

Deltek Open Plan® 8.8

Installation Guide

April 22, 2026

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Overview

Open Plan is an enterprise-class project management software solution that offers the power and flexibility to complete medium to large or multiple projects on time and on budget. With multi-project analysis, critical path planning and resource management, Deltek Open Plan offers the power and flexibility to serve the differing needs of business, resource and project managers. With Deltek Open Plan, you can improve project success, allocate resources across projects more effectively and share project information across the enterprise.


This document is meant to serve as a guideline for hardware and software requirements and provide your firm's IT department with information about the technical deployment architecture.

It is important to note that the choices of hardware, relational database software, and operating systems in these examples represent guidelines, are subject to change, and do not replace a needs analysis and site survey with a Deltek Technical Consultant. Contact a Deltek Technical Systems Engineer for suitability of legacy equipment.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it [here](#) free from Adobe.

To add a custom note using Adobe Reader s:

1. On the Reader toolbar, click **Comment** at the far right.
2. In the **Annotations** pane that displays, click  **Sticky Note**
The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click
A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box
5. Continue adding notes as needed.
6. Save the document.

Note: Deltek recommends that you save the document to a slightly different filename so as to keep the original from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, cumulative updates, and sub-releases. You can access DSM through the Deltek Support Center or use Deltek Software Manager Lite to download Deltek products.

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

1. In your Web browser, go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Login**.
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek product and click **OK**.

Note: When you log on for the first time, DSM asks you to select a default folder where Deltek products are to be downloaded.

You can change this folder anytime in the Settings dialog box.

6. In the left pane, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download.

Options include:

- **Complete**
- **Cumulative Updates**
- **Hotfixes**
- **Sub-Release**

8. In the table, select the check box that corresponds to the Deltek product that you want to download.

The right pane displays a message stating that the product has been added to the download queue.

Note: To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane to download the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite:

1. In your Web browser, go to <https://dsm.deltek.com/DeltekSoftwareManagerLite>.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Logon**.
3. When the Deltek Software Manager Lite page displays, select a product from the drop-down list.
4. Click the product type that you want to download.

Note: The download behavior and download folder may differ depending on the browser and browser settings that you are using.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click [here](#).
- To view a tutorial on how to use Deltek Software Manager, click [here](#).
- To view more information on troubleshooting Deltek Software Manager, click [here](#).

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

Pre and Post-Installation Checklists

Preinstallation Checklist

Steps		Related Topics
1.	Verify that you have the supported operating system and database platforms installed for the database and client tiers.	<ul style="list-style-type: none"> ▪ System Requirements
2.	Verify that you have at least 150MB of disk space available for this installation.	
3.	Verify that the user account performing the installation is a member of the local Windows System Administrators group.	
4.	Open Plan is installed and configured to use a Microsoft Access database by default and does not require that you have an MS SQL Server or Oracle database to use the software.	<ul style="list-style-type: none"> ▪ Appendix B: Open Plan Databases ▪ Set Up a Database

Post-Installation Checklist

Steps		Related Topics
1.	Verify that users have permission for the Open Plan folders.	<ul style="list-style-type: none"> ▪ Give Users the Appropriate Open Plan Folder Permissions
2.	Verify that users and groups have been added to the Deltek EPM Security Administrator.	<ul style="list-style-type: none"> ▪ Launch the Deltek EPM Security Administrator
3.	<p>Open Plan is pre-configured to use an included Access database by default.</p> <p>If you wish to use Open Plan with a SQL Server or Oracle database, follow these steps to create and configure the database for use with Open Plan.</p> <ol style="list-style-type: none"> 1. Set up the database. 2. Set up a data source for the database. 3. Load the default data for the database. 	<ul style="list-style-type: none"> ▪ Set Up a Database ▪ Set Up a Data Source for a New Database ▪ Load Default Data

Before You Begin Deployment

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

- Logical Tiers
- Installation / Deployment Models
- Hardware and Software Requirements

Logical Tiers Overview

Open Plan uses a two-tier architecture. The logical tiers are as follows:

- **Client / Application Tier** — This tier performs Open Plan's functional process logic and provides the user interface layer. This tier can be a workstation or a Citrix/Terminal Server.
- **Database Tier** — This tier consists of a database server where the Open Plan data is stored and retrieved.

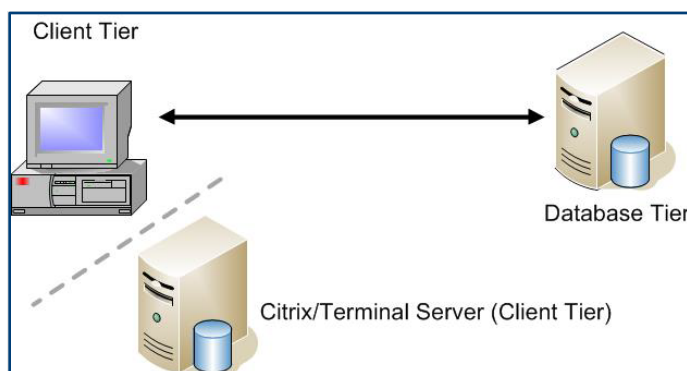
Installation/Deployment Models

Stand-Alone Deployment

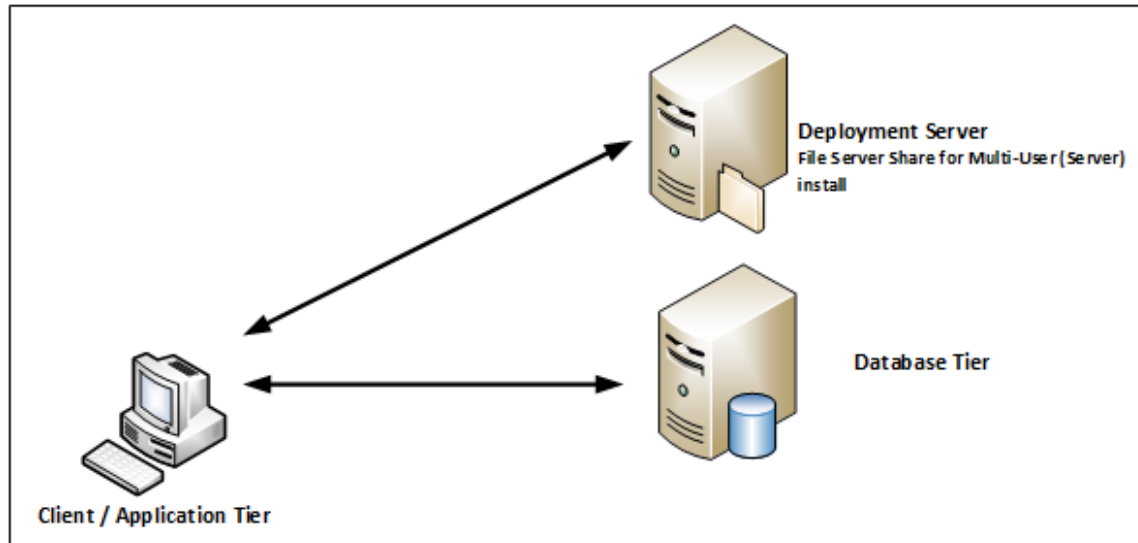
The stand-alone model is designed for a single-user setup. The client, application, and database tiers all reside on the same machine.

Client/Server Deployment

In the client/server model, you install the client / application tier on workstations that directly connect to a database server. However, when a client workstation that is connected to the database goes through a router or a firewall, this type of setup often yields poor performance. This model can be deployed in a Citrix / Terminal Server environment to improve performance in that scenario.



In addition, the Multi-User (Server) install can be performed, where the application files reside on a network file share, and the Workstation installation is performed on each workstation.



Unsupported Scenarios

The Open Plan installation does not support installing any Open Plan tiers on any of the following servers:

- Domain Controller
- Microsoft Exchange Server
- Proxy, Firewall, or ISA Server
- Microsoft SharePoint Portal Server
- Installing any Open Plan Tier on Small Business/Essential Business Server

Using these services / servers can cause significant issues in the performance, reliability, and functionality of the Open Plan application and the other applications on your network.

System Requirements

Your organization has made a substantial commitment to ensure it has a fully integrated earned value management (EVM) solution. To support that commitment, Deltek recommends that you carefully consider the hardware requirements necessary to run Open Plan properly.

Hardware Sizing Considerations

There are several factors that go into sizing an appropriate server infrastructure. The number of concurrent users accessing the system at any given time, the amount of data being analyzed, and growth expectations all have an impact on the initial sizing plans. The hardware profiles provided in the previous sections are intended as a starting point for deployment. It is expected that our clients will use the product in many ways, plan for future release, and client customizations will all impact the growth and scaling of the overall solution. Further in-depth discussion of the business needs of the solution during implementation of application will provide final guidance on hardware requirements.

Memory Requirements for Typical/Average Use

Below are details on the memory footprint of the product. This can be helpful when sizing a client tier that runs in a virtual environment, Citrix, or Terminal Server.

Tier	Memory*
Client Tier	50 MB for an Open Plan project with about 2,000 activities, 2,000 relationships, and 4,000 resource assignments (plus memory required by the database driver being used).
Application Tier (Citrix/Terminal Server only)	Please see your vendor for recommendations.
Database Tier	Database instance memory should be 10% - 15% of the database size. For example, if database size is expected to be 500GB then allocate 50GB - 75GB memory.

* Per concurrent client instance and in addition to any memory needed for the operating system and other applications that may run in parallel with this product.

Definition of Typical/Average Use

A user working with moderate-sized projects (2,000 – 5,000 activities), one project at a time, in either exclusive or shared mode, and using spreadsheet or bar chart views of moderate complexity.

If the user is working with views in Open Plan that put a heavy demand on memory (for example, a bar chart view with many types of bars defined, a large number of “normal” calculated fields, or a smaller number of calculated fields that are calculation-intensive), larger amounts of memory will be used.

In addition, for customers doing either Microsoft Project or Primavera integrations, Open Plan requires more memory.

Note: With the 32-bit version of Open Plan, a maximum of 3-4 GB may be used by the application due to operating system constraints. The 64-bit version of Open Plan can use up to 192 GB for the Professional, Enterprise, and Ultimate versions of Windows 10.

Hardware Requirements

The number of people using Open Plan, the PM Compass processes they are using, and the size of your database all have an effect on the hardware and software requirements for your servers.

Note: Specific server hardware configurations may have an impact on your overall Deltek product licensing requirements. Deltek recommends that you confirm with a Deltek Technical Sales Engineer that the server hardware you plan to deploy is in line with your Deltek license agreement and that you learn how overall server infrastructure expansion in the future may affect your Deltek licensing.

Standalone Deployment

The following table lists the recommended minimum hardware and software requirements for a deployment of Deltek Open Plan in a standalone, workstation environment.

Tier	Hardware/Software Required	Determining Factors
Client Database Tier	<ul style="list-style-type: none"> ▪ Intel 2.0 GHz or higher ▪ 2 GB RAM ▪ 10-20GB of available disk space for application, plus additional space for each project 	<ul style="list-style-type: none"> ▪ Usage ▪ Integration Requirements ▪ Database Size

Client/Server and Citrix/Terminal Server Deployment

In the client/server model, you install the client and application tiers on workstations (or Citrix / Terminal Server) that directly connect to a database server.

The following tables list the recommended minimum hardware and software requirements for a deployment of Deltek Open Plan in a client / server environment.

Small Client/Server Installation: 1 - 25 Concurrent Users

Tier	Hardware/Software Required	Determining Factors
Database	Server Class Machine: <ul style="list-style-type: none"> ▪ Logical Cores 2.0+ GHz or faster CPU ▪ 8+ GB Physical Memory ▪ High performance disk volume – SSD preferred 	<ul style="list-style-type: none"> ▪ Database Size ▪ Database Growth ▪ Usage
Application Server <i>(Citrix/Terminal Server only)</i>	Server Class Machine: <ul style="list-style-type: none"> ▪ 4 - 8 x Logical Cores 2.5 GHz or faster CPU ▪ 8+ GB Physical Memory ▪ 125 MB of available disc space for application, plus additional space for each project 	<ul style="list-style-type: none"> ▪ Total Users ▪ Power Users ▪ User Location
Client	Desktop Class Machine: 1.8 GHz or faster CPU Recommend 4 GB Physical memory 530 MB of available disk space for application, plus additional space for each project Monitor resolution must be at least 1024×768	Applications running in client machine

Medium Client/Server Installation: 25 – 50 Concurrent Users

Tier	Hardware Required	Determining Factors
Database	Server Class Machine: <ul style="list-style-type: none"> ▪ 8 x Logical Cores 2.8 GHz or faster CPU ▪ 8+ GB Physical memory 	<ul style="list-style-type: none"> ▪ Database Size ▪ Database Growth

Tier	Hardware Required	Determining Factors
	<ul style="list-style-type: none"> 100 GB Hard drive 100 MB Network card 	
Application Server <i>(Citrix/Terminal Server only)</i>	Server Class Machine: <ul style="list-style-type: none"> 8 x Logical Cores 2.5 GHz or faster CPU 12 GB Physical memory 200 GB Hard drive space 125 MB of available disc space for application, plus additional space for each project 	<ul style="list-style-type: none"> Total Users Power Users User Location
Client	<ul style="list-style-type: none"> 1.8 GHz or faster CPU Recommend 4 GB Physical memory 530 MB of available disk space for application, plus additional space for each project Monitor resolution must be at least 1024x768 	<ul style="list-style-type: none"> Applications running in client machine

Large Client/Server Installation: 50+ Concurrent Users

Tier	Hardware Required	Determining Factors
Database	Server Class Machine: <ul style="list-style-type: none"> 8 x Logical Cores 2.8 GHz or faster CPU 8+ GB Physical memory 100 GB Hard drive High performance disk volume – SSD preferred 100 MB Network card 	<ul style="list-style-type: none"> Database Size Database Growth
Application Server	Server Class Machine: <ul style="list-style-type: none"> 8 x Logical Cores 2.5 GHz or faster CPU 	<ul style="list-style-type: none"> Total Users Power Users

Tier	Hardware Required	Determining Factors
<i>(Citrix/Terminal Server only)</i>	<ul style="list-style-type: none"> 16 GB Physical Memory 200 GB Hard drive space 125 MB of available disc space for application, plus additional space for each project 	<ul style="list-style-type: none"> User Location
Client	Desktop Class Machine <ul style="list-style-type: none"> 1.8 GHz or faster CPU Recommend 4 GB Physical memory 530 MB of available disk space for application, plus additional space for each project Monitor resolution must be at least 1024×768 	<ul style="list-style-type: none"> Applications running in client machine

Software Requirements

The supported minimum software requirements for a complete installation of Deltek Open Plan are listed below.

Attention: For a complete list of the recommended minimum software requirements, see the [Deltek Product Support Compatibility Matrix](#) document that you can download from the [Deltek Customer Care Connect site](#).

Supported Deployment Technology

Supported versions are the current actively tested versions of technologies used to deploy Open Plan. Except for the Deltek Integrated Products, these technologies are not directly supported by Deltek. Changes to these technologies occur at the discretion of the individual technology vendors.

Supported Deployment Technology	
Operating System	<ul style="list-style-type: none"> Windows 11 Windows Server 2019 Windows Server 2022 Windows Server 2025

Supported Deployment Technology	
	<ul style="list-style-type: none"> ▪ Windows Server 2022 Azure Edition
Citrix	<ul style="list-style-type: none"> ▪ Citrix Virtual Apps and Desktop 7 (Windows Server 2019) ▪ Citrix Virtual Apps and Desktop 7 (Windows Server 2022)
VMWare Horizon	<ul style="list-style-type: none"> ▪ VMWare Horizon 8
Database Platform	<p>Microsoft SQL Server</p> <ul style="list-style-type: none"> ▪ SQL Server 2022 (also supported on Linux and Unix) ▪ SQL Server 2019 (also supported on Linux and Unix) ▪ SQL Server Express 2022 ▪ SQL Server Express 2019 ▪ Azure SQL <p>Oracle</p> <ul style="list-style-type: none"> ▪ Oracle 19.3 ▪ Oracle is supported on Windows, Linux, Unix and Exadata <p>Microsoft Access</p> <ul style="list-style-type: none"> ▪ Microsoft Access 2016 ▪ Microsoft Access 2019 ▪ Microsoft Access 2021
Database Driver	<p>Open Plan supports Access, Oracle, and SQL Server databases through an OLEDB 2.1 compliant provider. The data source providers to use for each database type are listed below.</p> <ul style="list-style-type: none"> ▪ Oracle Provider for OLE DB ▪ Microsoft SQL Server Native Client 11.0 (SQL Server 2012 Native Client, version 11.4.7001.0 or higher) ▪ Microsoft OLE DB Driver for SQL Server, version: 18.2.2.0 or higher ▪ Microsoft OLE DB Provider for Jet ▪ Microsoft ACE OLEDB 16

Supported Deployment Technology	
	<ul style="list-style-type: none"> ▪ Microsoft ACE OLEDB 15 <div style="border: 1px solid #0056b3; padding: 10px; margin-top: 10px;"> <p>Note: The 64-bit version of Open Plan requires the 64-bit version of the Microsoft Access Database Engine.</p> <p>The 64-bit Microsoft Access Database Engine can be obtained from the Microsoft Download Center at the following location: https://www.microsoft.com/en-us/download/details.aspx?id=54920.</p> </div>
Scheduling Tools	<p>Microsoft Project Standard</p> <ul style="list-style-type: none"> ▪ Microsoft Project Standard 2024 ▪ Microsoft Project Standard 2021 <p>Microsoft Project Professional</p> <ul style="list-style-type: none"> ▪ Microsoft Project Professional 2024 ▪ Microsoft Project Professional 2021 <p>Microsoft Project Server</p> <ul style="list-style-type: none"> ▪ Microsoft Project Server 2019 ▪ Microsoft Project Server 2016 <p>Oracle Primavera</p> <ul style="list-style-type: none"> ▪ Primavera P6 24.12 ▪ Primavera P6 23.12 ▪ Primavera P6 22.12 ▪ Primavera P6 21.12 ▪ Primavera P6 20.12 <p>Kidasa</p> <ul style="list-style-type: none"> ▪ Kidasa Milestones 2025 ▪ Kidasa Milestones 2023 ▪ Kidasa Milestones 2021 <p>IPMDAR Schedule Performance Format</p>

Supported Deployment Technology	
Jira	<ul style="list-style-type: none"> Jira Data Center 10.7 Jira Data Center 9.17
Embedded Technology	<ul style="list-style-type: none"> Visual C++ 2015-2022 Redistributable Package (x86) Visual C++ 2015-2022 Redistributable Package (x64)
.NET Framework	<ul style="list-style-type: none"> Microsoft .NET Framework 4.8 Microsoft .NET Framework 4.8.1

Supported PPM Product Versions

The table below outlines the PPM product versions compatible with Open Plan 8.8. The versions listed below are the minimum supported versions. Subsequent cumulative update (CU) releases within the listed major/minor release will be supported unless otherwise specified. Subsequent major/minor releases are not supported.

Supported PPM Product Version	
Deltek Acumen	<ul style="list-style-type: none"> 8.11 8.10
Deltek Cobra	<ul style="list-style-type: none"> 8.7 8.6
Deltek EPM Security Administrator	<ul style="list-style-type: none"> 8.6
Deltek PPM Administrator	<ul style="list-style-type: none"> 1.0
Deltek PM Compass	<ul style="list-style-type: none"> 8.5 Cumulative Update 11 and higher 8.4 Cumulative Update 19 and higher
Deltek wInsight Analytics	<ul style="list-style-type: none"> 8.3.4 (<i>when this version is released</i>) 8.3.3 8.3.2

Compatible Deployment Technology

Compatible versions are the recent previously supported and tested technologies used to deploy Open Plan. These are not actively being tested but are believed to be compatible with Open Plan. Deltek does

not recommend these technologies for new deployments but will make its best effort to answer questions concerning these technologies. These technologies may not be available for troubleshooting at Deltek.

Compatible Deployment Technology	
Operating System	Windows Server 2016
Citrix	XenApp 7.* (Windows Server 2016)
Database Platform	<p>Microsoft SQL Server</p> <ul style="list-style-type: none"> ▪ SQL Server 2017 (also supported on Linux and Unix) ▪ SQL Server 2016 ▪ SQL Server Express 2017 ▪ SQL Server Express 2016 <p>Oracle</p> <ul style="list-style-type: none"> ▪ Oracle 18.3 ▪ Oracle 12.2
Scheduling Tool	<p>Microsoft Project Server</p> <ul style="list-style-type: none"> ▪ Microsoft Project Server 2013 <p>Oracle Primavera</p> <ul style="list-style-type: none"> ▪ Primavera P6 8.4 <p>Kidasa</p> <ul style="list-style-type: none"> ▪ Kidasa Milestones 2019

Open-Source Software Included with Open Plan

Open Plan includes the following open-source software:

Software	Company
D3DES	Public domain implementation of the Triple DES encryption algorithm from the book "Applied Cryptography" http://www.schneier.com/book-applied-source.html
Natural Sort	Freeware sort algorithm. http://sourcefrog.net/projects/natsort/

Software	Company
Pcrypt	Public domain Password encryption based on D3DES
PJNSMTP	Freeware SMTP protocol library

Integrate Open Plan with Other PPM Products

Before integrating Open Plan with any PPM products, including Acumen, Cobra, PM Compass, and wInsight Analytics, Deltek recommends that you consider the following:

- Verify that you are installing the supported version of each PPM product.

Attention: For more information, see [“Supported PPM Product Versions”](#) under System Requirements in this guide.

- For a new installation on a shared database, where Open Plan 8.8 is installed first, older versions of other PPM products that do not support the new encryption protocol will neither function nor integrate with Open Plan 8.8.
- You should consider installing or upgrading all products in the Deltek PPM suite to versions that support the new encryption model.

Attention: For more information on the encryption model, see [“Appendix D: PPM Encryption Conversion Utility”](#) in this guide.

This table lists the versions that support the new encryption model:

Product	Version
Acumen	8.9 or later
Acumen Touchstone	8.2 or later
Cobra	8.5 or later
Open Plan	8.7
PM Compass	8.4 Cumulative Update 02 or later
wInsight Analytics	8.3.2 or later

- If you are installing Open Plan on a database that already contains another Deltek PPM application that is not configured to use Unicode, you must first update the existing database tables to use Unicode structures before installing Open Plan 8.8.
- If you are setting up a new database that will include the Open Plan 8.7 (CU 05 or earlier) or 8.6 (CU 10 or earlier), you need to run the Open Plan scripts prior to running scripts for other PPM products
- Run any recommended installation and upgrade database scripts.

Attention: For installation details, see the [Installation Guide of each PPM product](#).

Integration with PM Compass

If you have upgraded from one version of Open Plan to another and are using PM Compass, ensure that you install the most recent version of the Open Plan Integration for PM Compass file that was released prior to or at the same time as the Open Plan Cumulative Update (CU) that you are using on your PM Compass server.

Creating a new integration file is not necessary for every Open Plan CU release. If there is no integration file for the current Open Plan CU release, use the previous one.

Attention: For more information on the [PM Compass Cumulative Updates and Integration Releases](#), download the related document from the [Deltek Support Center](#) site. If you have any questions, contact a Deltek Customer Success analyst.

Upgrade from Earlier Versions of Open Plan

When upgrading from an earlier version of Open Plan, you must install Open Plan 8.8 in a new folder rather than attempting to overwrite/upgrade an existing Open Plan installation. Open Plan supports concurrent installations with previous versions of Open Plan, provided that:

- The user has Administrator rights. This is necessary to enable Open Plan to update OLE Automation Server registration when different versions are used.
- The two versions do not share the same database.
- The two versions are installed to different folders.

It is necessary to perform a new Workstation installation for users that access Open Plan from a shared server installation. The Workstation setup application is available in the Workstation Setup folder of the server installation folder.

Upgrade the Database

Upgrading from an earlier version of Open Plan requires upgrading the database. Prior to upgrading, Deltek recommends backing up the Open Plan database. After you upgrade, you can no longer use the database with a prior version of the application.

Note: Before running the upgrade scripts for Oracle or SQL Server, your Database Administrator must verify if the Open Plan database is in Unicode. If so, the appropriate setting in the script to upgrade the database in Unicode must be set.

If you are installing to a database that already contains Deltek Cobra or Deltek PM Compass, you must select the same Unicode option as the existing applications.

After the upgrade, review [Run Oracle Scripts for PM Compass Integration](#) to see if it is necessary to run additional scripts to support integration with PM Compass.

If you are upgrading ...	Use this upgrade script
3.5 to 8.0	<ul style="list-style-type: none"> ▪ For SQL, run OPP80_Upgrade_SqlServer.sql ▪ For Oracle, run OPP80_Upgrade_Oracle.sql
8.0 to 8.1	<ul style="list-style-type: none"> ▪ For SQL, run OPP81_Upgrade_SqlServer.sql ▪ For Oracle, run OPP81_Upgrade_Oracle.sql
8.1 to 8.2	<ul style="list-style-type: none"> ▪ For SQL, run OPP82_Upgrade_SqlServer.sql

If you are upgrading ...	Use this upgrade script
	<ul style="list-style-type: none"> ▪ For Oracle, run OPP82_Upgrade_Oracle.sql
8.2 to 8.3	<ul style="list-style-type: none"> ▪ No upgrade needed. 8.2 and 8.3 can use the same database
8.3 to 8.4	<ul style="list-style-type: none"> ▪ For SQL, run OPP84_Upgrade_SqlServer.sql ▪ For Oracle, run OPP84_Upgrade_Oracle.sql
8.4 to 8.5	<ul style="list-style-type: none"> ▪ For SQL, run OPP85_Upgrade_SqlServer.sql ▪ For Oracle, run OPP85_Upgrade_Oracle.sql
8.5	<ul style="list-style-type: none"> ▪ For SQL, run OPP86_Upgrade_SqlServer.sql ▪ For Oracle, run OPP86_Upgrade_Oracle.sql
8.6	<ul style="list-style-type: none"> ▪ For SQL, run OPP87_Upgrade_SqlServer.sql ▪ For Oracle, run OPP87_Upgrade_Oracle.sql
8.7	<ul style="list-style-type: none"> ▪ For SQL, run OPP88_Upgrade_SqlServer.sql ▪ For Oracle, run OPP88_Upgrade_Oracle.sql

Note: The update scripts used in this procedure can be found in the Open Plan installation folder.

- **MS SQL** — You can find the scripts in the <Installation directory>\SQL Server folder.
- **Oracle** — You can find the scripts in the <Installation directory>\Oracle folder.
- **MS Access** — Open Plan does not support upgrading the Microsoft Access database used by a previous version of Open Plan. To transfer data from a previous version of Open Plan to the new version of Open Plan, perform a backup in the previous version of Open Plan and then perform a restore in the new version of Open Plan.

Install a Single-User Version of Open Plan

This section describes how to install a 32-bit or 64-bit single-user version of Open Plan on either a stand-alone PC or on a network drive.

Note: If you are integrating with PM Compass, you must install the 32-bit version of Open Plan.

To install a single-user version of Open Plan:

1. Download the Open Plan Professional software using the instructions in the [Downloading Deltek Products using Deltek Software Manager](#) section.
2. Go to the location where you saved the Open Plan installer.
3. Double click the appropriate installation package version to launch the installation wizard.
 - **32-bit version of Open Plan** — The installation package for the 32-bit version of Open Plan is **DeltekOpenPlanProfessional88_x86.exe**
 - **64-bit version of Open Plan** — The installation package for the 64-bit version of Open Plan is **DeltekOpenPlanProfessional88_x64.exe**
4. On the **Welcome to the Open Plan Professional 8.8 Setup Wizard** page, click **Next**.
5. On the **Customer Information** page, enter your user information and click **Next**.

Note: For your Open Plan serial number and license key, please contact your Open Plan administrator.

6. On the **Change current destination folder** page, select a destination for Open Plan by clicking the browse button, and click **Next**.
7. On the **Choose Setup Type** page, select one of the following installation options:
 - **Complete** – Installs all Open Plan’s features.
 - **Custom** – Allows you to select or clear the individual Open Plan features.
 - **Multi-User (Server)** – Installs Open Plan to a network drive for shared use by multiple workstations.

Note: Multi-User (Server) installation is covered in detail in the section entitled [Perform a Multi-User Installation of Open Plan](#).

If you do not choose to install a particular feature at this time, you can return to the installation wizard and add the feature later.

8. On the **Ready to Install** page, click **Install**. The system displays the installation's progress.
9. When the installation process is completed, click **Finish** on the **Completing the Open Plan Professional 8.6 Setup Wizard** page.

The next step is to [Start Open Plan for the First Time](#).

Perform a Multi-User Installation of Open Plan

Creating a multi-user installation of Open Plan is a two-step procedure:

- Performing a server installation
- Performing a workstation installation for each licensed user

Perform a Server Installation

The purpose of the Multi-User (Server) installation is to allow multiple users to run the application from a shared network location. After performing the Server installation, each user must perform a Workstation installation to run the application from the shared network location.

During the Multi-User (Server) installation, the destination folder path is written into the file Setup.ini located in the Workstation Setup folder.

The destination folder path can be specified as either a UNC based \\server\folder path or a mapped drive:\folder path. Deltek recommends using a UNC-based path when performing a Multi-User (Server) installation. If a mapped drive:\folder path is used, you must ensure that all the user workstations use the same drive:\folder mapping. When performing an installation using a mapped drive, you must ensure that the Windows System account has access to the mapped drive because the Windows Installer uses the Windows System account when performing the installation. The Microsoft-recommended way to map a drive that is available to the Windows System account is to map the drive in an administrator command prompt using the Net Use command:

```
net use <Drive Letter> <UNC Path> /user:<User Name>
```

Microsoft KB article 937624 explains the issue and workaround in more detail:

<http://support.microsoft.com/kb/937624>

Network Share Location

After the Server installation, and before you perform a Workstation installation, verify that the path in the Setup.ini file points to the correct network share location because the Workstation installation will use this path to create shortcuts and perform application registration on the workstation.

The line in Setup.ini looks like this:

```
UNC \\Server\Folder path: PROPERTIES=INSTALLDIR="\\<Server>\<Destination Folder>\"
```

```
Drive:\Folder path: PROPERTIES=INSTALLDIR="<Drive>:\<Destination Folder>\"
```

To perform a 32-bit or 64-bit server installation:

1. Download the Open Plan software, using the instructions in the [Downloading Deltek Products using Deltek Software Manager](#) section.

2. Go to the location where you saved the Open Plan installer.
3. Double click the appropriate installation package version to launch the installation wizard.
 - **32-bit version of Open Plan** — The installation package for the 32-bit version of Open Plan is **DeltekOpenPlanProfessional88_x86.exe**
 - **64-bit version of Open Plan** — The installation package for the 64-bit version of Open Plan is **DeltekOpenPlanProfessional88_x64.exe**
4. On the **Welcome to the Open Plan Professional 8.8 Setup Wizard** page, click **Next**.
5. On the **Customer Information** page, enter your user information, then click **Next**.

Note: For your Open Plan serial number and license key, please contact your Open Plan administrator.

6. On the **Change current destination folder** page, select a destination for Open Plan by clicking the browse button, and click **Next**.
7. On the **Choose Setup Type** page, select **Multi-User (Server)**.
8. On the **Ready to Install** page, click **Install**. The system displays the installation's progress.
9. When the installation process is completed, click **Finish** on the **Completing the Open Plan Professional 8.8 Setup Wizard** page.
10. Before you perform a Workstation installation, verify that the path in the Setup.ini file points to the correct network share location because the Workstation installation will use this path to create shortcuts and perform application registration on the workstation.

The line in Setup.ini looks like this:

```
UNC \\Server\Folder path: PROPERTIES=INSTALLDIR="\\<Server>\<Destination Folder>\"  
Drive:\Folder path: PROPERTIES=INSTALLDIR="<Drive>:\<Destination Folder> \"
```

Perform a Workstation Installation

After the server version of Open Plan has been installed on a network drive, use this procedure to perform multiple workstation installations.

- You can only perform workstation installations from a server installation of Open Plan.
- Although similar to the single-user installation, the workstation installation does not prompt you to enter a serial number and password.
- You need to perform the workstation install on each computer that will be used to run Open Plan.

Important: Before you perform a Workstation installation, confirm that you have verified that the path in the Setup.ini file points to the correct network share location. For more information, see the [final step](#) in the Server Installation.

To perform a workstation installation of Open Plan:

1. Verify that a server installation of Open Plan has already been placed on the network.
2. Using Windows Explorer, locate the Open Plan server installation and navigate to the root folder for the workstation. For example, **C:\Deltek\Open Plan Professional <version>\Workstation Setup**.
3. Double-click **setup.exe** to launch the installation wizard.
4. On the **Welcome to the Open Plan Professional <version> (Workstation) Setup Wizard** page, click **Next**.
5. On the **Choose Setup Type** page, select one of the following:
 - **Administrator** – the procedure installs all of the features of the Standard setup together with the Security Administrator and the Data Tool.
 - **Standard** – the procedure installs the Open Plan Help system, documents, default access, data source, OLE setup, and Web Publisher.
6. On the **Ready to Install** page, click **Install**. The **Installing Open Plan Professional <version> (Workstation)** page shows the installation's progress.
7. When the installation process is completed, click **Finish** on the **Completing the Open Plan Professional <version> (Workstation) Setup Wizard** page.

Note: If you try to launch Open Plan after performing a workstation installation and receive an error saying the Data Sources could not be located, check that the paths to these files are mapped to the correct server. This is done by opening the **Config.dat** file located in the Open Plan root folder.

The next step is to [Start Open Plan for the First Time](#).

Start Open Plan for the First Time

If you use the setup utility to install Open Plan, you can start the application on the **Start** menu.

Note: To start Open Plan automatically each time you logon to Windows, drag the Open Plan application into the Windows Startup folder. For more information about the Startup program group, see your Windows documentation.

You must log on each time you launch Open Plan. You may log on to Open Plan for the first time as an administrator or a guest.

To start Open Plan:

1. Click **Start » All Programs » Deltek Open Plan <version> » Deltek Open Plan Professional <version>**.
2. On the Open Plan Login dialog box, log on as SYSADMIN or GUEST with the corresponding password.
 - Administrator:
 - User ID: SYSADMIN
 - Password: password
 - Guest:
 - User ID: GUEST
 - Password: <blank>

Note: When you log in using the GUEST account with a blank password, you will be immediately prompted with the Change Password dialog box. The default password policy is set to **Medium**, requiring a minimum password length of **12** characters.

3. Click **Login**.

Note: Open Plan is installed with a Microsoft Access database and does not require that you have an MS SQL Server or Oracle database to use the software. In addition, you cannot use the Microsoft Access database for shared access and large projects.

Set Up a Database

This procedure allows you to set up a new database using either Oracle or SQL server. Make sure you have created a database to store the Open Plan tables before performing this procedure.

Deltek recommends, as part of best practice, to install all products in the PPM suite into the same database. The installations apply schema changes (tables, views, stored procedures, and so on) to your existing database to support the integration. PM Compass, Cobra, and Open Plan must be installed in the same database for integration to work. You may install wInsight Analytics or Acumen in the same database but not both. Acumen cannot be installed in the same database as wInsight Analytics.

Note: Open Plan supports Access, Oracle, and SQL Server databases through an OLEDB 2.1 compliant provider. For information, see [Appendix B: Open Plan Databases](#).

To set up the database:

1. Navigate to your Open Plan installation folder.
2. Expand the contents of your Open Plan installation folder and click the **SQL** folder.
3. Open the subfolder that matches the type of database you want to set up: **Oracle** or **SqlServer**.
4. Select the scripts to run based on whether you are using Oracle or SQL Server.

If you are using Oracle, run the following scripts located in the Oracle subfolder:

- OPP_Tables_Oracle.sql
- WST_Tables_Oracle.sql

If using SQL Server, run the following scripts located in the SQL Server subfolder:

- OPP_Tables_SqlServer.sql
- WST_Tables_SQLServer.sql

Note: You must run the scripts in the Open Plan database that you created.

The scripts for creating tables on Oracle and SQL Server default to a Unicode installation. You may edit the scripts to create non-unicode tables. See the scripts for instructions on changing the Unicode table options.

The Oracle scripts include support for specifying the tablespaces for tables and indexes. See the Oracle scripts for instructions on changing the tablespaces that are used when creating tables and indexes.

Run Oracle Scripts for PM Compass Integration

You must run the scripts listed below the first time you set up Open Plan in the same Oracle schema as PM Compass.

- If your Open Plan installation is in the same schema as your PM Compass installation, you must run **OPP_Oracle_CI_Indexes.sql**.
- If Open Plan was installed first followed by PM Compass, you must run both **OPP_Oracle_CI_Indexes.sql** and **WST_Oracle_CI_Indexes.sql**.
- If PM Compass was installed first followed by Open Plan, you only need to run **OPP_Oracle_CI_Indexes.sql**.

Script	Description	Location
OPP_Oracle_CI_Indexes.sql	<p>Run this script to create case-insensitive indexes in Open Plan tables for integration with PM Compass.</p> <p>For explicit Tablespace support, set the <code>index_tablespace</code> variable in the DECLARE section.</p> <p>To control the type of indexes that are created, see the <code>indextype</code> variable in the DECLARE section.</p>	\\SQL\Oracle\Utility
WST_Oracle_CI_Indexes.sql	<p>Run this script to create case-insensitive indexes on WST tables for integration with PMCompass.</p> <p>For explicit Tablespace support, set the <code>index_tablespace</code> variable in the DECLARE section.</p> <p>To control the type of indexes that are created, see the <code>indextype</code> variable in the DECLARE section.</p>	\\SQL\Oracle\Utility

The next step is to [Set Up a Data Source for a New Database](#).

Set Up a Data Source for a New Database

After you have created a database and the Open Plan tables, the database must be initialized before it can be used. The Deltek Open Plan Data Tool is used to set up the default system data, security data, and optionally, the demonstration data.

To connect to a newly created database, you must add an Open Plan data source. An Open Plan data source has all the connection information that Open Plan needs in order to work with a database.

Log Into the Deltek Open Plan Data Tool

Note: This procedure is not required for the supplied Microsoft Access database.

To log into the Deltek Open Plan Data Tool:

1. Click **Start » All Programs » Deltek Open Plan <version> » Tools » Deltek Open Plan Data Tool**.
2. On the Data Tool Login dialog box, enter the password. (The default password as shipped from Deltek is **password**.)
3. Click **OK**. The Deltek Open Plan Data Tool dialog box displays.

Change the Deltek Open Plan Data Tool Password

Note: Deltek recommends that you change the password you used for login to prevent its unauthorized use.

To change the Deltek Open Plan Data Tool password:

1. Click **Start » All Programs » Deltek Open Plan <version> » Tools » Deltek Open Plan Data Tool**.
2. On the Data Tool Login dialog box, enter the password.
3. Click **Password**.
4. Enter a new password and confirm the new password.
5. Click **OK**.

Set Up a Data Source for a New Oracle Database

Use the procedure in this section to set up an Open Plan data source for a new Oracle database.

For Oracle, you can either set up an account (username and password) that automatically restricts access to a specific schema or use a general account and specify the schema name in the Edit Data Source dialog box.

To set up an Open Plan data source for a new Oracle database:

1. Click **Start » All Programs » Deltek Open Plan <version> » Tools » Deltek Open Plan Data Tool**.
2. On the Data Tool Login dialog box, enter the password.
3. On the Deltek Open Plan Data Tool dialog box, click the Target DSN ellipses button.
4. On the Data Sources dialog box, click **Add**.
5. On the Provider tab of the Data Link Properties dialog box, select the appropriate database provider from the list.

Open Plan supports the Microsoft OLE DB Provider for Oracle and the Oracle Provider for OLE DB. Open Plan does not support the Microsoft OLEDB Provider for ODBC Drivers.

6. Click **Next**.
7. On the Connection tab, enter the following information:
 - **Server name**
 - **Valid username and password for the database**

Note: If you want to save your user name and password, select the **Allow saving Password** option. Select **Blank Password** only if your user name does not have an associated password.

8. Click on **Test Connection**.
9. When a message displays indicating that the connection is tested successfully, click **OK**.
10. Click **OK** on the Connection tab of the Data Link Properties dialog box.
11. On the Edit Data Source dialog box, enter a name for the Open Plan data source and the **Database Name (Schema)**. This field is used to identify the source. Leave this field blank if you are not using schemas or Access.
12. The scripts for creating tables default to a Unicode installation. If the Open Plan tables were created as non-Unicode, clear the **Database is Unicode** option.
13. Click **OK**. The new data source is added to the list on the Data Sources dialog box.
14. Select the new data source and click **OK** to return to the Deltek Open Plan Data Tool dialog box.

Do not close the Deltek Open Plan Data Tool. You will need this tool to load default data.

The next step is to [Load Default Data](#).

Set Up a Data Source for a New SQL Server Database

Use the procedure in this section to set up an Open Plan data source for a new SQL database.

To set up an Open Plan data source for a new SQL Server database:

1. Click **Start » All Programs » Deltek Open Plan <version> » Tools » Deltek Open Plan Data Tool**.

2. On the Data Tool Login dialog box, enter the password.
3. On the Deltek Open Plan Data Tool dialog box, click the Target DSN ellipses button.
4. On the Data Sources dialog box, click **Add**.
5. On the Provider tab of the Data Link Properties dialog box, select the appropriate database provider from the list.

Note: Open Plan supports the Microsoft OLE DB Provider for SQL Server and the SQL Server Native Client. Open Plan does not support the Microsoft OLE DB Provider for ODBC Drivers.

6. Click **Next**.
7. On the Connection tab, enter the following information:
 - **Server Name** – Select or enter the appropriate server name.
 - **Information to log on to the server** – Select whether to use Windows NT Integrated Security or to use a specific username and password. If you elect to use a specific Username and Password, enter a valid username and password for your database.
 - **Blank password** – Select this option only if your username does not have an associated password.
 - **Allow saving password** – Always select this option. Both the username and password are encrypted, and the information is stored in the Datasources.dat file along with the connection properties. If this option is not selected, the users are prompted to log into the database each time they launch OpenPlan and they may encounter database errors.
 - **Select the database on the server** – Select the appropriate database to use on the server by default. This name is used to identify the data source in the Data Sources dialog box.
 - **Attach a database file as a database name** – Select this option if you want to attach a database file directly.

Note: If you want to save your user name and password, select the **Allow saving Password** option.

8. Click on **Test Connection**.
9. When a message displays indicating that the connection is tested successfully, click **OK**.
10. Click **OK** on the Connection tab of the Data Link Properties dialog box.
11. On the Edit Data Source dialog box, enter a name for the Open Plan data source.
12. If you selected a database name on the Connection tab of the Data Link Properties dialog box, leave the **Database Name (Schema)** field blank if you are not using schemas or Access.
13. The scripts for creating tables default to a Unicode installation. If the Open Plan tables were created as non-Unicode, clear the **Database is Unicode** option.
14. Click **OK**. The new data source is added to the list on the Data Sources dialog box.



15. Select the new data source and click **OK** to return to the Deltek Open Plan Data Tool dialog box.

Do not close the Deltek Open Plan Data Tool. You will need this tool to load default data.

The next step is to [Load Default Data](#).

Load Default Data

Use the Deltek Open Plan Data Tool dialog box to set up default data. Using this dialog box, select the data source you created in the Edit Data Sources dialog box from the Target DSN field.

Note: Running the data tool erases all data of the specified type in the data source that you use it against.

The data tool cannot be run on data sources that have PM Compass installed. The options and the **Create Data** button are disabled when PMCompass is detected in a data source.

Select the appropriate fields on the Deltek Open Plan Data Tool dialog box:

- The **Install default data** option needs to be run only once for a data source. It will refresh the data dictionary, security data, system library, explorer folders, spread curves, views, title blocks, bar sets, and symbols.
- If you select the **Remove existing data** option, all data in the data source will be removed before the default data is installed.
- The **Install demonstration data** option installs the demonstration projects CLEAN, CONSTR, DCMA, DEVELOP, MOVIE, Movie in Progress, MOVIES15, OP_S1, OP_S2, OP_S3, PHARMACY, SHIP, Startup, STS-65 and TOUR. To install the demonstration data, you must select the **Remove existing data** option.

To load default data:

1. Click **Start » All Programs » Deltek Open Plan <version> » Tools » Deltek Open Plan Data Tool**.
2. On the Data Tool Login dialog box, enter the password.
3. On the Deltek Open Plan Data Tool dialog box, in the **Target DSN** field, select the data source that you previously set up and click **OK**.
4. Select **Install Default Data**.

Note: To install the demonstration data, select **Remove Existing Data**, and then select **Install Demonstration Data**.

5. Click **Create Data**.
6. After the data has been created, click **Close**.

Create Users and Groups

Use the PPM Administrator or EPM Security Administrator to create users and groups and add users to the groups.

Attention: For more information, see the [Deltek PPM Administrator Online Help](#) or [Deltek EPM Security Administrator Online Help](#).

The next step is to [Give Users the Appropriate Open Plan Folder Permissions](#).

Give Users the Appropriate Open Plan Folder Permissions

When installing Open Plan Professional on a network, the following network access rights must be provided to users:

Open Plan Professional Folder	Required Access Rights
OPP	Read
\Documentation	Read
\Help	Read
\Sample Data	Read
\Sample Tools	Read (or write if the users want to modify the sample source code)
\Spell	Write (to add words to dictionary)
\SQL	Read (Write to use the default Access database)
\Symbols	Read
\User	Read
\Workstation Setup (Server installations only)	Read

Modify, Repair, or Uninstall Open Plan

Open Plan provides facilities for changing which features are installed, repairing installation errors, and removing Open Plan. Use the procedure in this section to change your Open Plan installation structure.

To modify, repair, or remove your Open Plan installation:

1. Launch the MS Windows Control Panel.
2. Click on **Programs and Features**.
3. On the **Programs and Features** list, right-click **Deltek Open Plan Professional <version>** and click **Change** on the context menu. The Deltek Open Plan Professional <version> Setup Wizard displays.
4. Click **Next**.
5. On the **Modify, Repair, or Remove Installation** page, select one of the following options, depending on the task that you want to do:
 - **Modify** — Select this option to change your Open Plan installation structure. Selecting this option displays the **Custom Setup** page.
 - **Repair** — Select this option to repair installation errors by reinstalling the Open Plan components. Selecting this option displays the **Repair Deltek Open Plan Professional <version>** page. Click **Next** to repair Open Plan.
 - **Remove** — Select this option to uninstall Open Plan from your machine. Selecting this option displays the **Remove Deltek Open Plan <version>** page. Click **Next** to uninstall Open Plan.
6. When the process is complete, click the **Finish** button to exit the Setup Wizard.

Next Steps

Open Plan includes several tools to help you learn about the features and operations of the product.

Guided Tour

To help you get up to speed as quickly as possible, Open Plan provides a guided tour that includes several facilities designed to introduce you to the basic operations of the package. The tour uses sample project data that comes with your installation to introduce you to the basics of Open Plan. There is no substitute for a hands-on encounter with the software, and that is what this tour is designed to provide. For information, see the *Deltek Open Plan Guided Tour Guide*.

Online Help

Use the Getting Started with Open Plan topics in the online help to familiarize yourself with the Open Plan features and processes.

Developer Guide

For in-depth information about advanced topics, review the *Deltek Open Plan Developer Guide* which includes information on topics such as customizing project views, data file structures, compatibility issues, and OLE automation techniques.

Training Courses

For information on Open Plan training courses, visit our Web site at www.deltek.com. Click **Learn » Deltek University » Browse Courses**. In the Deltek Learning Zone, click on the Open Plan icon. You can learn more about training and browse for specific courses on that page.

Troubleshooting

System Error When Launching Open Plan

The following error might display when you launch Open Plan: “The program can’t start because api-ms-win-crt-runtime-l1-1-0.dll is missing from your computer. Try reinstalling the program to fix this problem.”

If this error occurs when launching Open Plan, you need to download and install the Universal C Runtime for Windows from Microsoft.

Microsoft KB article 2999226 provides information about how to download and install this update:

<https://support.microsoft.com/en-us/help/2999226/update-for-universal-c-runtime-in-windows>.

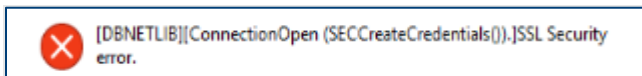
Custom Tools Are Not Connecting to Open Plan

When you develop a custom tool that uses the Open Plan API, you may need to manually register the Open Plan .exe file for the tool to connect to Open Plan.

You can do this by opening a Command Prompt window and running: `OpenPlan /register` from the installation folder.

SQL Server Connection Errors

- **Microsoft OLE DB Provider** — If your database server requires a secure connection, and you are using the default Microsoft OLE DB provider for SQL Server, you may see the following error when you log into Open Plan:



In order to resolve the issue, install the SQL Server Native Client and then follow the steps below.

- **SQL Server Native Client** — When you use SQL Server Native Client and specify a database username and password, you may see the following error when you log into Open Plan:



You must complete the steps below in order to get the data source to remember the password.

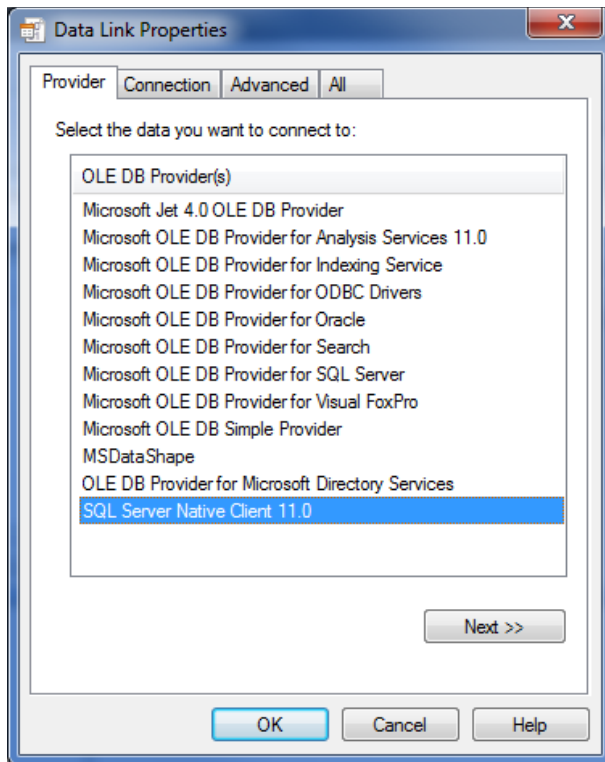
To resolve the SQL Server connection errors:

Note: You will need to complete these steps any time you create or edit the properties in the Data Link Properties dialog box for the SQL Server Native Client.

1. In Open Plan, click **File » Preferences » Data Sources**.

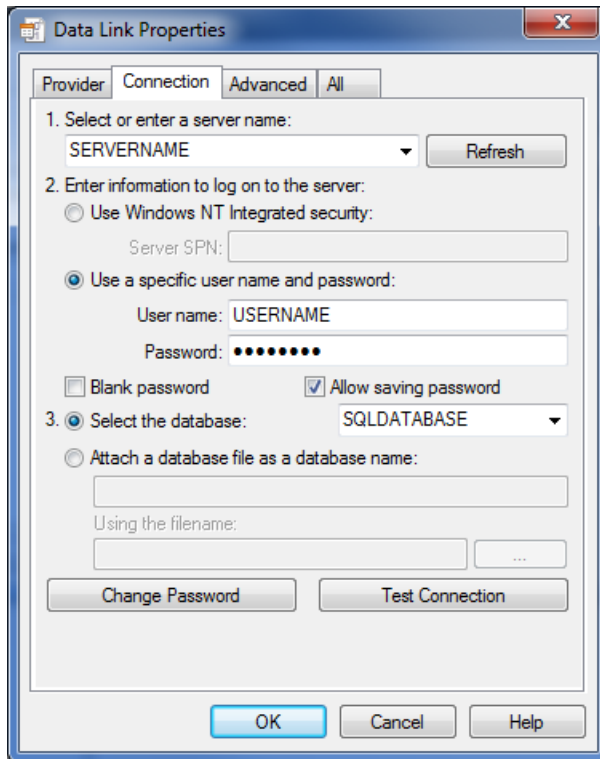
2. Select the data source and click **Edit**.
3. Click Data Link Properties.
4. On the Provide tab, select **SQL Server Native Client <version>** and click **Next**.

The Microsoft ODBC driver is not supported and does not display in this list.

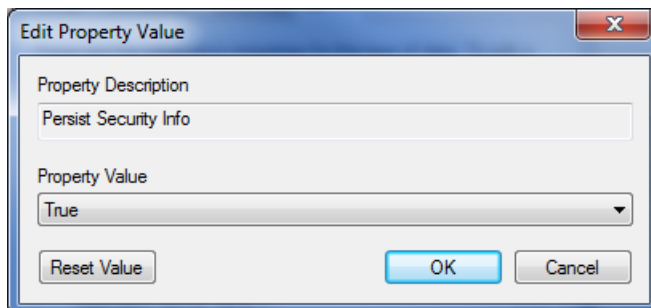
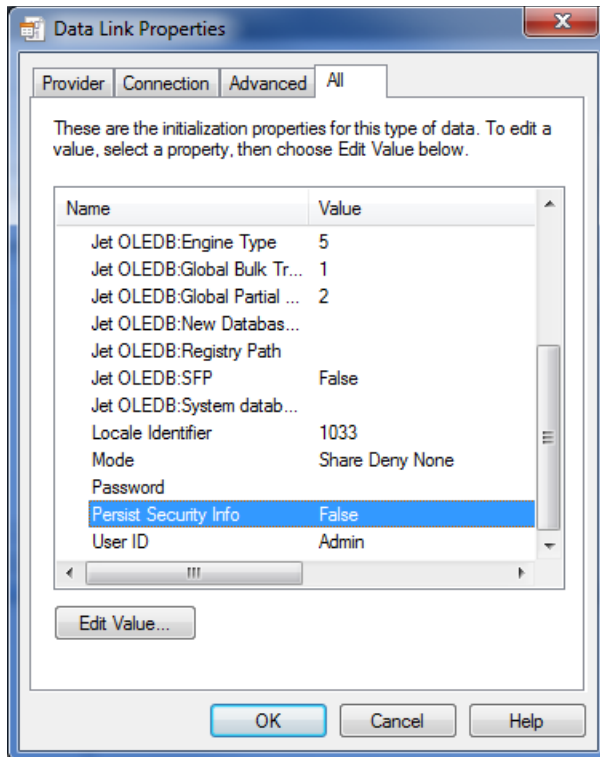


5. On the Connection tab:
 - a. Select or enter a server name.
 - b. Enter your SQL Server username and password. To enter the password, you will need to clear **Blank Password** and select **Allow saving password**.

- c. Select the database.



6. On the All tab, scroll down to **Persist Security Info**.
7. Double click the option and select **True** in the **Property Value** field.



8. Click **OK** to close to the property dialog box.
9. Click **OK** to close the Data Link Properties dialog box.

Appendix A: Open Plan Terminal Services (Remote Desktop Services)/Citrix Installation

This appendix is designed to explain the additional steps required to install Open Plan in a shared application server (MS Terminal Server/Remote Desktop Services or Citrix XenApp Server) environment.

Version Information

Beginning with Windows Server 2008 R2, Terminal Services was renamed Remote Desktop Services. In addition to the name change, the deployment and configuration of Remote Desktop Services have changed significantly. For guidance on deploying the Remote Desktop Services Role and Features, refer to the Microsoft Remote Desktop Services documentation page (<https://technet.microsoft.com/en-us/windowsserver/ee236407>).

Note: In this appendix, the terms "Terminal Services" and "Remote Desktop Services" are used interchangeably.

Many customers use Open Plan on Citrix XenApp Server. Citrix offers more sophisticated load balancing capabilities and provides solutions for cross-platform remote access.

Important Information

For improved application performance, Deltek strongly recommends that all application software be accessed in a Terminal Server/Remote Desktop Services environment installed locally on the Terminal Server/Remote Desktop Session Host application server. For Windows 2008 R2 or higher, when deploying the Remote Desktop Services role, the **session-based desktop deployment** scenario is recommended and is comparable to the deployment of Windows Terminal Services of Windows 2008 and earlier versions.

Database Connections

The two most important factors affecting Open Plan performance are memory available to the application and database performance. Deltek recommends that Open Plan Professional be used with either SQL Server or Oracle in a multi-user environment and that the database server be close to the Terminal Server/Remote Desktop Session Host application server. Smaller implementations can install the database software on the Terminal Server/Remote Desktop Session Host itself, but for larger implementations (more than 10 users) we recommend a separate database server. We suggest that the Terminal Server and database server be connected to the same network switch and that if the solution will be supporting many users, then serious consideration should be given to a Gigabit link.

Server Sizing

We recommend that you follow the application server supplier guidelines for server sizing. Open Plan falls into the knowledge worker category for sizing purposes. In the absence of other advice, Deltek suggests 200MB for the system and 50MB per concurrent user. Accepted wisdom is that one fast processor is more advantageous than 2 slow processors, so we would suggest considering a dual 3 GHz solution over a quad 1.5 GHz solution (a quad 3 GHz is better).

Terminal Server/Citrix Installation

The recommended approach for Terminal Server/Citrix installation is to install the application locally on the server using the **Complete** installation option. The appropriate menu options will be added to all users. Terminal Server/Citrix will automatically create appropriate registry entries for each user. Open Plan Professional will automatically create the required user files when first launched in the user's My Documents folder.

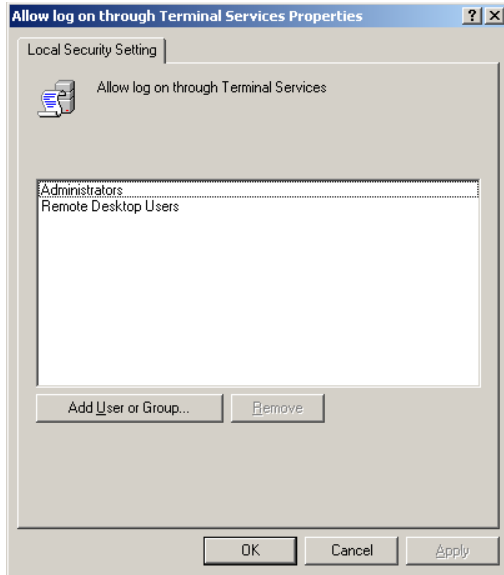
Attention: For details on how to change this behavior, see [Modifying the User Directory](#).

When a Terminal Server is in Application Server mode (required to support remote access by more than 2 users), the Server must be placed into Installation Mode so that it will correctly copy application registry keys for new users. The correct way to enter Installation Mode is to use the **Programs and Features** option in the Control Panel.

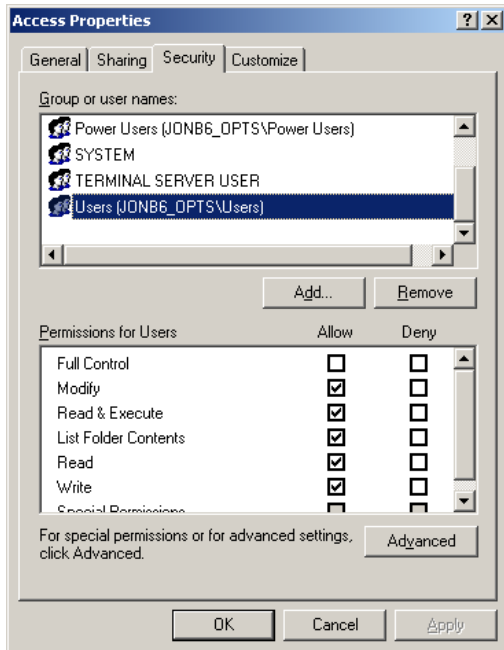
In **Programs and Features**, find and double-click **Deltek Open Plan Professional <version>.exe**. Select the **Complete** Installation.

Security Considerations

Make sure the users requiring Remote Desktop access are members of the Remote Desktop Users group or that the users have been granted Terminal Server logon rights through the local security policy (Administrative Tools; Local Security Policy).



The limited user group must be granted MODIFY access to the default MS Access database if this will be used.

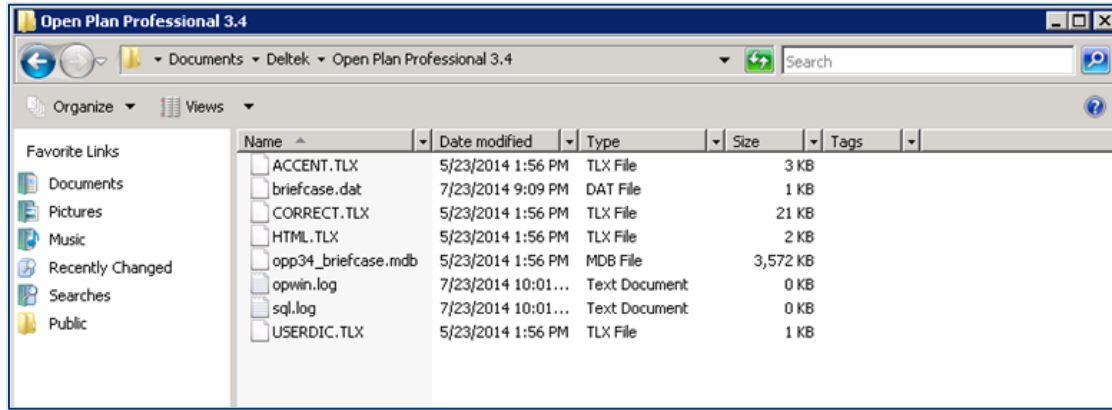


If this data source is not used, then the Administrator must update the Open Plan DATASOURCES.DAT file with the appropriate connection settings for the required database.

Logon as the limited user

Run Open Plan (menu and desktop items should automatically appear).

The user's My Document folder will be updated to include a Deltek folder containing the Open Plan working files, including the BRIEFCASE database and SPELLING DICTIONARIES, among others.



Modifying the User Directory

Open Plan defaults to creating the user working directory as a subfolder of the current user's **My Documents\Deltek** folder. It is possible to globally modify this behavior by adding the following line to CONFIG.DAT in the root of the Open Plan installation.

```
[SYSTEM]
UserDir=N:\OPP
```

This would cause Open Plan to create the Open Plan files in the folder N:\OPP. It is the System Administrator's responsibility to ensure that this represents a unique location for each user. This means that typically Drive N: must be mapped as part of the login process, taking care to map to a different physical folder for each user.

Appendix B: Open Plan Databases

Access

A default Access database is automatically created when Open Plan is installed, and Open Plan is configured to use this database by default.

Oracle and SQL Server

If you prefer to have Open Plan use an Oracle or SQL Server database, you first need to create tables and define a data source. When you configure an SQL database, you must consider several aspects regarding the database itself:

- Database size
- Transaction log size
- Database permissions

Refer to your Oracle or MS SQL documentation for information on how to create a database.

Upgrading the Database

Upgrading from an earlier version of Open Plan requires upgrading the database. The update scripts are in the Open Plan executable folder. For more information, see [Upgrade from Earlier Versions of Open Plan](#).

Database Size

When creating the Open Plan database, you must consider the number of anticipated project elements that will be created in Open Plan and the number of records the project elements will contain. Generally, each project activity uses 3000-4000 bytes. Each project baseline adds an additional 2000-3000 bytes per project activity. Note that records contain variable length free-form text and can add up to an additional 32,000 bytes for each note in use.

Following these rules, a typical 1000-activity project with two baselines and notes containing 200 bytes of text on 20% of the activities would require approximately 10 MB of disk space, not including database-specific overhead. You can use the Excel spreadsheet ([sizing30.xls](#)) located in the Open Plan destination folder to help estimate disk requirements.

Transaction Log Size

Open Plan performs updates on large numbers of database table rows when saving changes to project data. Transaction logs must be sized appropriately to allow for these types of operations.

Database Permissions

To create and modify project elements in the database, you must have the following permissions on the Open Plan tables: SELECT, INSERT, UPDATE, DELETE, and EXECUTE.

It is not necessary to create a separate user account for each Open Plan user on the database, nor is it necessary for users to see the database login prompts.

Appendix C: Using the PPM Security Tools

PPM provides security tools that are crucial for managing various aspects of the PPM solutions.

The Deltek EPM Security Administrator and Deltek PPM Administrator enable you to manage license keys, users, groups, roles, and access to various PPM applications. Download either tool (PPM Administrator 1.0 or EPM SA 8.6) separately from DSM before installing it.

Attention: Whether you plan to use EPM Security Administrator or PPM Administrator, you must download the selected application from Deltek Software Manager and install it separately.

For more information on these security tools, see their respective Installation Guides and Help Systems.

Appendix D: Deltek Open Plan Professional Folder and Files

Start Menu

In addition to a shortcut to the Open Plan application, the installation creates several folders with shortcuts under the Deltek **Open Plan <version>** folder.

Documentation

The following reference materials are available in the Documentation and Help folders:

- **Open Plan Help System** – The Open Plan context-sensitive help system. You have the option to use the Online Help system or continue using locally installed help files via the **Use online help when available** option on the General Tab within the Options dialog box (**Preferences » Application**).
- **Open Plan Release Notes** – A document that discusses the new features and enhancements of this release, changes to the documentation, and the Software Issues Resolved.
- **Open Plan Guided Tour** — A document that introduces you to the basic Open Plan operations using sample project data that comes with your installation.
- **Open Plan Developer Guide** – A reference manual for more technical topics in Open Plan.
- **Open Plan Batch Processor Guide** — Information about running the Open Plan multi-instance batch processor.

Security

EPM Security Administrator – The EPM Security Administrator allows you to define the security rights for Open Plan. EPMSecAdmin.exe is installed in the root of the Open Plan installation folder.

Tools

Deltek Open Plan Data Tool – A utility to set up the default system data, security data, and optionally, the demonstration data. OpenPlanDataTool.exe is installed in the root of the Open Plan installation folder.

Appendix E: PPM Encryption Conversion Utility

Overview

The PPM Encryption Conversion Utility is designed to scan a computer for all copies of installed PPM products and validate if the PPM products have been upgraded to compatible versions that support the new protocols. It also validates that any configuration files and databases that are shared by the PPM products are eligible to be upgraded to support the new protocols.

These validations are designed to ensure that the upgrade is only performed when all installed PPM products are compatible with the new protocols, which guarantees that environments with a mix of new PPM products and older PPM products will continue to function properly ~~until all installed versions of PPM products are compatible with the new protocols.~~

If configuration files and databases that are shared by PPM products are eligible to be upgraded, the PPM Encryption Conversion Utility performs the necessary upgrades to the configuration files and databases to enable the use of the new protocols.

Important: Check to see if the PPM product you are integrating with Open Plan supports the PPM Encryption Conversion Utility. This will help you make sure the right installation steps are taken, avoiding any potential problems. For more information, see [“Integrate Open Plan with Other PPM Products”](#) in this guide.

Note:

- The PPM Encryption Conversion Utility must be run on all computers that have PPM Product configuration files.
- Each PPM product is shipped with this tool (**PPMEncryptionConverter.exe**) and its location may vary per product. For more information, see [“Run the PPM Encryption Conversion Utility”](#) in this guide.

Upgrading from Older Versions

When upgrading from older versions of PPM Products to new versions, PPM Products will continue to use the previous protocols by default to ensure compatibility with older versions of PPM Products. Therefore, a separate conversion process is required to upgrade existing PPM Product configuration files and data sources to enable the use of the new protocols.

To support the conversion process, PPM products include a new PPM Encryption Conversion Utility application that is designed to perform the upgrade of existing PPM Product configuration files and data sources to enable the use of the new protocols.

Note: Deltek strongly recommends that you run the new PPM Encryption Conversion Utility application to upgrade existing PPM Product configuration files and data sources to enable the use of the new protocols.

Note: New installations of PPM Products and data sources are pre-configured to use the new protocols by default. New installations do not need to run the PPM Encryption Conversion Utility.

Run the PPM Encryption Conversion Utility

You need to run this tool under the following conditions:

- You have an environment with existing PPM products.
- All PPM products have been upgraded to a version that supports the new hashing and encryption protocols.

Note: You do not need to run the tool when all files and databases have already been converted.

- The **UserID** and **Password** values on each data source are encrypted with AES1 protocol (the value starts with **000001**).
- All configuration files and data sources on the details screen are disabled, and the **Errors** column displays "File/Datasource has already been converted."
- The **WST_UPD** table on the database contains the **_PASSWORDHASHPROTOCOL = 1** and **_ENCRYPTIONPROTOCOL = 4** categories.

To run the conversion utility tool:

1. Navigate to the location of the PPM Encryption Conversion Utility.
 - For 64-bit: C:\Program Files\Deltek\OpenPlan 8.8\
 - For 32-bit: C:\Program Files(x86)\Deltek\Open Plan 8.8\
 - 2. Double-click **PPMEncryptionConverter.exe** or click the corresponding shortcut from the Start menu.

It automatically detects all installed PPM products in your machine and determines whether the installed products are compatible to determine if their files and databases are eligible for upgrade.

Note: Upon launching the conversion utility, the PPM Encryption Converter folder is created for the backup files in the C:\Users\\Documents\Deltek. This folder contains <Backup> folders using the yyyyymmdd_hhmmss name format, which refers to the date and time when the conversion utility is launched (for example, 20221116-194029). Each <Backup> folder contains the Backup sub-folder and the PPMEncryptionConverter.log (which is created after the conversion process).

3. On the first screen of the PPM Encryption Conversion Utility dialog box, click **Next**.

Note: This screen contains the **Products** grid, which displays all installed PPM products on your machine. The grid is read-only.

- When the **Compatible** column is set to **Yes** for an installed product, the corresponding version meets the minimum compatibility standard
- When you hover your mouse cursor over a product in the list, it displays the installation location of that product.

4. On the second screen, select the database configuration files and data sources you need to upgrade.

Selecting a configuration file in the Files grid displays all the databases in the Datasources grid and checks whether they can be converted. Alternatively, you can click the **Check all datasources** button to verify the status of all data sources for all of files instead of selecting the files one by one.

Note: You cannot select and upgrade the configuration files and data sources of those PPM products that do not meet the minimum compatible version.

Attention: Different icons display beside the available files and data sources to indicate their conversion status. For more information, see the *Conversion Status Icons* section of the Deltek PPM Encryption Conversion Utility Guide.

If you need to add more encrypted files to convert, click **Add**.

Attention: PPM products have different locations (or containers) where encrypted and hashed data is stored. For more information, see the [Updated Files and Data](#) section in this document.

5. Click **Process**.

Note: During the conversion process, the PPM Encryption Conversion Utility creates a copy of the database configuration file in the Backup folder. The backup name has the **<n>.<filename>** format, where **<n>** represents a number starting from 1 to make the backup files unique (such as, 1.datasources.dat, 2.ideablade.ibconfig, and 3.databases.enc).

It also creates a file named FileMapping.txt, which contains the mappings of both the backup and original files. The mapping follows the **<backup file> (<original file>)** format. For example, 1.datasources.dat (C:\Program Files (x86)\Deltek\Cobra\datasources.dat).

After the conversion process, the WST_UPD (for all products), WST_CFG (for Cobra and Open Plan), and WST_UPF (for Acumen Touchstone and Open Plan) tables are updated.

Updated Files and Data

PPM products use different files to store encrypted and hashed data. For Open Plan, the updated files are Datasources.dat and SQL Databases.

Attention: For more information, see the Updated Files and Data section of the Deltek PPM Encryption Conversion Utility Guide.

Change Passwords

After a PPM data source has been upgraded by the PPM Encryption Conversion Utility, users are prompted to update their password the very first time they log on to the converted data source using a PPM product. This is a necessary step to update the user's stored password to use the new password protocol for storing user passwords.

The first time the user log on to the converted data source with a PPM product, the product displays the Change Password dialog box to allow them to enter their existing password again or create a new password.

Note: Users are permitted to enter their existing password again if desired. It is not necessary to create an entirely new password.

Note: Users must complete the Change Password step to use the PPM product with the converted data source. If they choose to cancel the Change Password step, they return to the Login dialog box.

Data Tool

When the Data Tool encrypted the Data Tool password using the old protocol, the password was not case-sensitive, and it was stored in uppercase. When users enter their password in the Data Tool Login

dialog box, the Data Tool converted the entered password to uppercase and then compared it with the stored password.

When the PPM Encryption Conversion Utility converts the stored password, it still stores the password in uppercase. The Data Tool now recognizes that the stored password is using the new protocol. As a result, it no longer converts the entered password to uppercase before comparing it to the stored password

Note: During the conversion of Cobra and Open Plan, the Data Tool password is changed to all uppercase characters. You should log on to the Data Tool using the prior password in uppercase. Deltek recommends that you change your password to the Data Tool after the encryption.

Appendix F: If You Need Assistance

If you need assistance installing, implementing, or using Open Plan, 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 Open Plan Batch Processor Guide	This document contains information about running the Open Plan multi-instance batch processor.
Deltek Open Plan Data Tool	This document provides help for all areas of the Open Plan Data Tool application.
Deltek Open Plan Developer's Guide	This document is meant to serve as a reference manual for more technical topics in Open Plan.
Deltek Open Plan Guided Tour	This document introduces you to the basic Open Plan operations using sample project data that comes with your installation.
Deltek Open Plan Milestone Professional Interface Add-In Module	This document is meant to serve as a guideline for using the Milestones Link tool.
Deltek Open Plan Release Notes	This document contains a summary of the pre-installation information, new features and

Document Name	Description
	enhancements, database changes, and software issues resolved.
Deltek Open Plan Technical Overview and System Requirements	This document is meant to serve as a guideline for hardware and software requirements and provide your firm's IT department with information about the technical deployment architecture.