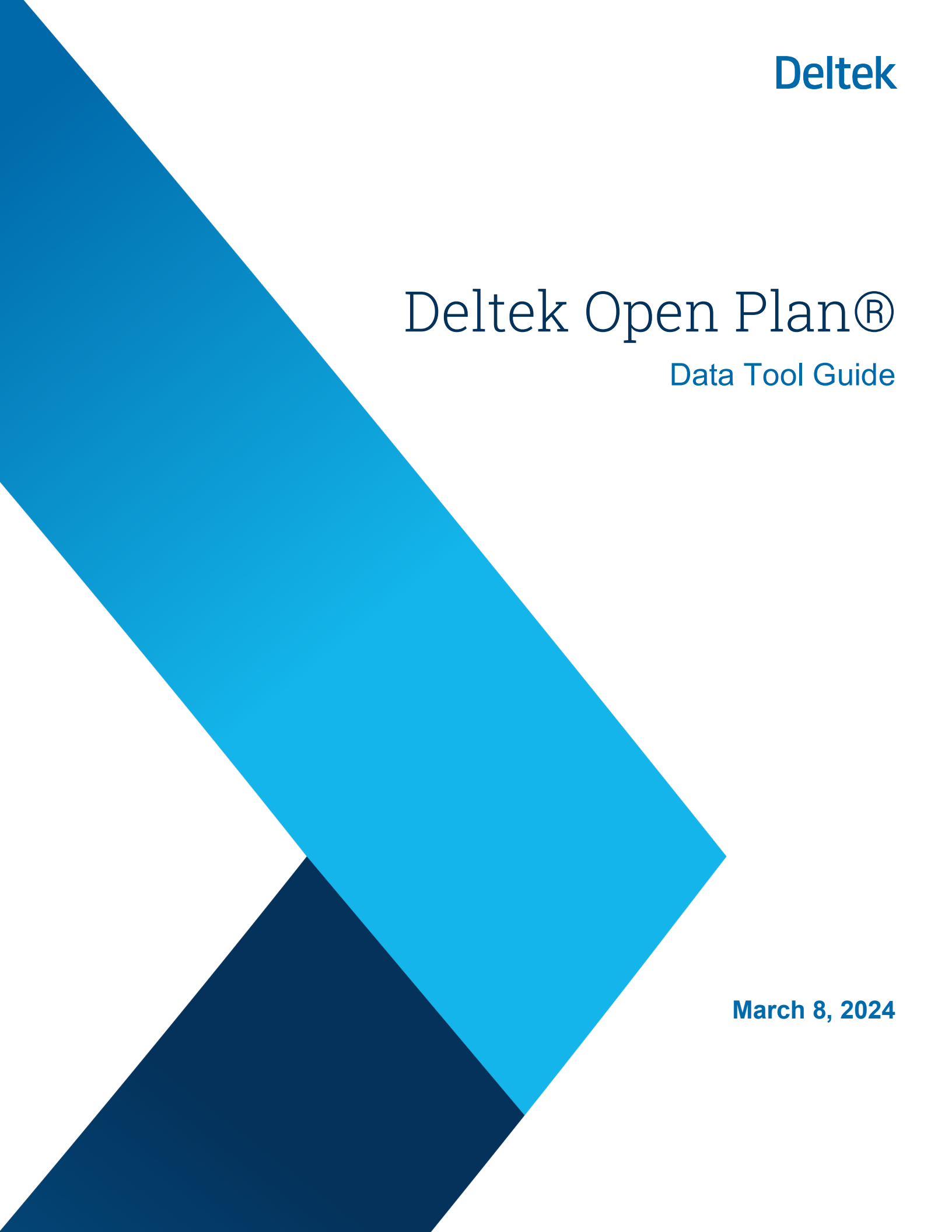




Deltek

Deltek Open Plan®

Data Tool Guide

March 8, 2024



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Overview

The Deltek Open Plan Data Tool is used to create or update connection information, load system data (such as reports, menu items, and required users and groups) during the installation process, and define result field names.

These field names are then used to define the results that can be added to resource calculations. In addition, the Open Plan Data Tool allows you to define the data link properties to the Open Plan database.

By default, the Data Tool displays by clicking **Start Programs » Deltek Open Plan 8.x » Deltek Open Plan Data Tool**. You can change the path of the Open Plan menu items during installation. You can also launch the Data Tool through the EPM Security Administrator menu bar by clicking **Tools » Change data source**.

Important: You cannot run the Deltek Open Plan Data Tool if PM Compass is installed in the same database.

The Data Tool is installed when you perform a standalone installation or choose the Administrator installation option when you perform a workstation installation.

The Data Tool allows you to perform the following tasks:

- Add, edit, and delete data sources
- Specify the type of data source that you want to use

Attention: Each PPM product is shipped with the PPM Encryption Conversion Utility tool. During the conversion of 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. For more information about this tool, refer to the Deltek PPM Encryption Conversion Utility Guide.

Supported Providers

The Open Plan Data Tool supports the following database providers.

- Microsoft OLE DB Provider for SQL Server
- Oracle Provider for OLE DB
- SQL Server Native Client

It is important to consider the following information:

- Using an OLE DB provider allows you to share the Datasources.dat file across multiple Deltek products, such as Cobra 8.5 and wlnsight 8.2 (or higher). If you are likely to do this, use an OLE DB provider; otherwise, you can use either type of driver.
- You can customize and define your own list of OLE Database providers.

Data Source

A data source is a named connection to a database.

Before you can build a connection to a database, you must first have a database to which you connect. A data source contains information about the database location and the database type.

Datasources.dat File

The Datasources.dat file is an initialization file that contains data sources and global options information.

This file contains a list of names of the data sources. Each data source section contains the following information:

- Connection String
- Provider
- Schema Name
- Unicode
- Extended Properties

The Datasources.dat file is created in the root folder for all installation types. This file is not created in the Server folder in an n-tier installation.

Data Tool Login

By using the Data Tool Login dialog box, you can access the Deltek Open Plan Data Tool or change your current password.

Log Into Data Tool

This procedure allows you to log on to the Data Tool application.

To log in to Data Tool:

1. Click **Start » Programs » Deltek Open Plan 8.x » Open Plan Data Tool**.
2. In the Data Tool Login dialog box, enter your password in the corresponding field for authentication.
3. By default, the password is "password". You can change it by clicking **Change Data Tool Password....** You can enter up to 128 alphanumeric and special characters.
4. Click **OK**.

Change Data Tool Password

This procedure allows you to modify the current Data Tool password.

To change the Data Tool password:

1. Click **Start » Programs » Deltek Open Plan 8.x » Deltek Open Plan Data Tool**.
2. In the Data Tool Login dialog box, click **Change Data Tool Password....**
3. In the Change Password dialog box displays, enter your old password and new password, and then confirm the new password.
4. Click **OK**. A message displays informing you that the password has changed.
5. Click **OK** to return to the main login page.

Close Data Tool

To exit the Data Tool application, click either the close (X) button at the upper right corner of the interface or the Cancel button.

Data Tool Login Dialog Box

Use the Data Tool Login dialog box to access Data Tool or change your current password.

Password

Enter your password. By default, the value is "password".

Change Data Tool Password...

Click this button to modify the current password. You can enter up to 128 alphanumeric and special characters.

Click **OK** to validate the login or click **Cancel** to close the Login window.

Display the Data Tool Login Dialog Box

Use this procedure to display the Data Tool Login dialog box.

To display the Data Tool Login dialog box:

1. Click **Start » Programs » Deltek Open Plan 8.x » Deltek Open Plan Data Tool**.

Change Password Dialog Box

Use the Change Password dialog box to modify the current Data Tool password.

Field	Description
Old Password	Enter your current password.
New Password	Enter your new password. You can enter up to 128 alphanumeric and special characters.
Confirm New Password	Enter your new password again. If the values in the New Password and the Confirm New Password fields do not match, an error message displays. Click OK to confirm the new password. It then displays another window with the message "Password Changed" and the OK button. Click OK to return to the main login page. The new password is automatically encrypted and entered in the corresponding field.

Display the Change Password Dialog Box

Use this procedure to display the Change Password dialog box.

To display the Change Password dialog box:

1. Click **Start » Programs » Deltek Open Plan 8.x » Deltek Open Plan Data Tool**.
2. In the Data Tool Login dialog box, click **Change Data Tool Passwords**.

Deltek Open Plan Data Tool Dialog Box

Use the Deltek Open Plan Data Tool to specify the type of data source you want to use:

- Default Data
- Demonstration Data

This dialog box contains the Options group box with the following fields:

Field	Description
Target DSN	Click the drop-down arrow to select a target data source from the list of data sources that have been set up. You can click the ellipsis to display the Data Sources dialog box, where you can manage the list of available data sources. Selecting a data source enables the Create Data option.
Install Default Data	Select this option if you want the Data Tool to populate the selected Target DSN with Open Plan default data. Default data includes the following: ▪ Data dictionary ▪ Security data ▪ System library ▪ Explorer folders ▪ Spread curves ▪ Views ▪ Title blocks ▪ Symbols ▪ Other product-specific default data In addition to installing the default data, the Data Tool also copies the demonstration projects and their ancillary files and views to the target data source.
Remove Existing Data	Select this option if you want the Data Tool to delete all data from the selected data source.
Install Demonstration Data	This option is only enabled when the Remove Existing Data option is selected. Select this option if you want the Data Tool to populate the selected target data source with the demonstration projects and their associated ancillary files and views.

Field	Description
Create Data	Click to populate the target data source according to the options you specified.
Password	Click to display the Change Password dialog box where you can change your password for the Open Plan Data Tool.
Close	Click to close the dialog box without making any changes.
Help	Click to display the dialog box help topic.

Create Data

This procedure allows you to populate the target data source with the options you selected in the Deltek Open Plan Data Tool.

To create data:

1. Click **Start » Programs » Deltek Open Plan 8.x » Deltek Open Plan Data Tool**.
2. In the Data Tool Login dialog box, enter your password.
3. In the Deltek Open Plan Data Tool, enter or select the appropriate values.
4. When you are done, click **Create Data**.

Data Sources Dialog Box

The Data Sources dialog box displays a list of data sources to which you can connect.

When you select a data source, the application to which you are establishing a connection displays a dialog box that allows you to enter additional information.

Field	Description
Data Sources	This field displays a named connection to a database.
Add	Click this button to configure a data source and add it to the list displayed in the Data Sources dialog box. Clicking this button displays the tabbed Windows Data Link Properties dialog box.
Edit	Select a data source from the Data Sources list and click this button displays the Edit Data Source dialog box, where you can modify settings for the selected data source. A button on this dialog box also provides access to the Windows Data Link Properties dialog box. You can change any of the

Field	Description
	properties that you wish. However, if you are currently connected to the data source you are modifying, your changes will not take effect until the next time you start Open Plan. The Connection tab on the Windows Data Link Properties dialog box has an Allow saving password option. Selecting this option encrypts both the User ID and password and passes this information to the Security Administrator. If this option is not selected, you will be prompted to login to a data source when you start the DataTool.
Delete	Select a data source from the Data Sources list and click this button to delete the data source.

Display the Data Sources Dialog Box

Use this procedure to display the Data Sources dialog box.

To display the Data Sources dialog box:

1. Click **Start » Programs » Deltek Open Plan 8.x » Deltek Open Plan Data Tool**.
2. In the Data Tool Login dialog box, enter your password.
3. In the Deltek Open Plan Data Tool, click the ellipsis button beside the **Target DSN** drop-down field.

Add a New Data Source

This procedure allows you to create a new database connection.

To add a data source:

1. In the Deltek Open Plan Data Tool, click the ellipsis button beside the **Target DSN** drop-down field.
2. In the Data Sources dialog box, click **Add...**
3. In the Windows Data Link Properties dialog box, configure the database connection.
4. Click **OK**. The **Data Sources** list displays the new data source.
5. In the Data Sources dialog box, click **Close**.

Data Link Properties Dialog Box

Use the Data Link Properties Dialog Box to define connection information or to view existing setting options for a particular connection.

This dialog box features four tabs:

- Provider

- Connection
- Advance
- All

This dialog box also contains the following buttons:

Click **OK** or **Cancel** in the Data Link Properties dialog box to return to the Add Data Source dialog box or Edit Data Source dialog box, depending on the task that you select on the Data Sources page.

Click **Help** displays the corresponding Data Link help, depending on the tab that you select in this dialog box.

Display the Data Link Properties Dialog Box

Use this procedure to display the Data Link Properties dialog box.

To display the Data Link Properties dialog box:

1. In the Data Sources dialog box, click **Add** or **Edit**.
2. If you click **Edit**, in the Edit Data Sources dialog box, click **Data Link Properties**.

Configure a Database Connection

This procedure allows you to configure a database connection using the Windows Data Link Properties dialog box.

To access the Data Link Properties dialog box within the Data Tool application, click either the Add button or the Edit button on the Data Sources page then click the Data Link Properties button.

To configure database connection:

1. On the Provider tab, select the OLE DB provider that matches the database in which your data is stored. You can select any of the following:
 - Oracle Provider for OLE DB
 - Microsoft 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 Office 15.0 Access Database Engine OLEDB Provider
 - Microsoft Office 16.0 Access Database Engine OLEDB Provider
2. Click **Next** or the **Connection** tab.
3. In the **Use data source name** field, enter the name of the database to use.
4. Select the **Allow saving password** option to encrypt both the user ID and password, and to pass this login information on the Security Administrator.
5. In the **Enter information to log on to the server** field, enter the user name and password you use to log on to the database.
6. Click **Test Connection** to confirm that the connection to your database works.
7. In the Microsoft Data Link message box, click **OK**.
8. Click **OK** to apply and save the changes. The Edit Data Source dialog box displays.

Edit Data Source Dialog Box

Use the Edit Data Source dialog box to update an existing data source.

Field	Description
Name	This field displays the name of the selected data source.
Database Owner	This field is required if you are using either an SQL or Oracle server. Enter the name of the database owner. The entered value is validated when you click OK in this dialog box, or when you click Next on the Data Source page.
Data Link Properties	Click this button to display the standard Windows Data Link Properties dialog box, which allows you to configure the data source. Click OK to return to the Data Sources page and add the newly defined Data Source to the list. This new data source is selected by default. Click Cancel to disregard any change and return to the Data Sources page.

Display the Edit Data Sources Dialog Box

Use this procedure to display the Edit Data Sources dialog box.

To display the Edit Data Sources dialog box:

1. Click **Start » Programs » Deltek Open Plan 8.x » Deltek Open Plan Data Tool**.
2. In the Data Tool Login dialog box, enter your password.
3. In the Deltek Open Plan Data Tool , click the ellipsis button beside the **Target DSN** drop-down field.
4. In the Data Sources dialog box, select a data source and click **Edit**.

Edit a Data Source

This procedure allows you to modify current settings for a selected data source.

To edit a data source:

1. In the Deltek Open Plan Data Tool, click the ellipsis button beside the **Target DSN** drop-down field.
2. In the Data Sources dialog box, select a data source from the list and click **Edit**.
The **Name** field is disabled.
3. In the Edit Data Source dialog box, enter the necessary information. You can also click **Data Link Properties** to change the connection properties.
4. Click **OK** .

5. In the Data Sources dialog box, click **OK**.
6. In the Deltek Open Plan Data Tool dialog box, click **Close**.

Delete a Data Source

This procedure allows you to remove a selected data source from a list of available data sources.

To delete a data source:

1. In the Deltek Open Plan Data Tool, click the ellipsis button beside the **Target DSN** drop-down field.
2. In the Data Sources dialog box, select the data source that you want to remove from the list.
3. Click **Delete**. A confirmation message displays.
4. Click **Yes**.
5. In the Data Sources dialog box, click **Close**.

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using Deltek Open Plan Data Tool, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care 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 Customer Care 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 Customer Care 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 Installation Guide	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.
Deltek Open Plan Batch Processor Guide	This document contains information about running the Open Plan multi-instance batch processor.
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 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.
Deltek PPM Encryption and Conversion Utility Conversion Guide	This document provides instructions for upgrading the hashing and encryption protocols used to

Appendix A: If You Need Assistance

Document Name	Description
	store passwords and other sensitive credentials that are used to access network resources.



About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com