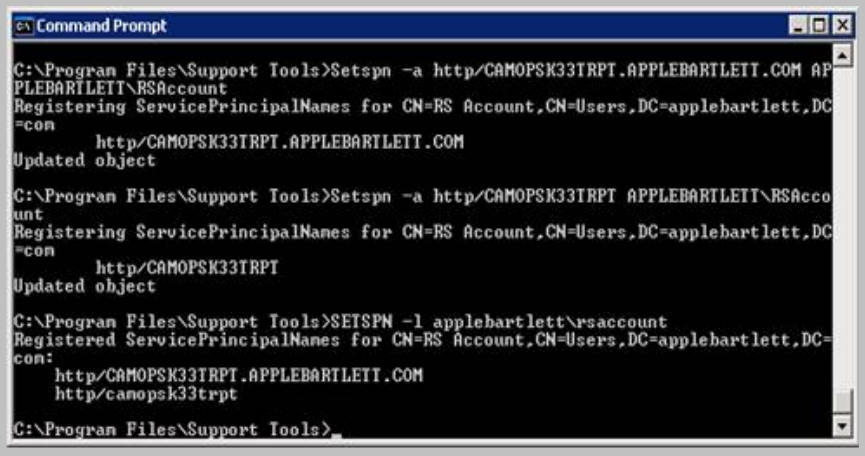
If you have configured the Report Server Service Account to be a domain account, Reporting Services will use Kerberos Authentication by default. To prevent HTTP 401 errors when installing Vision Web Tier, testing Vision Weblink connections to Reporting Services or loading reports in Vision, you must ensure that you perform one of the following:

- Created an SPN for the account
- Turn off Kerberos authentication in the rsreportserver.cofing file on the report server

Complete one of the following steps:

1. To configure an SPN, logon to a domain controller as a domain administrator and complete the steps in this Microsoft link: http://msdn.microsoft.com/en-us/library/cc281382.aspx (NOTE: Do not specify a port in the command syntax as suggested from the Microsoft link)

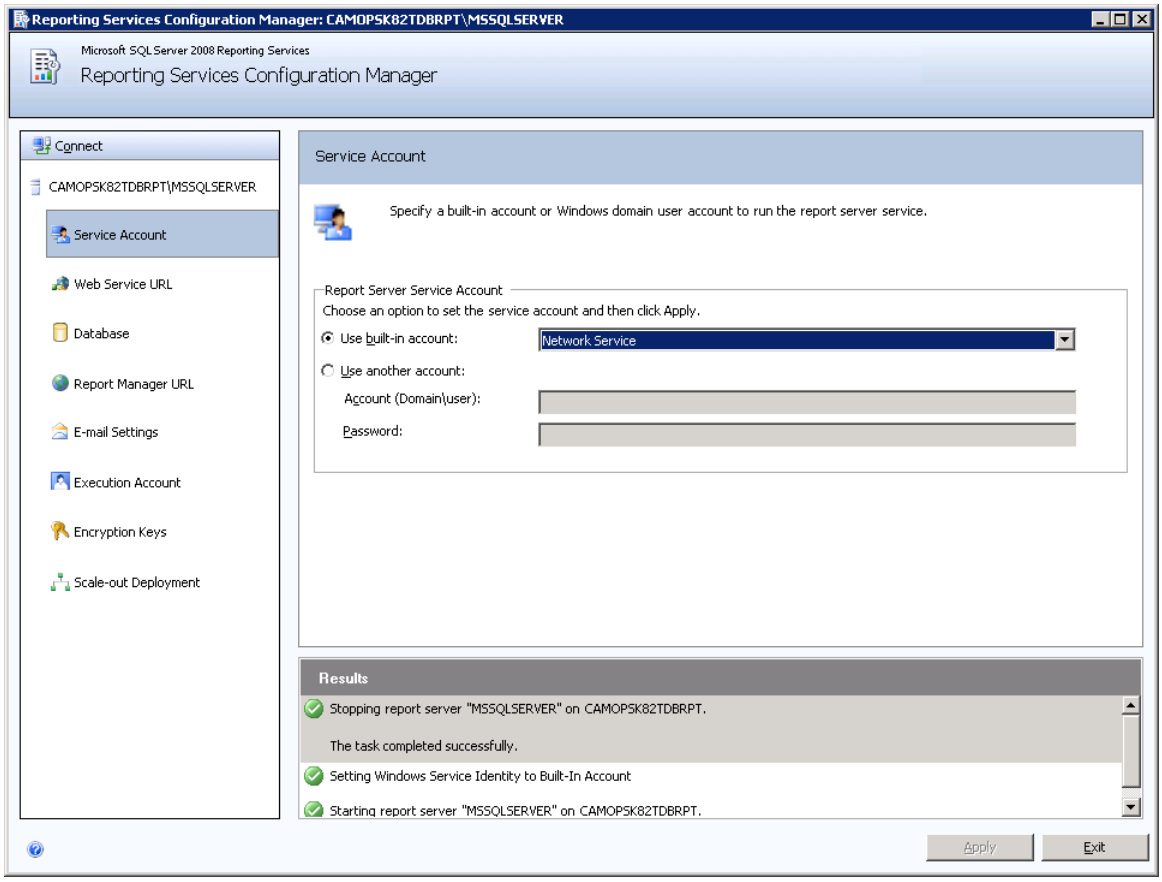
   The screenshot below is an example of the syntax used to **a**dd an SPN (setspn -**a**) for the Report Server's NETBIOS and FQDN names with a Domain account as well as the syntax to show a **l**ist (setspn -**l**) of the registered SPNs for the domain account. In the screenshot example below,the domain=applebartlett.com, report server name=CAMOPSK33TRPT and the account name=RSAccount.



2. Alternatively, instead of setting an SPN, you can configure the RSReportServer.config file with the following XML structure that specifies NTLM only. This is for deployments that do not support Kerberos or to work around Kerberos authentication errors (HTTP 401 errors). By default this file is located in the Reporting Services Installation folder in a "\Reporting Services\ReportServer" subdirectory :

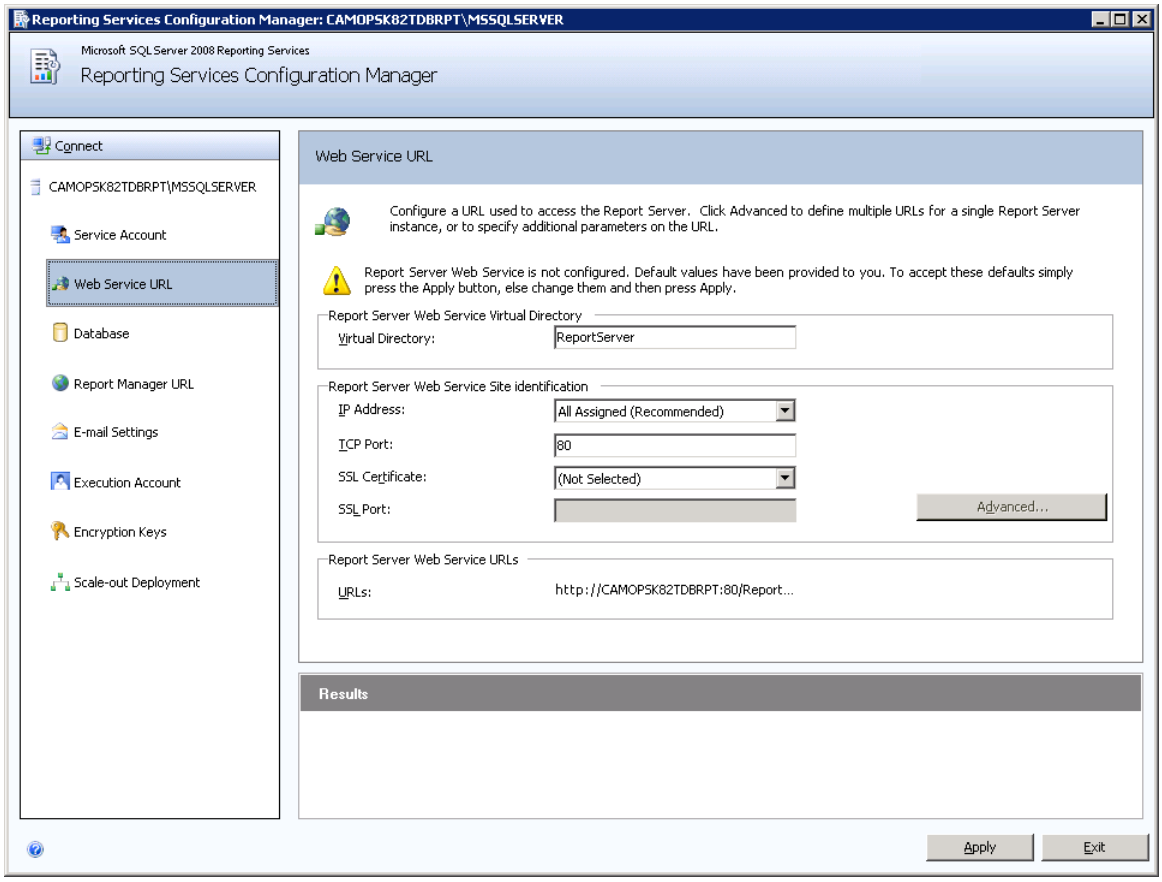
```
<AuthenticationTypes>

    <RSWindowsNTLM />

</AuthenticationTypes>
```

Details related to Kerberos related authentication issues and additional steps on editing the RSReportServer.config file can be found in the following Microsoft Reporting Services documentation:
http://msdn.microsoft.com/en-us/library/cc281253.aspx



The Service Account Screen displays again with the results listed below.

5. Click **Web Service URL** on the left.

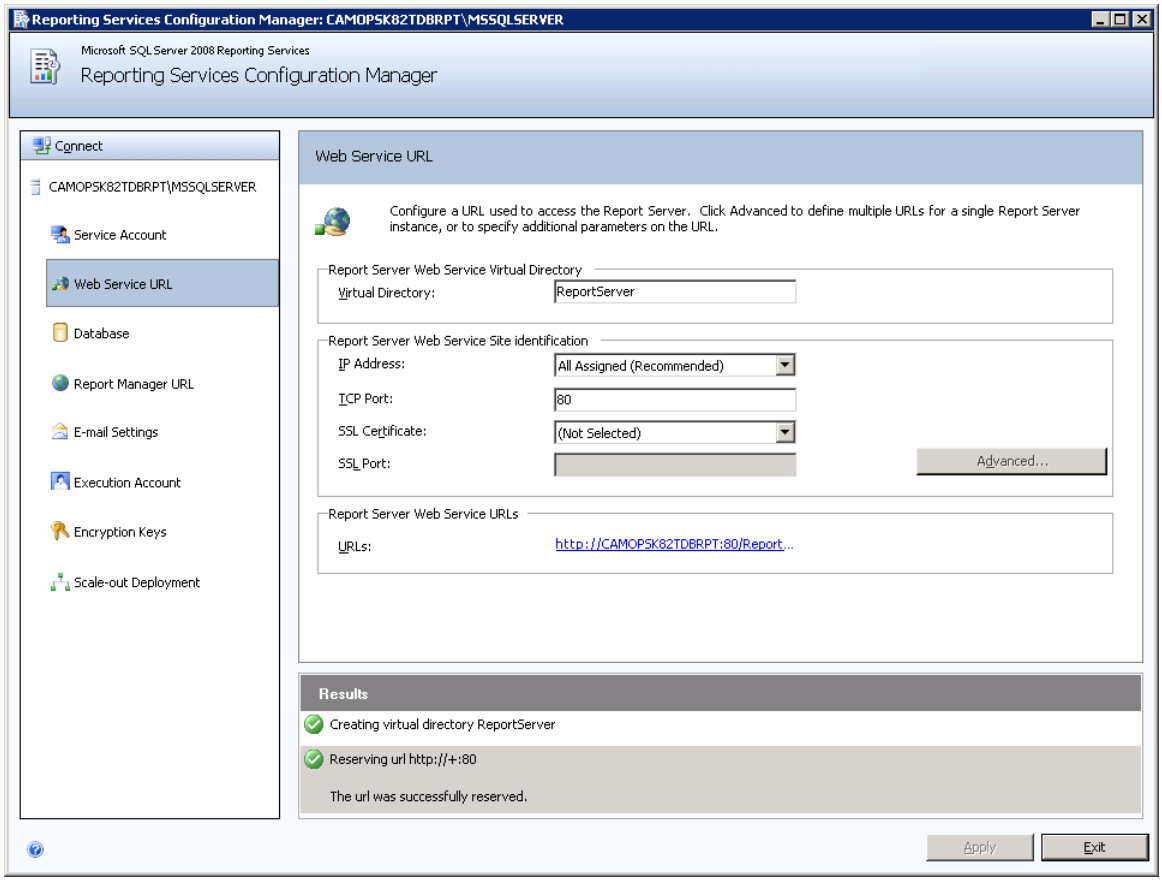


The Web Service URL screen displays.

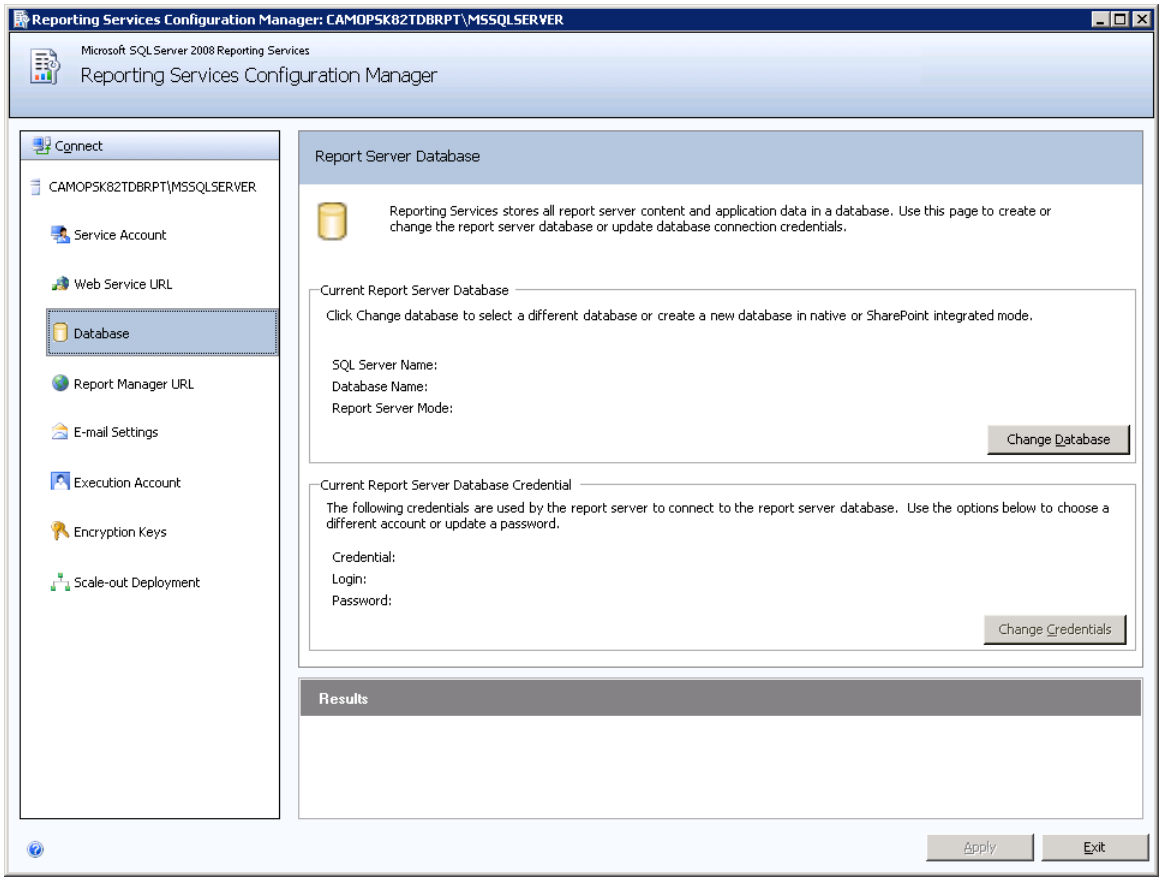
6. Accept the defaults. The default for **Virtual Directory** is **ReportServer**. If you installed Report Server as an instance, the virtual directory will usually start with ReportServer separated by a separation character such as an underscore or dollar sign and the instance name to differentiate itself.

> Vision uses the Report Server Web Service URL at the bottom of the screen as part of its test connection URL when it tries to connect to the Report Server.
>
> SQL Server 2008 Reporting Services does not require IIS to be enabled.

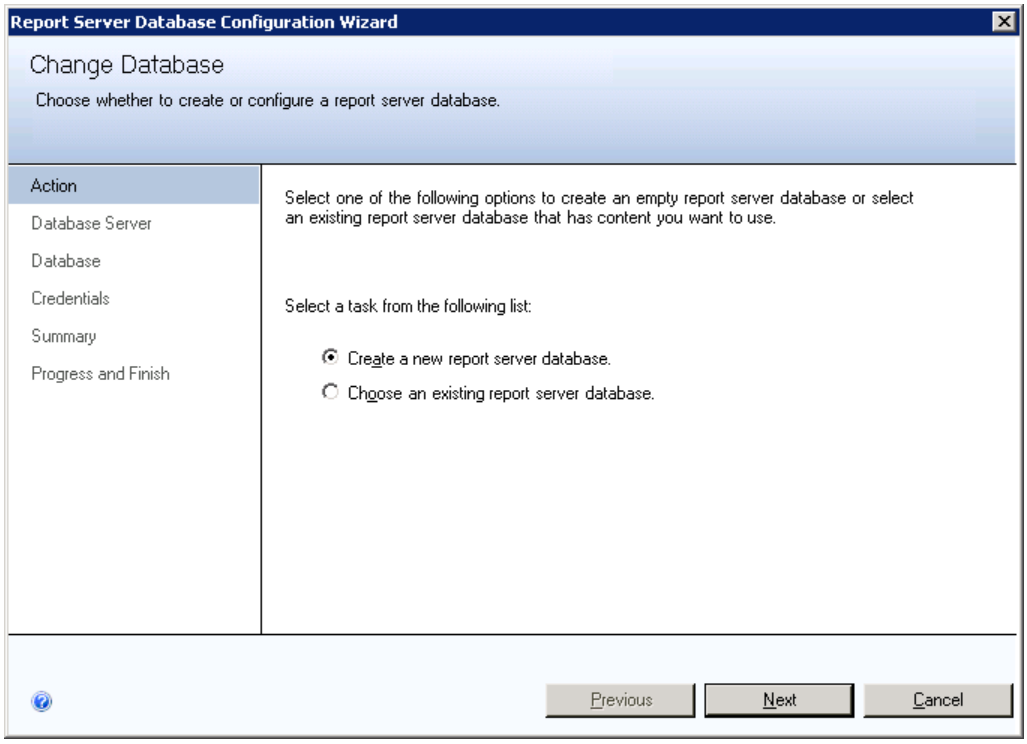
7. Note the Report Server Web Service URL listed in case Vision is unable to connect to the report server during the installation and prompts for the correct path in order to continue. Click **Apply** to accept your settings. If the settings are correct, the **Results** pane is populated with the status.



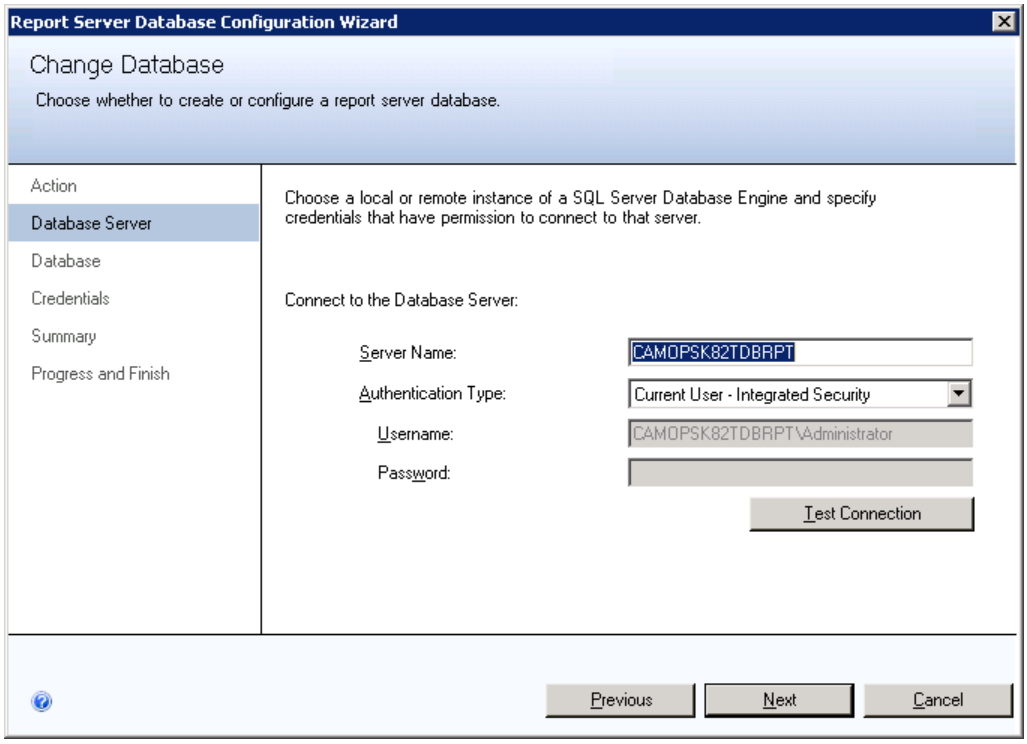
8. Click **Database** on the left. The Report Server Database screen displays.



9. Click **Change Database** and choose whether to create a new Report Server database or use an existing one. Because this is a new installation, choose the **Create a new report Server database** option and click **Next**.

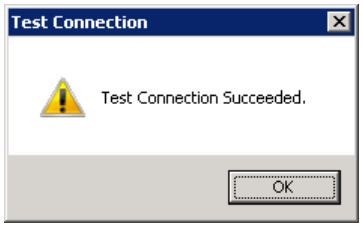


10. When the Connect to the Database Server screen displays, click **Next.**



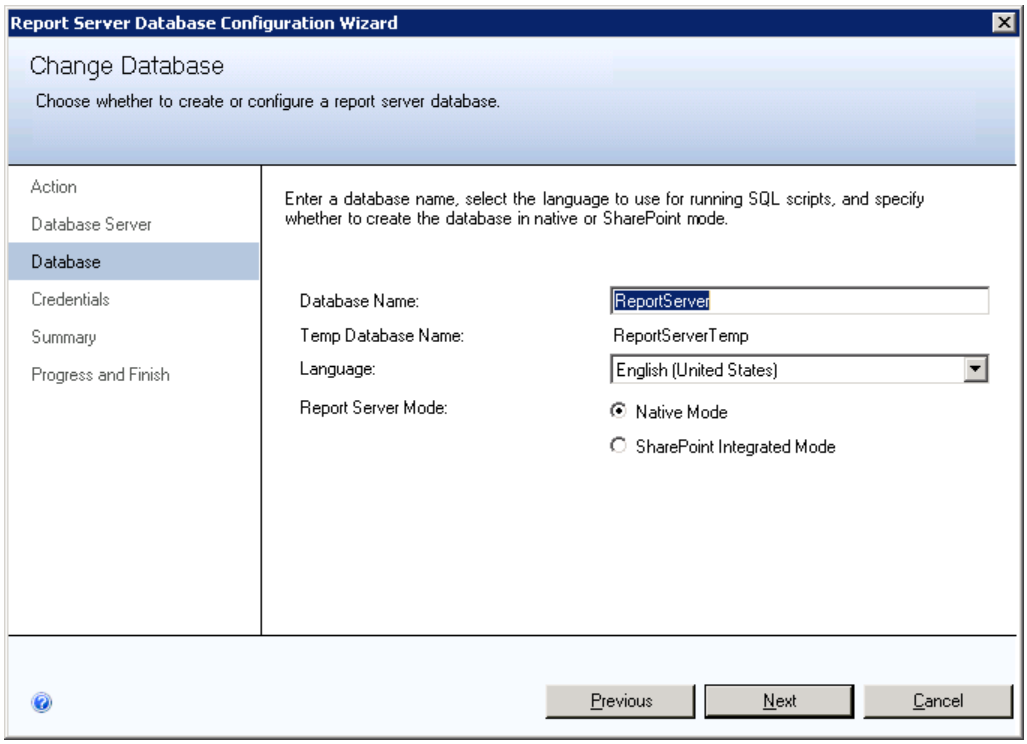
11. Enter your database **Server Name** and a user account that has the appropriate privilege to the SQL Server database in order to create/select the database and assign any required rights.

12. Click **Test Connection** to test your credentials on the server and make corrections as necessary if the server name or the user credentials are incorrect.



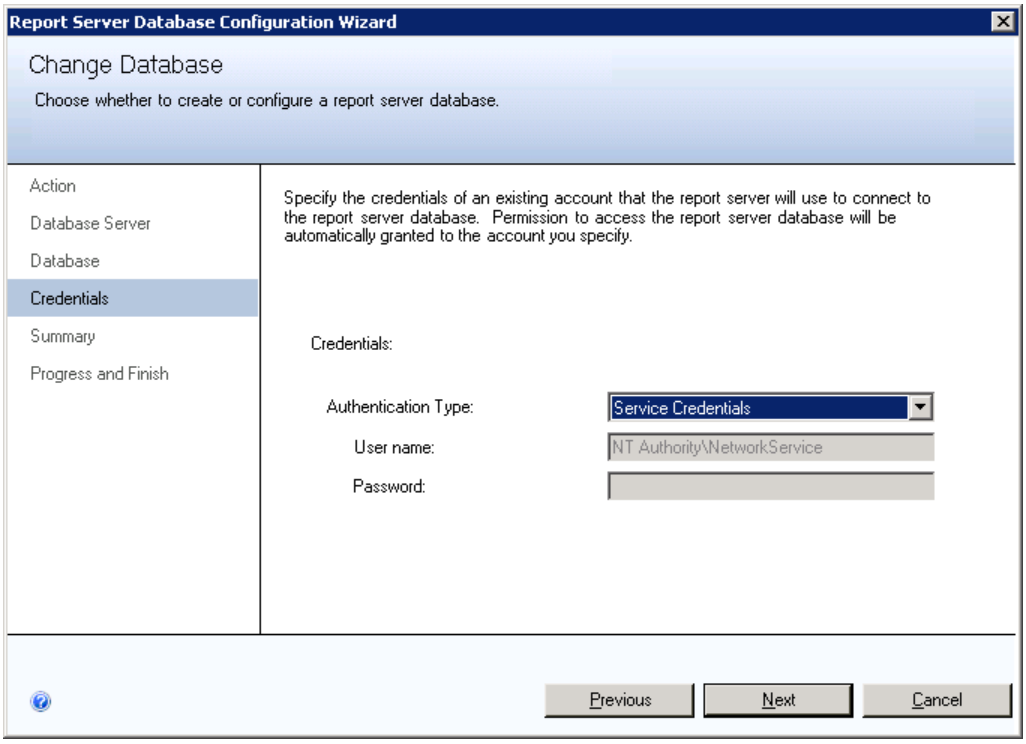
13. Click **OK** when you have connected successfully.

14. Click **Next** to display the Change Database screen.



15. Accept the defaults and click **Next** to continue.

> Only Native Mode is supported. Select **Native Mode** if it is not selected by default.



The Change Database Credentials screen displays.

16. Select the appropriate account for the Report Server to connect to the Report Server database. Click **Next** to connect.

IMPORTANT!

Important Information about Configuring Report Services

- If you will be using the server-side printing functionality of Deltek Vision, see Appendix E: Printing in Deltek Vision 6.x for instructions on where and how to configure the account.
- If you have configured the Report Server Service Account to be a domain account, Reporting Services will use Kerberos Authentication by default. You must ensure that you have created an SPN for the account. To configure an SPN, complete the steps in this Microsoft link: http://msdn.microsoft.com/en-us/library/cc281382.aspx
- Alternatively, you can configure the RSReportServer.config file with the following XML structure that specifies NTLM only. This is for deployments that do not support Kerberos or to work around Kerberos authentication errors (HTTP 401 errors) :

  <AuthenticationTypes>

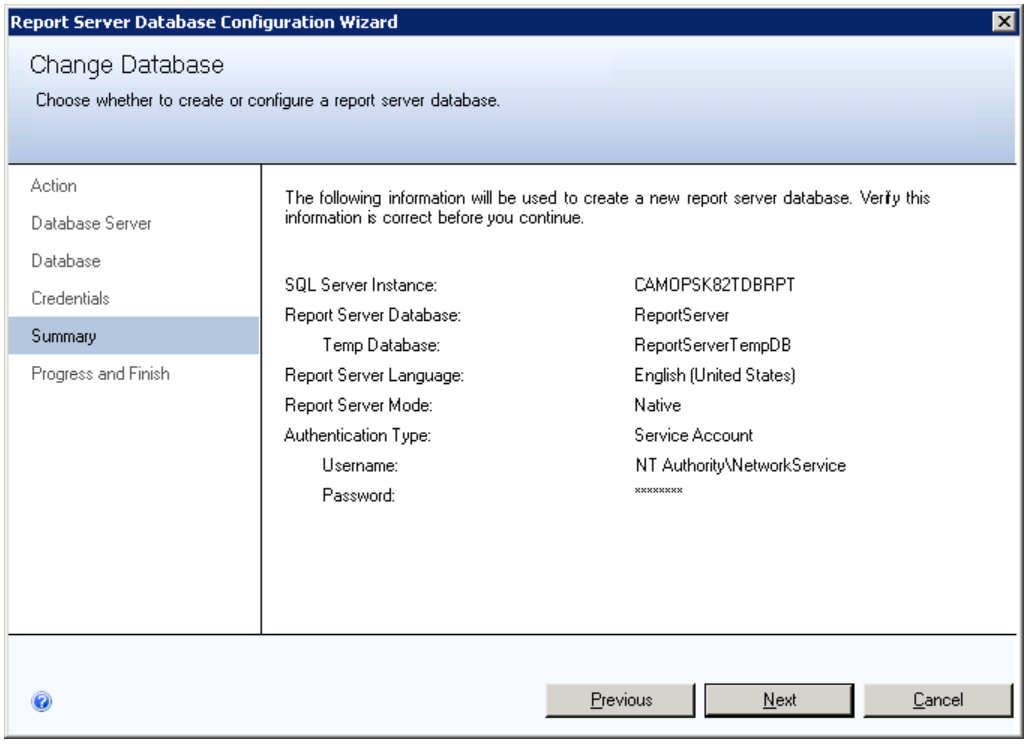
  <RSWindowsNTLM/>

  </AuthenticationTypes>

- Details related to Kerberos related authentication issues can be found in the following Microsoft Reporting Services documentation:

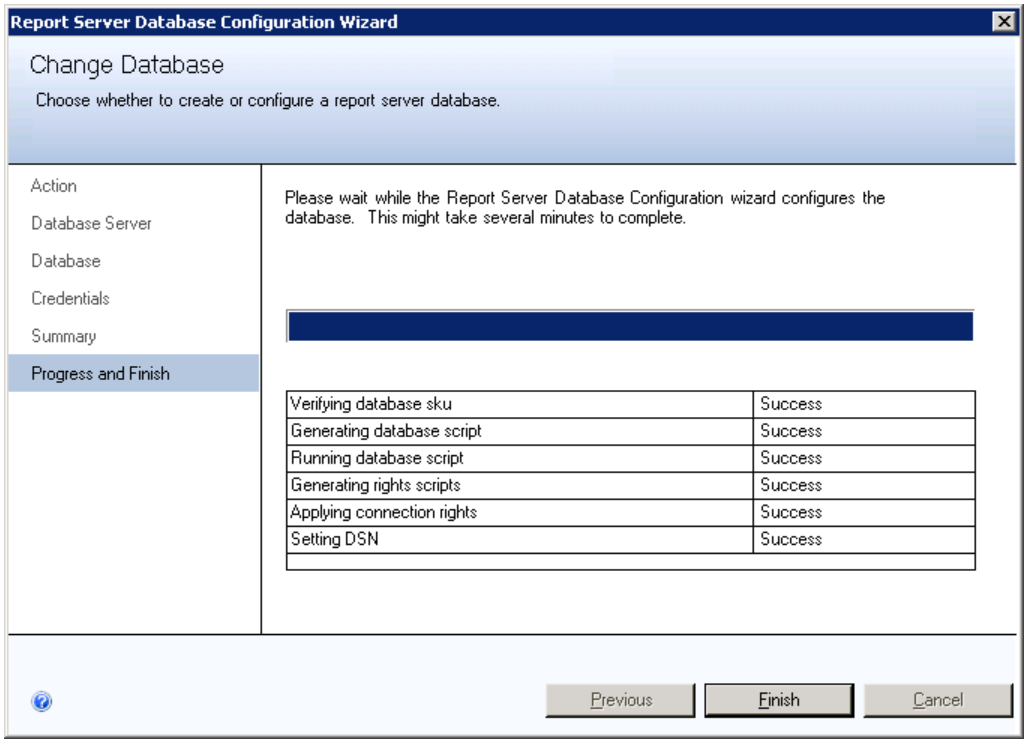
  http://msdn.microsoft.com/en-us/library/cc281253.aspx

17. Specify the type of credential and accounts you will use for Reporting Services connections to the database and click the **Apply** button in the lower right hand corner of the screen. The SQL Server Connection Dialog will appear. Specify a SQL Server and administrator login credential that will be used to give the accounts you specified the correct access to the database server. Click **OK** to continue.
18. Click **New**. The Create a New Virtual Directory Screen displays.
19. Click **OK**.



The Create Report Server Database Confirmation screen displays listing a summary of the changes.

20. Click **Next** to continue.

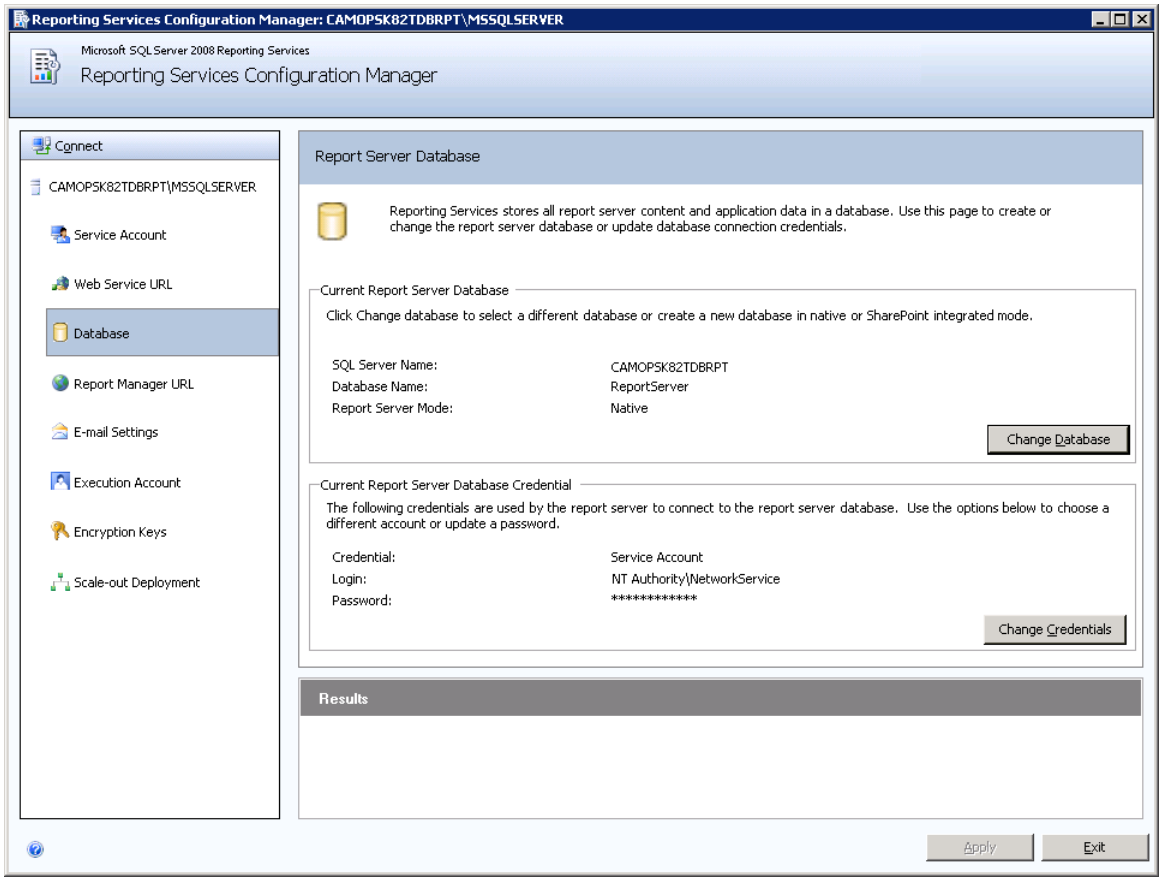


The Report Server Database Configuration Wizard displays the status of the steps taken to create the Report Server databases.

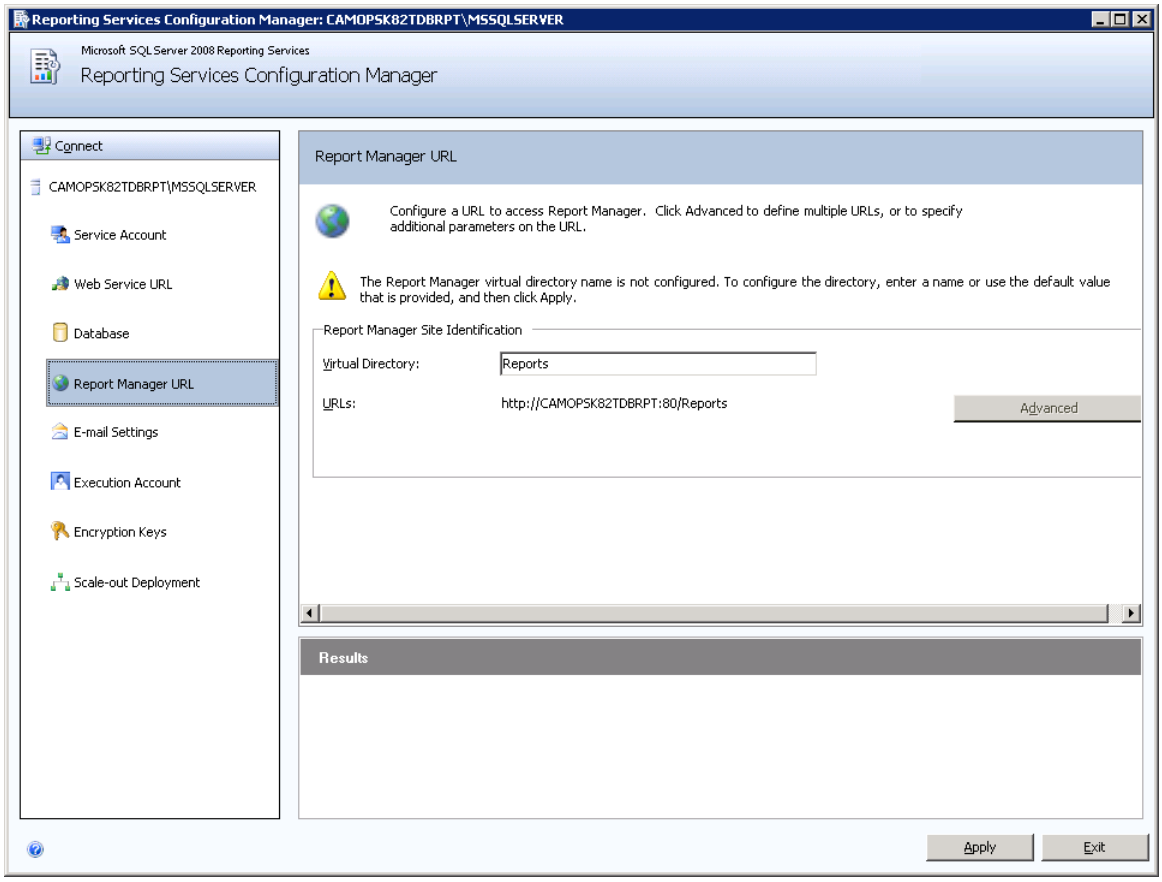
21. Click **Finish** to continue when all the selections are listed as a success.

    The Report Server Database Screen displays with the selections you made in the steps above.

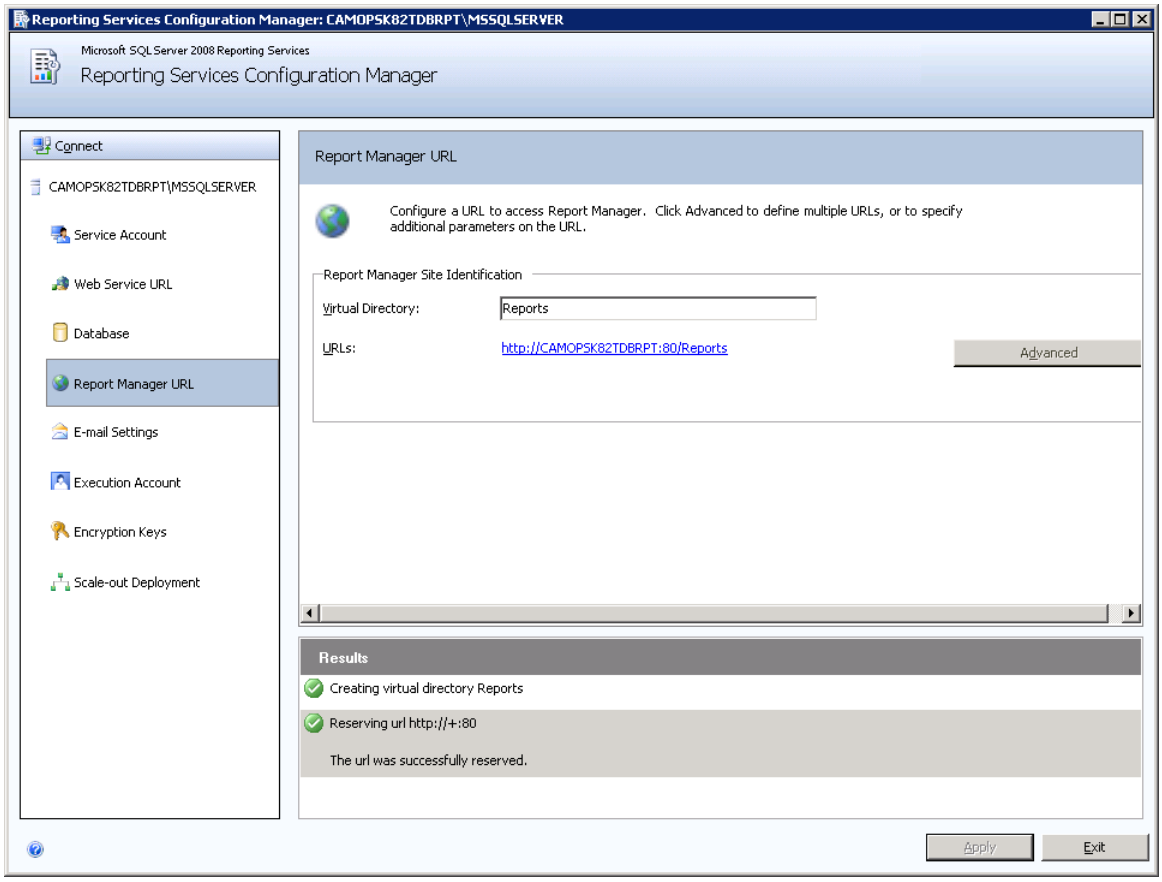
22. Click **Report Manager URL** on the left.



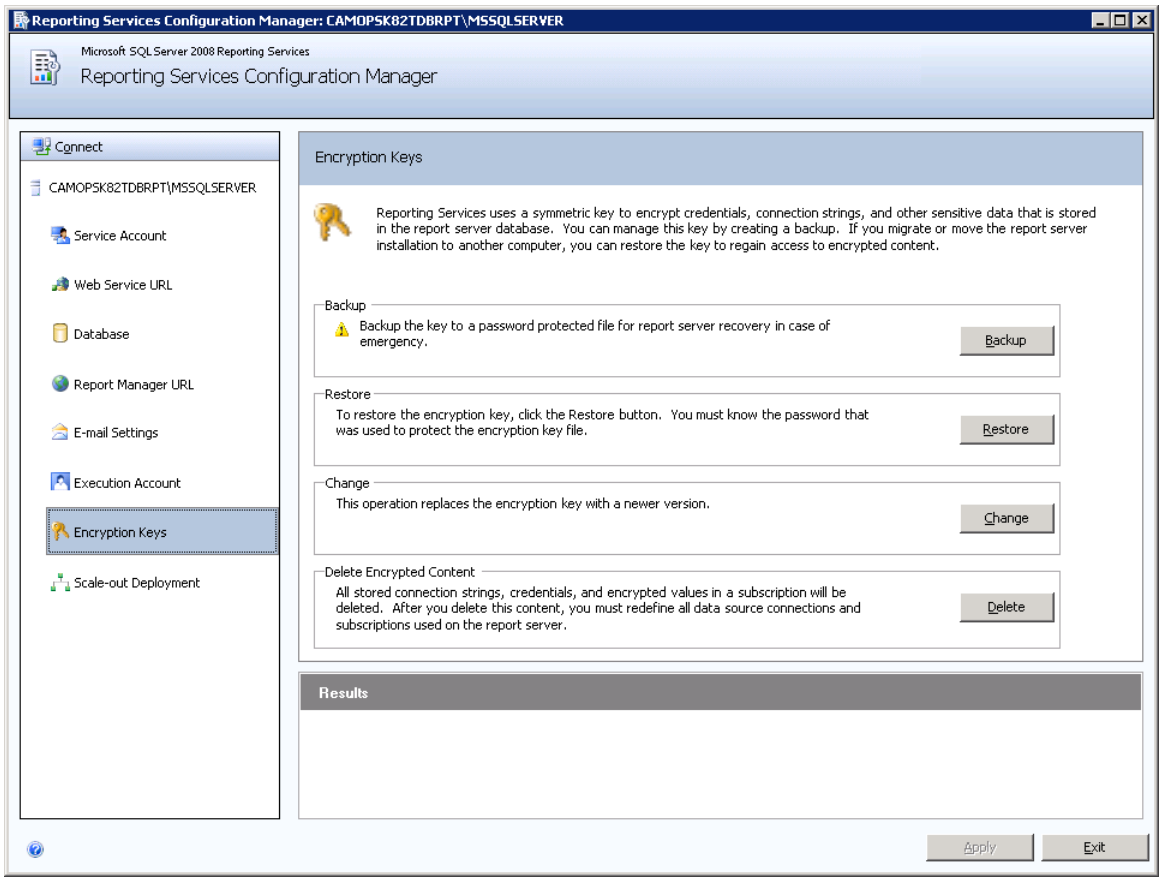
The Report Manager URL screen displays.



23. Accept the defaults and click **Apply**.
24. The Results are displayed in the Task Status Pane.



25. Click **Encryption Keys** and choose to back up the encryption keys to a safe location.



26. Click **Exit**. You are now ready to begin the Vision installation. Click **Exit** to close the Reporting Services Configuration Manager Tool.

Do not configure an Execution Account during the Report Server Configuration. Configuring this account causes the account specified in the Execution Account to be used instead of the credentials listed in Weblink. This may result in reporting errors within Vision.

Appendix E: Printing in Deltek Vision 6.x

Overview

In Deltek Vision 5.x and earlier, you could print using only the printers installed on the Report Server. Users who wanted to print to their local printers had to first print preview a report, save the report as a PDF file, and then while viewing the PDF version of the report in their PDF viewer, they could print to their local printer.

Deltek Vision 6.x provides the ability to:

- Print directly to users' local printers.
- Send a printout or batch to printers that are installed directly on the Web Server. This is primarily used for batch job printing using the process server for transactions such as Batch Billing.

Printing to Local Printers on End-User Workstations

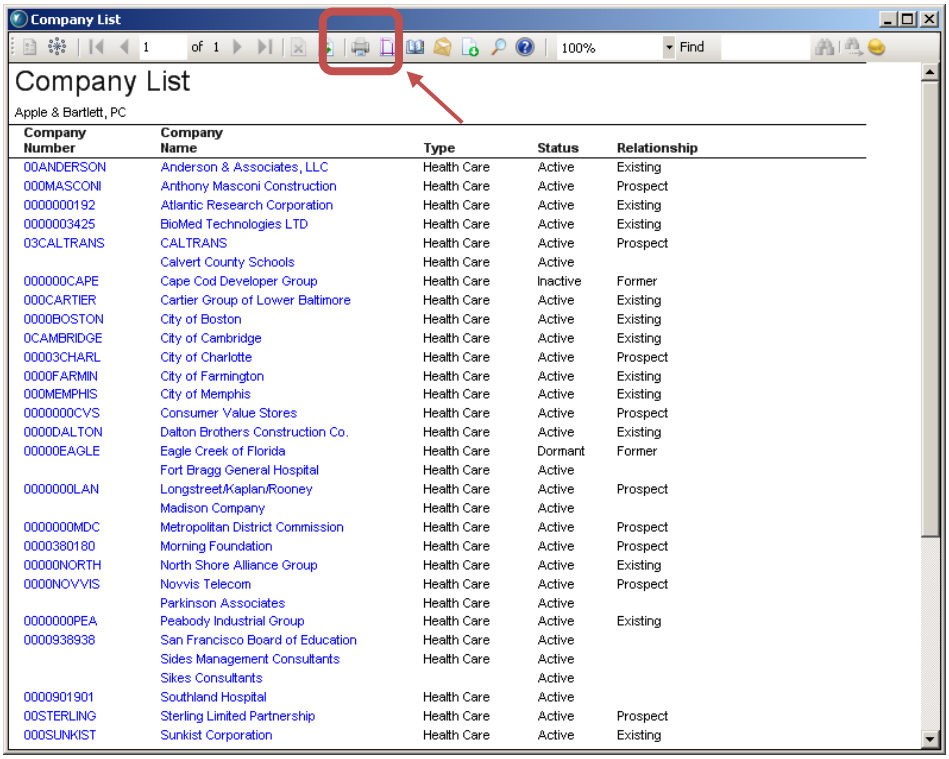
Deltek Vision 6.1 uses the Microsoft SQL Reporting Services WinForm report viewer control to render reports and allow users to preview a report. From the preview window, a print job is sent directly to a user's local printer without the requirement of saving to a PDF file first. In the preview window, viewers still have the option to download to PDF and other file types.

The Microsoft SQL Reporting Services WinForm report viewer control requires a direct connection to the server running the SQL Reporting Services web service (http://<server>/reportserver) over Port 80. This means that your report server (and possibly your database server if they are installed on the same machine) are directly exposed to the Internet. It also requires an external FQDN so that the report server can be resolved by the external users.

A reverse proxy that uses Microsoft's Application Request Routing (ARR) extension for IIS 7.0 allows the direct forwarding of requests through the Vision web server to the reporting services web service with responses back to your Internet clients. This configuration resolves all of the issues identified in the previous paragraph but does require that the server hosting the Vision web/application server be running Windows Server 2008 with IIS 7.0. See the *Deltek Vision® 6.0 Creating a Reverse Proxy for SQL Reporting Services Using IIS 7.0 Application Request Routing (ARR)* documentation for configuration steps.

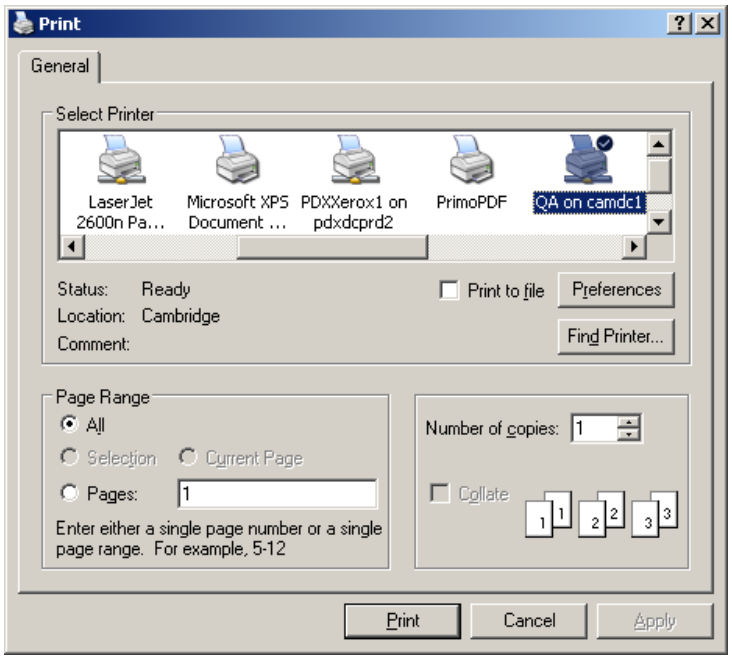
To print to a local printer, complete the following steps:

1. In Vision, preview a report.
2. Click the Printer icon in the preview window to display a list of printers that are installed on the local workstation.



Company Number	Company Name	Type	Status	Relationship
00ANDERSON	Anderson & Associates, LLC	Health Care	Active	Existing
000MASCONI	Anthony Masconi Construction	Health Care	Active	Prospect
0000000192	Atlantic Research Corporation	Health Care	Active	Existing
0000003425	BioMed Technologies LTD	Health Care	Active	Existing
03CALTRANS	CALTRANS	Health Care	Active	Prospect
	Calvert County Schools	Health Care	Active	
000000CAPE	Cape Cod Developer Group	Health Care	Inactive	Former
000CARTIER	Cartier Group of Lower Baltimore	Health Care	Active	Existing
0000BOSTON	City of Boston	Health Care	Active	Existing
0CAMBRIDGE	City of Cambridge	Health Care	Active	Existing
00003CHARL	City of Charlotte	Health Care	Active	Prospect
0000FARMIN	City of Farmington	Health Care	Active	Existing
000MEMPHIS	City of Memphis	Health Care	Active	Existing
0000000CVS	Consumer Value Stores	Health Care	Active	Prospect
0000DALTON	Dalton Brothers Construction Co.	Health Care	Active	Existing
00000EAGLE	Eagle Creek of Florida	Health Care	Dormant	Former
	Fort Bragg General Hospital	Health Care	Active	
0000000LAN	Longstreet/Kaplan/Rooney	Health Care	Active	Prospect
	Madison Company	Health Care	Active	
0000000MDC	Metropolitan District Commission	Health Care	Active	Prospect
0000380180	Morning Foundation	Health Care	Active	Prospect
00000NORTH	North Shore Alliance Group	Health Care	Active	Existing
0000NOVVIS	Novvis Telecom	Health Care	Active	Prospect
	Parkinson Associates	Health Care	Active	
0000000PEA	Peabody Industrial Group	Health Care	Active	Existing
0000938938	San Francisco Board of Education	Health Care	Active	
	Sides Management Consultants	Health Care	Active	
	Sikes Consultants		Active	
0000901901	Southland Hospital	Health Care	Active	
00STERLING	Sterling Limited Partnership	Health Care	Active	Prospect
000SUNKIST	Sunkist Corporation	Health Care	Active	Existing

3. Select the local printer, and click the **Print** button to send the printout to the local printer.

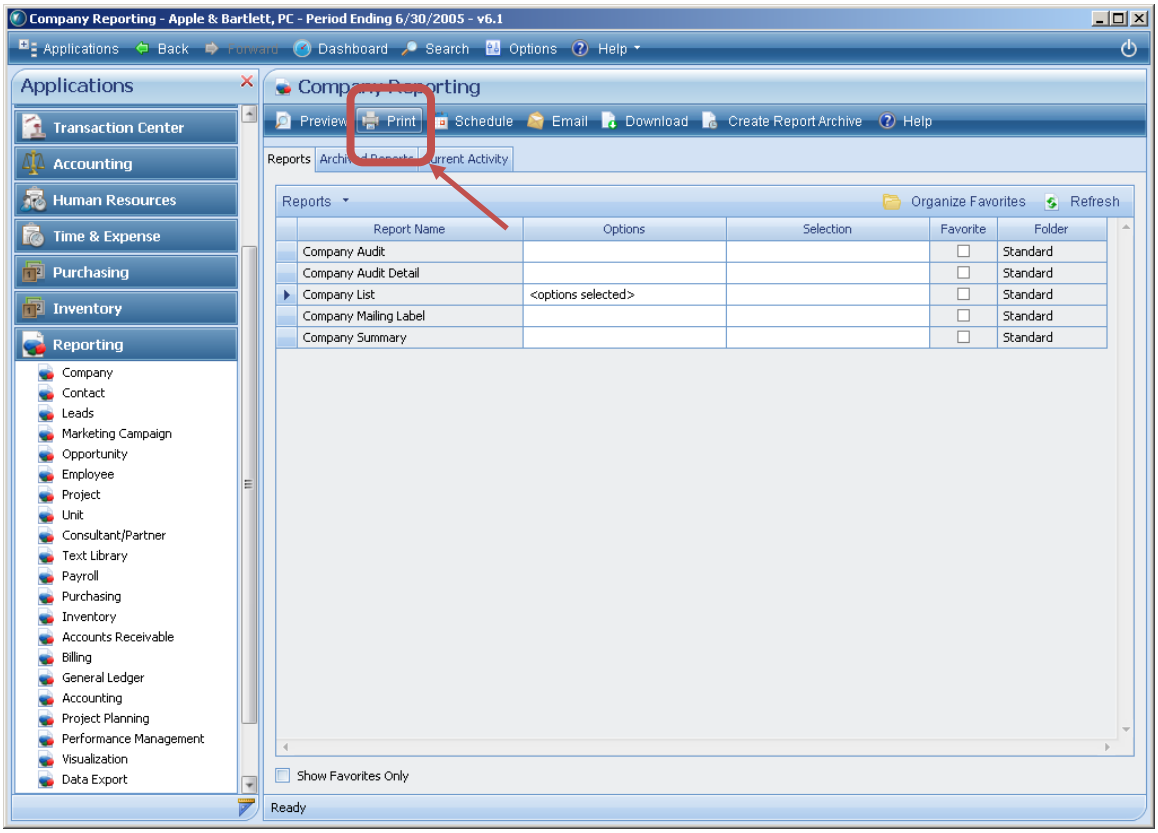


Printing to Network Printers installed on the Web Server

In Vision 6.1, you print to network printers installed on the network server, the same as you did in previous versions of Vision. The only change is that the printers are now installed on the Web Server instead of on the Report Server. Steps for installing printers on the Web Server are in the next section titled *Installing Network Printers on the Deltek Vision Web Server*.

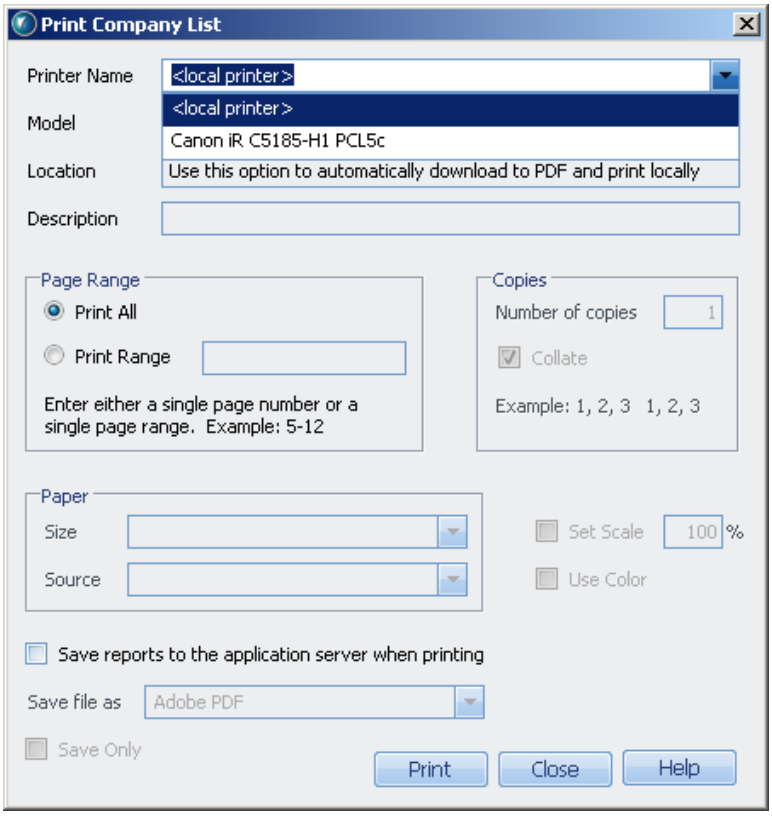
To print to a network printer installed on the Vision Web Server, complete the following steps:

1. In Vision, select a report, and click the **Print** icon on the toolbar.



2. From the drop-down list, select the network printer. If only <Local Printer> is listed, the system administrator has not yet installed printers on the server. The steps for installing network printers on the Vision Web Server are in Appendix F: How to Pre-Deploy Deltek Vision Smart Client to User Workstations.

3. Click the **Print** button to send the job to the printer.



Installing Network Printers on the Deltek Vision Web Server

Overview

The Deltek Vision Weblink application allows you to configure the account that connects Vision to the SQL Server Reporting Services. Vision uses this account to run reports, view report activity and perform server-side printing, such as when batch printing, is required. It is possible to have two accounts that work with SQL Server Reporting Services, depending on your report server database access selection. If you select Windows Authentication, then you can only have one account. If you select SQL Authentication, then you can have two accounts (one for access to the printers and the URL, and the other account to access the database).

The following procedures address the requirements for establishing the necessary rights and privileges on the Web, Database, and Report Servers for batch printing. This is required if you change the Windows Username account specified in Weblink from the default local account “DeltekVision” created by the installation.

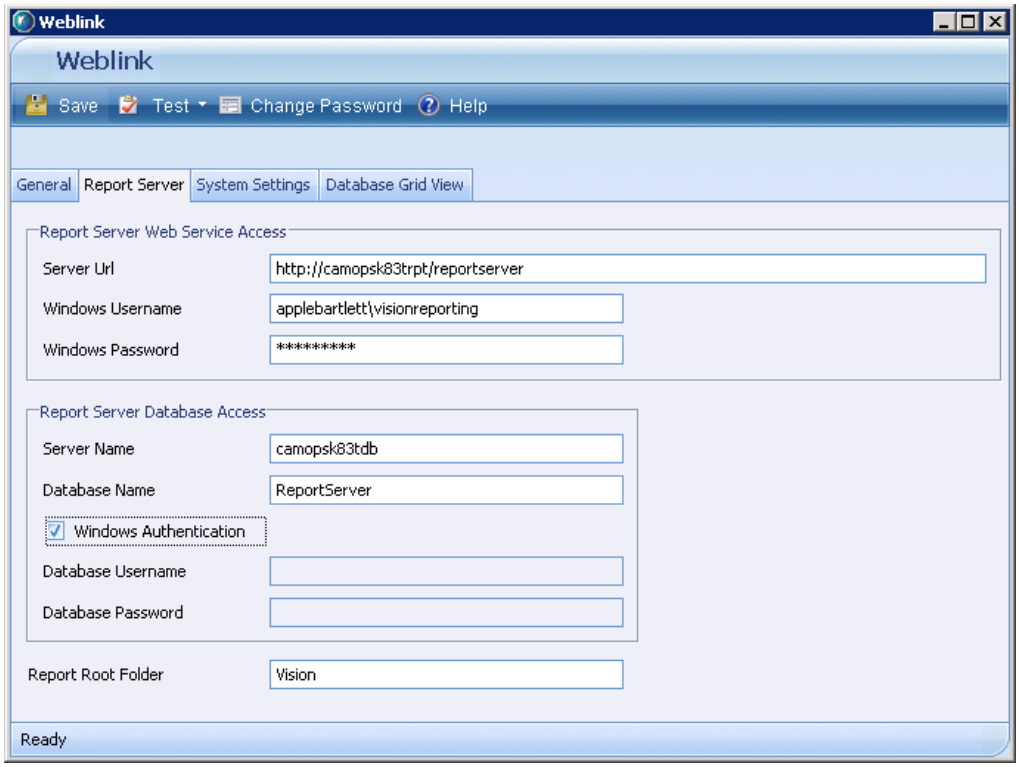
In the Weblink application, the Report Server tab is used to configure Vision for connecting to Microsoft SQL Server Reporting Services. The tab contains the following two sections:

- Report Server Web Service Access — The account entered in this section connects the SQL Server Reporting Services URLs for loading Vision reports into Reporting Services, checking Vision report versions, and running the Vision reports. See Report Server Web Service Access for more information.

- Report Server Database Access — The account entered in this section connects the database server hosting the Reporting Services Report Server Databases and the Vision database. It is also used for running reports and checking Vision reporting activity in Reporting Services. You can use the following two options:
    - Windows Authentication - Select this option for the account in the Report Server Web Service Access section to be used to connect to the database server.
    - Specify a SQL Server Username and Password – Remove the selection of the Windows Authentication option and specify the SQL Server Login you have created in SQL Server Management Studio into the Database Username field.

      Steps to configure the required rights for either option must be configured in the database server procedure below. See Report Server Database Access for more information.

To configure network printers for Vision batch jobs, launch Weblink and complete the following steps to assign the appropriate rights to the account being used in each section.



Report Server Web Service Access

To change the account listed from Deltek Vision to a domain account, complete the following steps:

1. Create a domain user account (not a domain administrator). If local or domain password policies may cause the password to expire, ensure that the password is updated in Weblink in a timely manner to avoid connection errors.
2. Complete these steps on the Web Server:

a. Log on to the Web Server and add the account to the Local Administrator Group. (This gives the account the privilege to install the print drivers.)

b. On the Web Server, click **Control Panel » Administrative Tools**, and launch the Local Security Policy applet.

c. Expand Local Policies and click **User Rights Assignment**.

d. Double-click the **Logon as a Service** option and add the account to the list. (This allows Vision to enumerate the list of printers.)

e. Log on to the Web Server as the account and install all the printers that are required.

3. Complete these steps on the Report Server:

   a. Log on to the Report Server and add the account to the local administrator's group. (This gives the account the required privileges for SQL Server Reporting Services.)

   a. If you are using SQL Server 2008 on Windows Server 2008 or Windows Vista, the account referenced in Weblink may not have the necessary privileges (even as a member of the local administrator's group). You must logon to the server as a local Administrator (preferably as the account you were logged in as when you installed SQL Server Reporting Services). You can copy and paste the following command lines into a command prompt (DOS) window to give the account the appropriate privileges to the Reporting Services Web Service. When you launch the command prompt, right-click and choose the **Run As Administrator** option.

We recommend that you copy each of the two commands into Notepad and turn off the word wrap feature. This allows each command that is pasted into the command prompt window to be executed as one contiguous line.

In the command line syntax below, make replacements as necessary for the path to the Deltek Vision Scripts folder, replace <SERVERNAME> with the name of your report server, and replace <DOMAIN\USERNAME> with the username you plan to use. Do not remove the double quotation marks.

"c:\Program Files\Microsoft SQL Server\100\Tools\Binn\rs.exe" -i "C:\Program Files\Deltek\Vision\Support\Scripts\DeltekAddItemSecurity.rss" -s http://<SERVERNAME>/reportserver -v userName="DOMAIN\USERNAME" -v roleName="System Administrator" -v itemPath="/" -v keepCurrentPolicy="True"

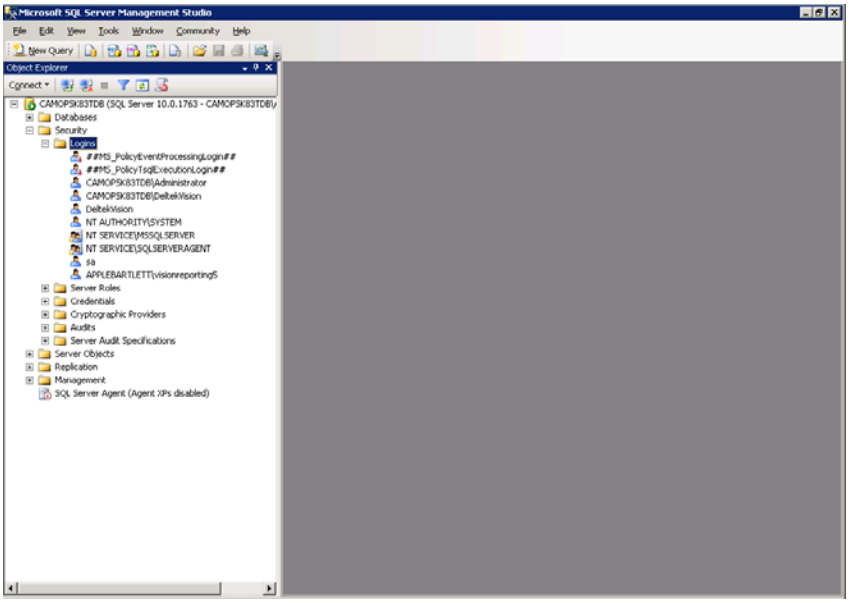
"c:\Program Files\Microsoft SQL Server\100\Tools\Binn\rs.exe" -i "C:\Program Files\Deltek\Vision\Support\Scripts\DeltekAddItemSecurity.rss" -s http://<SERVERNAME>//reportserver -v userName="DOMAIN\USERNAME" -v roleName="Content Manager" -v itemPath="/" -v keepCurrentPolicy="True"

Report Server Database Access

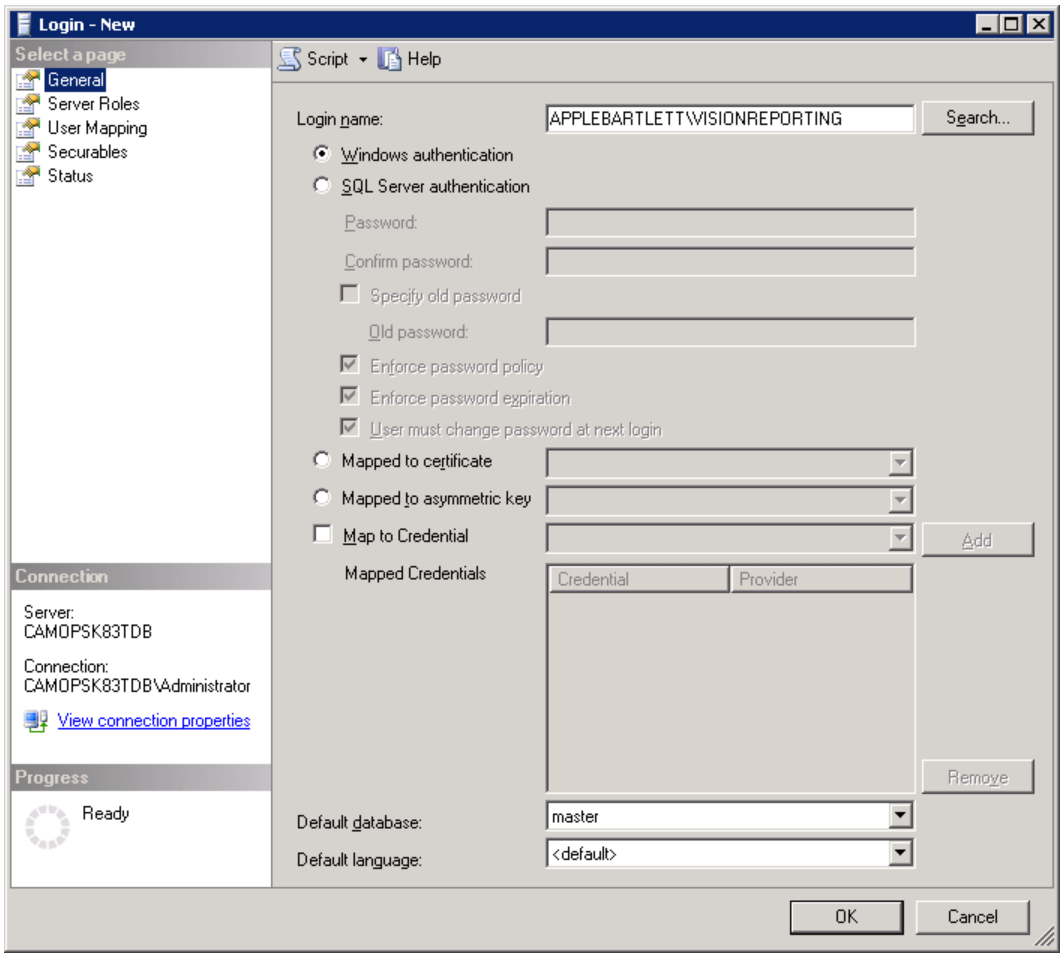
The following steps guide you through creating/adding a SQL Server login that corresponds to the account you entered in the Deltek Vision Weblink Report Server tab. In these steps, you also give the account the appropriate rights to the databases on the SQL Servers hosting your Vision and Report Server databases.

To create an account and add the appropriate rights, complete the following steps:

1. Launch the SQL Server Management Studio and connect to the database server(s) hosting the Vision and Reporting Server databases.
2. Expand the security folder.

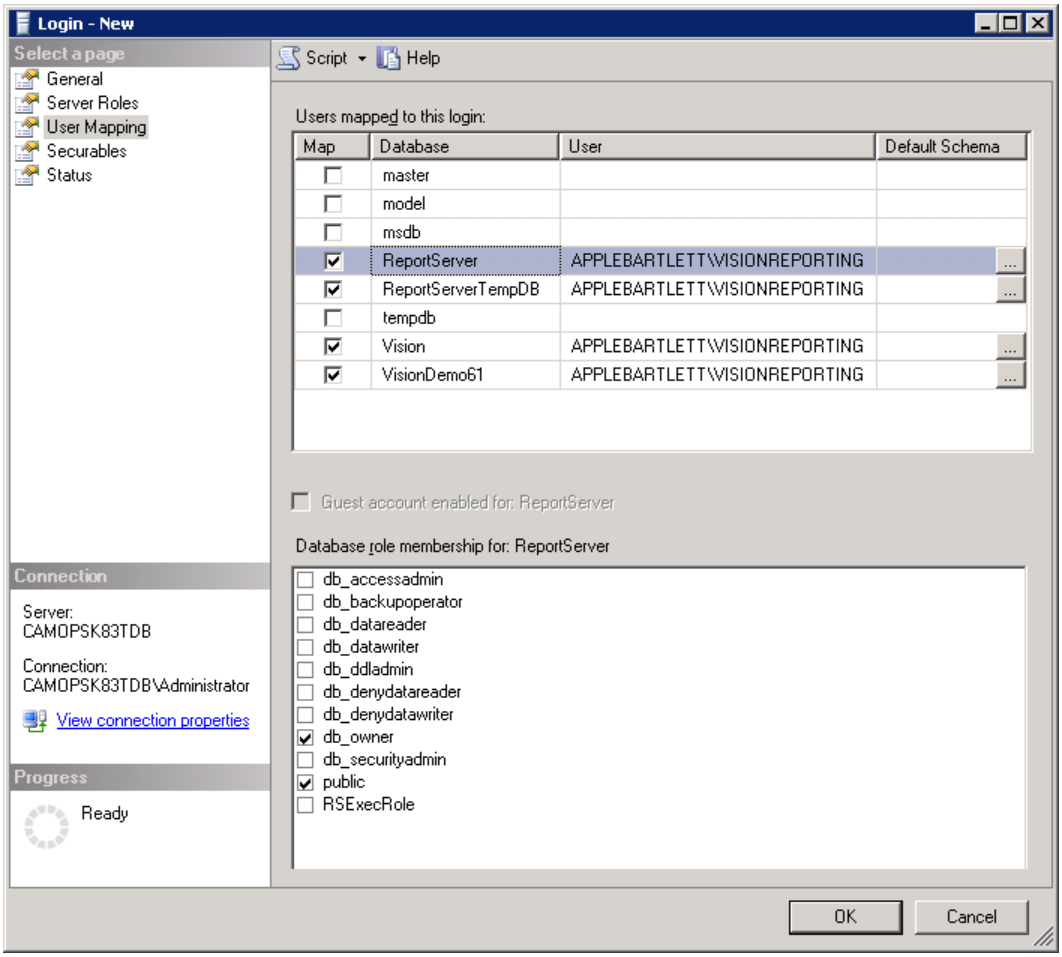


3. Right-click logins and select **New Login**. The New Login screen displays.



4. Click the General tab.
5. Complete the following fields:
   - **Login name**: Enter the name of the SQL Server Login. The Login name you enter here and the authentication option you select must match what you enter in Weblink on the Report Server Tab.
   - **Windows Authentication**: If you selected Windows Authentication on your Weblink entry (Database Access section), select this option and enter in the same name you entered in the Windows Username field of the Report Server Web Service Access section of Weblink. The Integrated Authentication checkbox MUST be enabled in the Database Server Connection section of the Report Server Tab in Weblink.
   - **SQL Server Authentication**: If you selected SQL Authentication on your Weblink Entry (Database Access section), select this option and enter the same name you entered into the **Database Username** field of the Report Server Database Server Connection section of Weblink. (Note: The name specified for this section cannot be in the Domain\Username format.)
6. Click **OK**.

7. Click the User Mapping tab.



Use these fields to determine the databases the Login Name will be mapped to and the role membership it will be assigned to within the databases.

8. Make sure the following databases are selected in the **Users mapped to this login** grid:
   - ReportServer
   - ReportServerTempDB
   - Your Vision databases

     This maps the login/user to the respective databases.

9. As you select each database (including your Vision database), select the db_owner role in the **Database role membership for:** section. You must select this option for each database.

> You must map the Login that is created on the database server to all Vision databases that are configured in Weblink. This is in addition to the ReportServer and ReportServerTempDB databases. If the login is not a member of the db_owner role in those databases, the Weblink Reporting Services connections will fail.
>
> In the screenshot example above, there are two Vision databases on the database server and both are being mapped to the new login account.

Launch Deltek Vision Weblink

1. Launch the Deltek Vision Weblink application and select your database entry. The database entry you select here should have also been mapped in Step 8 above.
2. Select the Report Server tab.
3. Enter the Domain account you created and configured on the Web server in the Report Server Web Service Access section.
4. In the Report Server Database Access of Weblink, enter the SQL Server Login you created and configured on the database server, or select the **Windows Authentication** option. This allows you to use the domain account you used in the Report Server Web Services section to connect to the Report Server Database Servers.

> Do not enter a Windows Domain account in this option.

Launch Deltek Vision Application and Refresh Report Printers

1. Launch the Deltek Vision application and log in to the database entry you configured in Weblink.
2. Select **Utilities » Report Administration**.
3. Select the Report Printers tab.
4. Click **Refresh Report Printers** to update Vision with the printers that were installed.

Appendix F: How to Pre-Deploy Deltek Vision Smart Client to User Workstations

Overview

The ClickOnce deployment technology is used for delivering Windows-based applications to the user. The Deltek Vision Smart Client application uses this technology to check for new updates on the application/web server each time the application is launched, and automatically installs them into the local user's profile (%USERPROFILE%\Local Settings\Apps\2.0\...).

To reduce the size of the initial client-side download when a user launches Deltek Vision, you can pre-deploy the Smart Client files to specific locations on workstations for all Windows XP and Vista users. This "Hybrid Deployment Model" installs the application by first looking in a specific folder on the workstation and, if not found, then downloading the file from the application/web server.

Hybrid Deployment Model (HDM) – ClickOnce only delivers ~ 15 files (enough to display the login page), after that, HDM takes over to deliver core application assemblies, hotfixes, language specific satellite assemblies and custom.

ClickOnce Deployment Features

- Applications are installed per-user, not per-computer
- Administrator privileges are not required
- Applications do not have to be installed through add/remove programs
- Nothing registered to the GAC (Global Assembly Cache)
- No ActiveX objects, Plug-ins, or Java Applets
- ClickOnce Cache Location
    - Windows XP – "\Documents and Settings\USERPROFILE_Name\Local Settings\Apps\2.0"
    - Windows Vista – "\Users\USERPROFILE_Name\AppData\Local\Apps\2.0"

You must repeat the process below each time you upgrade your Vision Application/Web Servers to a new release.

Files to be Deployed

The files that must be pre-deployed to the user workstations are located on the application\web server in the ***"\Program Files\Deltek\Vision\WebClient"*** folder (where Vision 6.1 is installed):

- DeploymentManifest.xml
- DeltekVisionClient.zip - (contains the Deltek Vision Smart Client components in a compressed format)

Workstation Deployment Location

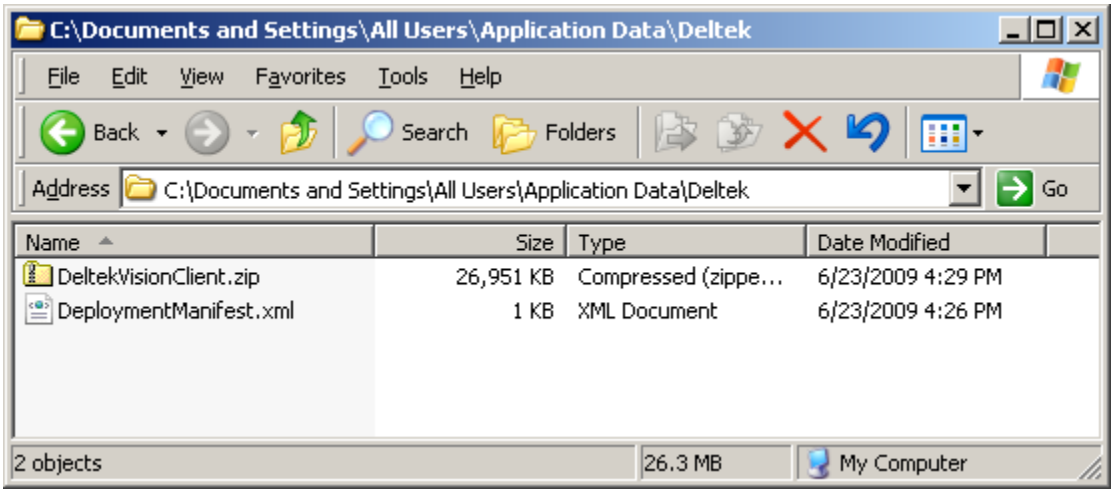
The location to pre-deploy the above files will vary depending on the workstation operating system. Refer to the following procedures based on your operating system.

> By default, the "\Documents and Settings" folder on XP and the "\ProgramData" folder on Vista are hidden, so you may have to enable the Show Hidden Files option in Windows Explorer Tools Menu\Folder Options\View Tab.

Windows XP Operating System

To deploy on a workstation with the Windows XP operating system, complete the following steps:

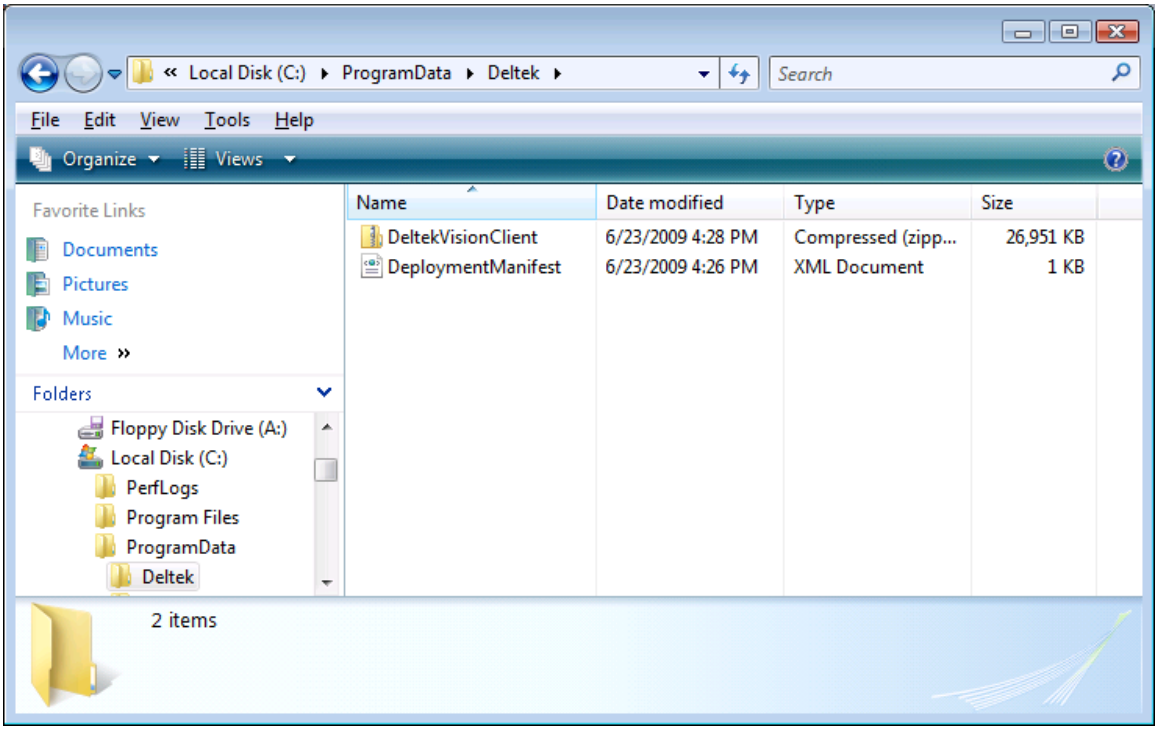
1. Locate the "\Documents and Settings\All Users\Application Data\" directory and create the Deltek directory.
2. Copy the DeltekVisionClient.zip and DeploymentManifest.xml files from the Vision\WebClient directory on the application\web server into the Deltek directory.



Windows Vista Operating System

To deploy on a workstation with the Windows Vista operating system, complete the following steps:

1. Locate the "\ProgramData\" directory and create the Deltek directory.
2. Copy the DeltekVisionClient.zip and DeploymentManifest.xml files from the application\web server into the Deltek directory.



You must repeat this process each time you upgrade your Vision Application/Web Servers to a new release.

Appendix G: Load Standard Vision Reports

During the Web Server/Tier installation process, Vision installs a standard set of reports. Vision uses the following internal steps to complete this process:

1. Vision installs the Vision report folders and files into the Vision\Reports folder (default location: \Program Files\Deltek\Vision\Reports).
2. Vision imports the Vision Report files into Microsoft SQL Server Reporting Services (SSRS), which makes the reports available in Reporting Services.

Connection Errors

If there are problems with the connection between Vision and the report server, the reports will not install correctly onto the report server.

Installation Type	Problem	Possible Cause	Solution
Upgrade existing Vision 6.x installation	The connection between the Report Server database and Reporting Services URL fails.	The account specified in Weblink may not have the appropriate rights to the report server, web server, report server databases, and Vision database.	Upgrade your installation. See **Upgrade an Existing Vision 6.x Installation** in the “Identify the Error” section below for steps to resolve the issue.
New Vision 6.x installation	An error displays during installation.	Internal error occurred during the installation.	Check the Vision installation log files and correct the condition that is listed in the error message. See **New Installation of Vision 6.x** in the “Identify the Error” section below for steps to resolve the issue.
All installations	The connection between the Report Server database and Reporting Services URL fails.	The Report Server did not respond in a timely manner and the connection timed out.	Launch Vision and reload the reports. See **Reload Reports into Vision** in the “Identify the Error” section below for steps to resolve the issue.

Identify the Error

If Vision displays an error message stating that Vision Reports were not successfully imported during the installation process, you must complete the appropriate procedure for your installation type.

Upgrade an Existing Vision 6.x Installation

To upgrade an existing Vision 6.x installation, complete the following steps:

1. Launch the Deltek Vision Weblink application.
2. For each database in the drop-down list, click the Report Server tab.
3. Click the **Test Report Server** button to verify that no errors occur during the connection. Refer to “Appendix E: Printing in Deltek Vision 6.x” for information on assigning rights to the account listed in Weblink.
4. Save your changes and exit Weblink.
5. Reload your reports into Vision. See the “Reload Reports into Vision” procedure below for additional information.

New Installation of Vision 6.x

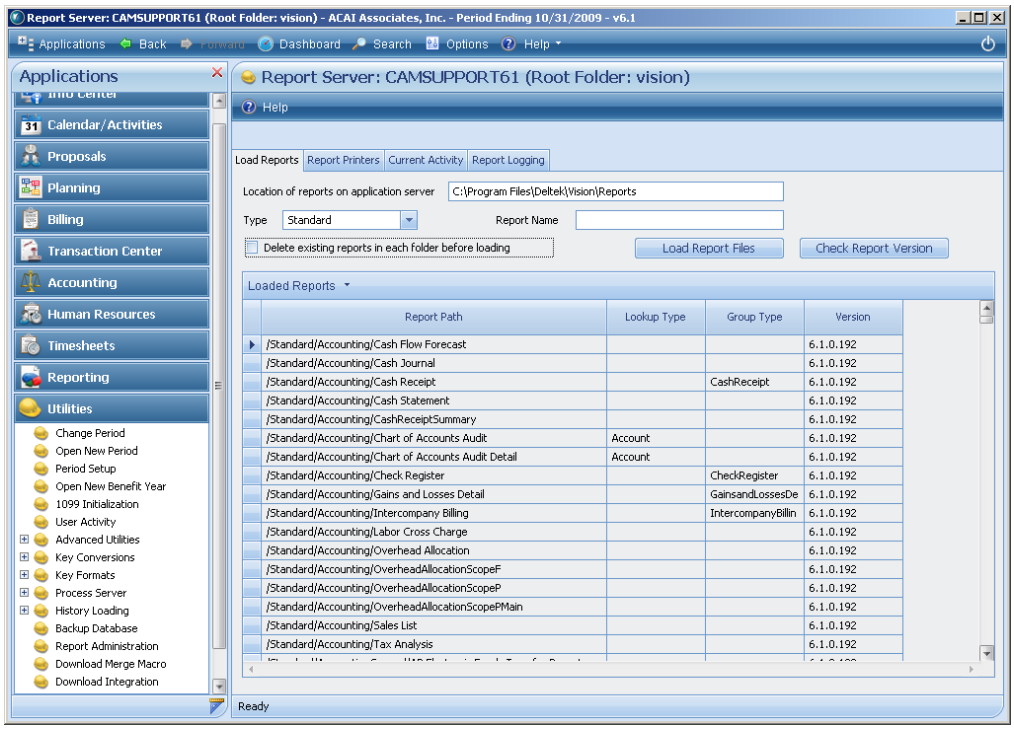
For a new installation of Vision 6.x, complete the following steps:

1. Open the Deltek Vision installation location folder (\ProgramFiles\Deltek\Vision\Logs).
2. Review the latest **DeltekVision61CMD_xx-XX.log** file (xx-XX represents the language of your loaded reports).
3. If an error is reported in the log file, you must correct the condition causing the error.
4. Reload your reports into Vision. See the “Reload Reports into Vision” procedure below for additional information.

Reload Reports into Vision

To reload reports on the Vision reports server, complete the following steps:

1. Double-click the Vision icon to launch the Vision application.
2. From the Vision Applications menu, click **Utilities » Report Administration** to display the Reporting Administration form.
3. Select the Load Reports tab to load reports on the report server.



4. In the **Location of reports on application server** field, enter the file path location of the reports (RDL files) on the report server.
5. From the **Type** option drop-down list, select **Standard**.
6. If you want to load a single report, enter the name of the report in the **Report Name** field. (You do not need to supply the .RDL extension.)

   You can also use this field as a wild card search. For example, if you enter **Project**, Vision finds and loads all files that contain the word Project, such as Project List, Project Summary, and Project Audit.

   Sub reports do not load for main reports; you must load them manually by name.

   If you leave the **Report Name** field blank, all reports load.
7. Click **Load Report Files**. A loading reports warning message displays.
8. Click **OK** to continue the reload report process.
9. To install custom reports, return to step 5. This time, select **Custom** from the **Type** option drop-down list. Then complete the remaining steps of the procedure.

> For additional information on reloading reports, click the **Help** button on the Load Reports Tab.