

# Deltek wInsight® Analytics 8.3.4

Product Overview

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## Overview

Deltek wInsight Analytics is an Earned Value management and analysis product from Deltek and is part of the Deltek Project and Portfolio Management (PPM) product suite.

This document provides a high-level overview of the product together with some guidance as to which modules should be installed to meet the needs of individual users. Most users would not need access to all modules.

## Product Introduction

Deltek wInsight Analytics comprises several applications, all of which work against a common database and allow you to perform the following tasks:

- Maintain a database of performance data.
  - Import data from external project and cost management systems using industry standard XML transfer files.
  - Import cost data from an external system, such as Deltek Cobra and Deltek Acumen, in the Deltek Cost Data Exchange (DCDE) or Integrated Program Management Data Analysis Report (IPMDAR) format.
  - Import schedule data from scheduling tools, such as Microsoft Project Server, Open Plan, Primavera P6, Microsoft Project Professional, and Integrated Program Management Data Analysis Report (IPMDAR).
  - Calculate key metrics and trends for data over the life of the project.
  - Enter required data, metrics, and narrative not provided in the source systems.
  - Perform DECM metric rollup and detail reporting using metrics calculated by Acumen.
- Export data using industry standard XML or IPMDAR format to customers/partners.
- Produce performance reports for submittal to meet customer reporting requirements.
- Analyze data using both traditional methods and advanced associative techniques to determine which areas of the project are under/over performing and where corrective action may be required.
- Load and view DCMA Metrics that have been calculated and published by Deltek Acumen.
- Support region-based access control through the Authorized Control Countries (ACC) feature.

Use the descriptions in the next section to determine which modules you need to install to meet the needs of your organization.

**Attention:** For detailed instructions about the installation process, see the individual component installation guides specified in the [Additional Documentation](#) section.

# Deltek wInsight Analytics Applications

This section describes the component modules of wInsight Analytics and provides a guide to when they should be installed.

## Deltek wInsight Analytics Administrator

The wInsight Analytics Administrator application is the key component for configuring and maintaining the wInsight Analytics database. It allows you, as the administrator, to perform the following tasks:

- Enter data directly into the database.
- Import data from a variety of sources.
- Calculate the key metrics and trends for the imported data.
- Merge, back up, and restore projects.
- Export project data in XML format including UN/CEFACT XML.
- Export and import cost data in the Integrated Program Management Data Analysis Report (IPMDAR) format.
- Export custom fields to Custom Summary Performance of IPMDAR.
- Import schedule data directly from the source tool or from IPMDAR or XML files and associate it with cost data.
- Use the Microsoft Edge WebView2 control when generating, displaying, and printing reports as well as narratives.
- Support region-based access control through the Authorized Control Countries (ACC) feature.

Generally, this module is only used by those users responsible for maintaining the project data within the database, sending data to customers and partner organizations, and configuring system security.

**Note:** The wInsight Analytics Administrator should be installed as the first component in any wInsight Analytics installation.

## Deltek wInsight Analytics Module

The wInsight Analytics Module provides the advanced associative analytics capabilities for which the product is named and is the component that most users use on a day-to-day basis. It provides the most flexible level of end user access to the system from Web, desktop, and mobile clients.

In addition, wInsight Analytics Module allows you to load and view DCMA EVAS Metrics that have been calculated and published using Deltek Acumen.

**Note:** The wInsight Analytics Module should be installed as the primary user interface to your performance database.

## Deltek wInsight Analytics Desktop

wInsight Analytics Desktop is a Windows application that provides end users access for analyzing and reporting wInsight data. It is an alternative to the wInsight Analytics Module for end user analysis of wInsight Analytics data.

If you need to use the standalone installation rather than the server installation and/or need users to have access to legacy views and reports or need users to be able to enter data, such as variance narrative, statement of work narrative, or user forecast estimates, then you should install wInsight Analytics Desktop.

## Deltek wInsight Analytics C/S Glue Viewer

The wInsight Analytics C/S Glue Viewer application is a companion product to the wInsight Analytics Desktop. It allows you to view a Gantt chart of schedule data related to the cost data currently being viewed in the wInsight Analytics Desktop. You can run the wInsight Analytics C/S Glue Viewer as standalone application to view schedule data in a basic Gantt format.

## Deltek wInsight Analytics Briefing Wizard

The wInsight Analytics Briefing Wizard allows you to generate Microsoft PowerPoint presentations from wInsight Analytics Desktop charts and reports. It should be installed if you have a requirement to provide regular briefings based on a similar set of charts and reports from wInsight Analytics Desktop.

Alternatively, interactive charts and tables from wInsight Analytics can be hosted in PowerPoint or chart images can be copied and pasted to PowerPoint from wInsight Analytics.

## Deltek wInsight Analytics Connect Products

The wInsight Analytics system has several modules that export data from external systems (Deltek MPM, Microsoft Project, and Microsoft Excel) to a format that can be imported by the wInsight Analytics Administrator. You should install the Connect tool appropriate to your source system if required:

- wInsight Analytics Excel Connect
- wInsight Analytics MPM Connect
- wInsight Analytics Project Connect

**Note:** When you click a link, you will be asked to log into DSM if you aren't already logged in.

## Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using wInsight Analytics, Deltek makes a wealth of information and expertise readily available to you.

### Customer Services

Deltek has always 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 Deltek Support Center
- Phone and email support from Deltek Support Services analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

**Attention:** Find out more about these and other services from the [Deltek Support Center](#).

### Deltek Support Center

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

The following are some of the many options that the Deltek Support Center provides:

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

- Initiate a Chat to submit a question to a Deltek Support Services analyst online

**Attention:** For more information regarding Deltek Support Center, refer to the online help available from the Web site.

## Access Deltek Support Center

### To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

**Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

## Additional Documentation

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

Document Name	Description
Deltek wInsight Analytics Technical Overview and System Requirements	This document is meant to serve as a guideline for hardware and software requirements and provides your firm's IT department with information about the technical deployment architecture of the products in the Deltek wInsight Analytics product suite.
Deltek wInsight Analytics Desktop and wInsight Analytics Administrator Help	This document contains detailed information and instructions on how to use various features of wInsight Analytics Desktop and wInsight Analytics Administrator.
Deltek wInsight Analytics Module Help	This document contains detailed information and instructions on how to use various features of wInsight Analytics Module.

Document Name	Description
Deltek wInsight Analytics Administrator Installation Guide	This document provides instructions for the installation and configuration of wInsight Analytics Administrator.
Deltek wInsight Analytics Administrator Release Notes	This document contains a summary of the technical considerations of the application. This release does not have any new features or enhancements.
Deltek wInsight Analytics Module Installation Guide	This document provides instructions for the installation of the wInsight Analytics Module.
Deltek wInsight Analytics Module Administration Guide	This document contains detailed information and instructions on how to use various features of the wInsight Analytics Module.
Deltek wInsight Analytics Module Release Notes	This document contains a summary of the technical considerations, new features, enhancements, and known issues of the application.
Deltek wInsight Analytics Desktop Installation Guide	This document provides instructions for the installation and configuration of wInsight Analytics Desktop.
Deltek wInsight Analytics Desktop Release Notes	This document contains a summary of the technical considerations of the application. This release does not have any new features or enhancements.
Deltek wInsight Analytics Ancillary Applications Installation Guide	<p>This document provides instructions for the installation of the following wInsight Analytics ancillary applications:</p> <ul style="list-style-type: none"> <li>▪ Briefing Wizard</li> <li>▪ C/S Glue Viewer</li> <li>▪ C/S Glue for Project</li> <li>▪ Excel Connect</li> <li>▪ MPM Connect</li> </ul>

Document Name	Description
Deltek wInsight Analytics Ancillary Applications Release Notes	<ul style="list-style-type: none"><li>▪ Project Connect</li></ul> <p>This document contains a summary of the technical considerations of the following wInsight Analytics ancillary applications:</p> <ul style="list-style-type: none"><li>▪ Briefing Wizard</li><li>▪ C/S Glue Viewer</li><li>▪ C/S Glue for Project</li><li>▪ Excel Connect</li><li>▪ MPM Connect</li><li>▪ Project Connect</li></ul> <p>This release does not have any new features or enhancements.</p>