Deltek

Use the Deltek File Transfer Tool to Upload Your Database

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Contents

Overview

This guide applies for Deltek Vantagepoint, Vision, Ajera CRM, and GovWin Capture Management.

Follow the steps in this guide to upload a database to Deltek to replace your production or sandbox database.

Option	Purpose
Replace Production Database	This option overwrites your live database with the uploaded database. The name of your live database includes your company name. It is listed in the **Database** drop-down list on the login screen.
Replace Sandbox Database	This option overwrites your existing sandbox database with the uploaded database. The name of your sandbox database includes the suffix **_Sandbox**. It is listed in the **Database** drop-down list on the login screen. Sandbox databases are typically used for testing and training.

This process has two parts:

1. Open a "Database Upload" support case.
2. Upload the database, using the support case number.

Open a “Database Upload” Support Case

You need a Deltek support case number to upload your database. To receive this number, your Cloud (SaaS) administrator must open a support case.

This case must:

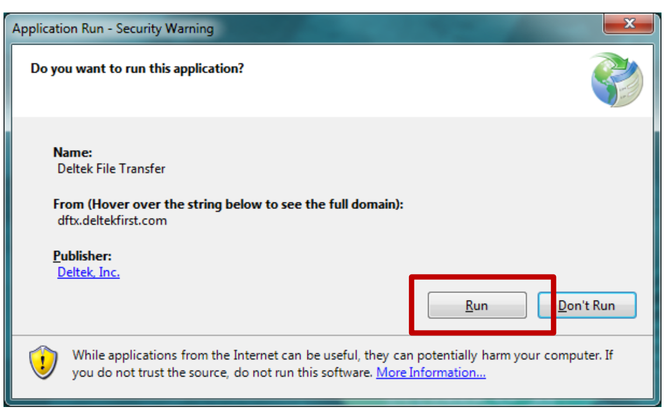
- Be created by the Cloud (SaaS) administrator.
- Be created from the Cloud Solutions page, using the **Database Upload** option. (You cannot use the **Submit a Case** option or call Deltek Customer Care to open the case.)
- Indicate whether the database should replace your production or sandbox database.
- Be a new case, created specifically for this database upload. You cannot reuse an old case number.

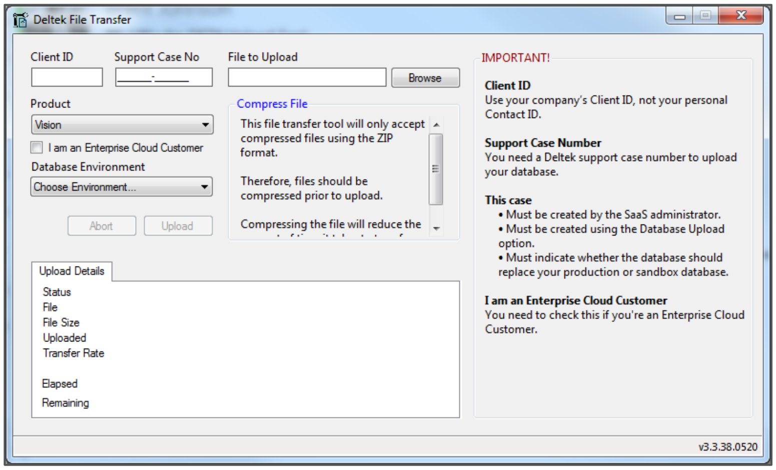
Note: Deltek will not fulfill any upload request that does not meet these requirements.

Steps to Open the Support Case

Step	Do this:	Watch out for this:
1	Log into the Deltek Support Center at https://deltek.custhelp.com/app/home.	You must be the SaaS administrator to perform these steps.
2	Click **Cloud Solutions** and select your product from the drop-down list. Click **Go**.	Do not create a new support case using the **Submit a Case** option or by calling Deltek Customer Care.
3	In the Service Requests area, select **Database Upload**.	
4	Select **Production** or **Sandbox**, depending on the type of database that you want to replace.	
5	If you have multiple production or sandbox databases, enter the name of the database that you want to overwrite (for example, CompanyName_CRM or CompanyName_Sandbox1). Click **Submit**. You will see a **Database Upload Submitted** message that includes a case number (for example, Case No. 171214-000636).	
6	Save the case number. You will need it when you upload the database.	

Upload the Database

Step	Do this:	Watch out for this:
1	Prepare the database backup file that you will upload. ▪ Create a .BAK file of your database. Include the word LIVE or TEST in the filename. ▪ Zip the file. The upload tool only uploads .ZIP files. ▪ If you use FileStream to store supporting documents, make a backup of the FileStream database as well as a backup of your primary database. Include both .BAK files in the same .ZIP file.	
2	Launch the upload tool (Deltek File Transfer) from Internet Explorer or Microsoft Edge. ▪ For customers that are hosted in the United States, United Kingdom, and Australian regions, go to https://dftx.deltekfirst.com/. ▪ For customers that are hosted in the Canadian region, go to https://dftx-ca.deltekfirst.com.	You must launch the tool from Internet Explorer or Microsoft Edge only, not another browser. If you are unable to launch the tool from Microsoft Edge, see Enable ClickOnce Support in Microsoft Edge. You must have Microsoft .NET Framework 3.5 SP1 installed on the workstation that you are using.
3	**If you are using the upload tool for the first time, you must install it first.** This dialog box displays. Click **Run** to install the upload tool. 	

Step	Do this:	Watch out for this:
	When the upload tool is installed, this dialog box displays.  	
4	In the **Client ID** field, enter your 5-digit client ID.	Be sure to use your company's **Client ID**, not your **Contact ID**. If you don't know your company's **Client ID**, ask your SaaS administrator.
5	In the **Support Case Number** field, enter the number of the support case that your SaaS administrator opened for this database upload.	You must use the support case number of the Database Upload support case that your SaaS administrator opened for this upload. You cannot use a different support case number.
6	In the **Product** field, select your Deltek product from the drop-down list.	
7	If you use the enterprise-level cloud offering, select **I am an Enterprise Cloud Customer**.	If you don't know if you are an enterprise-level customer, see your SaaS administrator.
8	In the **Database Environment** field, select either **Production** or **Sandbox** from the drop-down list.	Your choice must match the environment that your SaaS administrator chose when opening the Database Upload support case.
9	Next to the **File to Upload** field, click **Browse** and select the database backup .ZIP file to upload.	

Step	Do this:	Watch out for this:
10	Click **Upload**. A progress bar displays as the upload happens. In the Upload Details area, you can see information about the file, file size, transfer rate, and upload time elapsed and remaining. When the upload is finished, you will see the message **File upload is completed**.	

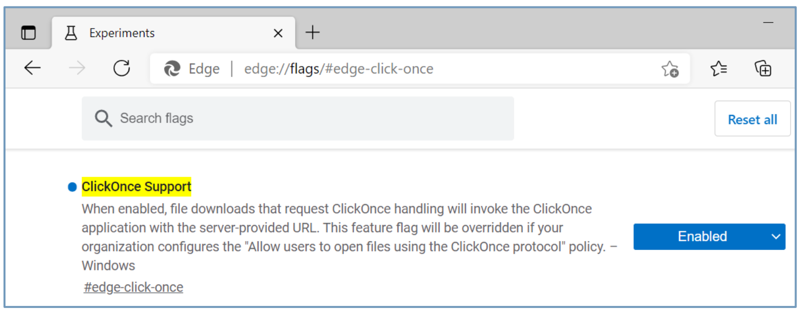
Enable ClickOnce Support in Microsoft Edge

If you use Microsoft Edge to open ClickOnce applications such as the upload tool (Deltek File Transfer), you may encounter issues in starting the application. You must first enable ClickOnce Support in the browser to run the application.

To enable ClickOnce Support in Microsoft Edge:

1. In the Microsoft Edge address bar, enter **edge://flags/#edge-click-once**.

   The browser displays the **ClickOnce Support** feature flag on the Experiments page.
2. Click the drop-down menu and then select **Enabled**.

3. Restart Microsoft Edge to apply the change.

Relaunch the Upload Tool from Microsoft Edge

After you enable ClickOnce Support, reopen Microsoft Edge and launch the upload tool.

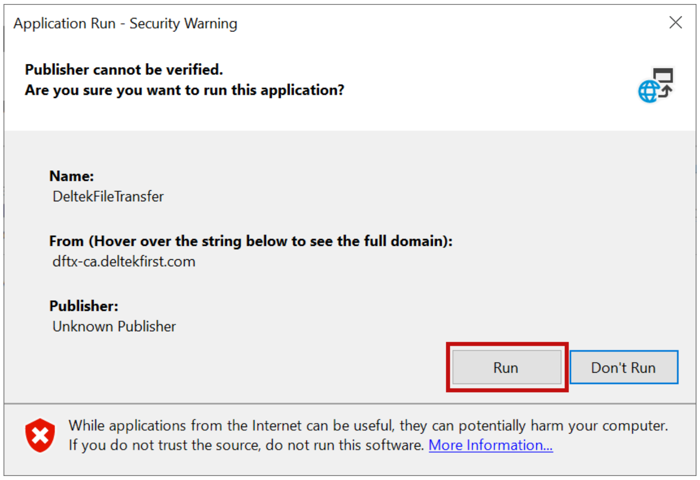
To relaunch the tool:

1. Based on your location, go to one of the following links:
   - For customers that are hosted in the United States, United Kingdom, and Australian regions, go to https://dftx.deltekfirst.com/.
   - For customers that are hosted in the Canadian region, go to

     https://dftx-ca.deltekfirst.com.

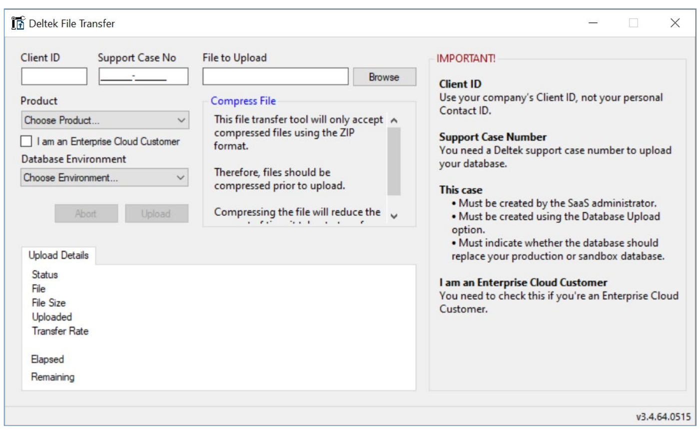
   If you receive a warning message telling you to enable the ClickOnce flag, click **OK**.
2. In response to the confirmation prompt to open the file, click **Open**.
3. If you receive a message asking how you want to open the file, select **Microsoft Edge**.

   The following dialog box displays:



4. Click **Run** to install the upload tool.

   When the upload tool is installed, the following dialog box displays:



5. To upload the database file, complete steps 4 through 10 in Upload the Database.

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