

Deltek Budgeting & Planning 6.0.9 Installation Guide

January 31, 2012



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This edition published January 2012.

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Contents

| | |
|---|----|
| Overview | 1 |
| Supported Deltek Product Versions | 1 |
| Supported Platforms..... | 1 |
| Deployment Models..... | 2 |
| General Installation Features | 2 |
| Pre-Installation Checklist | 3 |
| Deltek Budgeting & Planning Web Server | 3 |
| Deltek Budgeting & Planning Database Server | 5 |
| Domain and Database Accounts Needed During Installation | 6 |
| Network/Firewall Considerations..... | 7 |
| Deltek Budgeting & Planning Installation Wizard | 8 |
| Additional Installation Requirements..... | 22 |
| Log On to Budgeting & Planning the First Time | 26 |
| Web Server Changes | 27 |
| Database Server Changes | 28 |
| Post-Installation Considerations | 31 |

Overview

This document contains installation information for the Deltek Budgeting & Planning product. The following sections are included:

- Supported Deltek Product Versions
- Supported Platforms
- Deployment Models
- General Installation Features — A summary of general installation features.
- Deltek Budgeting & Planning Installation Wizard — A visual walkthrough of the installation wizard with descriptions about each page of the wizard.
- Web Server Changes — A list of changes made to the web server during installation.
- Database Server Changes — A list of changes made to the database server during installation.

Supported Deltek Product Versions

Deltek Budgeting & Planning 6.0 may work with older versions of Costpoint, GCS Premier, and Time & Expense, but Deltek only actively supports the latest versions of these products:

- Deltek Costpoint 6.1 SP2
- Deltek GCS Premier 5 SP8
- Deltek Time &Expense with Employee Self-Service 8.2

If you are running an older version of one of these products, Deltek may not be able to provide full support for issues that you may run into during installation and implementation of Budgeting & Planning. In order to ensure that you are running a supported configuration, please upgrade to these versions before installing Budgeting & Planning.

Supported Platforms

- Windows Server 2003 (32-bit)
- Windows Server 2008 (32-bit)
- Windows Vista (32-bit/64-bit) — Non-Production
- Windows 7 (32-bit/64-bit) — Non-Production
- DeltekBP Database — SQL Server 2005 (SP3)
- DeltekBP Database — SQL Server 2008 (RTM)
- DeltekBP Database — SQL Server 2008 (SP1)
- Deltek Costpoint Database on Microsoft SQL Server
- Deltek Costpoint 6.x Database on Oracle
- Deltek GCS Premier on File Share
- Deltek Time & Expense Database on Microsoft SQL Server
- Deltek Time & Expense Database on Oracle

Deployment Models

- Single Server
 - Web/Application and Database Server (DeltekBP Database)
- Dual Server
 - Web/Application
 - Database Server (DeltekBP Database)

Both models support a remote Costpoint, GCS, or Time & Expense database server.



All setups are run from the web/application tier and will complete all of the database tasks (outlined below) remotely.

General Installation Features

- You must be a local administrator to run the installation.
- An installation log is created for all installations. During the installation, the log is at “C:\Documents and Settings\<Username>\Local Settings\Application Data\Deltek\Budgeting & Planning”. After the installation, the log is date/time stamped and copied to “C:\Program Files\Deltek\Budgeting & Planning\Logs”
- The Microsoft .NET Framework 3.5 (SP1) downloads and installs during the setup pre-requisite check before any pages of the installation wizard are displayed. If you do not want the .NET Framework to be downloaded (due to download performance speed), you can copy the MicrosoftDotNetFramework35SP1.exe file to the same directory from which that you are launching the Budgeting & Planning setup file.



If you do not already have the .NET Framework 3.5 (SP1) setup file, you can download it directly from Microsoft at <http://download.microsoft.com/download/2/0/e/20e90413-712f-438c-988e-fdaa79a8ac3d/dotnetfx35.exe>.

- If the following components are not already installed, they are also downloaded and installed:
 - Microsoft Windows Installer 4.5 — Required for Microsoft .NET Framework 3.5 and SMO
 - Microsoft XML Services 6.0 — Required for SMO
 - Microsoft SQL Server 2008 System CLR Types — Required for SMO
 - Microsoft SQL Server 2008 Native Client — Required for SMO
 - Microsoft SQL Server 2008 Management Objects (SMO) — Required for SMO
- The following validations are made before the installation starts installing files including:
 - Operating system (Windows Server 2003 or later)
 - Interactive user is a local administrator
 - Internet Information Services (IIS) is installed and running
 - IIS Administration Scripts and Tools are installed and running (Windows 7, Windows Server 2008, Windows Server 2008 R2 Only)
 - ASP .NET is enabled

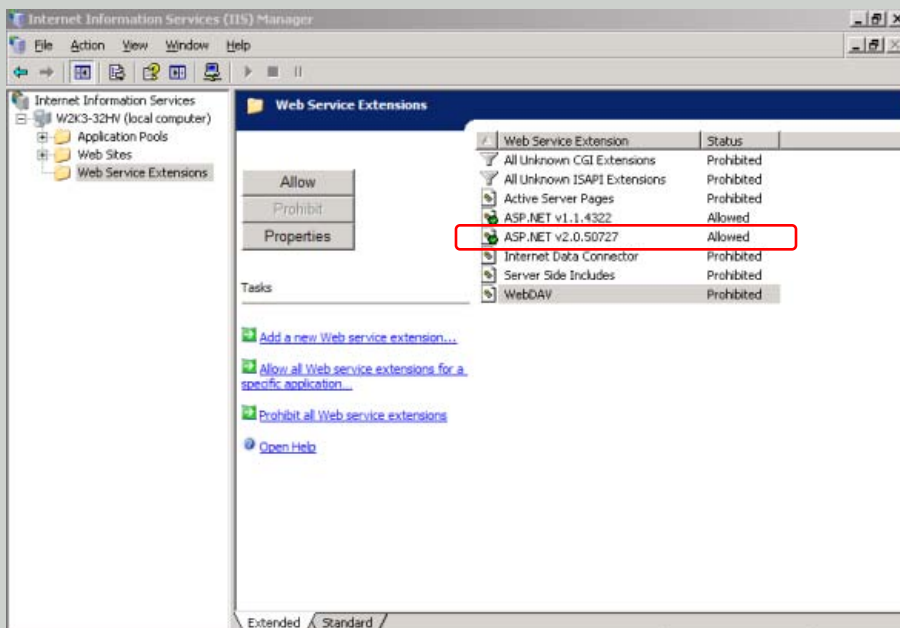
Pre-Installation Checklist

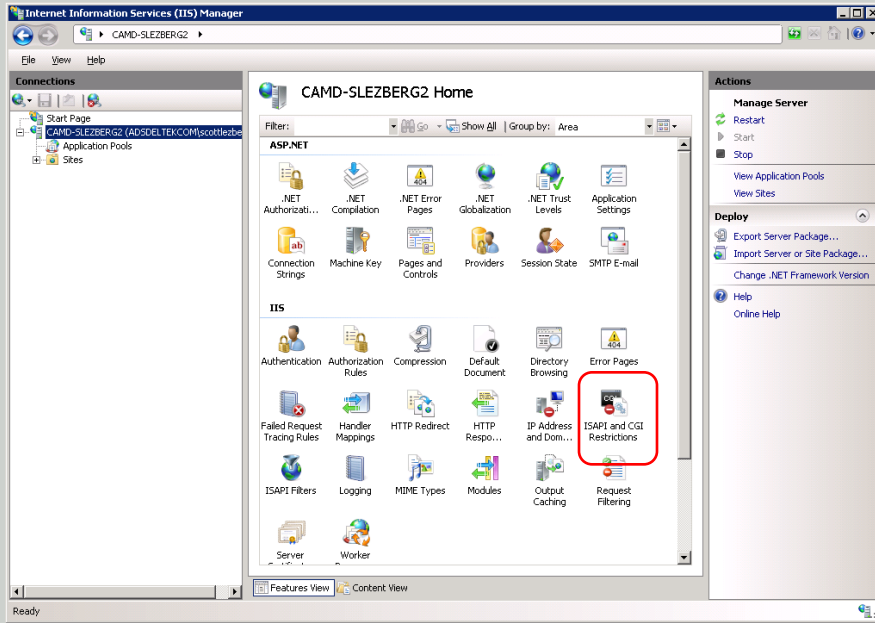
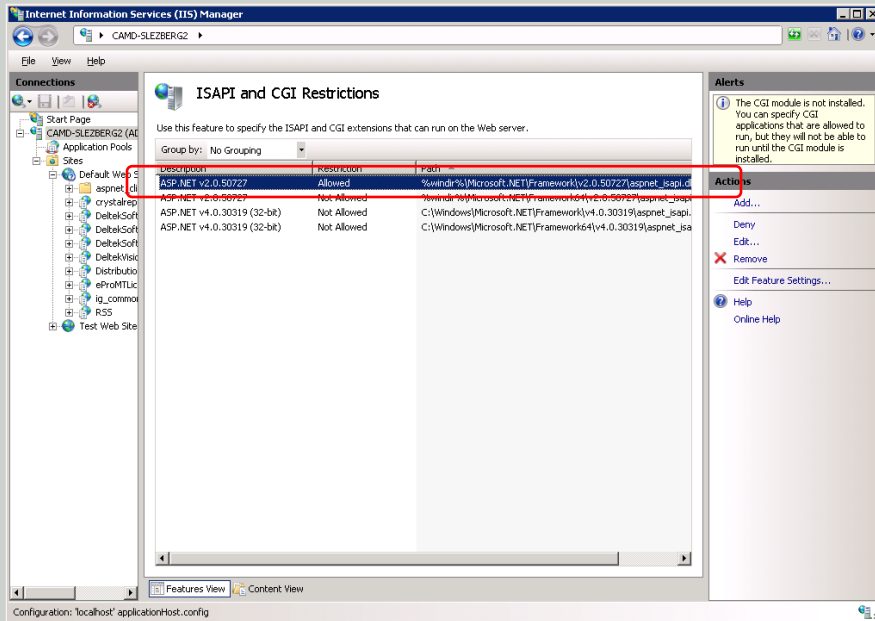
After you are familiar with the installation procedures, Deltek recommends that you carefully review and execute the technical checklist below before beginning your Deltek Budgeting & Planning installation.

Deltek Budgeting & Planning Web Server

Required software:

- Windows Server 2003 (32-bit or 64-bit), Windows Server 2008 (32-bit or 64-bit), or Windows Server 2008 R2

| Step | Description | ✓ | | | | | | | | | | | | | | | | | | |
|------------------------------|--|-----------------------|--------|----------------------------|------------|------------------------------|------------|---------------------|------------|-------------------|---------|---------------------------|----------------|-------------------------|------------|----------------------|------------|--------|------------|--|
| 1 | Enable IIS (Internet Information Services) and IIS Management Scripts and Tools | | | | | | | | | | | | | | | | | | | |
| 2 | Install Microsoft .NET Framework 3.5 (SP1): http://download.microsoft.com/download/2/0/e/20e90413-712f-438c-988e-fdaa79a8ac3d/dotnetfx35.exe | | | | | | | | | | | | | | | | | | | |
| 3 | <p>Ensure that ASP .NET v2.0.50727 is set to Allowed.</p> <ul style="list-style-type: none">On Windows Server 2003/2003 R2 (IIS6), launch Internet Information Services from Administrative Tools and select Web Service Extensions. Ensure that ASP .NET v2.0.50727 is set to Allowed.  <p>The screenshot shows the 'Web Service Extensions' tab in the IIS Manager. A table lists various extensions and their status:</p> <table><tr><th>Web Service Extension</th><th>Status</th></tr><tr><td>All Unknown CGI Extensions</td><td>Prohibited</td></tr><tr><td>All Unknown ISAPI Extensions</td><td>Prohibited</td></tr><tr><td>Active Server Pages</td><td>Prohibited</td></tr><tr><td>ASP.NET v1.1.4322</td><td>Allowed</td></tr><tr><td>ASP.NET v2.0.50727</td><td>Allowed</td></tr><tr><td>Internet Data Connector</td><td>Prohibited</td></tr><tr><td>Server Side Includes</td><td>Prohibited</td></tr><tr><td>WebDAV</td><td>Prohibited</td></tr></table> | Web Service Extension | Status | All Unknown CGI Extensions | Prohibited | All Unknown ISAPI Extensions | Prohibited | Active Server Pages | Prohibited | ASP.NET v1.1.4322 | Allowed | ASP.NET v2.0.50727 | Allowed | Internet Data Connector | Prohibited | Server Side Includes | Prohibited | WebDAV | Prohibited | |
| Web Service Extension | Status | | | | | | | | | | | | | | | | | | | |
| All Unknown CGI Extensions | Prohibited | | | | | | | | | | | | | | | | | | | |
| All Unknown ISAPI Extensions | Prohibited | | | | | | | | | | | | | | | | | | | |
| Active Server Pages | Prohibited | | | | | | | | | | | | | | | | | | | |
| ASP.NET v1.1.4322 | Allowed | | | | | | | | | | | | | | | | | | | |
| ASP.NET v2.0.50727 | Allowed | | | | | | | | | | | | | | | | | | | |
| Internet Data Connector | Prohibited | | | | | | | | | | | | | | | | | | | |
| Server Side Includes | Prohibited | | | | | | | | | | | | | | | | | | | |
| WebDAV | Prohibited | | | | | | | | | | | | | | | | | | | |
| | <ul style="list-style-type: none">On Windows Server 2008 (IIS 7) and Windows Server 2008 R2 (IIS 7.5), launch Internet Information Services from Administrative Tools. In the | | | | | | | | | | | | | | | | | | | |

| Step | Description | | | | | | | | | | | | | | | | |
|-----------------------------|---|--|------------|------|--------------------|---------|--|--------------------|-------------|--|-----------------------------|-------------|--|-----------------------------|-------------|--|---|
| | <p>Connections pane, select your Web server. Double-click the ISAPI and CGI Restrictions icon under the IIS group.</p>  <p>Ensure that ASP .NET v2.0.50727 is set to Allowed for the path named “%windir%\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll” (that is, the Framework directory and not the Framework64 directory).</p>  <table border="1"> <thead> <tr> <th>Extension</th> <th>Permission</th> <th>Path</th> </tr> </thead> <tbody> <tr> <td>ASP.NET v2.0.50727</td> <td>Allowed</td> <td>%windir%\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll</td> </tr> <tr> <td>ASP.NET v2.0.50727</td> <td>Not Allowed</td> <td>%windir%\Microsoft.NET\Framework64\v2.0.50727\aspnet_isapi.dll</td> </tr> <tr> <td>ASP.NET v4.0.30319 (32-bit)</td> <td>Not Allowed</td> <td>C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_isapi.dll</td> </tr> <tr> <td>ASP.NET v4.0.30319 (32-bit)</td> <td>Not Allowed</td> <td>C:\Windows\Microsoft.NET\Framework64\v4.0.30319\aspnet_isapi.dll</td> </tr> </tbody> </table> | Extension | Permission | Path | ASP.NET v2.0.50727 | Allowed | %windir%\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll | ASP.NET v2.0.50727 | Not Allowed | %windir%\Microsoft.NET\Framework64\v2.0.50727\aspnet_isapi.dll | ASP.NET v4.0.30319 (32-bit) | Not Allowed | C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_isapi.dll | ASP.NET v4.0.30319 (32-bit) | Not Allowed | C:\Windows\Microsoft.NET\Framework64\v4.0.30319\aspnet_isapi.dll | ✓ |
| Extension | Permission | Path | | | | | | | | | | | | | | | |
| ASP.NET v2.0.50727 | Allowed | %windir%\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll | | | | | | | | | | | | | | | |
| ASP.NET v2.0.50727 | Not Allowed | %windir%\Microsoft.NET\Framework64\v2.0.50727\aspnet_isapi.dll | | | | | | | | | | | | | | | |
| ASP.NET v4.0.30319 (32-bit) | Not Allowed | C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_isapi.dll | | | | | | | | | | | | | | | |
| ASP.NET v4.0.30319 (32-bit) | Not Allowed | C:\Windows\Microsoft.NET\Framework64\v4.0.30319\aspnet_isapi.dll | | | | | | | | | | | | | | | |

Deltek Budgeting & Planning Database Server

Required Software:

- Windows Server 2003 (32-bit or 64-bit), Windows Server 2008 (32-bit or 64-bit), or Windows Server 2008 R2
- Microsoft SQL Server 2005 (SP3) or later, or Microsoft SQL Server 2008



Microsoft SQL Express cannot be used since it does not include SQL Agent and Full-Text Search.

| Step | Description | ✓ |
|------|---|---|
| 1 | Install Microsoft SQL Server Full Text Service on this server. This is part of the Microsoft SQL Server installation. | |
| 2 | Install Microsoft SQL Server Management Tools on this server. This is part of the Microsoft SQL Server installation. | |
| 3 | Requires that this Microsoft SQL Server installation be in Mixed security mode (that is, SQL Server and Windows Authentication Mode). | |
| 4 | Backup your Deltek Budgeting & Planning database (if you are upgrading from a previous version). | |
| 5 | Restart your Microsoft SQL Server Service and ensure that it starts up correctly. | |
| 6 | Restart your Microsoft SQL Server Agent Service and ensure that it starts up correctly. | |
| 7 | <p>If your Deltek Costpoint or Deltek Time & Expense database is hosted on an Oracle database:</p> <ul style="list-style-type: none"> Install the Oracle client on the Budgeting & Planning database server. The TNSNAMES.ORA file needs to be set up and successfully connected (via TNSPing) to your Costpoint and/or Time & Expense databases. You will need your TNS Name (Alias) given for each application, respectively, for the connection dialog box during the installation. The SID field on this screen must match exactly what is stated in the TNSNames.ora file. | |
| 8 | <p><u>Costpoint Customers</u></p> <p>If your Budgeting & Planning database server and your Costpoint database server are on different database servers, then the following additional checks should be completed:</p> <ul style="list-style-type: none"> Ensure that your Microsoft SQL Server Service account <i>and</i> Microsoft SQL Agent Service account are running under the same domain account that has read access to the Costpoint database. Add that same domain account to have read access to your Costpoint database. | |

| Step | Description | ✓ |
|------|--|---|
| | <ul style="list-style-type: none"> If your Costpoint database is hosted on Microsoft SQL Server, that SQL Server installation must be in Mixed security mode (that is, SQL Server and Windows Authentication Mode). | |
| 9 | <u>GCS Premier Customers</u> <ul style="list-style-type: none"> Ensure that your Microsoft SQL Server Service <i>and</i> Microsoft SQL Agent Service account are running under the same domain account that has read access to the UNC network share that your GCS Premier data is hosted on. Ensure that this same account has full access rights to the GCS Data Extraction utility path (typically C:\Program Files\Deltek\Budgeting & Planning\Database on your database server). Most likely, the account has full access rights since the service account used by Microsoft SQL Server should have local administrator rights. If you are installing the Budgeting & Planning Web Server on a different server than the Budgeting & Planning database server, remember that you will need to run the Budgeting & Planning installation a second time on the Budgeting & Planning database server. | |
| 10 | <u>Time & Expense Customers</u> <p>If your Budgeting & Planning database server and your Time & Expense database server are on different database servers, then the following additional checks should be completed.</p> <ul style="list-style-type: none"> Ensure that your Microsoft SQL Service <i>and</i> Microsoft SQL Agent Service account are running under the same domain account that has read access to the Time & Expense database. Add that same domain account to have read access to your Time & Expense database. If your Time & Expense database is hosted on Microsoft SQL Server, that SQL Server installation must be in Mixed security mode (that is, SQL Server and Windows Authentication Mode). | |

Domain and Database Accounts Needed During Installation

| Step | Description | ✓ |
|------|--|---|
| 1 | You will need to be a local or domain administrator to install Deltek Budgeting & Planning on your web server. This account should be a local administrator on both the web server and your Deltek Budgeting & Planning database server. | |
| 2 | Either your Windows logon (using Windows Integrated security) or a sysadmin (that is, sa) account is needed to connect to the Deltek Budgeting & Planning database server during the installation. | |
| 3 | Costpoint Customers <ul style="list-style-type: none"> Microsoft SQL Server: A read-only SQL logon account to your Deltek | |

| Step | Description | ✓ |
|------|--|---|
| | Costpoint database. <ul style="list-style-type: none"> Oracle: The SID field on this screen must match exactly what is stated in the TNSNames.ora file for your Deltek Costpoint database. Your Costpoint Company ID | |
| 4 | GCS Premier Customers <ul style="list-style-type: none"> UNC Network Path to your GCS Premier Data Files | |
| 5 | Time & Expense Customers <ul style="list-style-type: none"> Microsoft SQL Server: A read-only SQL logon account to your Deltek Time & Expense database. Oracle: The SID field on this screen must match exactly what is stated in the TNSNames.ora file for your Deltek Time & Expense database. | |
| 6 | Your Time & Expense Schema | |

Network/Firewall Considerations

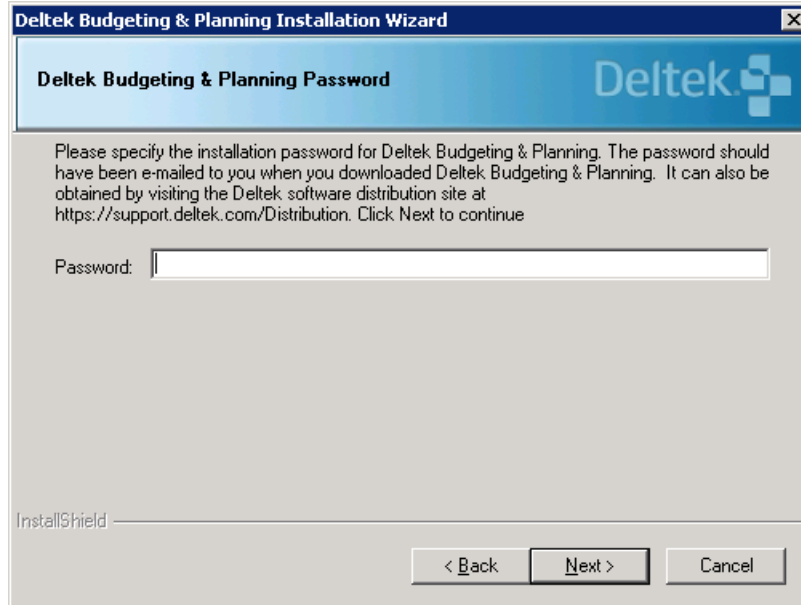
| Step | Description | ✓ |
|------|---|---|
| 1 | If you will be hosting your Budgeting & Planning Web Server on a DMZ, then you will need to ensure that port 1433 (SQL Server) is open inbound on the internal firewall interface to your database server hosting Budgeting & Planning. | |

Deltek Budgeting & Planning Installation Wizard

To install Budget & Planning, complete the following steps:

1. Locate the **DeltekBudgetingAndPlanning609GA.exe** setup file, and double-click to run it.

The Deltek Budgeting & Planning Password page displays.

The screenshot shows a Windows-style dialog box titled "Deltek Budgeting & Planning Installation Wizard". The main heading inside is "Deltek Budgeting & Planning Password" with the Deltek logo to the right. The text inside reads: "Please specify the installation password for Deltek Budgeting & Planning. The password should have been e-mailed to you when you downloaded Deltek Budgeting & Planning. It can also be obtained by visiting the Deltek software distribution site at <https://support.deltek.com/Distribution>. Click Next to continue". Below this is a text input field labeled "Password:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner of the dialog box.

2. Enter the password, and click **Next**.
 - If you entered the Costpoint password, the Deltek Costpoint Budgeting & Planning Installation Wizard launches.
 - If you entered the GCS Premier password, the Deltek GCS Premier Budgeting & Planning Installation Wizard launches.

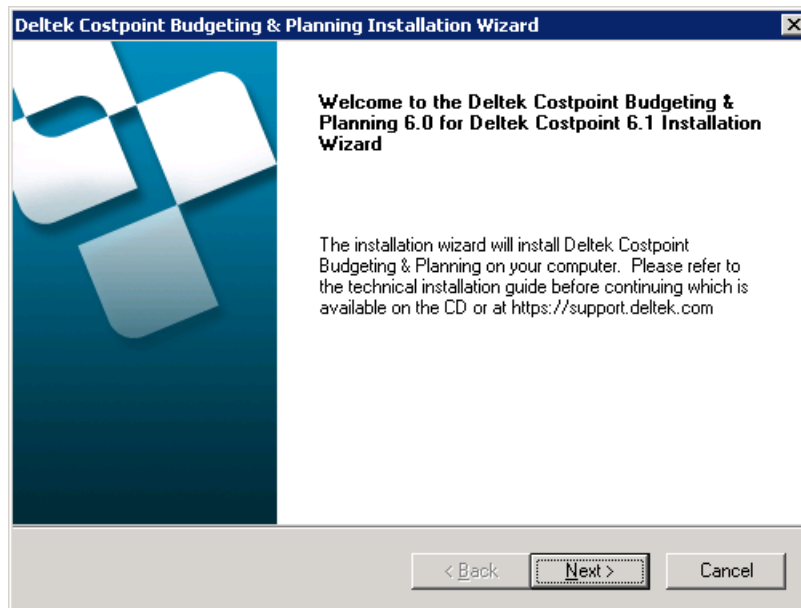


Regardless of the product, the installation wizard is the same except where noted in the procedure. The Costpoint wizard was used for the majority of the screen shots in this procedure.



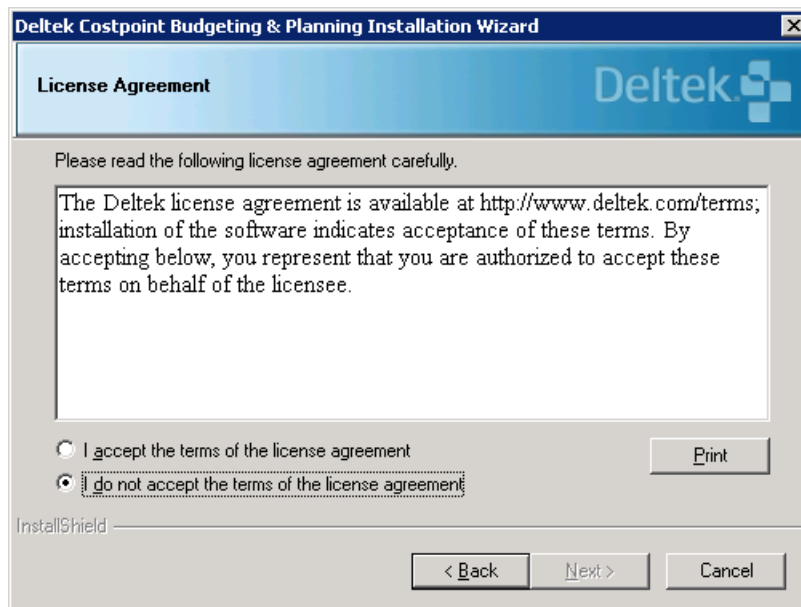
Please contact Deltek if you have not received your password.

The Welcome page of the Installation Wizard displays.



3. Click **Next**.

The License Agreement page of the wizard displays.



4. After reading the license agreement, accept the terms, and click **Next**.

The Account Name and License Key page of the wizard displays.

The screenshot shows a window titled "Deltek Costpoint Budgeting & Planning Installation Wizard". The header bar is blue with the Deltek logo on the right. Below the header, the title "Account Name and License Key" is displayed. A message reads: "Please specify your account name and license key given to you by Deltek." There are two text input fields: "Account Name:" and "License Key:". At the bottom left, there is an "InstallShield" logo. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

5. Enter your **Account Name** and **License Key**.




The account name is validated by the license key you enter. The encrypted license key is decrypted and the account name and licensed user account is parsed out.

6. Click **Next**.

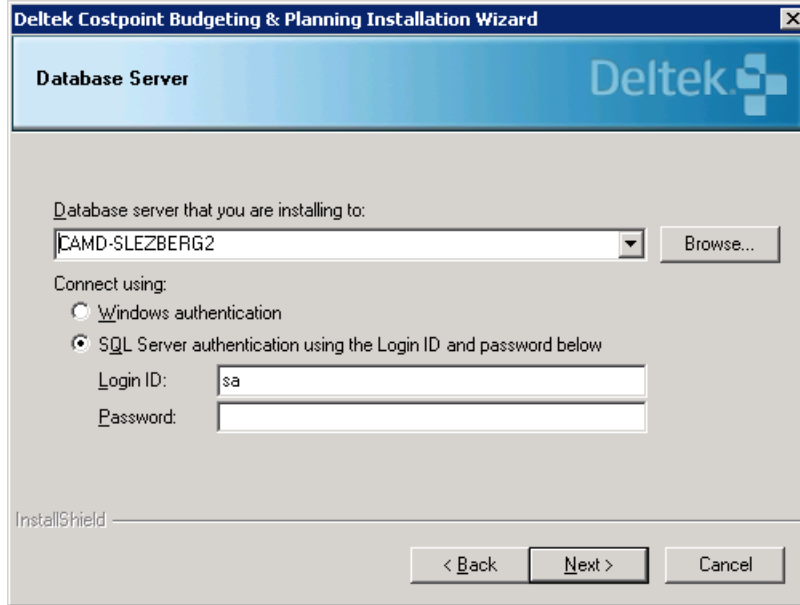
The Choose Destination Location page of the wizard displays.

The screenshot shows a window titled "Deltek Costpoint Budgeting & Planning Installation Wizard". The header bar is blue with the Deltek logo on the right. Below the header, the title "Choose Destination Location" is displayed. A message reads: "Install Deltek Budgeting & Planning to:" followed by the path "C:\...\Deltek\BudgetingAndPlanning". There is a "Change..." button to the right of the path. At the bottom left, there is an "InstallShield" logo. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".


7. Select the default location, or click **Change** to select a new location. Click **Next**.

 Deltek recommends keeping the default installation directory.

The Database Server page of the wizard displays.



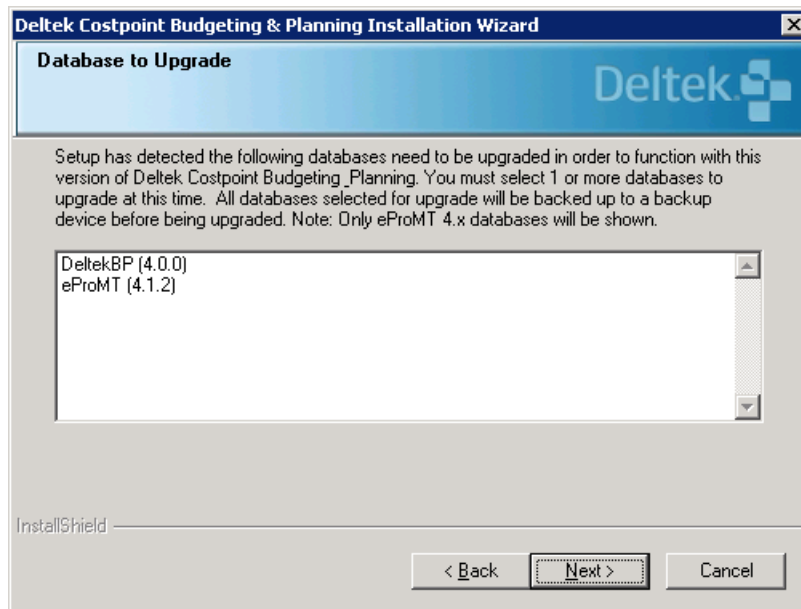
8. Take the following actions:
- Enter, or click **Browse** to select, the database server to which you want to install.
 - Select SQL Server authentication, and enter **sa** for the **Login ID**.
 - Click **Next**.

 The connection must have system rights (that is, **sa**) to complete tasks. When you click **Next**, setup:

- Validates that it connect to the database server
- Checks that you have sysadmin rights
- Ensures that Microsoft SQL Server is version 2005 (SP3) or later
- Checks that Full-Text is installed and running
- Checks to see if any existing Deltek Budgeting & Planning databases exists

Please note the following:

- If no database exists, then the wizard creates a new database called **DeltekBP**.
- If one or more databases already exists, the Database to Upgrade page of the wizard displays, allowing you to select which databases to upgrade.



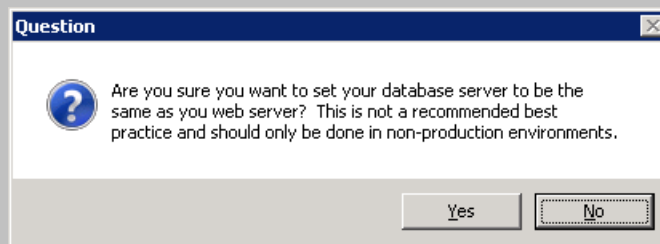
9. Select the database(s) to upgrade, and click **Next**.



You must select one or more databases to upgrade. You can upgrade other databases via the Resource Kit after the installation. The Costpoint, GCS Premier, and/or Time & Expense pages of the wizard will not display during an upgrade because that information is already in the configuration table and will not be updated.



The following warning displays if the database server is the same as the web server. Deltek recommends that this deployment model should only be used for test environments and not in a production environment.



Costpoint



If you entered the GCS Premier password in step 2, please skip to step 13.

10. If you entered the Costpoint password in step 2, the Deltek Costpoint Database Information page of the wizard displays.

11. From the **Database Platform** drop-down list, select either **Microsoft SQL Server** or **Oracle**.
 - **Microsoft SQL Server** — If you selected this database type, the wizard page displays the following fields.

Enter the following information:

- **Database Server** — This is the name of the server where your Costpoint database resides.
- **Database Name** — This is the name of your Costpoint transaction database.
- **Database Username** — This is a read-only database user account.
- **Database Password** — This is the password for the read-only database user account specified above.
- **Costpoint Company ID** — This is the 10-character company ID for which you are installing Budgeting & Planning.
- **Oracle** — If you selected this database type, the wizard page displays the following fields:

Enter the following information:

- **SID** — This is the name given in TNSNames.ora.
- **Database Username** — This is a read-only database user account specified in the TNSNames.ora for the SID specified above.
- **Database Password** — This is the password for the read-only database user account specified above.
- **Costpoint Company ID** — This is the 10-character company ID for which you are installing Budgeting & Planning.



The Oracle Client Tools must be installed on the DeltekBP database server and configured correctly to connect to the Costpoint database.

Also, the Microsoft SQL Server Agent service account name on the DeltekBP database server must have read access to the Costpoint database. If the Microsoft SQL Server Agent is running as LocalSystem, LocalService, or NetworkService and the web and database tiers are on separate machines, setup will exit so that you can correct this issue. Please re-run setup after this issue has been corrected.

Messages will appear reminding you to install these tools. Click **OK** to continue.

12. Click **Next**, and proceed to step 16.

GCS Premier



If you did not enter the GCS Premier password in step 2, please skip to step 16.

13. The Deltek GCS Premier Database Information page of the wizard displays.

14. In the **Data** field, enter the Deltek GCS Premier data directory.
15. Click **Next**.

Time & Expense



This page of the wizard may or may not display, depending on the Deltek products you own. If it does not display, please skip to step 18.

16. The Deltek Time & Expense Database Information page of the wizard displays.

17. From the **Database Platform** drop-down list, select either **Microsoft SQL Server** or **Oracle**.

- **Microsoft SQL Server** — If you selected this database type, the wizard page displays the following fields.

Enter the following information:

- **Database Server** — This is the name of the server where your Time & Expense database resides.
- **Database Name** — This is the name of your Time & Expense database.
- **Database Username** — This is a read-only database user account.
- **Database Password** — This is the password for the read-only database user account specified above.
- **Time & Expense Schema** — This is the name of the Time & Expense database schema that you want to connect to Budgeting & Planning.
- **Oracle** — If you selected this database type, the wizard page displays the following fields.

Deltek Costpoint Budgeting & Planning Installation Wizard

Deltek Time & Expense Database Information

Please specify your Deltek Time & Expense database connection information. The Oracle Client tools must be installed on the CAMD-SLEZBERG2 and the TNSNames.ora file must be configured to successfully connect to your Deltek Time and Expense database. The SID field on this screen must match exactly what is stated in the TNSNames.ora file.

Database Platform:

SID:

Database Username:

Database Password:

Time and Expense Schema:

InstallShield

< Back Next > Cancel

Enter the following information:

- **SID** — This is the name given in TNSNames.ora.
- **Database Username** — This is a read-only database user account specified in the TNSNames.ora for the SID specified above.
- **Database Password** — This is the password for the read-only database user account specified above.
- **Time & Expense Schema** — This is the name of the Time & Expense database schema that you want to connect to Budgeting & Planning.



The Oracle Client Tools must be installed on the DeltekBP database server and configured correctly to connect to the Costpoint database.

Also, the Microsoft SQL Server Agent service account name on the DeltekBP database server must have read access to the Costpoint database. If the Microsoft SQL Server Agent is running as LocalSystem, LocalService, or NetworkService and the web and database tiers are on separate machines, setup will exit so that you can correct this issue. Please re-run setup after this issue has been corrected.

Messages will appear reminding you to install these tools. Click **OK** to continue.

18. Click **Next**.

The Specify Web Site page of the wizard displays.



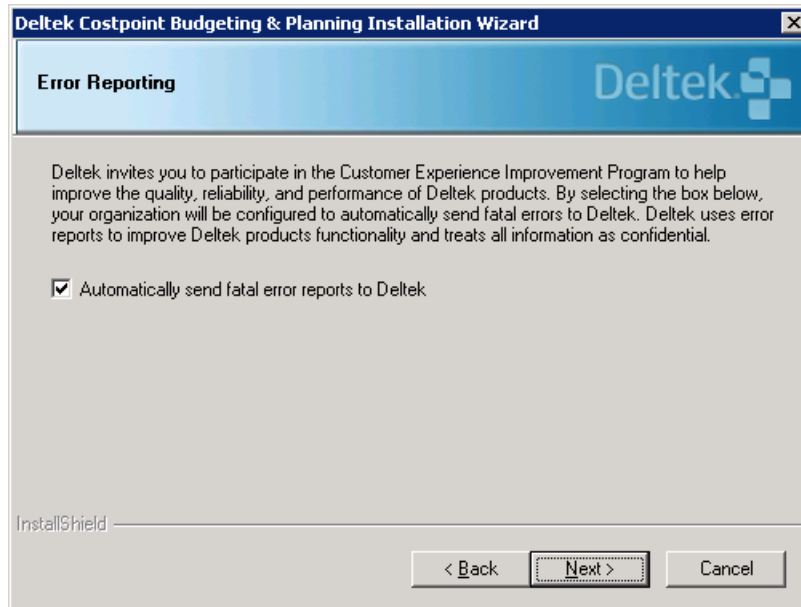
The Specify Web Site page of the wizard displays only if there are multiple Web sites installed on the Web server.

The default virtual directory name is DeltekBP, and the default application pool created is DeltekBPAppPool. This can be changed after the installation by using the Deltek Budgeting & Planning Resource Kit tool.

19. From the **Available Web Sites** drop-down list, select the Web site to which you want to install Deltek Budgeting & Planning.

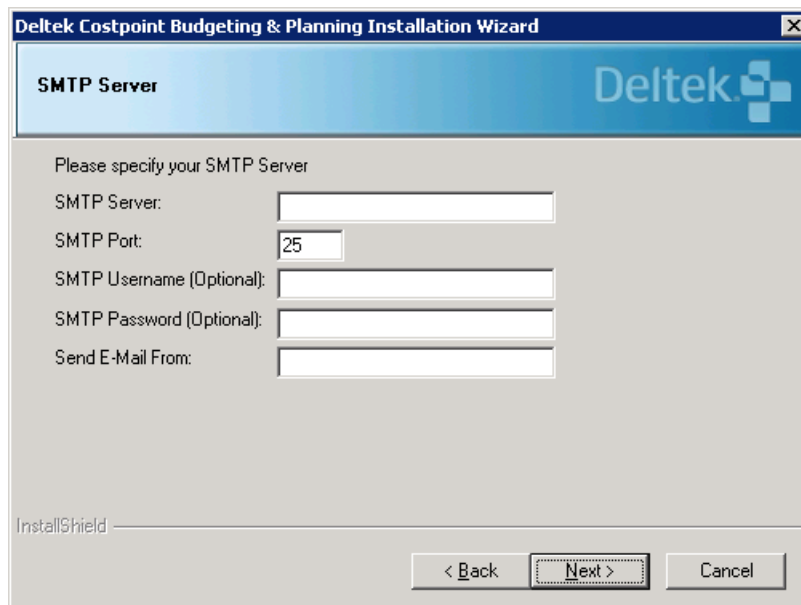
20. Click **Next**.

The Error Reporting page of the wizard displays.



The screenshot shows the 'Error Reporting' window of the Deltek Costpoint Budgeting & Planning Installation Wizard. The window has a blue header with the Deltek logo. The main text explains that Deltek invites users to participate in the Customer Experience Improvement Program to help improve product quality, reliability, and performance. It states that by selecting the checkbox, the organization will be configured to automatically send fatal errors to Deltek, which uses these reports to improve functionality and treats all information as confidential. A checkbox labeled 'Automatically send fatal error reports to Deltek' is checked. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a dashed border. The 'InstallShield' logo is visible in the bottom left corner.

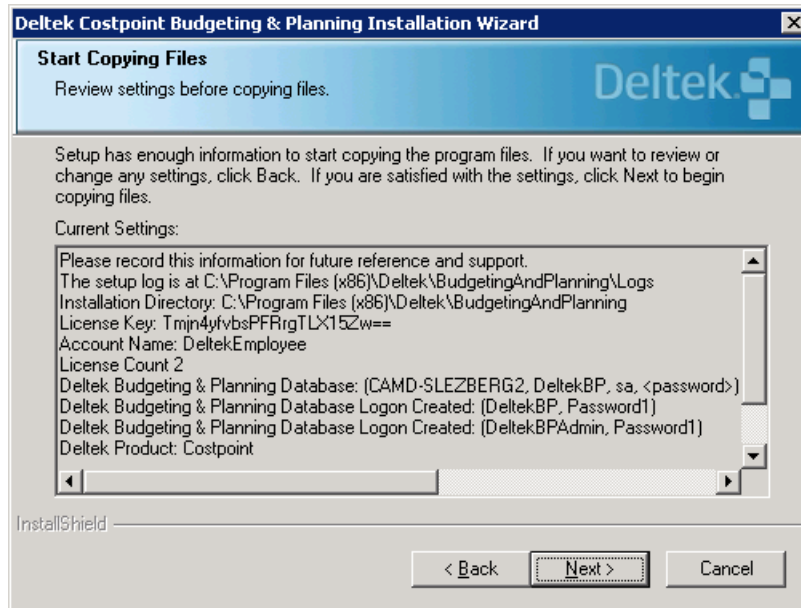
21. Select the option on this page if you want to automatically send fatal error reports to Deltek, and click **Next**.
22. If you selected the option to send the fatal reports, then the SMTP Server page of the Wizard displays.



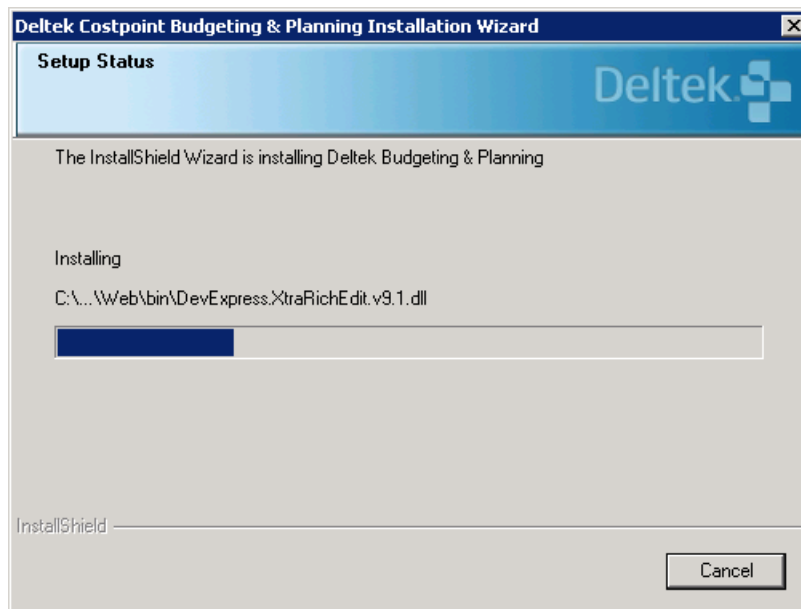
The screenshot shows the 'SMTP Server' window of the Deltek Costpoint Budgeting & Planning Installation Wizard. The window has a blue header with the Deltek logo. The main text asks the user to 'Please specify your SMTP Server'. Below this, there are five input fields: 'SMTP Server:', 'SMTP Port:', 'SMTP Username (Optional):', 'SMTP Password (Optional):', and 'Send E-Mail From:'. The 'SMTP Port' field contains the value '25'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a dashed border. The 'InstallShield' logo is visible in the bottom left corner.

23. Enter the SMTP Server information for your company, and click **Next**.

The Ready to Install page of the wizard displays.

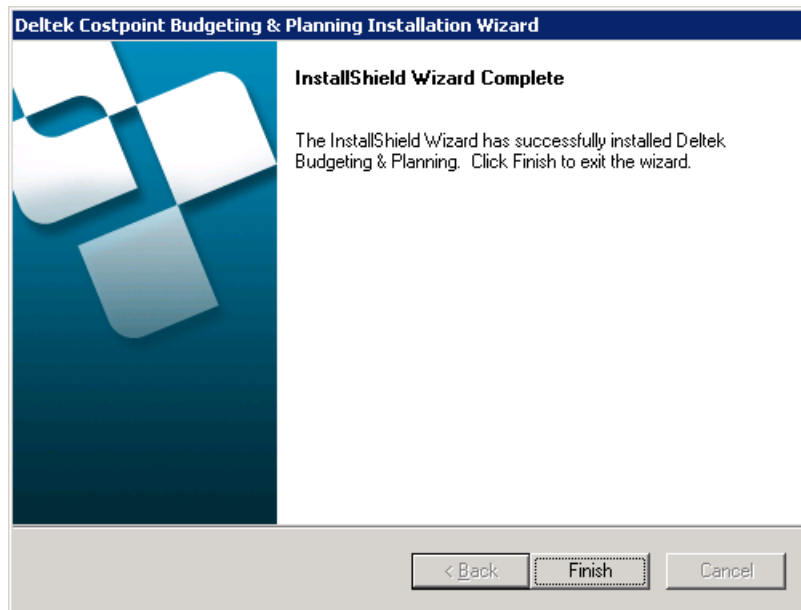


24. Read through the summary of the installation settings, and take one of the following actions:
 - If any of the information is incorrect, click **Back** to change your settings.
 - If the information is correct, click **Next** to start the installation.
25. The Setup Status page of the wizard displays, showing you the progress of the installation.



You can click **Cancel** at any time and on any page of the installation wizard to abort the installation.

26. When the InstallShield Wizard Complete page displays, click **Finish** to exit the wizard.



Additional Installation Requirements

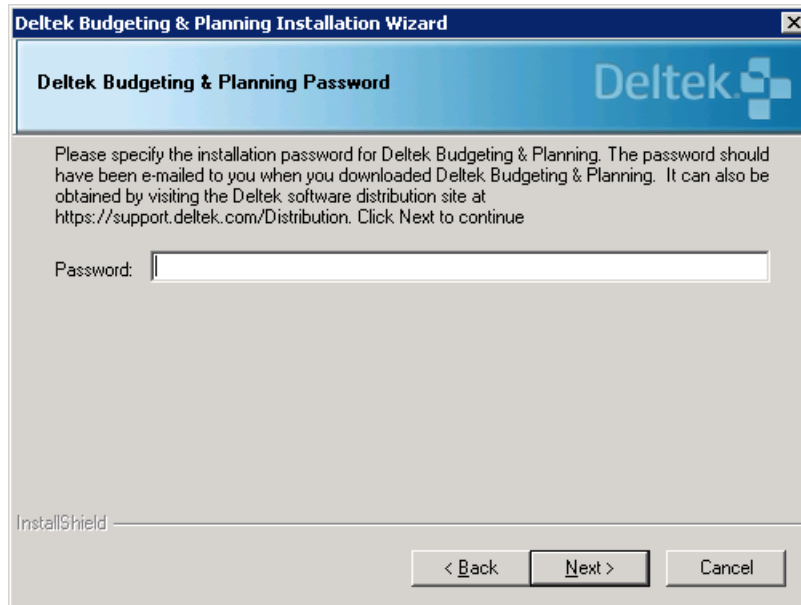
An additional installation step is required if all of the following conditions are met:

- You currently use Deltek GCS Premier
- Your DeltekBP web server and your DeltekBP database server are on different servers.

If you meet both of these conditions, complete the following additional steps:

1. From your DeltekBP database server, locate the **DeltekBudgetingAndPlanning609GA.exe** setup file, and double-click to run it.

The Deltek Budgeting & Planning Password page displays.

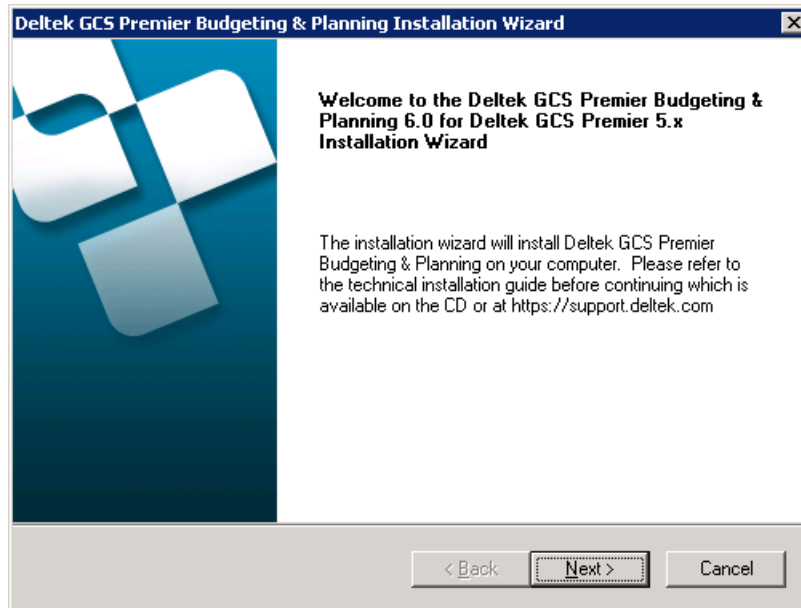


2. Enter the Deltek Budgeting & Planning Database Tier for Deltek GCS Premier password you received in the message box during the web tier installation. For example,



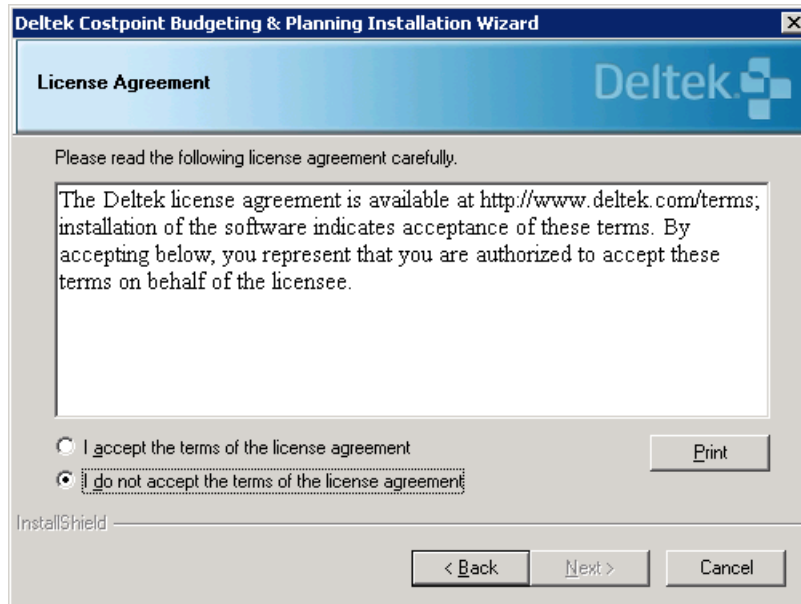
3. Click **Next**.

The Welcome page of the Installation Wizard displays.



4. Click **Next**.

The License Agreement page of the wizard displays.



5. After reading the license agreement, accept the terms, and click **Next**.

The Account Name and License Key page of the wizard displays.

The screenshot shows a window titled "Deltek Costpoint Budgeting & Planning Installation Wizard". The header bar is blue with the Deltek logo on the right. Below the header, the title "Account Name and License Key" is displayed. A message reads: "Please specify your account name and license key given to you by Deltek." There are two text input fields: "Account Name:" and "License Key:". At the bottom left, there is a small "InstallShield" logo. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

6. Enter your **Account Name** and **License Key**.




The account name is validated by the license key you enter. The encrypted license key is decrypted and the account name and licensed user account is parsed out.

7. Click **Next**.

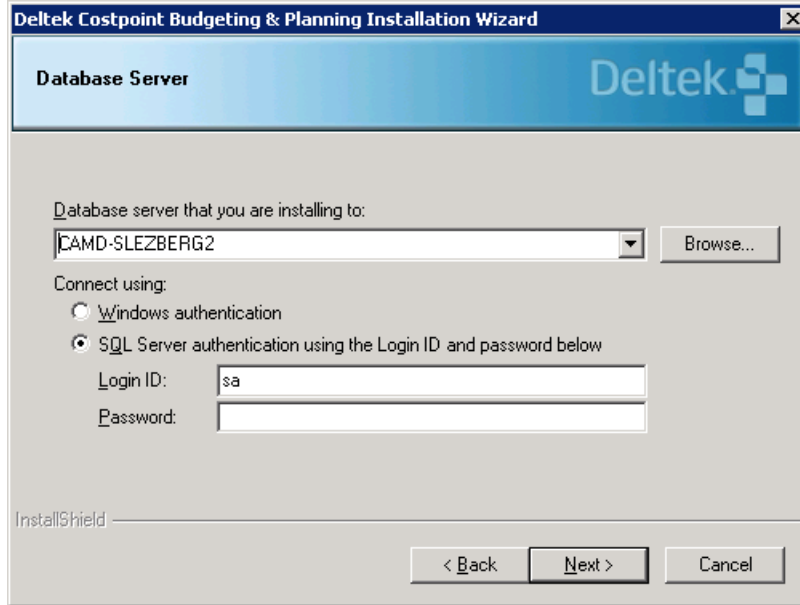
The Choose Destination Location page of the wizard displays.

The screenshot shows a window titled "Deltek Costpoint Budgeting & Planning Installation Wizard". The header bar is blue with the Deltek logo on the right. Below the header, the title "Choose Destination Location" is displayed. A message reads: "Install Deltek Budgeting & Planning to:" followed by the path "C:\...\Deltek\BudgetingAndPlanning". To the left of the path is a folder icon. To the right of the path is a "Change..." button. At the bottom left, there is a small "InstallShield" logo. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

8. Select the default location, or click **Change** to select a new location, and then click **Next**.

 Deltek recommends keeping the default installation directory.

The Database Server page of the wizard displays.



9. Take the following actions:
- Enter, or click **Browse** to select, the database server to which you **already** installed Deltek Budgeting & Planning for Deltek GCS Premier.
 - Select SQL Server authentication, and enter **sa** for the **Login ID**.
 - Click **Next**.
10. The Ready to Install page of the wizard displays. Click **Next** to install the files and configure the database.

Log On to Budgeting & Planning the First Time

When you log on to Budgeting & Planning the first time after you have installed the application, you will need to use the default administration credentials.



After you are logged in, you can use the Maintain Login Users screen to add your users to Budgeting and Planning. For more information, refer to the Getting Started Guide.

To log on to Budgeting & Planning for the first time, complete the following steps:



This procedure uses a screen shot of the Costpoint Budgeting & Planning login screen. If you use GCS Premier Budgeting & Planning, the screen is exactly the same except for the title.

1. Launch the application by clicking the appropriate Budgeting & Planning icon located on your desktop or provided URL.

The Deltek Budgeting & Planning logon screen displays.

2. Enter the following information:
 - **Account Name** — Use the same account name that you entered on the Account Name and License Key page during installation (step 4).
 - **User ID** — Enter **admin**.
 - **PIN** — Enter **1111**.
 - **Password** — Enter **Deltek1!**.



The password is case-sensitive.

3. Click **Log In**. The Budgeting & Planning navigation screen displays.

Web Server Changes

The installation process makes the following changes to the Web Server.

| |
|--|
| If not already installed, the Microsoft Report Viewer 2008 (SP1) is downloaded and installed. |
| Creates IIS Application Pool (DeltekBPAppPool) |
| Creates IIS Virtual Directory (DeltekBP) |
| Sets IIS Virtual Directory (DeltekBP) for Windows Integrated and Anonymous Authentication |
| Sets Virtual Directory DefaultDocuments to "Logon.aspx,default.htm,default.aspx,default.asp" |
| Sets Virtual Directory EnableParentPaths to True |
| Sets AllowDebugging to False |
| Assigns Virtual Directory to Application Pool |
| Installs ASP. NET Script Maps |
| Enables 32bitAppOnWin64 for the Application Pool |
| Creates data.config (<add name="deltek" providerName="System.Data.SqlClient" connectionString="server=HQ1APDEV70;database=DeltekBP;uid=DeltekBP;pwd=Password1;" />) in the "C:\Program Files\Deltek\Budgeting & Planning\Web" directory |
| Encrypts data.config |

Database Server Changes

The installation process makes the following Database Server changes.

| |
|--|
| Creates DeltekBP Database |
| Sets Database Compatibility to SQL 2000 |
| Sets Recovery Model to Simple |
| Sets PageVerify (that is, Torn Page Detection) to Checksum |
| Sets Show Advanced Options to 1 |
| Sets xp_cmdshell to 1 |
| Sets Ole automation procedures to 1 |
| Sets Ad Hoc Distributed Queries to 1 |
| Set sp_fulltext_database = enable for DeltekBP Database |
| Creates DeltekBP SQL Login |
| Adds DeltekBP to db_datareader Role |
| Adds DeltekBP to db_db_datawriter Role |
| Creates DeltekBPAdmin SQL Login |
| Adds DeltekBPAdmin to SYSADMIN Role |
| Adds DeltekBPAdmin to master database |
| Adds DeltekBPAdmin to msdb database |
| Adds DeltekBPAdmin to DeltekBP database |
| Adds DeltekBP to master database |
| Adds DeltekBP to DeltekBP database |
| Grants sp_OACreate to DeltekBP |
| Grants sp_OASetPropertyto DeltekBP |
| Grants sp_OAMethod to DeltekBP |
| Grants sp_OAGetErrorInfo to DeltekBP |

| |
|--|
| Grants sp_OADestroy to DeltekBP |
| Grants sp_Start_Job to DeltekBPAdmin |
| Creates Full Text Catalog on DeltekBP Database |
| Initializes DeltekBP Database – Called ScriptsMain and DataMain |
| Updates eProMT_CONFIG - INTEGRATION_FS_SOURCE = DELTEK_CP (DELTEK_GCS or DELTEK_CP) |
| Updates eProMT_CONFIG - INTEGRATION_TS_SOURCE = DELTEK (DELTEK, UNANET, or NONE) |
| Updates eProMT_CONFIG - INTEGRATION_EXP_SOURCE = DELTEK (DELTEK, UNANET, or NONE) |
| Updates eProMT_CONFIG - DELTEK_CP_TYPE = SQL (SQL or Oracle) |
| Updates eProMT_CONFIG - DELTEK_CP_CLIENT = SQLNCLI (SQLNCLI or ORAOLEDB.Oracle) |
| Updates eProMT_CONFIG - DELTEK_CP_CONN = <SQL or Oracle Connection String> |
| Updates eProMT_CONFIG - DELTEK_TE_TYPE = SQL (SQL or Oracle) |
| Updates eProMT_CONFIG - DELTEK_TE_CLIENT = SQLNCLI (SQLNCLI or ORAOLEDB.Oracle) |
| Updates eProMT_CONFIG - DELTEK_TE_CONN = <SQL or Oracle Connection String> |
| Updates eProMT_CONFIG - eMAIL_SMTP_SERVER = <If SMTP Server was entered during UI> |
| Updates eProMT_CONFIG - eMAIL_SMTP_PORT = <If SMTP Server was entered during UI> |
| Updates eProMT_CONFIG - eMAIL_SMTP_USER = <If SMTP Server was entered during UI> |
| Updates eProMT_CONFIG - eMAIL_SMTP_PASSWORD = <If SMTP Server was entered during UI> |
| Updates eProMT_CONFIG - eMAIL_ADDRESS_FROM = <If SMTP Server was entered during UI> |
| Updates eProMT_CONFIG - eMAIL_ADDRESS_TO = <Deltek email alias> |
| Updates eProMT_CONFIG - LICENSE_KEY = <Encrypted Serial Number entered during UI> |
| Updates eProMT_CONFIG - VERSION = <Version field in setup> |
| Checks to see if SQLServer Agent is running and start if not. |

| |
|--|
| Creates MSSQL Agent Job to run Stored Procedure (SRC00_PROCESS_ALL) every day at 2:00 AM |
| If Costpoint, the MSSQL Agent Job is named "ImportDeltekCostpointToDeltekBP." |
| If GCS, the MSSQL Agent Job is named "ImportDeltekGCSPremierToDeltekBP." |
| Updates eProMT_CONFIG - REFRESH_PROCESS_NAME = < MSSQL Agent Job Name Above> |
| Updates eProMT_TABLE - REFRESH_PROCESS_NAME = < MSSQL Agent Job Name Above> |
| If Costpoint, the value is "SRC01_REFRESH_PROCESS." |
| If GCS, the value is "SRC02_REFRESH_PROCESS." |
| Creates MSSQL Backup Device called DeltekBPBackupDevice |
| Creates MSSQL Agent Job to backup database every day at 1:00 AM |
| If the Costpoint and/or Time & Expense database is on a Microsoft SQL Server, the installation wizard gets the service account name of the database server that DeltekBP database is on and checks to see if that Windows account has access to the Costpoint and/or Time & Expense databases on the Microsoft SQL Server. If it does not, then the wizard creates the Windows account on the Costpoint and/or Time & Expense database server, adds it to the Costpoint and/or Time & Expense database, and grants the user db_datareader rights to that database so that the job can execute in the context of the SQL Agent account on the Costpoint and/or Time & Expense remote database server. |
| Executes an initial backup of the DeltekBP Database to the DeltekBPBackupDevice |

Post-Installation Considerations

During the execution of the Installation Wizard, default values were assigned to various database tables that control the behavior of the Deltek Budgeting & Planning application, including the presentation of data in its various report pages. Although these default values will allow the product to be immediately functional, it is important that they be reviewed and updated as appropriate. This will ensure that the routine data integration processes and the product features properly reflect your unique accounting system installation and reporting and budgeting preferences.



Please contact your Deltek Budgeting & Planning implementation manager for more information.