

# Deltek wInsight Analytics Module 8.1.1

## Installation Guide (Server and Standalone)

July 2017

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## Overview

Welcome to wlnsight Analytics Module 8.1.1. This installation guide will help you successfully install this application on your system and make it work efficiently according to your organization's business structure.

# Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, cumulative updates, and sub-releases. You access DSM through the Deltek Customer Care Connect site.

When you access DSM from within the Deltek Customer Care Connect site, you do not have to log on since you are already logged into the Customer Care Connect site.

## Accessing DSM from within the Customer Care Connect Site

To access Deltek Software Manager from within the Customer Care Connect site, complete the following steps:

1. In your Web browser, go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **User name** and **Password**, and click **Log In**.
3. When the Customer Care Connect site displays, click the Product Downloads tab.  
You are automatically logged in to Deltek Software Manager.
4. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.



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

5. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.



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

6. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.



If you want to download a Beta or LA version and it is not visible, click the View menu and select **Show Beta/LA Versions**.

7. Select the product type that you want to download. Your options are **Complete**, **Cumulative Update**, and **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.



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. Deltek Software Manager downloads the product to the folder that you selected.

## 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](#).



The above troubleshooting link will only work if you are logged into Deltek Customer Care Connect.

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## 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

The wlnsight Analytics product suite uses a multitier (n-tier) architecture. Various parts of a wlnsight Analytics product are distributed to logical tiers for performance and scalability. The logical tiers are as follows:

- **Client Tier** — This tier performs wlnsight Analytic's functional process logic and provides the user interface layer.
- **Web/Application Tier** — The Web tier, which contains no business logic, passes requests from browser to server and vice versa, while also packaging and unpackaging data. The application tier, built around QlickView Server, maintains both user sessions and manages application transactions.
- **Database Tier** — This tier consists of database servers where the wlnsight Analytics data is stored and retrieved.

### Installation/Deployment Models

#### Stand-Alone Deployment

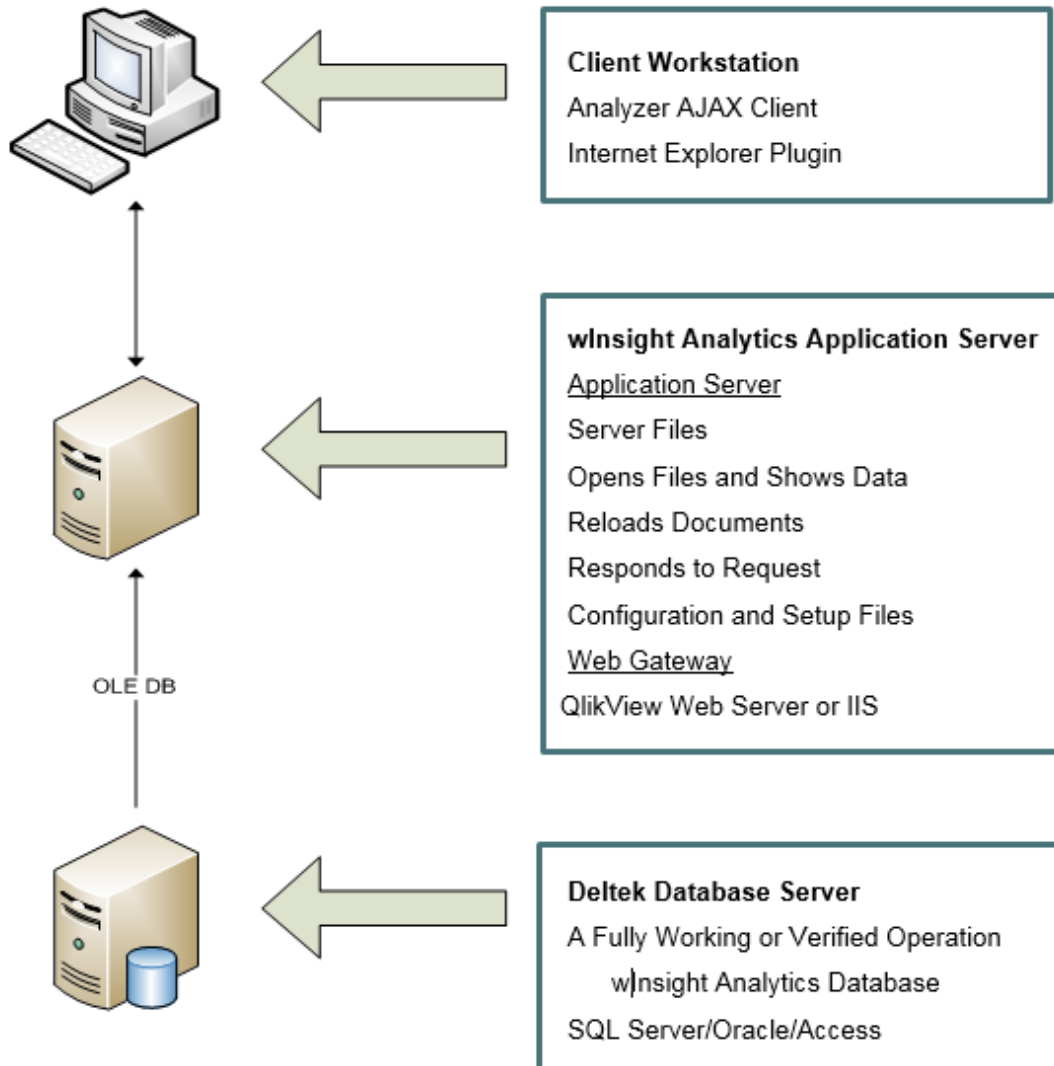
Delttek wlnsight Analytics has a stand-alone deployment model. Users who previously operated the legacy wlnsight Desktop or Professional interface installed on their workstations can continue to use the decentralized deployment model with wlnsight Analytics.

## N-Tier Deployment



If the wInsight Analytics Module is deployed in a multi-tier mode, the wInsight Analytics Administrator and wInsight Analytics Desktop uses a client-server deployment model.

In an n-tier installation, the processing occurs on the application server. It is recommended that the database tier reside on a different computer than the application server. The connection between the application server and the database should limit the number of routers and firewalls that can adversely affect data traffic.





## Unsupported Scenarios

The wlnsight Analytics Module installation does not support installing any tiers on any of the following servers:

- Domain Controller
- Microsoft® Exchange Server
- Proxy, Firewall, or ISA Server
- Microsoft SharePoint Portal Server
- Small Business/Essential Business Server

Using these services/servers can cause significant issues in the performance, reliability, and functionality of the application and 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 a wlnsight Analytics product properly.

### Platform Virtualization

Platform Virtualization is a new technology that allows multiple operating systems and platforms to run simultaneously as separate virtual machines on a single set of server hardware.

Deltek recognizes the growing use of virtual environments by our customers. Virtual environment software, such as VMware®, resides in the hardware layer underneath the operating system and is used by customers to partition a single server into a multiple server/multiple operating system environment. Deltek's product development makes limited use of virtual environments at this time.



For more information, see *Virtual Environments Statement* on the [Deltek Support Center](#).

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## Display Settings

The recommended display resolution is 1440 x 900 or higher.

## 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 are intended as a starting point for deployment. It is expected that our clients will use the product in many different ways, such as planning for future release, and client customizations. Further in-depth discussion of the business needs of the solution during implementations of application will provide final guidance on hardware requirements.

The number of elements, records, contracts, and accounting periods analyzed all have an impact on the amount of RAM you will need in the application server. This data, along with other information, is loaded into RAM on the application server, which allows for much more rapid analytics and display results. If the application server does not have enough RAM to store all of the required data, then it will get loaded into virtual memory, which has a significantly slower

response capability than RAM. All data used by wInsight Analytics for aggregation and display is stored in system memory, so hard drive storage does not have a significant impact on server sizing.



For the wInsight Analytics Module, the memory of the server should be approximately 10% – 20% of the database size (for example, 1- 2GB for a 10 GB database) plus 10% for each concurrent user. This would mean that for an Oracle or SQL Server where the data size is 10 GB and where you expect 20 concurrent users, you should allow 2GB plus 20 x 200 MB, for example, 6 GB of memory for the wInsight Analytics Module.

### Memory Requirements for a 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*
<b>Client Tier</b>	2 GB (assuming the wInsight Analytics Module is being run as a server application)
<b>Web / Application Tier</b>	N/A
<b>Database Tier</b>	<ul style="list-style-type: none"> <li>Database instance memory should be 10%–15% of the database size. For example, if database size is expected to be 500 GB, then allocate 50 GB–75 GB memory.</li> </ul>

\* 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

Sample Details for a Typical Small/Medium Data Sizing:

- Number of Contracts: 50
- Number of Element Records: 50,000
- Number of Earned Value Records: 1,200,000
- Number of Past and Future Period Records: 75,000,000

### Hardware Requirements



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

### Stand-Alone Deployment

The following table lists the recommended minimum hardware and software requirements for a deployment in a stand-alone environment.

Tier	Hardware Required	Determining Factors
<b>Client Tier</b>	<ul style="list-style-type: none"> <li>Intel Core 2.0 Duo or higher</li> </ul>	Database Size

Tier	Hardware Required	Determining Factors
	<ul style="list-style-type: none"> <li>4 GB RAM (Depending on data volumes, more may be required.)</li> <li>80 GB Hard Drive</li> </ul>	Database Growth

## N-Tier Deployment



If the wlnsight Analytics Module is deployed in a multi-tier mode, the wlnsight Analytics Administrator and wlnsight Analytics Desktop uses a client-server deployment model.

## N-Tier Installation for 1 to 10 Concurrent Users

Tier	Hardware Required	Determining Factors
<b>Web/ Application Tier</b>	<b>Server Class Machine</b> <ul style="list-style-type: none"> <li>1 x Six-core x64 2.86+ GHz or faster CPU</li> <li>32+ GB Physical memory (adjust as needed based on the RAM discussion below)</li> <li>RAID 1 Disk array (for fault tolerance and performance, also consider adding an additional hard drive to perform as a hot spare for the RAID set)</li> <li>100/1000 Mb Network card</li> </ul>	<ul style="list-style-type: none"> <li>Number of contracts</li> <li>Contract size</li> <li>Number of elements and records analyzed</li> <li>Number of accounting periods used (# of months &amp; subperiods)</li> <li>Configuration of QVW</li> <li>Concurrent Users</li> </ul>

## N-Tier Installation for 11 to 25 Concurrent Users

Tier	Hardware Required	Determining Factors
<b>Web/ Application Tier</b>	<b>Server Class Machine</b> <ul style="list-style-type: none"> <li>2 x Six-core x64 2.86+ GHz or faster CPU</li> <li>64+ GB Physical memory (adjust as needed based on above RAM discussion)</li> <li>RAID 1 Disk array (for fault tolerance and performance, also consider adding an additional hard drive to perform as a hot spare for the RAID set)</li> <li>100/1000 Mb Network card</li> </ul>	<ul style="list-style-type: none"> <li>Number of contracts</li> <li>Contract size</li> <li>Number of elements and records analyzed</li> <li>Number of accounting periods used (# of months &amp; subperiods)</li> <li>Configuration of QVW</li> <li>Concurrent Users</li> </ul>

## N-Tier Installation for 26+ Concurrent Users

Tier	Hardware Required	Determining Factors
<b>Web/ Application Tier</b>	<b>Server Class Machine</b> <ul style="list-style-type: none"> <li>2 x Six-core x64 2.86+ GHz or faster CPU</li> <li>64+ GB Physical memory (adjust as needed based on the RAM discussion below)</li> <li>RAID 1 Disk array (for fault tolerance and performance, also consider adding an additional hard drive to perform as a hot spare for the RAID set)</li> <li>100/1000 Mb Network card</li> </ul>	<ul style="list-style-type: none"> <li>Number of contracts</li> <li>Contract size</li> <li>Number of elements and records analyzed</li> <li>Number of accounting periods used (# of months &amp; subperiods)</li> <li>Configuration of QVW</li> <li>Concurrent Users</li> </ul>

## Software Requirements



Supported versions are the currently actively tested versions of technologies used to deploy wlnsight Analytics. 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.

Compatible versions are the recent previously supported and tested technologies used to deploy wlnsight Analytics. These are not actively being tested but are believed to be compatible with wlnsight Analytics. 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.

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 Support Center](#).

## Stand-Alone Installation

Supported and Compatible Deployment Technology	
<b>Operating System</b>	<ul style="list-style-type: none"> <li>Microsoft Windows® 7</li> <li>Microsoft Windows 8.1</li> <li>Microsoft Windows 10</li> <li>Microsoft Windows Server® 2008 R2 (x64) (Compatible)</li> <li>Microsoft Windows Server 2012</li> <li>Microsoft Windows Server 2012 R2</li> </ul>
<b>Citrix</b>	<ul style="list-style-type: none"> <li>XenApp® 6.0 (Windows Server 2008 R2) (Compatible)</li> <li>XenApp 6.5 (Windows Server 2008 R2) (Compatible)</li> <li>XenApp 7.0 (Windows Server 2008 R2) (Compatible)</li> </ul>

Supported and Compatible Deployment Technology	
	<ul style="list-style-type: none"> <li>▪ XenApp 7.0 (Windows Server 2012)</li> <li>▪ XenApp 7.0 (Windows Server 2012 R2)</li> <li>▪ XenApp 7.6 (Windows Server 2012 R2)</li> <li>▪ XenApp 7.7 (Windows Server 2012 R2)</li> <li>▪ XenApp 7.8 (Windows Server 2012 R2)</li> <li>▪ XenApp 7.9 (Windows Server 2012 R2)</li> </ul>
<b>Database</b>	<ul style="list-style-type: none"> <li>▪ Microsoft SQL Server 2008 R2 (Compatible)</li> <li>▪ Microsoft SQL Server 2012</li> <li>▪ Microsoft SQL Server 2014</li> <li>▪ Microsoft SQL Server 2016</li> <li>▪ Microsoft Access 2007</li> <li>▪ Microsoft Access 2010</li> <li>▪ Microsoft Access 2013</li> <li>▪ Microsoft Access 2016</li> <li>▪ Oracle 11.2</li> <li>▪ Oracle 12.1</li> <li>▪ Oracle is also supported on Linux, Unix, and Exadata</li> </ul>
<b>Database Drivers</b>	<p>NOTE: wInsight Analytics Module requires 64-bit database drivers.</p> <ul style="list-style-type: none"> <li>▪ Oracle Provider for OLE DB</li> <li>▪ Microsoft SQL Server Native Client</li> <li>▪ Microsoft OLE DB Provider for SQL Server</li> <li>▪ Microsoft OLE DB Provider for Jet</li> <li>▪ Microsoft ACE OLEDB 12</li> <li>▪ Microsoft ACE OLEDB 15</li> </ul>
<b>Microsoft Office</b>	<ul style="list-style-type: none"> <li>▪ Microsoft Excel® 2010</li> <li>▪ Microsoft Excel 2013</li> <li>▪ Microsoft Excel 2016</li> </ul>
<b>Embedded Technologies</b>	<ul style="list-style-type: none"> <li>▪ Visual C++ 2005 SP1 Redistributable Package (x86)</li> <li>▪ Visual C++ 2013 Redistributable Package (x86)</li> <li>▪ MSXML 6.0 Service Pack 2 (Microsoft XML Core Services)</li> </ul>
<b>.NET Framework</b>	<ul style="list-style-type: none"> <li>▪ Microsoft .Net Framework 4.0</li> <li>▪ Microsoft .Net Framework 4.5.0</li> </ul>

### Supported and Compatible Deployment Technology

	<ul style="list-style-type: none"> <li>Microsoft .Net Framework 4.5.1</li> <li>Microsoft .Net Framework 4.5.2</li> <li>Microsoft .Net Framework 4.6</li> <li>Microsoft .Net Framework 4.6.1</li> </ul> <p>NOTE: You can download the Microsoft.NET Framework from Microsoft's Web site at <a href="http://www.microsoft.com/en-us/download/details.aspx?id=17718">http://www.microsoft.com/en-us/download/details.aspx?id=17718</a>. For instructions for adding it using Server Manager, see your Microsoft Windows documentation.</p>
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The wlnsight database must contain at least one contract with more than one period of data.

### Server Installation

### Supported and Compatible Deployment Technology

<b>Web Server</b>	<ul style="list-style-type: none"> <li>Internet Information Services 7.5 (Compatible)</li> <li>Internet Information Services 8</li> <li>Internet Information Services 8.5</li> <li>QlikView Web Server 11.2 SR15</li> </ul> <p>NOTE: When installing IIS, make sure to install the IIS Management Scripts and Tools, ASP.NET 4.5, and Windows Authentication components.</p> <p>For information on how to install these components, refer to the Microsoft documentation on this link:  <a href="https://docs.microsoft.com/en-us/iis/install/installing-iis-85/installing-iis-85-on-windows-server-2012-r2">https://docs.microsoft.com/en-us/iis/install/installing-iis-85/installing-iis-85-on-windows-server-2012-r2</a> </p>
<b>Citrix</b>	<ul style="list-style-type: none"> <li>XenApp 6.0 (Windows Server 2008 R2) (Compatible)</li> <li>XenApp 6.5 (Windows Server 2008 R2) (Compatible)</li> <li>XenApp 7.0 (Windows Server 2008 R2) (Compatible)</li> <li>XenApp 7.0 (Windows Server 2012)</li> <li>XenApp 7.0 (Windows Server 2012 R2)</li> <li>XenApp 7.6 (Windows Server 2012 R2)</li> <li>XenApp 7.7 (Windows Server 2012 R2)</li> <li>XenApp 7.8 (Windows Server 2012 R2)</li> <li>XenApp 7.9 (Windows Server 2012 R2)</li> </ul>
<b>Database</b>	<ul style="list-style-type: none"> <li>Microsoft SQL Server 2008 R2 (Compatible)</li> </ul>

Supported and Compatible Deployment Technology	
	<ul style="list-style-type: none"> <li>Microsoft SQL Server 2012</li> <li>Microsoft SQL Server 2014</li> <li>Microsoft SQL Server 2016</li> <li>Microsoft SQL Server Express</li> <li>Microsoft Access 2007</li> <li>Microsoft Access 2010</li> <li>Microsoft Access 2013</li> <li>Microsoft Access 2016</li> <li>Oracle 11.2</li> <li>Oracle 12.1</li> <li>Oracle is also supported in Linux, Unix, and Exadata.</li> </ul>
<b>Database Drivers</b>	<p>NOTE: wInsight Analytics Module requires 64-bit database drivers.</p> <ul style="list-style-type: none"> <li>Oracle Provider for OLE DB</li> <li>Oracle Provider for OLE DB</li> <li>Microsoft SQL Server Native Client</li> <li>Microsoft OLE DB Provider for SQL Server</li> <li>Microsoft OLE DB Provider for Jet</li> <li>Microsoft ACE OLEDB 12</li> <li>Microsoft ACE OLEDB 15</li> </ul>
<b>Microsoft Office</b>	<ul style="list-style-type: none"> <li>Microsoft Excel 2010</li> <li>Microsoft Excel 2013</li> <li>Microsoft Excel 2016</li> </ul>
<b>Browsers</b>	<ul style="list-style-type: none"> <li>Internet Explorer® 10</li> <li>Internet Explorer 11</li> <li>Microsoft Edge</li> <li>Chrome©</li> <li>Safari®</li> <li>Firefox©</li> </ul>
<b>Embedded Technologies</b>	<ul style="list-style-type: none"> <li>Visual C++ 2005 SP1 Redistributable Package (x86)</li> <li></li> </ul>
<b>.NET Framework</b>	<ul style="list-style-type: none"> <li>Microsoft .Net Framework 4.0</li> <li>Microsoft .Net Framework 4.5.0</li> </ul>

### Supported and Compatible Deployment Technology

- Microsoft .Net Framework 4.5.1
- Microsoft .Net Framework 4.5.2
- Microsoft .Net Framework 4.6
- Microsoft .Net Framework 4.6.1

NOTE: You can download the Microsoft.NET Framework from Microsoft's web site at <http://www.microsoft.com/en-us/download/details.aspx?id=17718>. For instructions for adding it using Server Manager, see your Microsoft Windows® documentation.



The wlnsight database must contain at least one contract with more than one period of data.

The 64-bit Access drivers are not compatible with 32-bit versions of MS Office. If are using Access on the server, you need to install 64-bit versions of Excel (and other Office products).



## Types of Installations

You can install the wInsight Analytics Module on a server for use by multiple users or on a standalone computer for use by a single user. This guide contains instructions and related information for both types of installations.

- For information on how to install the wInsight Analytics Module on a server, see [Server Installation](#).
- For information on how to install the wInsight Analytics Module on a standalone computer, see [Standalone Installation](#).
- You may also upgrade your existing wInsight Analytics Module installation. For more information, see [Upgrade Installations](#).

## Upgrade Installations

If you are currently using an earlier version of the wInsight Analytics Module and are upgrading to 8.1.1, read the important notes below before you begin the 8.1.1 installation.

### Preparing Your Existing wInsight Analytics Module Server or Standalone Computer for 8.1.1 Installation

If you are upgrading to 8.1.1 on your existing production wInsight Analytics Module server or standalone computer, you must follow the steps below, uninstall the wInsight Analytics Module, and then follow the installation steps for a new installation.

**To prepare your existing wInsight Analytics Module server or standalone computer for 8.1.1 installation, complete the following steps:**

1. Back up your current wInsight Analytics folders. On the server or standalone computer, make backup copies of the following wInsight Analytics installation folders and their sub-folders:
  - Admin
  - Setup
  - Final

This is crucial if you want to restore your configuration settings following the installation.

2. Uninstall your existing wInsight Analytics Module.

If you reinstall wInsight Analytics Module 8.1.1 on top of an existing 8.1.1 installation, the installer displays the following message:



3. If you are upgrading from a wInsight Analytics Module version that is earlier than 8.1, uninstall QlikView. For more information, see [Appendix E: Uninstall QlikView](#).

If you start the 8.1.1 installation on a server or standalone computer on which a version of wInsight Analytics Module older than 8.1 was installed without first uninstalling QlikView, the installer displays the following message:





If you want to install 8.1.1 in a different location, you must first uninstall it and then follow the installation steps for a new installation.

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## Multiple wInsight Databases

If your core wInsight Analytics data is divided among multiple databases, Deltek strongly recommends that you consolidate those databases into one to take full advantage of the capabilities of the wInsight Analytics Module. Existing wInsight functionality is available to accomplish the consolidation. Contact Customer Care if you have questions about how to do that.

A given instance of the wInsight Analytics Module can only be connected to one core wInsight database. If you want to retain multiple databases and you want to use the wInsight Analytics Module to perform data analysis on the databases, you must set up one instance of the wInsight Analytics Module for each core wInsight database.

## Server Installation

The information in this section applies only to server installations. If you are doing an installation on a standalone computer, see [Standalone Installation](#).



This document assumes that the person installing the wlnsight Analytics Module is familiar with SQL, Oracle, and Access databases, domain accounts, Windows Authentication, IIS Manager, EPM Security Administrator, and wlnsight Analytics Administrator.

For the wlnsight Analytics system administrator, additional documentation is available on QlikView®, QlikView Server, QlikView Publisher, the QlikView automation interface, and the QlikView API. Documentation is located in C:\ProgramData\QlikTech\QlikView Documentation and in C:\ProgramData\QlikTech\QlikView Server Documentation on the wlnsight Analytics Module server or on the standalone computer running the wlnsight Analytics Module.

### Preinstallation Checklist

Steps		Related Topics
1.	Make sure all the prerequisites are installed.	<a href="#">System Requirements</a>
2.	Make sure you have all necessary accounts set up and you have the serial and control numbers for QlikView.	<a href="#">What You Need to Complete the Installation</a>
3.	Make sure that your database setup meets the requirements of the wlnsight Analytics Module. <ul style="list-style-type: none"> <li>If you are installing wlnsight Analytics Module for the first time, Deltek recommends that you first test the analytics load process using the Sample.mdb database file (which is included in the installation) before you configure it to run against your own database.</li> <li>If you choose to load or restore your own projects into Sample.mdb to test the load process and dashboards, make sure you load multiple periods of those projects.</li> </ul>	<a href="#">Multiple wlnsight Databases</a>
4.	Make sure that you have installed wlnsight Analytics Administrator 8.1.1 and created a wlnsight Analytics 8.1.1 database. If you have an 8.1 or earlier database, you must convert it into an 8.1.1 database.	For information on installing the wlnsight Analytics Administrator, creating an 8.1.1 database, or converting an 8.1 or earlier database to 8.1.1, see the <i>Setting Up and Creating a New Database</i> and <i>Conversion Overview</i> sections in the <i>Deltek wlnsight Analytics Administrator 8.1.1 Installation Guide</i> .



When you open a QVW file and the Module Security for Document dialog box displays, select the **Allow any Macro (only for trusted documents)** option.

If the Edit Module dialog box displays, make sure that you set the **Requested Module Security** field to **System Access** and the **Current Local Security** field to **Allow System Access**.



**Important:** It is crucial that you read this entire document as there are a number of important steps that you must complete, including steps both before and after the actual installation. You will need to log on with the QlikView service account that the setup creates (DeltekAnalytics is the default) or that you specify during the installation and perform various tasks outlined below. It is very important that you perform these tasks while logged on to the account specified in the instructions.



The wlnsight database must contain at least one contract with more than one period of data.

The 64-bit Access drivers are not compatible with 32-bit versions of MS Office. If are using Access on the server, you need to install 64-bit versions of Excel (and other Office products).

## What You Need to Complete the Installation

To complete the wlnsight Analytics Module server installation, you must have the following:

- Logon credentials with administrative rights.  
If you need to configure the wlnsight Analytics Module further to suit your needs, [Appendix A: Set Up User Accounts for Loading Data](#).
- Service account.
- Serial number and control number for the QlikView Server.
- Internet access.
- QlikView License Enabler File (LEF), if installing on a standalone computer with no Internet access. Contact [CCOps@deltek.com](mailto:CCOps@deltek.com) to get your LEF. If you have someone in your company who has Internet access, you may get the LEF from this link: <http://lef1.qliktech.com/manuallef/default.aspx>.

## Your Service Account

The wlnsight Analytics Module requires one service account, which you specify during the installation process. The account can be a local account or domain account. If you plan to use domain accounts, it is crucial that you read the requirements and recommendations in the next section.

### Requirements for Using Domain Accounts as the Service Accounts

If you are going to use domain accounts, it is very important that you do the following before you begin the wlnsight Analytics installation:

- Create the domain accounts in Active Directory, or your LDAP.
- Set up the account as a member of the local administrators group. Make sure that the server is a member of the domain.
- Make sure you are logged on to that domain, with Administrative rights to the server/client, when you install the wlnsight Analytics Module.

## Obtain Your QlikView Serial and Control Numbers

If you are either a new wInsight Analytics customer or you are upgrading from wInsight Analytics 6.5.1 or later, and you are installing the wInsight Analytics Module for the first time, contact your Deltek Account Manager to get the serial numbers and control numbers that you need for the installation.

## Server Installation Procedures

The installation procedures that follow are for installing the wInsight Analytics Module on a server.

### Step 1: Install the wInsight Analytics Module

To install the wInsight Analytics Module, complete the following steps:

1. Log on to the server with an administrator account.
2. Double-click **DeltekwInsightAnalytics811.exe**.
3. On the Welcome page of the Deltek wInsight Analytics Module Installation Wizard, click **Next**.
4. On the License Agreement page, review the license agreement, select **I accept the terms of the license agreement**, and click **Next**.
5. On the Setup Type page, select **Server**, and click **Next**.
6. On the Choose Destination Location page, select folders where you want to install files, and click **Next**. By default, wInsight Analytics Module files are installed in the following locations:
  - QlikView Application files — **C:\Program Files\QlikView**
  - wInsight Application files — **C:\Program Files\Deltek\wInsight Analytics**
  - wInsight Data files — **C:\ProgramData\Deltek\Analytics**



You have the option to install the files to a different location by clicking **Change**.

The QlikView Application folder contains the Directory Service Connector, Distribution Service, Examples, Management Service, QvPlugin, QvProtocol, Server, Support Tools, Themes, and Web sub-folders and corresponding files.

The wInsight Application folder contains the bin and WSWebSvc subfolders and corresponding files.

The wInsight Data folder contains the admin, Database, datapull, extension, final, Logs, publish, qvds, setup, Support, and translate sub-folders and corresponding files.

7. Specify the service account by taking one of the following actions:
  - Specify an existing domain account using the **<DOMAIN>\<USER NAME>** format and corresponding password.
  - Create a local account.

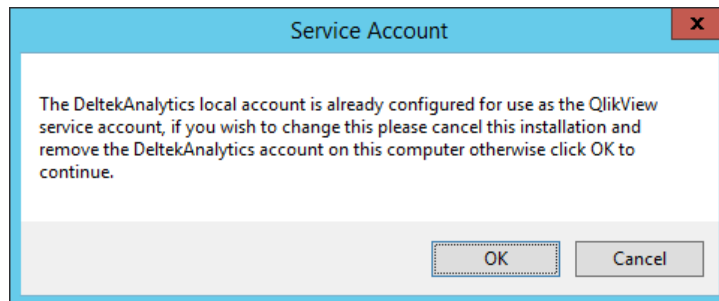


You have the option to enter a different local account name. It can be an existing account or account that does not yet exist. In the latter case, the installation process creates the account.

Instead of using a local account, you can specify an existing domain user name and password.

Before proceeding, make sure you read and complete the prerequisite tasks described in [Requirements for Using Domain Accounts as the Service Accounts](#).

If you are upgrading from an earlier version of wlnsight Analytics Module and you have not deleted the local account from the previous installation, the following message displays:



Click **OK**.



8. On the Add Administrator Users page, select the users who can configure wlnsight Analytics and run data load, and click **Next**. By default, the user running the installation displays in the list.
  - If you need to add a user, click **Add**. In the Select User dialog box, enter the domain and user name using the <DOMAIN>\<USER NAME> format, and then click **OK**.



The users that you add on this page are added automatically to the following groups by the installation:

- **QlikView Administrators** — This group has full access rights to QlikView Management Console and authenticates communication between QlikView services, if Windows Authentication is used.
- **wlnsight Administrator** — This group has full access rights to the wlnsight Analytics Data folder.

If you still need to add users to these groups after the installation, you can add them manually to the Local Users and Groups/Users folder on Windows Computer Management. For more information on adding data loading accounts, see [Appendix A: Set Up User Accounts for Loading Data](#) in this document.

- If you need to delete a user from the list, click **Remove**.



When the server where wlnsight Analytics Module is being installed has multiple Web sites/ports, the Select Web Site page that contains a dropdown list of available Web sites will be displayed in the installation wizard and user will be asked to select the Web site to be used for his installation.

9. On the Customer Experience Improvement Program page, if you want to participate in the program, leave **Send installation data to Deltek** selected, and click **Next**.  
If you participate, the data listed on the page is sent to Deltek automatically during the installation process.
10. On the Start Copying Files page, click **Next** to start the installation process. The Setup Status page displays the status of the process.
11. When the Installation Complete page displays, click **Finish**.



By default, the **Yes, I want to restart my computer now** option is selected. You must restart your computer before continuing with the remaining steps in the installation process.

12. After restarting your computer, log on to the server using an Administrator account.



Make sure that the <installation location> folder is not marked as Hidden. Otherwise, you might encounter problems in locating the files in the translate folder.

## Step 2: License QlikView Server

This procedure allows you to license QlikView Server so that you can access wlnsight Analytics Module from the AccessPoint URL. In addition, this procedure assumes that you are logged on as the QlikView administrator account identified during the installation.

Make sure that all QlikView services are running by clicking **Start » Control Panel » Administrative Tools » Services** and checking the status of the QlikView services. If there is any service that does not run automatically after restart, run the service manually by selecting it and clicking **Start**.



If you are installing wlnsight Analytics on a computer with no Internet access, you need a copy of your QlikView License Enabler File (LEF). To request your LEF, contact [CCOps@deltek.com](mailto:CCOps@deltek.com). If you have someone in your company who has Internet access, you may get the LEF from this link: <http://lef1.qliktech.com/manuallef/default.aspx>.

The administrator account that you associate with the QlikView for Windows (QV.exe) license is the only account that can be used to access QlikView for Windows and wlnsight Analytics Module on this computer.

### To license QlikView Server, complete the following steps:

1. Launch the QlikView Management Console in one of the following ways:
  - Click **Start » All Programs » Deltek wlnsight Analytics » QlikView Management Console**.
  - Or
  - Run Internet Explorer and go to <http://localhost:4780/qmc/default.htm>.



If you are asked to log on when you run QlikView Management Console, log on with the user name and password for the service account that you entered during the installation.

Select **Remember my credentials** and click **OK**.

2. If you see the following message in the browser window, click the message bar and select **Enable Intranet Settings**:
 

*"Intranet settings are now turned off by default. Intranet settings are less secure than Internet options. Click for options..."*

Click **Yes** to confirm that you want to turn on intranet security settings.
3. In the QlikView Management Console, click the System tab, and then click the Licenses sub-tab.
4. Under **Type**, select **QlikView OEM Server**.

The screenshot shows the 'Licenses' tab in the QlikView Management Console. On the left, a table lists license types: 'QlikView Publisher' (QHS@MyServer) and 'QlikView OEM Server' (QVS@MyServer). The 'QlikView OEM Server' is selected. The main panel has two tabs: 'QlikView OEM Server License' and 'Client Access Licenses (CALs)'. Under the selected tab, there are input fields for 'Serial number' and 'Control', a large text area for pasting LEF file contents, and 'Owner Information' fields for 'Name' and 'Organization'. At the bottom right, there are three buttons: 'Clear License', 'Update License From Server', and 'Apply License'.

5. Click the QlikView Server License tab in the right pane.
6. In the **Serial number** field, enter your QlikView Server serial number.
7. In the **Control** field, enter your QlikView Server control number.
8. In the **Name** and **Organization** fields, enter your name and your firm's name.
9. Scroll down until the **Apply License** button is visible, and click **Apply License**.
10. A message displays stating that the QlikView Server will be restarted. Click **OK**.  
If the license information is accepted, information displays in **Paste the contents of the LEF file here (optional)**.



To check if the license was applied correctly, click the Status tab in the QlikView Management Console, then click **Services**. The **Status** column for the **Service Name** should display **Running**. If the **Status** column displays **Off Duty**, there is a problem with the license.

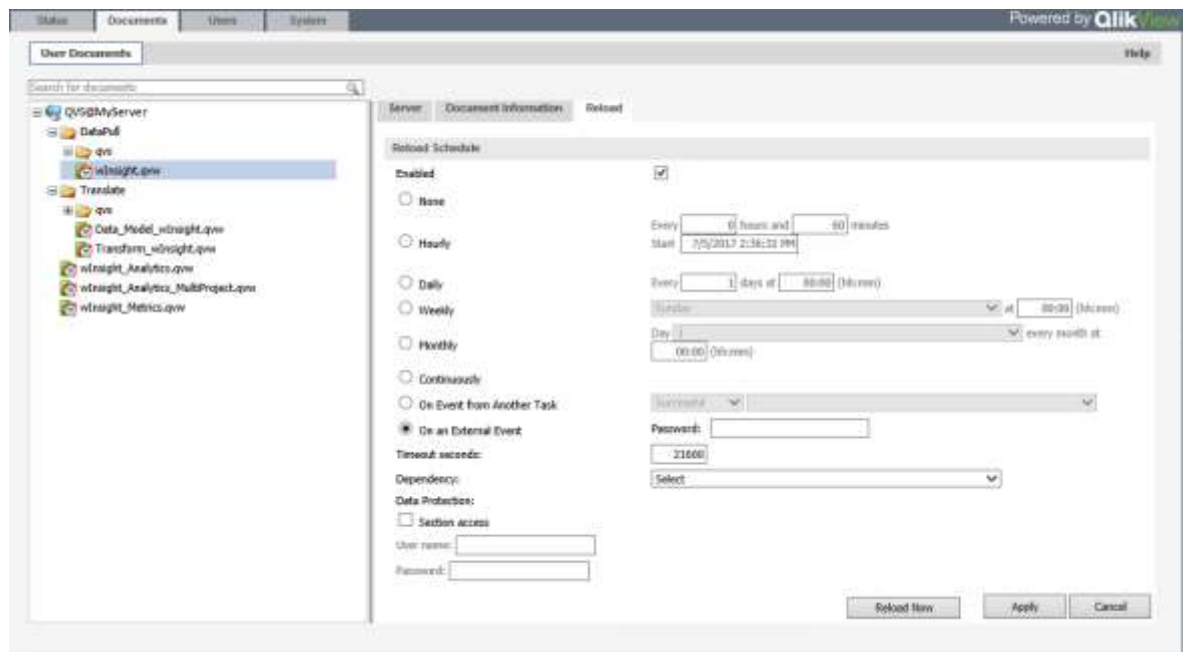
11. *This step is optional and applies only if you have a capped license.* Use the directories linked to the QlikView server if you need to give other users access to the server. For more information, see [Appendix B: Add Users to the QlikView Server from a Directory \(For Capped Licenses\)](#).
12. Still in QlikView Management Console, click the Setup sub-tab on the System tab.
13. Expand **Management Service**, and expand **QlikView Web Servers**.
14. Select **QVWS@servername**.
15. Click the General tab in the right pane.
16. If the default QlikView Web server port specified in the **Port** field under **Communication** is already being used for another process, enter another suitable port number. For more information, see [Appendix C: Change the TCP Port](#).
17. Click **Apply** and proceed to the next step.

### Step 3: Create Tasks for Loading Projects Using QlikView AccessPoint

To create tasks for loading projects using QlikView AccessPoint, complete the following steps:

1. In QlikView Management Console, click the Documents tab and click **User Documents**.
2. Expand **QVS@servername**.

- Expand the **DataPull** folder, and then expand the **qvs** folder.

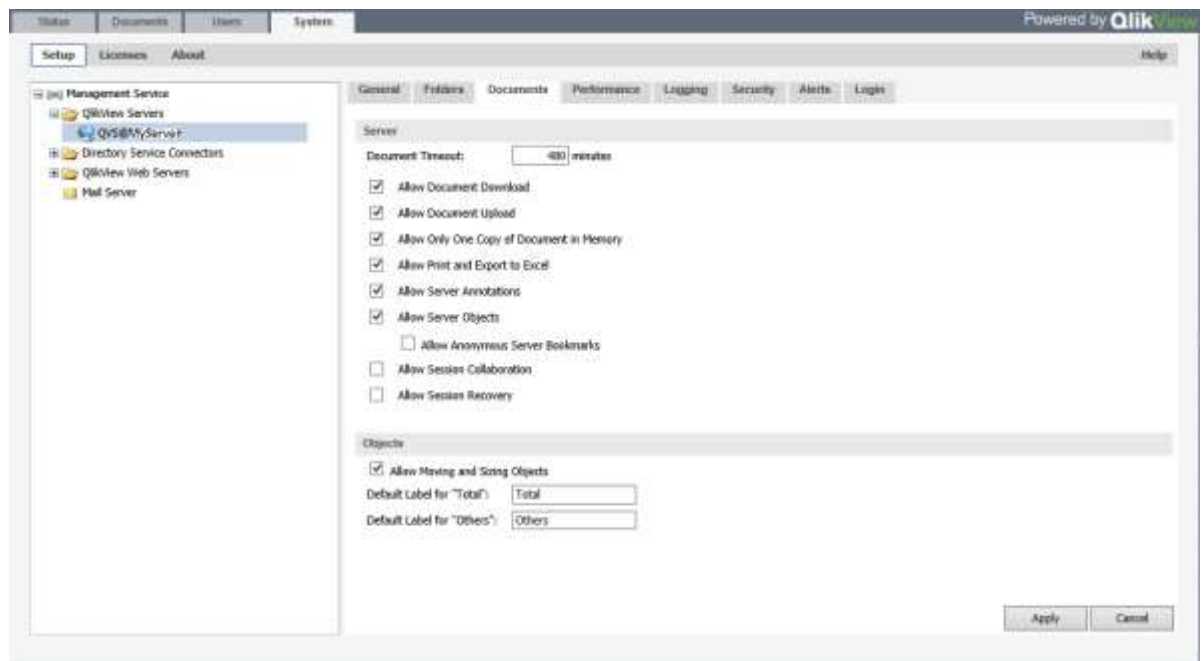


- Select **wInsight.qvw**, and then click the Reload tab in the right pane.
- On the Reload tab, mark the **On an External Event** option, and then click **Apply**.
- Expand the **Translate** folder and apply the **On an External Event** option to the following QVWs, as well:
  - Data\_Model\_wInsight.qvw
  - Transform\_wInsight.qvw
  - wInsight\_Analytics.qvw
  - wInsight\_Analytics\_MultiProject.qvw
  - wInsight\_Metrics.qvw
- Click the Status tab and expand **ReloadEngine@servername**.
- Expand the Default folder and confirm that it contains the QVWs that you marked the **On an External Event** option for.
- Proceed to the next step.

#### Step 4: Clear the Allow Session Recovery Check Box

- In QlikView Management Console, click the System tab and the Setup sub-tab.
- Expand **QlikView Servers** and select your QlikView server.
- In the right pane, click the Documents tab.

- Make sure that the **Allow Session Recovery** check box is not marked.



- Click **Apply**.
- Close the QlikView Management Console.

## Step 5: Launch and License QlikView for Windows

The following steps assume that you are logged on as the QlikView administrator account identified during the installation.

The procedure you use to license QlikView for Windows depends on the type of license you have.



QlikView for Windows always requires a standalone license key even if it is installed on a server. This allows you to access winsight Analytics Module from the server to perform general maintenance, customizations, and data load process.

### If You Have a Capped License

If you are not sure what type of license you have, contact your Delttek Account Manager.

**To launch and license QlikView for Windows if you have a capped license, complete the following steps:**

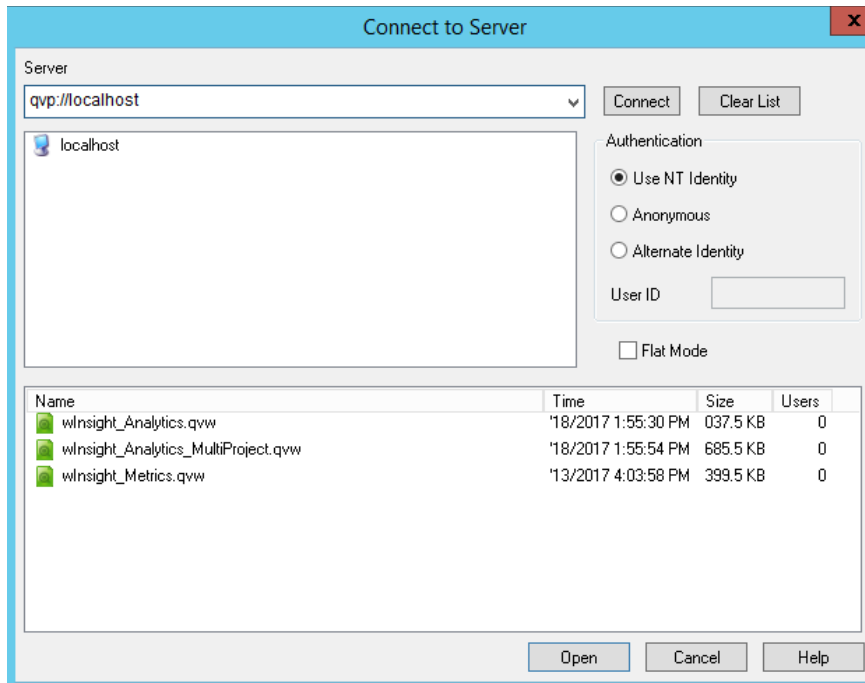
- Launch QlikView for Windows.
- Click **Settings » User Preferences**.
- On the General tab of the User Preferences dialog box, click **Change Interface Language**.

- On the Select Interface Language dialog box, select **English** if it is not already selected, and click **OK**.



- Click **OK** to close the User Preferences dialog box.
- On the QlikView **File** menu, click **Open in Server**.
- In the **Server** field, enter **qvp://localhost** and click **Connect**.

The list below the **Server** field displays **localhost**.



- Select **wlInsight\_Analytics.qvw** from the bottom list, and click **Open**.
- If the Module Security for Document dialog box displays, select **Allow any Macro (only for trusted documents)**, and click **OK**. Mark the **Always use this option for documents from this QlikView Server** check box to prevent this dialog box from displaying in the future.
- Close QlikView. If a message displays asking if you want to save changes to **wlInsight\_Analytics.qvw**, click **Yes**.

This process licensed the Client version of QlikView by leasing a license from your server installation.



After the QlikView for Windows has been licensed, you need to run the **SetWebServicesURL.bat** file, which you can find in the <Installation location>\admin folder, to configure the default Web services URL in the wlnsight\_Analytics.qvw so that you no longer need to enter the URL from AccessPoint.

### If You Have an Uncapped License

If you have an uncapped license, you have two keys initially, a server license key and a standalone license key. If you are not sure what type of license you have, contact your Deltek Account Manager.



If you are installing wlnsight Analytics on a computer with no Internet access, you need a copy of your QlikView License Enabler File (LEF). To request your LEF, contact [CCOps@deltek.com](mailto:CCOps@deltek.com). If you have someone in your company who has Internet access, you may get the LEF from this link: <http://lef1.qliktech.com/manuallef/default.aspx>.

The administrator account that you associate with the QlikView for Windows license is the only account that can be used to access QlikView for Windows and the wlnsight Analytics Module on this computer.

**To launch and license QlikView for Windows if you have an uncapped license, complete the following steps:**

1. Launch QlikView for Windows.
2. From the **Settings** menu, click **User Preferences**.
3. In the User Preferences dialog box, click the License tab.
4. Click the **Change** button.
5. Enter your QlikView for Windows standalone license key and control number, and click **Next**.
6. Read the User License Agreement, and click **I Agree**.
7. Take one of the following actions:
  - If you are installing on a computer with an Internet connection, a dialog box displays informing you that your license key has been validated. Click **Continue** in this dialog box and proceed to step 8.
  - If you are installing on a computer that does not have an Internet connection, a dialog box containing three options displays. Perform the following actions on that dialog box:
    - a. Select **Enter my License Information manually (LEF)**, and click **Continue**.
    - b. Copy the contents of your License Enabler File (LEF) and paste it into the box under **Enter your license enabling information**.
    - c. Click **Next**. A dialog box displays informing you that your license key has been validated.



If Next is grayed out, that means you pasted an invalid LEF. Contact [CCOps@deltek.com](mailto:CCOps@deltek.com).

- d. When the license key has been validated successfully, click **Continue**.
8. In the User Preferences dialog box, click **OK**.





After the QlikView for Windows has been licensed, you need to run the **SetWebServicesURL.bat** file, which you can find in the <Installation location>\admin folder, to configure the default Web services URL in the wlnsight\_Analytics.qvw so that you no longer need to enter the URL from AccessPoint.

The remaining installation steps assume that you are logged on as the user who licensed QlikView for Windows. This user must also have been identified as wlnsight Administrator user during the installation.

## Step 6: Configure the Database Connection for wlnsight Analytics Module



When you open a QlikView (.QVW) file installed by wlnsight Analytics Module, always choose the option **Allow any Macro (only for trusted documents)** when asked.

**To configure the database connection for wlnsight Analytics Module, complete the following steps:**

1. Launch QlikView for Windows, if it is not already open.
2. On the File menu, click **Open**.
3. In the Open dialog box, browse to the location of the **Connection\_Setup.qvw** file, select the file, and click **Open**.

By default, Connection\_Setup.qvw is saved in C:\ProgramData\Deltak\Analytics\admin\.. This .qvw file allows you to configure the connection information for QlikView component of wlnsight Analytics. It also allows you to configure the data source for the wlnsight Web Services used by the QlikView extension objects by clicking **Select wlnsight Datasource** on the wlnsight Analytics – Connection Setup tab.

4. If the Module Security for Document dialog box displays, select **Allow any Macro (only for trusted documents)**, and click **OK**.
5. On the **File** menu, click **Edit Script**, or press **CTRL+E**.
6. On the Data tab of the Edit Script dialog box, select **OLE DB** from the Database drop-down list, and click **Connect**.
7. On the Provider tab of the Data Link Properties dialog box, do one of the following:
  - If your wlnsight Analytics database is Microsoft SQL Server, select **Microsoft OLE DB Provider for SQL Server** or **SQL Server Native Client**, depending on your setup, and click **Next**.



If you use SQL Server Native Client, you must set the **Persist Security Info** field on the All tab of the Data Link Properties dialog box to "True." To do this, complete the following steps:

1. While still In the Data Link Properties dialog box, click the All tab.
2. Scroll down and double-click **Persist Security Info**.
3. Select **True** in the **Property Value** field of the Edit Property Value dialog box.

- If your wlnsight Analytics database is Oracle, select **Oracle Provider for OLE DB**, and click **Next**.
- If your wlnsight Analytics database is Access, select **Microsoft Office 12.0 Access Database Engine OLE DB Provider** or **Microsoft Office 15.0 Access Database Engine OLE DB Provider**, and click **Next**.



- If your OLE DB provider is not listed, install and configure it before proceeding.



The server installation requires 64-bit drivers.

Deltek recommends SQL Server and Oracle databases for production use.

---

8. On the Connection tab of the Data Link Properties dialog box, do the following:

**Microsoft SQL Server:**

- a. In **Select or enter a server name**, enter your wlnsight Analytics database server name.
- b. Select **Use a specific user name and password**, and enter your user name and password.  
  
This was the user name you created when you set up the wlnsight database using the Deltek wlnsight Analytics Administrator.
- c. Select **Allow saving password**.
- d. In **Select the database on the server**, select your wlnsight Analytics database.

**Oracle:**

- a. In **Data Source**, enter the TNS names ID for the Oracle connection.
- b. Under **Use a specific user name and password**, enter your user name and password.  
  
This was the user name you created when you set up the wlnsight database using the Deltek wlnsight Analytics Administrator.
- c. Select **Allow saving password**.

**Microsoft Access:**

- a. Enter the location path of the database. For example, C:\ProgramData\Deltek\Analytics\data\Sample.mdb.
- b. Enter your user name and password (if applicable). For Access databases, the default user name is "Admin" and there is no password required.
- c. Select **Allow saving password**.

9. Click **Test Connection** to check your connections.

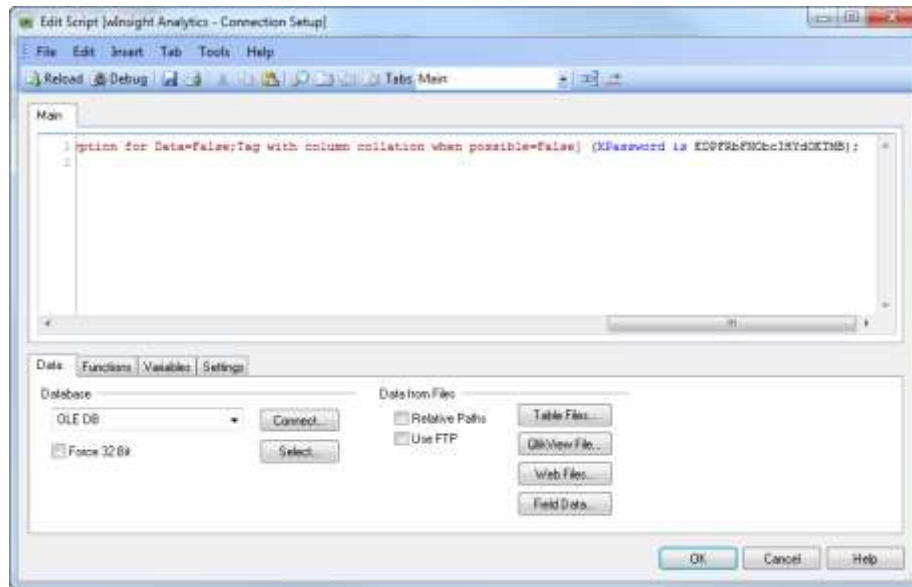
10. If the connection test is successful, click **OK**.

11. In the text box on the Main tab, scroll horizontally to the right end of the text area, and confirm that something similar to the text shown below displays (it will not be exactly the same). Verify that the password in the XPassword statement is encrypted.

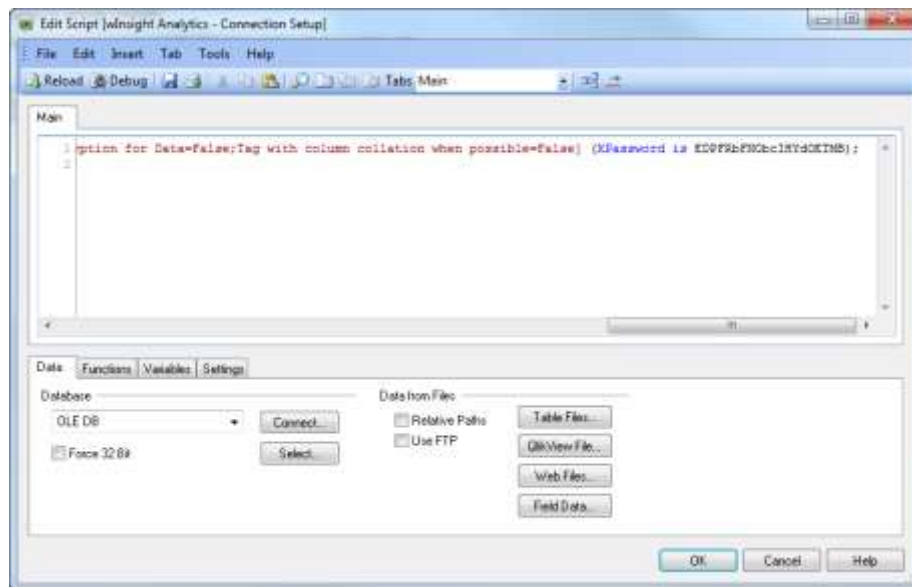


If the password is not encrypted, click **OK** to close the Edit Script dialog box. In the main QlikView window, click **Settings » User Preferences » General Tab**, mark the **Scramble Connect User Credentials** check box, and repeat steps 5 – 9.

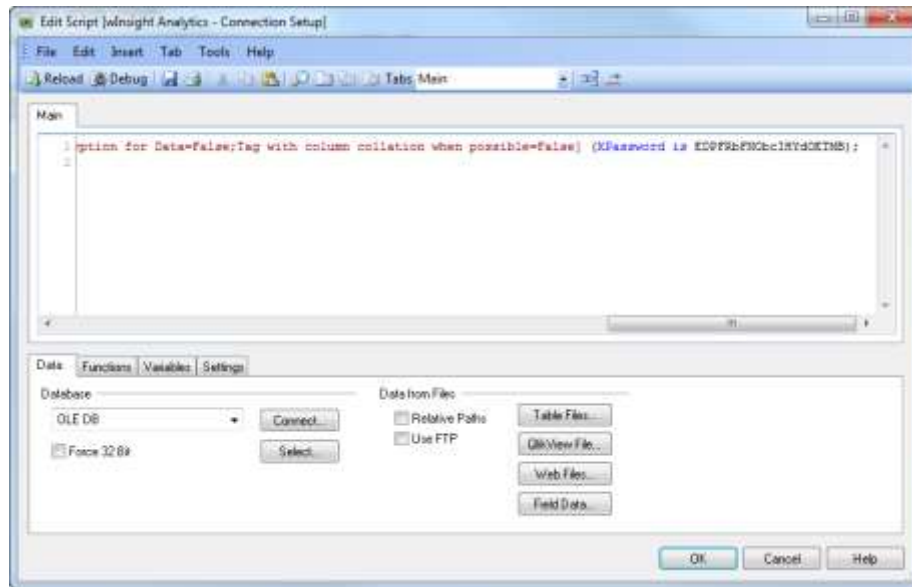
## Microsoft SQL Server



## Oracle



## Access



12. From the **File** menu, click **Export to Script File**.

If the **Export to Script File** option on the File menu is disabled, copy the entire **CONNECT TO** line (**CTRL+C**), open <installation location>\setup\Connection\_wlnsight.qvs in Notepad, paste (**CTRL+V**), and save the file.

13. In the Save Script dialog box, browse to the location of the **Connection\_wlnsight.qvs** file, select the file, and click **Save**. By default, Connection\_wlnsight.qvw is saved in C:\ProgramData\Deltek\Analytics\setup\.
14. When asked to replace the existing Connection\_wlnsight.qvs file, click **Yes**.
15. Click **OK** to close the Edit Script dialog box.

Do not close QlikView as you still need to configure the wlnsight data source in the next step.



If you are installing wlnsight Analytics Module for the first time, Deltek recommends that you first test the analytics load process using the Sample.mdb database file (which is included in the installation) before you configure it to run against your own database.

If you choose to load or restore your own projects into Sample.mdb to test the load process and dashboards, make sure you load multiple periods of those projects.

## Step 7: Configure the wlnsight Web Service Data Source

To configure the data source used by the wlnsight Analytics Web service, complete the following steps:

1. In the main QlikView window, click **Select wlnsight Datasource**.
2. In the Data Sources dialog box, click **Add**.

3. On the Provider tab of the Data Link Properties dialog box, select the appropriate database provider for your database, and click **Next**.
  - If your wlnsight Analytics database is Microsoft SQL Server, select **Microsoft OLE DB Provider for SQL Server** or **SQL Server Native Client**, depending on your setup.



If you use SQL Server Native Client, you must set the **Persist Security Info** field on the All tab of the Data Link Properties dialog box to "True." To do this, complete the following steps:

1. While still in the Data Link Properties dialog box, click the All tab.
2. Scroll down and double-click **Persist Security Info**.
3. Select **True** in the **Property Value** field of the Edit Property Value dialog box.

- If your wlnsight Analytics database is Oracle, select **Oracle Provider for OLE DB**.
- If your wlnsight Analytics database is Access, select **Microsoft Office 12.0 Access Database Engine OLE DB Provider** or **Microsoft Office 15.0 Access Database Engine OLE DB Provider**.

4. On the Connection tab, perform the following actions:

**Microsoft SQL Server:**

- a. In **Select or enter a server name**, enter your wlnsight Analytics database server name.
- b. Select **Use a specific user name and password**, and enter your user name and password.  
This was the user name you created when you set up the wlnsight database using the Deltek wlnsight Analytics Administrator.
- c. Select **Allow saving password**.
- d. In **Select the database on the server**, select your wlnsight Analytics database.

**Oracle:**

- a. In **Data Source**, enter the TNS names ID for the Oracle connection.
- b. Under **Use a specific user name and password**, enter your user name and password.  
This was the user name you created when you set up the wlnsight database using the Deltek wlnsight Analytics Administrator.
- c. Select **Allow saving password**.

**Microsoft Access:**

- a. Enter the location path of the database. For example, C:\ProgramData\Deltek\Analytics\data\Sample.mdb.
  - b. Enter your user name and password (if applicable). For Access databases, the default user name is "Admin" and there is no password required.
  - c. Select **Allow saving password**.
5. Click **Test Connection** to check your connections.
  6. If the connection test is successful, click **OK**.
  7. In the Edit Data Source dialog box, enter a name for the data source and click **OK**.

8. In the Data Sources dialog box, make sure that the newly added data source is selected, and click **OK**.
9. Close QlikView.
10. When asked to save the changes to Connection\_Setup.qvw, click **Yes**.



These steps update both the WSDATA.ini and App.config files with the selected data source.

## Step 8: Configure Data Load Settings and Perform Data Load

Before you perform this task, make sure you copy any customizations that you did from the old QVW files (which are located in the **<installation location>\Backups** folders) into their new respective **<installation location>** folders.



The installation process backs up existing QVW files (under the final, admin, and setup folders) prior to installing updated ones. These files are backed up to the **<installation location>\Backups** folder.

There are two ways to configure data load settings and perform data load:

- [Configure Data Load Settings and Perform Data Load via the QlikView Access Point](#)
- [Configure Data Load Settings via wlnsight\\_Analytics\\_Config.qvw and Perform Data Load Using Batch Files](#)



Before performing this step, make sure you have selected the data source you configured in [Step 7: Configure the wlnsight Web Service Data Source](#) in the Deltek EPM Security Administrator.

If you are upgrading from a previous version of the wlnsight Analytics Module, you have the option to apply your previous configuration settings. For more information, see [Appendix F: Apply Previous Configuration Settings](#).

Depending on whether or not you will use wlnsight Analytics Module security, you must specify security options in EPM Security Administrator and in the IIS server. For more information, see [Appendix G: Specify EPM Security Administrator and IIS Server Security Options](#).

### Configure Data Load Settings and Perform Data Load via the QlikView AccessPoint

To configure data load settings and perform data load via the QlikView AccessPoint, complete the following steps:

1. Launch QlikView AccessPoint using the shortcut under Deltek wlnsight Analytics (not the one under QlikView) on the **Start** menu. You can also launch your browser and enter the URL for your QlikView Server Access Point <http://<servername>/QlikView/index.htm>.
2. On the QlickView Access Point page, click **wlnsight\_Analytics.qvw**.
3. Click the Project Load tab, if it is not already selected.

4. In the **Web Service URL** field, replace [SERVER NAME] with the name of your QlikView server host machine and click **Connect**.

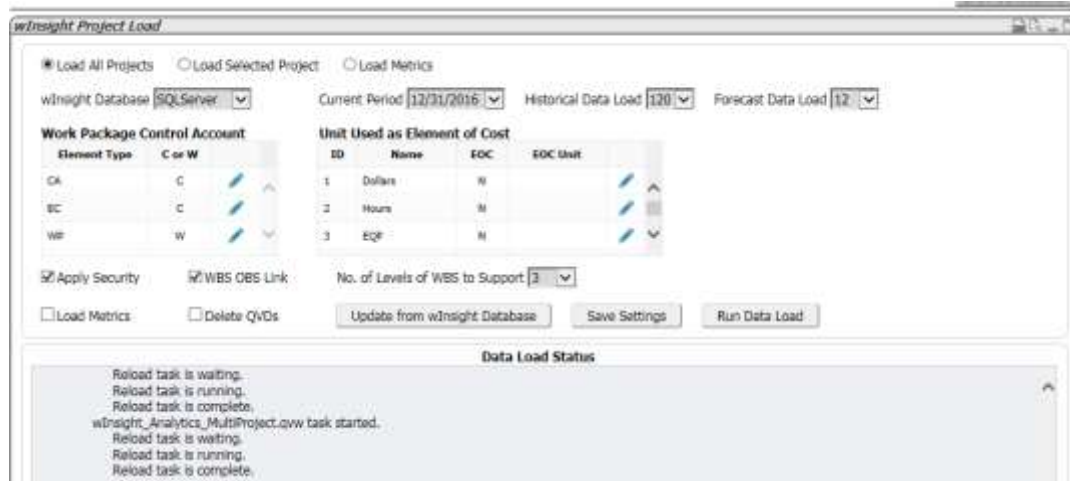


You only need to do this when you launch QlikView AccessPoint for the first time.



If you want to test Web services before doing a project load, you need to enter the Web service URL on the Project Load tab prior to testing Web services. For more information on testing Web services, see the [Appendix D: Test Web Services](#) section in this document.

5. Mark the **Load All Projects** check box, if it is not already marked.
6. In the **wInSight Database** field, select the type of database used to store your wInSight data (Access, Oracle, or SQL Server).
7. Click **Update from wInSight Database**. The Data Load Status pane displays the progress of the configuration update.
8. When the configuration update is complete, press **F5** to refresh the page.
9. If you have used the Element Type field to identify which elements represent control accounts (CAs) and work packages (WPs), the codes you used will be in the **Work Package Control Account** section as element types. You need to mark each element type as **C** if it is a control account or **W** if it is a work package.




For more information about CAs and WPs, see the *Configuration* section of the *wInSight Analytics Module 8.1.1 Administration Guide*.

10. Update the information for the following project fields:

- **Current Period**
- **Historical Data**
- **Forecast Data Load**
- **Unit Used as Element of Cost** (click  to specify the units that represent Element of Cost).



For more information about these fields, see the *Configuration* section of the *wInSight Analytics Module 8.1.1 Administration Guide*.

11. Mark the **Apply Security** if you want to use wInSight Analytics Module security.

Depending on whether or not you will use wInSight Analytics Module security, you must specify security options in EPM Security Administrator and in the IIS server. For more information, see [Appendix G: Specify EPM Security Administrator and IIS Server Security Options](#).

12. Mark the **WBS OBS Link** check box, if it is not already marked.



For more information about the WBS OBS Link, see the *Configuration* section of the *wInSight Analytics Module 8.1.1 Administration Guide*.

13. In the **No. of Levels of WBS to Support** field, specify the number of hierarchical levels of the work breakdown structure that you want to include in the data load. Use this field to select the amount of detail that is loaded into wInSight Analytics Module if your wInSight database is very large.

14. Leave the **Load Metrics** check box unmarked.

15. If this is your first time to load data for all projects, leave the **Delete QVDs** check box unmarked.

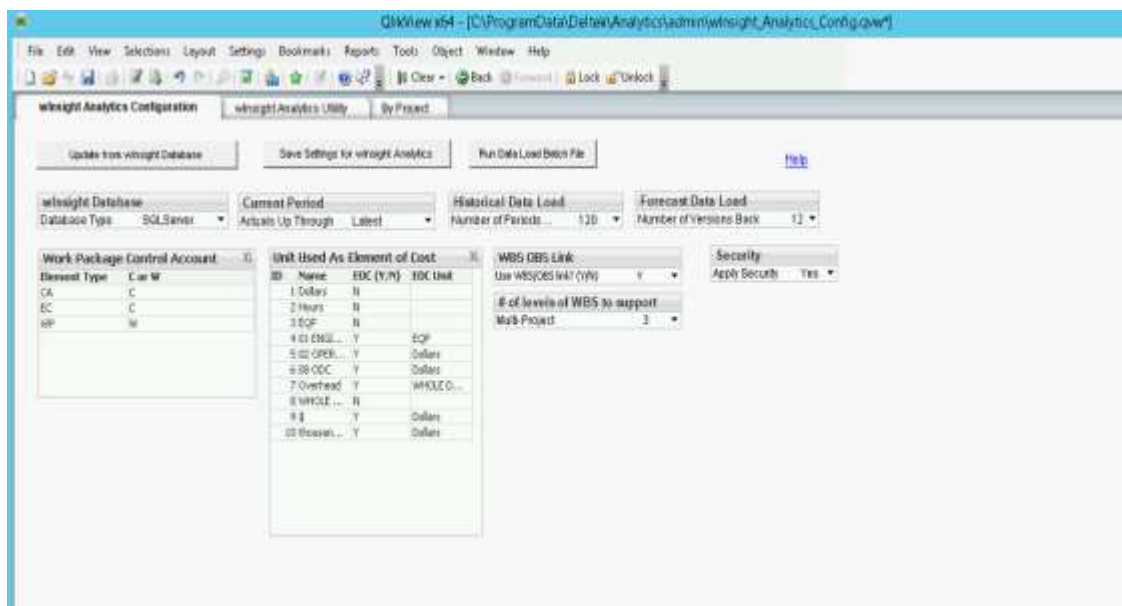


16. Click **Save Settings**. If this process is successful, a “Configuration settings have been saved...” message displays.
17. Click **Run Data Load**. You must perform a full data load before you can run single-project data loads. If this process is successful, a “Backed up QVWs from \publish folder...” message displays.

### Configure Data Load Settings via `wlinsight_Analytics_Config.qvw` and Perform Data Load Using Batch Files

To configure data load settings by manually launching `wlinsight_Analytics_Config.qvw` and perform data load using batch files, complete the following steps:

1. In Windows Explorer, browse to `wlinsight_Analytics_Config.qvw`, and double-click the file. By default, `wlinsight_Analytics_Config.qvw` is in `C:\ProgramData\Deltek\Analytics\admin\`.
2. On the Tools menu, click **Edit Module**.
3. If **Requested Module Security** does not contain **System Access** in the Edit Module dialog box, select that option.
4. If **Current Local Security** does not contain **Allow System Access** in the Edit Module dialog box, select that option.
5. Click **OK** and save the file.
6. Under **wlinsight Database** on the `wlinsight Analytics Configuration` tab, select the type of database used to store your `wlinsight` data (Access, Oracle, or SQL Server).
7. Click **Update from wlinsight Database**. The Script Execution Progress dialog box displays the progress of the update.
8. If you have used the Element Type field to identify which elements represent control accounts (CAs) and work packages (WPs), the codes you used will be under the **Element Type** column as element types. You need to mark each element type as **C** if it is a control account or **W** if it is a work package.



9. Update the information for the following project fields:

- **Current Period**
- **Historical Data**
- **Forecast Data Load**
- **Unit Used as Element of Cost**



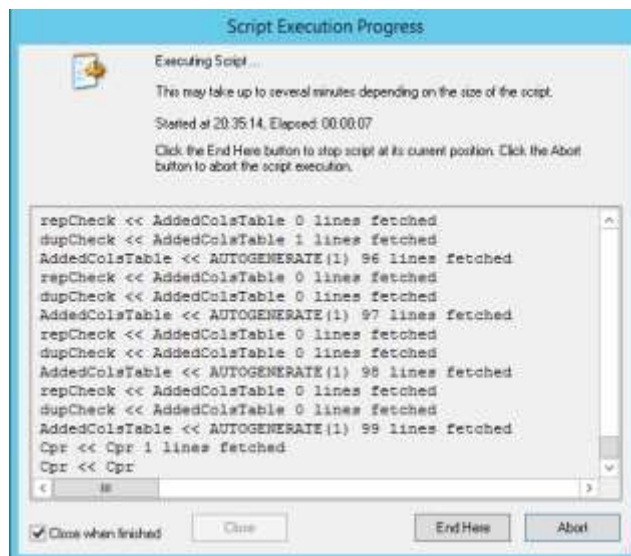
For more information about these fields, see the *Configuration* section of the *Wlnsight Analytics Module 8.1.1 Administration Guide*.

10. Mark the **WBS OBS Link** check box, if it is not already marked.



For more information about the WBS OBS Link, see the *Configuration* section of the *Wlnsight Analytics Module 8.1.1 Administration Guide*.

11. In the **No. of Levels of WBS to Support** field, specify the number of hierarchical levels of the work breakdown structure that you want to include in the data load. Use this field to select the amount of detail that is loaded into Wlnsight Analytics Module if your Wlnsight database is very large.
12. In the **Security** field, indicate whether or not you want to use Wlnsight Analytics Module security.
- Depending on whether or not you will use Wlnsight Analytics Module security, you must specify security options in EPM Security Administrator and in the IIS server. For more information, see [Appendix G: Specify EPM Security Administrator and IIS Server Security Options](#).
13. Click **Save Settings for Wlnsight Analytics**. If this process is successful, a “Configuration settings have been saved...” message displays. Click **OK** in the message.
14. Click **Run Data Load Batch File**. You must perform a full data load before you can run single-project data loads.
15. When QlikView asks if you approve the application for launch, click **Yes**. The Script Execution Progress dialog box displays the progress of the data load.



## Server Installation: Technical Notes

### Make the wInsight Analytics Module Server a Trusted Site

To avoid a variety of problems that can occur due to browser internet/intranet security, all wInsight Analytics Module users, regardless of how they access the product, should add the wInsight Analytics Module server (**http://<server name>**) to their list of trusted sites on the Security tab of the Internet Options dialog box in Microsoft Internet Explorer.

### Miscellaneous Technical Notes

The following are miscellaneous technical notes related to the installation of the wInsight Analytics Module:

- If you do not specify a domain account or an existing local account as the QlikView service account, the installation creates a local user with the name you specified (DeltekAnalytics is the default). It adds that user to the local administrators group and to the “Log On as Service” policy.
- The installation sets registry key –  
HKEY\_LOCAL\_MACHINE\SOFTWARE\QlikTech\QlikViewServer\Settings  
7\DocumentDirectory = <installation location>\publish. By default, the location is  
C:\ProgramData\Deltek\Analytics\publish.

# Standalone Installation

The information in this section applies only to standalone installations. If you are doing an installation on a server, see [Server Installation](#).



This document assumes that the person installing the wlnsight Analytics Module is familiar with SQL, Oracle, and Access databases, domain accounts, Windows Authentication, IIS Manager, wlnsight Analytics EPM Security Administrator, and wlnsight Analytics Administrator.

For the wlnsight Analytics system administrator, additional documentation is available on QlikView®, QlikView Server, QlikView Publisher, the QlikView automation interface, and the QlikView API. Documentation is located in C:\ProgramData\QlikTech\QlikView Documentation and in C:\ProgramData\QlikTech\QlikView Server Documentation on the wlnsight Analytics Module server or on the standalone computer running the wlnsight Analytics Module.

## Preinstallation Checklist

Steps		Related Topics
1.	Make sure all the prerequisites are installed.	<a href="#">System Requirements</a>
2.	Make sure you have all necessary accounts set up and you have the serial and control numbers for QlikView.	<a href="#">What You Need to Complete the Installation</a>
3.	Make sure that your database setup meets the requirements of the wlnsight Analytics Module. <ul style="list-style-type: none"> <li>If you are installing wlnsight Analytics Module for the first time, Deltek recommends that you first test the analytics load process using the Sample.mdb database file (which is included in the installation) before you configure it to run against your own database.</li> <li>If you choose to load or restore your own projects into Sample.mdb to test the load process and dashboards, make sure you load multiple periods of those projects.</li> </ul>	<a href="#">Multiple wlnsight Databases</a>
4.	Make sure that you have installed wlnsight Analytics Administrator 8.1.1 and created a wlnsight Analytics 8.1.1 database. If you have an 8.1 or earlier database, you must convert it into an 8.1.1 database.	For information on installing the wlnsight Analytics Administrator, creating an 8.1.1 database, or converting an 8.1 or earlier database to 8.1.1, see the <i>Setting Up and Creating a New Database</i> and <i>Conversion Overview</i> sections in the <i>Deltek wlnsight Analytics Administrator 8.1.1 Installation Guide</i> .



When you open a QVW file and the Module Security for Document dialog box displays, select the **Allow any Macro (only for trusted documents)** option.

If the Edit Module dialog box displays, make sure that you set the **Requested Module Security** field to **System Access** and the **Current Local Security** field to **Allow System Access**.



**Important:** It is crucial that you read this entire document as there are a number of important steps that you must complete, including steps both before and after the actual installation. For most of the steps, you must be logged on with the user account that you link to the QlikView for Windows license.

## What You Need to Complete the Installation

To complete the wInsight Analytics Module standalone installation, you must have the following:

- Logon credentials with administrative rights.
- Serial number and control number for QlikView for Windows.
- Internet access.
- QlikView License Enabler File (LEF), if installing on a standalone computer with no Internet access. Contact [CCOps@deltek.com](mailto:CCOps@deltek.com) to get your LEF. If you have someone in your company who has Internet access, you may get the LEF from this link: <http://lef1.qliktech.com/manuallef/default.aspx>.

## Obtain Your Serial Number and Control Number for the Installation

If you are either a new wInsight Analytics customer or you are upgrading from wInsight 6.5.1, and you are installing the wInsight Analytics Module for the first time, contact your Deltak Account Manager to get the serial number and control number that you need for the installation.

## Standalone Installation Procedures

The installation procedures that follow are for installing the wInsight Analytics Module on a standalone computer.

### Step 1: Install the wInsight Analytics Module

To install the wInsight Analytics Module for the first time, complete the following steps:

1. Log on to the standalone computer with an administrator account.
2. Double-click **DeltekWInsightAnalytics811.exe**.
3. On the Welcome page of the Deltek wInsight Analytics Module Installation Wizard, click **Next**.
4. On the License Agreement page, review the license agreement, select **I accept the terms of the license agreement**, and click **Next**.
5. On the Setup Type page, select **Stand-Alone**, and click **Next**.
6. On the Choose Destination Location page, select the folders where you want to install files, and click **Next**. By default, wInsight Analytics Module files are installed in the following locations:
  - QlikView Application files — **C:\Program Files\QlikView**
  - wInsight Data files — **C:\Users\<User name>\<Documents>\Deltek\Analytics**



<Documents> refers to Documents in Windows 8/8.1 and My Documents in Windows 7.

If you want to install the files to a different location, click **Change**.

7. On the Customer Experience Improvement Program page, if you want to participate in the program, leave **Send installation data to Deltek** selected, and click **Next**.  
If you participate, the data listed on the page is sent to Deltek automatically during the installation process.
8. On the Start Copying Files page, click **Next** to start the installation process.  
The Setup Status page displays the status of the process.
9. When the Installation Complete page displays, click **Finish**.



By default, the **Yes, I want to restart my computer now** option is selected. You must restart your computer before continuing with the remaining steps in the installation process.

## Step 2: Launch and License QlikView for Windows (Standalone Installation)

*This procedure does not apply if you are upgrading from a previous installation of wlnsight Analytics Module. In this case, the system uses the license key used in the previous installation.*

This procedure requires your QlikView standalone license key and control number, allowing you to access wlnsight Analytics Module from the server to perform general maintenance, customizations, and data load process.



If you are installing wlnsight Analytics on a computer with no Internet access, you also need a copy of your QlikView License Enabler File (LEF). To request your LEF, contact [CCOps@deltek.com](mailto:CCOps@deltek.com). If you have someone in your company who has Internet access, you may get the LEF from this link: <http://lef1.qliktech.com/manuallef/default.aspx>.

The administrator account that you associate with the QlikView for Windows license is the only account that can be used to access QlikView for Windows and the wlnsight Analytics Module on this computer.

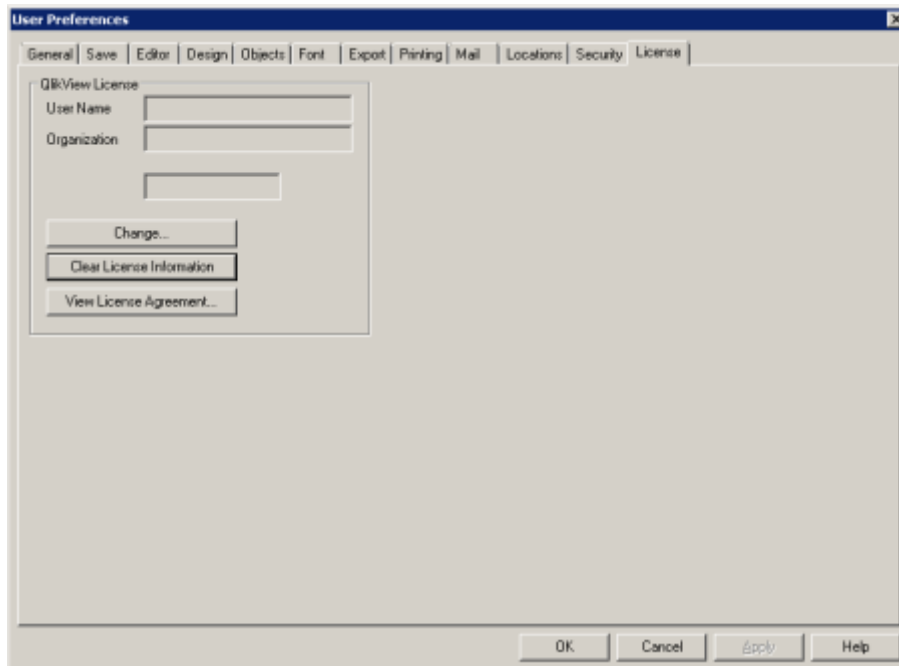
### To launch and license QlikView for Windows, complete the following steps:

1. Log onto your computer using the administrator user account that you want associated with the QlikView for Windows license.
2. Launch QlikView for Windows.
3. Click **Settings » User Preferences**.
4. On the General tab of the User Preferences dialog box, click **Change Interface Language**.

5. On the Select Interface Language dialog box, select **English** if it is not already selected, and click **OK**.



6. Click the License tab.



7. Click **Change**.
8. In the **License Key** and **Control Number** fields, enter your QlikView for Windows license key and control number.



9. In the **User Name** and **Organization** fields, enter your name and your firm's name.

The image shows a screenshot of the QlikView installation window. The window has a title bar that says "QlikView". Inside the window, there is a QlikView logo on the left. To the right of the logo, there are four text input fields: "License Key", "Control Number", "User Name", and "Organization". The "User Name" field contains the text "LocalAdmin". At the bottom right of the window, there is a button labeled "Next >>".

10. Click **Next**.
11. Read the QlikView license agreement, and click **I Agree**.
12. Take one of the following actions:
- If you are installing on a computer with an Internet connection, a dialog box displays informing you that your license key has been validated. Click **Continue** in this dialog box and proceed to step 13.
  - If you are installing on a computer that does not have an Internet connection, a dialog box containing three options displays. Perform the following actions on that dialog box:
    - a. Select **Enter my License Information manually (LEF)**, and click **Continue**.
    - b. Copy the contents of your License Enabler File (LEF) and paste it into the box under **Enter your license enabling information**. To request your LEF, contact [CCOps@deltek.com](mailto:CCOps@deltek.com). If you have someone in your company who has Internet access, you may get the LEF from this link: <http://lef1.qliktech.com/manuallef/default.aspx>.



- c. Click **Next**. A dialog box displays informing you that your license key has been validated.



If Next is grayed out, that means you pasted an invalid LEF. Contact [CCOps@deltek.com](mailto:CCOps@deltek.com).



- d. Click **Continue** and proceed to the next step.
13. In the User Preferences dialog box, click **OK**.

### Step 3: Configure the Database Connection for wInsight Analytics Module



When you open a QlikView (.QVW) file installed by wInsight Analytics Module, always choose the option **Allow any Macro (only for trusted documents)** when asked.

To configure the database connection for wInsight Analytics Module, complete the following steps:

1. On QlikView's **File** menu, click **Open**.
2. In the Open dialog box, navigate to your Documents library.
3. In your Documents library, click **Deltek » Analytics » admin**, and select the **Connection\_Setup.qvw** file.



<Documents> refers to Documents in Windows 8/8.1 and My Documents in Windows 7.

4. Click **Open**.
5. On the **File** menu, click **Edit Script**, or press **CTRL+E**.
6. In the Data tab of the Edit Script dialog box, select **OLE DB** from the Database drop-down list, and click **Connect**.

7. On the Provider tab of the Data Link Properties dialog box, perform one of the following actions:
  - If your wlnsight Analytics database is Microsoft SQL Server, select **Microsoft OLE DB Provider for SQL Server** or **SQL Server Native Client**, depending on your setup, and click **Next**.



If you use SQL Server Native Client, you must set the **Persist Security Info** field on the All tab of the Data Link Properties dialog box to "True." To do this, complete the following steps:

1. While still In the Data Link Properties dialog box, click the All tab.
2. Scroll down and double-click **Persist Security Info**.
3. Select **True** in the **Property Value** field of the Edit Property Value dialog box.

- If your wlnsight Analytics database is Oracle, select **Oracle Provider for OLE DB**, and click **Next**.
  - If your wlnsight Analytics database is Access, select **Microsoft Office 12.0 Access Database Engine OLE DB Provider** or **Microsoft Office 15.0 Access Database Engine OLE DB Provider**, and click **Next**.
  - If your OLE DB provider is not listed, install and configure it before proceeding.
8. On the Connection tab of the Data Link Properties dialog box, do the following:

**Microsoft SQL Server:**

- a. In **Select or enter a server name**, enter your wlnsight Analytics database server name.
- b. Select **Use a specific user name and password**, and enter your user name and password.  
  
This was the user name you created when you set up the wlnsight database using the Deltek wlnsight Analytics Administrator.
- c. Select **Allow saving password**.
- d. In **Select the database on the server**, select your wlnsight Analytics database.

**Oracle:**

- a. In **Data Source**, enter the TNS names ID for the Oracle connection.
- b. Under **Use a specific user name and password**, enter your user name and password.  
  
This was the user name you created when you set up the wlnsight database using the Deltek wlnsight Analytics Administrator.
- c. Select **Allow saving password**.

**Microsoft Access:**

- a. Enter the location path of the database. For example, C:\Program Files (86)\Deltek\wlnsight Analytics\data\Sample.mdb.
- b. Enter your user name and password (if applicable). For Access databases, the default user name is "Admin" and there is no password required.
- c. Select **Allow saving password**.

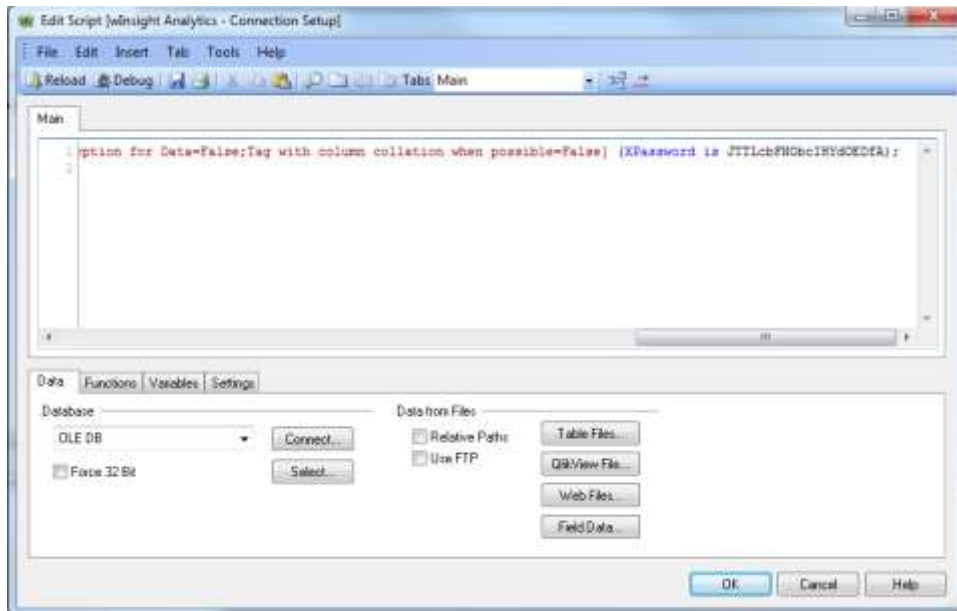
9. Click **Test Connection** to check your connections.

10. If the connection test is successful, click **OK**.
11. In the text box on the Main tab, scroll horizontally to the right end of the text area, and confirm that something similar to the text shown below displays (it will not be exactly the same). If you specified a password, verify that the password in the XPassword statement is encrypted.

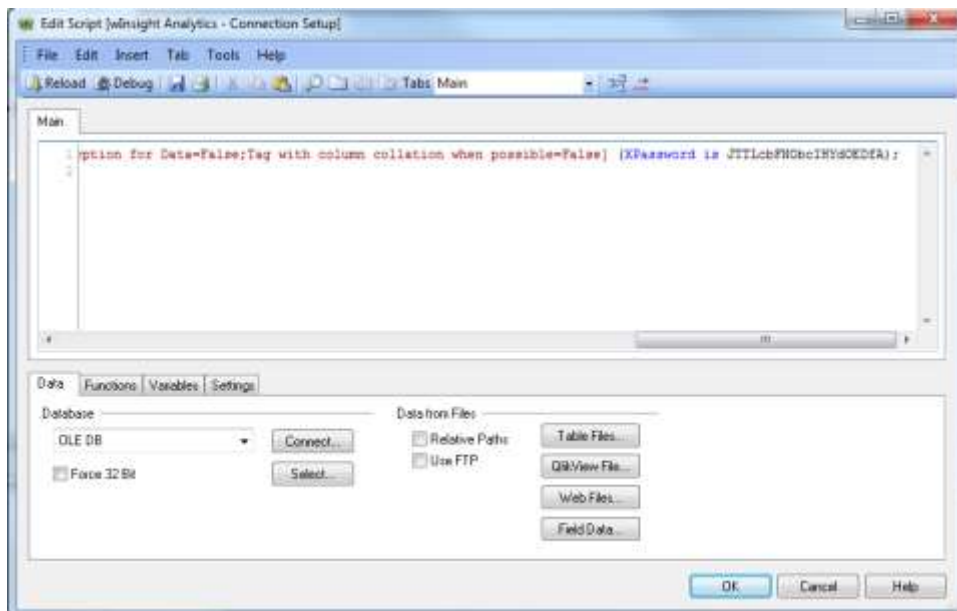


If the password is not encrypted, click **OK** to close the Edit Script dialog box. In the main QlikView window, click **Settings » User Preferences » General Tab**, mark the **Scramble Connect User Credentials** check box, and repeat steps 5 – 9 in this procedure.

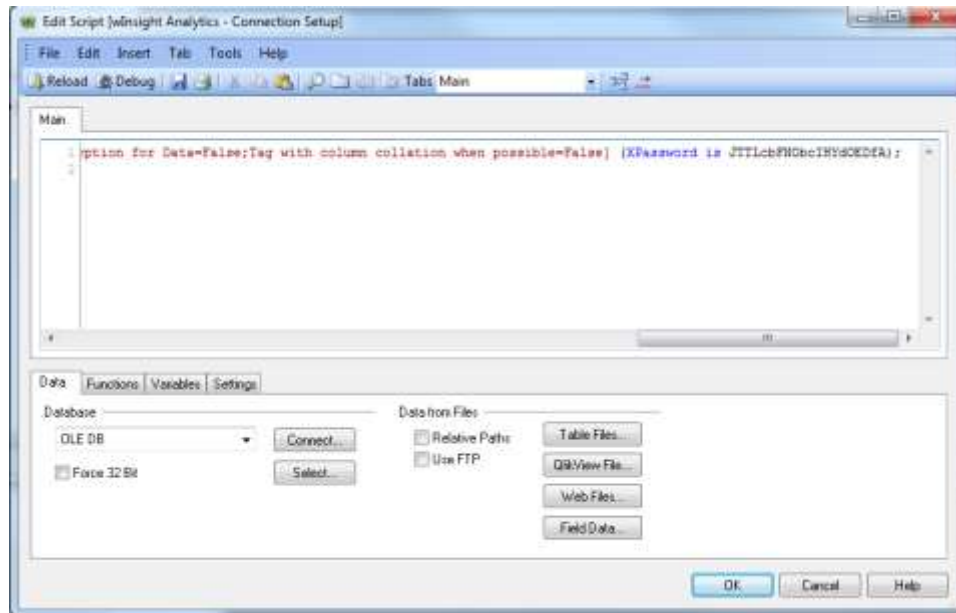
### Microsoft SQL Server



### Oracle



## Access



12. On the **File** menu, click **Export to Script File**.

If the **Export to Script File** option on the **File** menu is disabled, copy the entire **CONNECT TO** line (**CTRL+C**), open the **Connection\_Setup.qvw** file in Notepad (**Documents » Deltek » Analytics » setup**), paste (**CTRL+V**), and save the file.



<Documents> refers to Documents in Windows 8/8.1 and My Documents in Windows 7.

13. In the **File name** field of the Save Script dialog box, browse to the location of the **Connection\_wInsight.qvw** file, select the file, and click **Save**. By default, **Connection\_wInsight.qvw** is saved in **C:\Users\<User name>\<Documents>\Deltek\Analytics\setup**.
14. When asked to replace the existing file, click **Yes**.
15. Click **OK** to close the Edit Script dialog box.
16. Close QlikView. When asked to save the changes to **Connection\_wInsight.qvw**, click **Yes**.



If you are installing wInsight Analytics Module for the first time, Deltek recommends that you first test the analytics load process using the **Sample.mdb** database file (which is included in the installation) before you configure it to run against your own database.

If you choose to load or restore your own projects into **Sample.mdb** to test the load process and dashboards, make sure you load multiple periods of those projects.

## Step 4: Configure Data Load Settings and Perform Data Load

Though you are not running QlikView for Windows directly, you must be logged on with the user name and password associated with your QlikView for Windows standalone license key to run the data load process.



If you are upgrading from a previous version of the wlnsight Analytics Module, you have the option to apply your previous configuration settings. For more information, see [Appendix F: Apply Previous Configuration Settings](#).

Before performing a data load, make sure that the Authentication Mode in EPM Security Administrator is set to **None**.

If **Security** is set to **Yes** in wlnsight Analytics Administrator, loading data requires the user to have full rights or write access to all contracts in the database.

For information on how wlnsight security is enabled, refer to the *Security* section of the *wlnsight Analytics Module 8.1.1 Administration Guide* and the *EPM Security Model for wlnsight Analytics* topic in the *wlnsight Analytics Administrator 8.1.1* online help.

To configure data load settings and perform data load, complete the following steps:

1. Launch QlikView for Windows.
2. On the **File** menu, click **Open**.
3. In the Open dialog box, navigate to the wlnsight\_Analytics\_Config.qvw file (Documents » Deltek » Analytics » admin), select the file, and click **Open**.



<Documents> refers to Documents in Windows 8/8.1 and My Documents in Windows 7.

4. On the **Tools** menu, click **Edit Module**.
5. If **Requested Module Security** does not contain **System Access** in the Edit Module dialog box, select that option.
6. If **Current Local Security** does not contain **Allow System Access** in the Edit Module dialog box, select that option.
7. Click **OK** and save the file.

8. Under **wInsight Database** on the wInsight Analytics Configuration tab, select the type of database used to store your wInsight data (Access, Oracle, or SQL Server).
9. Click **Update from wInsight Database**. The Script Execution Progress dialog box displays the progress of the update.
10. If you have used the Element Type field to identify which elements represent control accounts (CAs) and work packages (WPs), the codes you used will be under the **Element Type** column as element types. You need to mark each element type as **C** if it is a control account or **W** if it is a work package.

11. Update the information for the following project fields:

- **Current Period**
- **Historical Data**
- **Forecast Data Load**
- **Unit Used as Element of Cost**



For more information about these fields, see the *Configuration* section of the *wInsight Analytics Module 8.1.1 Administration Guide*.

12. Mark the **WBS OBS Link** check box, if it is not already marked.



For more information about the WBS OBS Link, see the *Configuration* section of the *wInsight Analytics Module 8.1.1 Administration Guide*.

13. In the **No. of Levels of WBS to Support** field, specify the number of hierarchical levels of the work breakdown structure that you want to include in the data load. Use this field to select the amount of detail that is loaded into wInsight Analytics Module if your wInsight database is very large.

14. In the **Security** field, indicate whether or not you want to use wlnsight Analytics Module.



If you enabled wlnsight Analytics Module security, you must set the **Authentication Mode** to **Windows** in EPM Security Administrator.

If you disabled wlnsight Analytics Module security, you must set the **Authentication Mode** to **None** in EPM Security Administrator.

For more information, see the [EPM Security Administrator online help](#).

15. Click **Save Settings for wlnsight Analytics**. If this process is successful, a “Configuration settings have been saved...” message displays. Click **OK** in the message.
16. Click **Run Data Load Batch File** to start the data load. The Script Execution Progress dialog box displays the progress of the data load. When the processes are completed, the command window closes.

You have the option to run the **Load\_wlnsight\_Data.bat** file manually. In Windows Explorer, go to **Documents » Deltek » Analytics » admin** and double-click the **Load\_wlnsight\_Data.bat** file. This batch file runs a number of processes in a command window.



## Appendix A: Set Up User Accounts for Loading Data

The user performing the data load must be a member of the SYSADMIN group. Below are some of the requirements for this user:

- The user must have Administrator access to the server hosting the wInsight Analytics Module.
- *This applies to server installations only*. The user must be a member of the QlikView Administrator and wInsight Administrator groups.
- To perform data loading from a Standalone PC or a Server, the user needs a licensed QlikView for Windows account.
- *This applies to server installations only*. To perform data loading from the AccessPoint, the user needs a license in the QlikView Management Console.



In the event that data load will be performed by a user who is not a member of the SYSADMIN group and wInsight security is enabled, that user must have access to at least one contract in the database. That user must also have a role in the Deltak EPM Security Administrator that allows him/her to perform project loads.

The installer automatically creates wInsight Analytics Administrator and QlikView Administrator groups that have full control rights to wInsight Data and QlikView folders. The next steps should only be done if you need to add new user who will perform data loads and that user was not added during the installation of the wInsight Analytics Module.

### Step 1: Add a new user account to wInsight Analytics Module

The System Administrator can add a new user who will be responsible for loading data to the wInsight Analytics Module.

**To add a new user account to wInsight Analytics Module, complete the following steps:**

1. Click **Start » Control Panel » Administrative Tools » Computer Management**.
2. On the Computer Management screen, click **Local Users and Groups » Groups**.
3. Add the user to the following groups:
  - **QlikView Administrators**
  - **wInsight Administrator**

Make sure the **From this location** field in the Select Users, Computers, Service Accounts, or Groups dialog box is for the domain or local machine, depending on which user(s) you are adding. Click **Locations** to change between domain and local machine names.



Adding the user to these groups gives full control permission to the following files:

- QlikView Application files — **C:\Program Files\QlikView**
- wInsight Application files — **C:\Program Files\Deltak\wInsight Analytics**
- wInsight Data files — **C:\ProgramData\Deltak\Analytics**



## Step 2: Add the new wlnsight Analytics user to EPM Security Administrator

Any wlnsight Analytics user who will access QlikView AccessPoint must be added to the EPM Security Administrator, regardless of whether that user will perform data loads or not. Deltek recommends that the user performing data loads be added to the SYSADMIN group in EPM Security Administrator.



For information, see *Appendix B: EPM Security Administrator* of the *wlnsight Analytics* section of the *wlnsight Analytics Administrator 8.1.1 Installation Guide*.

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For additional information on loading data from the wlnsight database to the wlnsight Analytics Module see the *Configuration* and *Data Load* chapters of the *Deltek wlnsight Analytics Module 8.1.1 Administration Guide*.

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## Appendix B: Add Users to the QlikView Server from a Directory (For Capped Licenses)

By linking QlikView to a directory, you can easily add users to the QlikView Server for capped licenses, which allow them to access wlnsight Analytics Module from the AccessPoint URL.

### Link a Directory to the QlikView Server

To link a Directory to the QlikView Server, complete the following steps:

1. Launch the QlikView Management Console in one of the following ways:
  - Click **Start » All Programs » Deltek wlnsight Analytics » QlikView Management Console**.
  - Or
  - Run Internet Explorer and go to <http://localhost:4780/qmc/default.htm>.



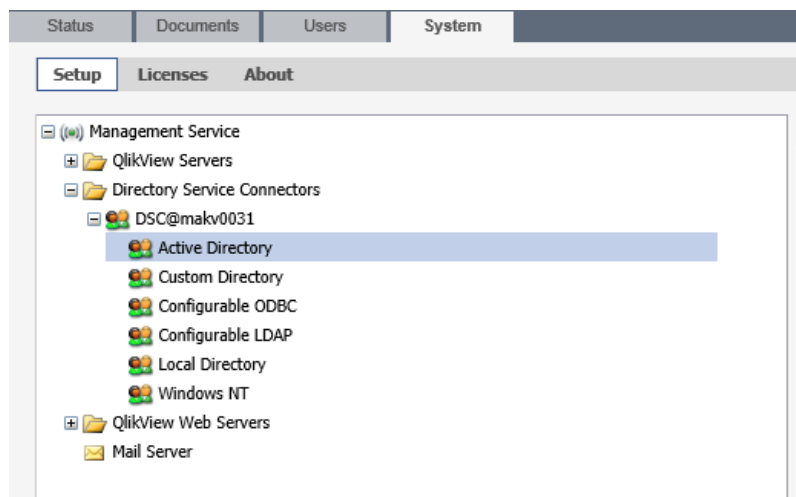
If you are asked to log on when you run QlikView Management Console, log on with the user name and password for the service account that you entered during the installation.


Select **Remember my credentials** and click **OK**.

2. If you see the following message in the browser window, click the message bar and select **Enable Intranet Settings**:
 


“Intranet settings are now turned off by default. Intranet settings are less secure than Internet options. Click for options...”

Click **Yes** to confirm that you want to turn on intranet security settings.
3. In the QlikView Management Console, click the System tab, and then click the Setup sub-tab.
4. Expand the Directory Service Connectors folder.
5. Expand **DSC@machinename** and select a directory type.



6. In the right pane, click .

7. Configure the following text boxes:

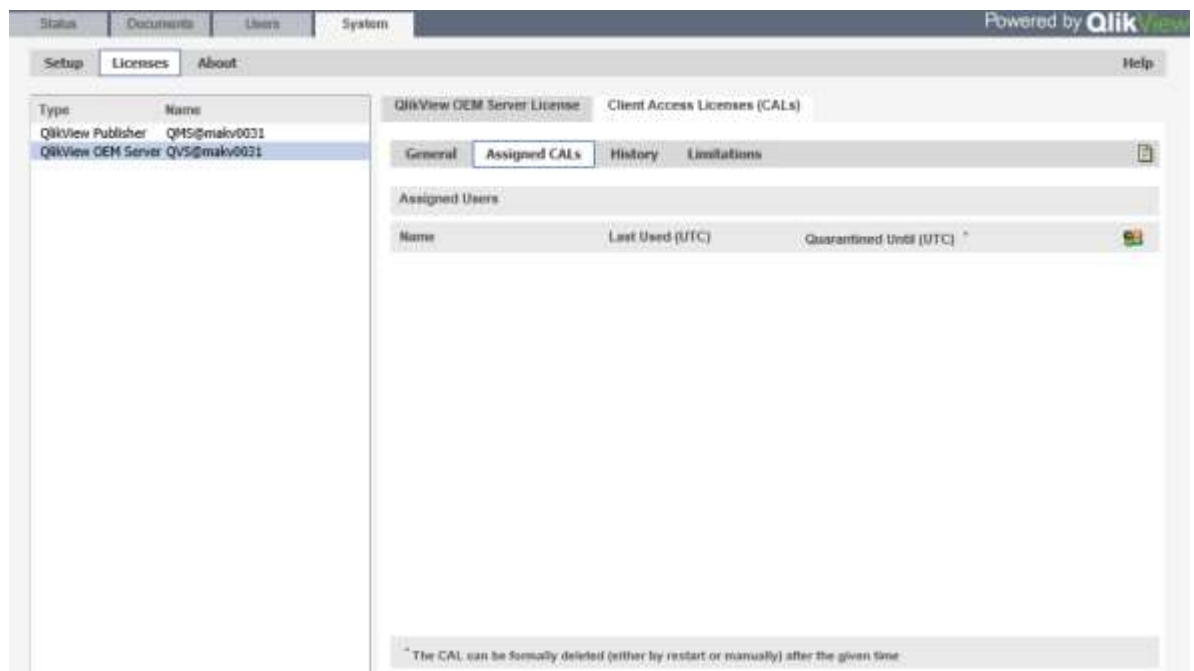
- **Path** – Enter the LDAP path to the directory service. You may also click  (Get Default) to get the default LDAP path. The default path corresponds to the domain of the account that you used in installing wlnsight Analytics Module.  
For more information, see [Requirements for Using Domain Accounts as the Service Accounts](#).
- **User Name** – Enter the user name for the account used to access the directory service using this format: <DOMAIN>\<USER NAME>.
- **Password** – Enter the password for the account used to access the directory service.


8. Click **Apply**.

## Add Users from a Directory to the QlikView Server

To add users from a Directory to the QlikView Server, complete the following steps:

1. In the QlikView Management Console, click the System tab, and then click the Licenses sub-tab.
2. Under **Type**, select **QlikView OEM Server**.
3. Click the Client Access Licenses (CALs) tab in the right pane, and click the Assigned CALs sub-tab.




4. Click  (Manage Users).
5. In the Manage Users dialog box, use the **Default Scope** field to select the directory that you want to use. You may select any of the directories that you linked to the QlikView Server using the procedure in [Link an Active Directory to the QlikView Server](#).  
You may also use the default value (**All Directories**) to display all directories linked to the QlikView Server.

6. In the **Search for Users and Groups** field, enter the name of the user that you want to add to the QlikView Server followed by an asterisk. For example: johndoe\*.



For more information about the supported search criteria for adding user names to the QlikView Server using directories, see the “Search Functions” topic in the QlikView Management Console online help.

---

7. Click . The **Search Result** column is populated by user names that matched your search criteria.
8. Select the users that you want to add to the QlikView Server and click **Add**.  
You may select multiple users simultaneously by using **Shift + Left Click** or **Ctrl + Left Click**.  
For user names that do not exist in the selected directory, use the **Manual Input of User Names** field.
9. After adding users to the **Selected Users** column, click OK.
10. On the Assigned CALs sub-tab, click **Apply**.

## Appendix C: Change the TCP Port

Perform this step only if you do need to change the TCP Port used by the QlikView Web Server Service.

To change the port number, complete the following steps:

1. Go to the <installation location>\Server\Web Server folder. By default, the Server\Web Server folder is in C:\Program Files\QlikView\.
2. Back up **QVWebServer.exe.config**.
3. Open **QVWebServer.exe.config** in a Text editor and change the port value to the desired port as shown below in the value= area.  
  

```
<!-- The port the service listens to. -->
<add key="WebServicePort" value="4750"/>
```
4. Save the file
5. Restart the Web Server Service (QlikView Web Server) or the Settings Service (IIS Web server)
6. Open the **QlikView Management Console**.
7. Click **System » Setup » QlikView Web Servers**.
8. Click the **Edit** button.
9. Change the default TCP port of 4750 to the port specified in step 3 (for example, http://<servername>:4750/QVWS/Service).
10. Click **Apply**.
11. Click **Status » Services** to verify the QVWS resource is online.

## Appendix D: Test Web Services

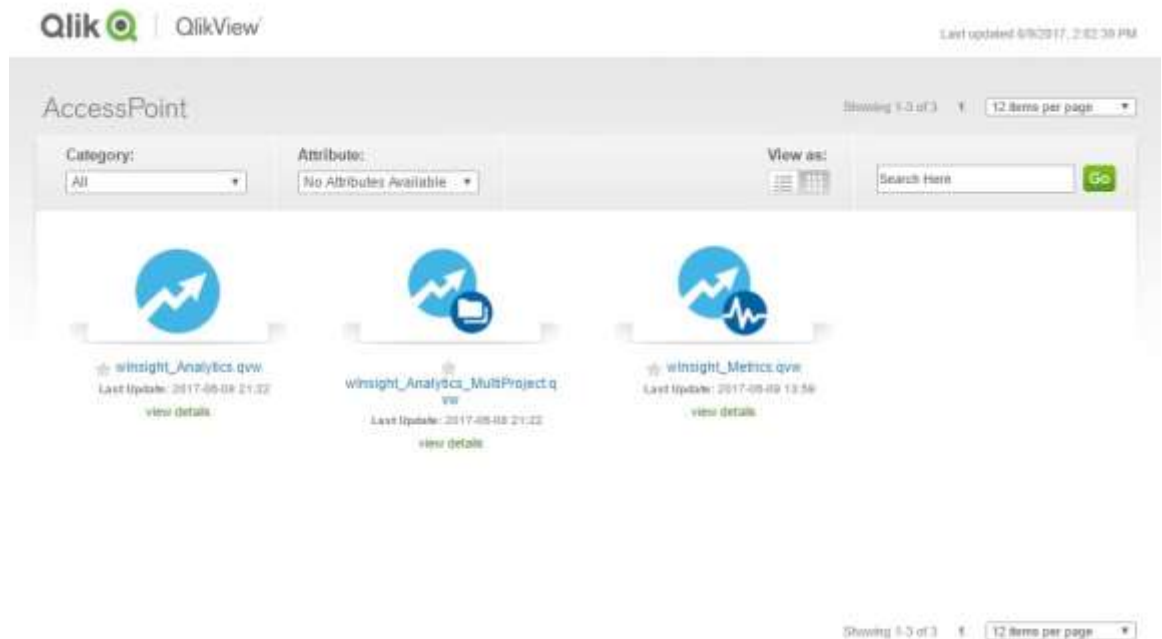
Use the Test Web Services feature if you encounter errors related to object extensions.



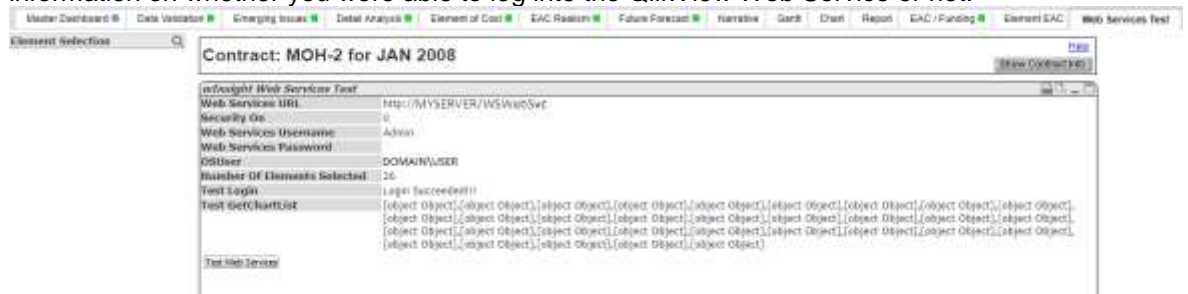
If you want to test Web services before doing a project load, you need to enter the Web service URL on the Project Load tab prior to testing Web services. For more information, see the [Step 8: Configure Data Load Settings and Perform Data Load](#) section in this document.

**To test Web Services, complete the following steps:**

1. Launch your browser and enter the URL for your QlikView Server Access Point:  
<http://servername/QlikView/index.htm>.
2. Open wlnsight\_Analytics.qvw.



3. Click the **Web Services Test** tab, and click **Test Web Services**. The page displays information on whether you were able to log into the QlikView Web Service or not.



## Appendix E: Uninstall QlikView

Use the procedure in this section only if you are upgrading from a wlnsight Analytics Module version that is earlier than 8.1. If you are upgrading from version 8.1 to 8.1.1, you do not need to uninstall QlikView.

**To uninstall QlikView and prepare for the new installation, complete the following steps:**

*For wlnsight Analytics Module 7.0/7.0.1/8.0/8.0.1 users who are upgrading to 8.1.1:*

1. In Windows Control Panel, uninstall any of the following that appear in your list of installed programs:
  - QlikView x64
  - QlikView Server x64 (server installations only)
  - QlikView Plugin (server installations with cache warming implemented only)
2. In Windows Explorer, delete the following folders:
  - C:\Program Files\QlikView
  - C:\ProgramData\QlikTech
3. *This step applies to server installations only.* In Computer Management, navigate to the Local Users and Groups/Users folder and delete the user DeltekAnalytics.
4. *This step applies to server installations only.* Still in Computer Management, navigate to the Local Users and Groups/Groups folder, double-click the QlikView Administrators group, and remove the DeltekAnalytics user.
5. In Task Scheduler, delete all jobs that begin with **DeltekwlnsightAnalytics**. There could be up to three of those jobs.
6. Restart the server or standalone computer.

## Appendix F: Apply Previous Configuration Settings

The information in this section applies only if you are upgrading from a previous version of the wlnsight Analytics Module and you want to use your previous configuration settings in the new version.




The installation process backs up existing QVW files (under the final, admin, and setup folders) prior to installing updated ones. These files are backed up to the <installation location>\Backups folder. If you have customized the dashboards, you can access your changes by opening the backup files in the folder indicated above and then copying the changes to the new QVW files.

**To upgrade from a previous version of the wlnsight Analytics Module and apply your previous configuration settings, complete the following steps:**



If you have extended the wlnsight Analytics Module by modifying the standard analytics or data models, you may also need to reapply those changes.

1. From the backup you made of your wlnsight Analytics Module installation folder and subfolders, copy the connection\_wlnsight.qvs from the **<backup location>\setup** folder into the **<new installation location>\setup** folder.
2. If wlnsight\_Analytics\_Config.qvw has been updated and you want to apply the previous wlnsight Analytics Module configuration settings to the new version, do the following:
  - a. Double-click the newly installed copy of wlnsight\_Analytics\_Config.qvw.
  - b. Click **Update from wlnsight Database**.
  - c. From your backup, go to the **<backup location>\admin** folder and run the old version of wlnsight\_Analytics\_Config.qvw to display your previous configuration settings.
  - d. Duplicate those settings in the new version of wlnsight\_Analytics\_Config.qvw.
  - e. Click **Save Settings for wlnsight Analytics**.
  - f. On the QlikView toolbar, click  to save your configuration.



## Appendix G: Specify EPM Security Administrator and IIS Server Security Options

**If you will use wlnsight Analytics security, you must perform the following:**

- In EPM Security Administrator, set the **Authentication Mode** to **Windows**: For more information, see the EPM Security Administrator online help.
- In the IIS server under the **WSWebSvc** web site, enable **Windows Authentication** and disable **Anonymous Authentication**. For more information, see the Microsoft Internet Information Services (IIS) documentation (<https://www.iis.net/configreference/system.webserver/security/authentication/windowsauthentication>).

**If you will not use wlnsight Analytics security, you must perform the following:**

- In EPM Security Administrator, set the **Authentication Mode** to **None**. For more information, see the EPM Security Administrator online help.
- In the IIS server under the **WSWebSvc** web site, enable **Anonymous Authentication**. For more information, see the Microsoft Internet Information Services (IIS) documentation (<https://www.iis.net/configreference/system.webserver/security/authentication/windowsauthentication>).

## Appendix H: If You Need Assistance

If you need assistance installing, implementing, or using the Deltek wInsight® Analytics Module, 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 Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training



Find out more about these and other services from the Customer Care Connect site.

### Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and cumulative updates



If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions.

## Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **User name** and **Password**.
3. Click **Log In**.




If you do not have a user name and password for the Customer Care Connect site, contact your firm's wInsight Analytics Administrator.

If you forget your user name or password, you can click the **Account Assistance** button on the login screen for help.

## Additional Documentation

The following table lists the additional Deltek documentation available for the wInsight Analytics Module. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Customer Care Connect site.

Document Name	Description
Deltek wInsight Analytics 8.1.1 Administration Guide for the wInsight Analytics Module	This guide describes how to configure the wInsight Analytics Module, how to set up security, and how to import data.
Deltek wInsight Analytics 8.1.1 Product Overview	This document provides a high-level overview of the product together with some guidance as to which modules should be installed to meet the needs of individual users. Most users would not need access to all modules.
Deltek wInsight Analytics 8.1.1 Release Notes for the wInsight Analytics Module	This document contains a summary of the technical considerations, new features, and enhancements of the application.



Deltek is the leading global provider of enterprise software and information solutions for professional services firms, government contractors, and government agencies. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. Over 14,000 organizations and 1.8 million users in approximately 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resource, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.®

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