

# Deltek wInsight® Analytics Administrator 8.1.1 Installation Guide

**July 2017**

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## Overview

Welcome to wInsight Analytics Administrator 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, hot fixes, and sub-releases. You can access DSM directly or through the Deltek Customer Care Connect site. You can also use DSM Lite to download Deltek products.

When you access DSM directly, you will be prompted to log on before you can access the application. If you access DSM from within the Deltek Customer Care site, you do not have to log on since you are already logged into the Customer Care site.

### Accessing DSM Directly

To access Deltek Software Manager directly, complete the following steps:

1. Launch Deltek Software Manager by taking one of the following actions:
  - Click [here](#).
  - On your desktop, click **Start » Programs » Deltek Software Manager**.
2. In the Deltek Software Manager logon dialog box, enter your Deltek Customer Care **User ID** and **Password**, and click **Logon**.
3. 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.

4. 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.

5. 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 clicked the link in step 1 to access DSM, the application automatically selects **winsight Analytics Administrator** for you.

6. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
7. 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.

8. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

## 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 **Username** and **Password**, and click **Log In**.
3. When the Customer Care Connect site displays, click the Product Downloads tab.  
You are automatically logged into 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.
7. Select the product type that you want to download. Your options are **Complete**, **HotFix**, 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.

## Accessing DSM Lite

To access Deltek Software Manager Lite, complete the following steps:

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



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

---

## DSM Documentation and Troubleshooting

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



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



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.

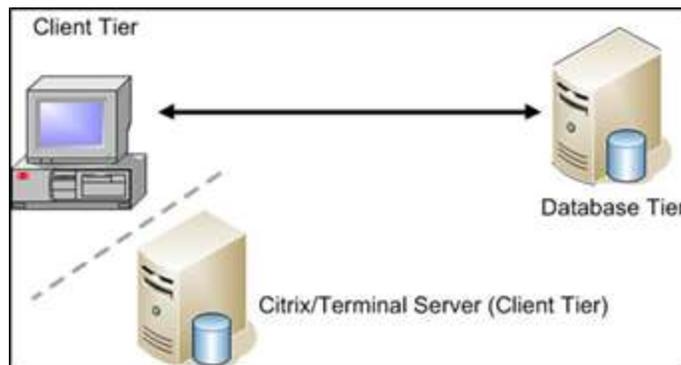
### Installation/Deployment Model

#### Stand-Alone Deployment

Deltek wlnsight Analytics Administrator and wlnsight Analytics Desktop have 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.

#### Client/Server Deployment

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



In addition, the application can be installed such that the application files reside on a network share on a machine and a shortcut is created on each workstation.

## 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](#).

### 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 provided in the previous sections are intended as a starting point for deployment. It is expected that our clients will use the product in many 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 on the server. This data, along with other information, is loaded into RAM on the server, which allows for much more rapid analytics and display results. If the 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 wlnsight Analytics for aggregation and display is stored in system memory, so hard drive storage does not have a significant impact on server sizing.

### 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*  |
|-------------|--|
| Client Tier | 2 GB (assuming the wlnsight Analytics Module is being run as a server application) |

| Tier                 | Memory*  |
|----------------------|--|
| <b>Database Tier</b> | 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. |

\* 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> <li>▪ 4 GB RAM (Depending on data volumes, more may be required.)</li> <li>▪ 80 GB Hard Drive</li> </ul> | <p>Database Size</p> <p>Database Growth</p> |

## 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 and Server Installations

| 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>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 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: wlnsight Analytics Administrator/wlnsight Analytics Desktop requires 32-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> </ul>  |

| <b>Supported and Compatible Deployment Technology</b> |  |
|---|--|
|   | <ul style="list-style-type: none"> <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>▪ MSXML 6.0 Service Pack 2 (Microsoft XML Core Services)</li> </ul>  |
| <b>Deltek Integrated Product</b>                      | <p>Deltek Acumen</p> <ul style="list-style-type: none"> <li>▪ 8.0</li> </ul> <p>Deltek Cobra</p> <ul style="list-style-type: none"> <li>▪ 5.1.3 (Compatible)</li> <li>▪ 5.1.4</li> <li>▪ 8</li> <li>▪ 8.1</li> <li>▪ 8.1.1</li> </ul> <p>Deltek MPM</p> <ul style="list-style-type: none"> <li>▪ 3.4.1</li> <li>▪ 3.5</li> </ul> |

## Getting Started

Before you begin to install wInsight Analytics Administrator, you should understand the hardware/software requirements. There are also several things you should consider to optimize the use of the software.

### Questions to Ask Before You Begin

You should answer the following questions before installing wInsight Analytics Administrator:

- Are you upgrading from an earlier version of wInsight Analytics Administrator? For more information, see the [Upgrade from an Earlier Version of wInsight Analytics Administrator](#) section.
- Are you performing a fresh install of the wInsight Analytics Administrator on a local machine? For more information see the [Install wInsight Analytics Administrator](#) section.
- Do your client workstations and servers meet hardware and software requirements? For more information, see the [System Requirements](#) section.
- Are you using Microsoft Access, Oracle, or Microsoft SQL as your database platform? For more information, see the [Set Up and Create a New Database](#) section.

### Installation Steps

Follow this sequence to successfully install wInsight Analytics Administrator:

| Step | Description  | Refer to These Sections   |
|------|--|---|
| 1    | Make sure that your system meets the hardware requirements to install the required software.   | <a href="#">System Requirements</a>   |
| 2    | Download the wInsight Analytics Administrator installer from the Deltek support site.  | <a href="#">Downloading Deltek Products using Deltek Software Manager</a>   |
| 3    | If you are upgrading from an earlier version of wInsight Analytics Administrator, make sure that you have recently backed up your wInsight Analytics data. | <a href="#">Upgrade from an Earlier Version of wInsight Analytics Administrator</a>   |
|      | Install wInsight Analytics Administrator.  | <a href="#">Install wInsight Analytics Administrator</a><br>or<br><a href="#">Install wInsight Analytics Administrator on a Network Share Setup</a> |
| 4    | Run the batch file or scripts to create or upgrade database tables.  | <a href="#">Create a Database</a><br>or   |

| Step | Description  | Refer to These Sections   |
|------|--|---|
|      |  | <a href="#">Convert wInsight Analytics Administrator 8.1 or Earlier Database to 8.1.1</a> |
| 5    | Run the data tool to set up a connection to the database used to store wInsight data.          | <a href="#">Appendix A: Data Tool</a>   |
| 6    | Run the EPM Security Administrator to define the security rights for wInsight Analytics users. | <a href="#">Appendix B: EPM Security Administrator</a>                                    |

## Upgrade from an Earlier Version of wInsight Analytics Administrator

Installing wInsight Analytics Administrator 8.1.1 automatically removes your wInsight Analytics Administrator 8.1 or earlier installation. You can also uninstall the earlier version by using either of the following methods:

- Use Windows' Programs and Features to remove the wInsight Analytics Administrator 8.1 or earlier.
- Run the installer of the earlier version, select the **Remove** option on the Program Maintenance page, and click the **Next** button to uninstall the program.

If you are upgrading from an earlier version of wInsight Analytics Administrator, make sure that you have recently backed up your wInsight Analytics data, especially if it is stored in the Sample data source that uses **sample.mdb**, which is located in **C:\Program Files (x86)\Deltek\wInsight Analytics\data**. This database is installed by default and might overwrite the existing one, thereby deleting your data.



If you are using an Access database and upgrading from 6.5.1 thru 8.0.2 to 8.1.1, the process involves creating wInsight backup of contracts and then restoring the .WSA file to an 8.1.1 database. For more information, see the [Back Up 8.1 or Earlier](#) and [Restore a .WSA File to an 8.1.1 Database](#) sections in this document.

If you are using an Access Database and upgrading from 8.1 to 8.1.1, the process involves running the upgrade script against the created database. For more information, see the [Convert an MS Access Database](#) section in this document.

If you are using an SQL or Oracle database and upgrading from 8.1 or earlier (from 6.5.1 thru 8.0.2) to 8.1.1, make sure you run the corresponding upgrade scripts. For more information, see the [Convert an MS SQL Server Database](#) and [Convert an Oracle Database](#) sections in this document.

After uninstalling the earlier version, run the wInsight Analytics Administrator 8.1.1 installer to install wInsight Analytics Administrator 8.1.1.

## Back Up 8.1 or Earlier

Though an 8.1 or earlier (from 6.5.1 thru 8.0.2) database can be upgraded to 8.1.1, you may want to back up your contracts from your 8.1 or earlier database and restore them into an 8.1.1 database.



For 6.5.1 thru 8.0.2, you can use the backup tool (**BackupMDB.exe**) after installing 8.1.1. For more information, see the [Create wInsight Backup of Contracts Automatically in an Access Database](#) section in this document.

---

## Back Up Contracts Manually

**To back up your contracts manually, complete the following steps:**

1. Start wInsight Analytics Administrator 8.1 or earlier.
2. Click **File » Login** and select the database with the 8.1 or earlier contract(s) to back up.
3. Click **Utilities » Backup** to back up your contract(s). Note the location where the 8.1 or earlier archive file (.WSA) was saved.
4. Exit wInsight Analytics Administrator 8.1 or earlier.

## Install wInsight Analytics Administrator

Use the following procedures to install wInsight Analytics Administrator. First-time installation options are different from re-installation options.



If you are re-installing wInsight Analytics Administrator, see the [Modify, Repair, or Uninstall wInsight Analytics Administrator](#) section in this document.

### To install wInsight Analytics Administrator, complete the following steps:

1. Download the wInsight Analytics Administrator software using the instructions in the [Downloading Deltek Products using Deltek Software Manager](#) section in this document.
2. Go to the location where you saved the wInsight Analytics Administrator installer.
3. Double-click **DeltekwInsightAnalyticsAdministrator811.exe** to launch the Deltek wInsight Analytics Administrator 8.1.1 InstallShield Wizard.
4. On the Welcome page, click the **Next** button.
5. On the License Agreement page, select the **I accept the terms in the license agreement** option and click the **Next** button.
6. On the Setup Type page, select one of the following options and click the **Next** button.
  - **Complete** — Installs all wInsight Analytics Administrator components. wInsight Analytics Administrator will be installed in the **C:\Program Files (x86)\Deltek\wInsight Analytics\** location by default. Proceed to step 8.
  - **Custom** — Installs only certain wInsight Analytics Administrator components. This option also allows you to change the location where wInsight Analytics Administrator is to be installed. If you selected the **Custom** option, the Custom Setup page displays. Proceed to step 7.
7. On the Custom Setup page, take any of the following actions and click the **Next** button:
  - Click the **Change** button if you want to change the directory where wInsight Analytics Administrator is to be installed. The default location is **C:\Program Files (x86)\Deltek\wInsight Analytics\**.
  - Click one of the  icons to change the features installed for any of the following components:
    - **Program Files** — Installs the wInsight Analytics Administrator program files in the destination directory and updates essential Windows system files. The default location is **C:\Program Files (x86)\Deltek\wInsight Analytics**.
    - **Help Files** — Installs online help for wInsight Analytics Administrator. The default location is **C:\Program Files (x86)\Deltek\wInsight Analytics\help\**.
    - **Sample Database** — Installs the sample MOH-2 contract, contained in the **sample.mdb** database file. The default location is **C:\Program Files (x86)\Deltek\wInsight Analytics\data**.
    - **Database Files** — Installs database scripts and template files. The default location is **C:\Program Files (x86)\Deltek\wInsight Analytics**.
    - **Utility Files** — Installs the wInsight Analytics Administrator XML Validator, (which is used to test if the XML or document you want to load is valid), BackupMDB tool (which is used to create a wInsight backup of all contracts in an

Access database formatted for wlnsight versions 6.5.1 to 8.0.1), and other utility files. The default location is **C:\Program Files (x86)\Deltek\wlnsight Analytics\util**.

- **System32Files** — Installs the Windows library files. The default location is **C:\Program Files (x86)\Deltek\wlnsight Analytics**.
8. On the Ready to Install the Program page, click the **Install** button to start the installation process. The Installing Deltek wlnsight Analytics Administrator page displays the installation progress.
  9. On the InstallShield Wizard Completed page, click the **Finish** button to exit the InstallShield Wizard. You can select the check box to launch the application after installation is completed.

## Back Up Copies of Existing MDB Files

*This only applies to the 6.5.1 thru 8.0.2 versions of the Access database.*

When performing an upgrade installation, any .MDB files found where 8.1.1 is being installed will be moved to the backup folder (which default location is **C:\Program Files (x86)\Deltek\wlnsight Analytics\Backup**).



For information on backing up all contracts in an Access database from the 6.5.1 thru 8.0.2 versions, see the [Create wlnsight Backup of Contracts Automatically in an Access Database](#) section in this document.

## Install wInsight Analytics Administrator on a Network Share Setup

You can install wInsight Analytics Administrator 8.1.1 files (.exe, .dll, or .htm) and other related files on a server and then run from a client PC. The software executes on the client PCs even though all wInsight Analytics Administrator files are stored on the server.

Certain files, however, must reside on the client PC (for example, MDAC 2.5), and certain .DLL files must be registered. You should create a shortcut on the client PC to launch wInsight Analytics Administrator.

Use the following procedures to set up wInsight Analytics Administrator to run from a server. This setup requires you to install wInsight Analytics Administrator only on the server and not on the client PCs.

### To perform a manual installation, complete the following steps:

1. Install wInsight Analytics Administrator on the server (see [Install wInsight Analytics Administrator](#)).



Make sure MDAC 2.5 or higher is installed on each client PC. Microsoft Windows Server 2003, 2008, and 2008 R2 have MDAC already installed and Microsoft Office 2000 installs MDAC. If the client PCs have either of these two products, you do not need to install MDAC on each client.

2. From the client PC, locate and run the **DoRegAll.bat** file in the **C:\Program Files (x86)\Deltek\wInsight Analytics\** folder on the server. To do this, complete the following steps:
  - a. Open an Administrative Command Prompt. The location of the command prompt varies, depending on the operating system. In Windows 7, for example, click the **Start** button then click **All Programs » Accessories**. Right-click **Command Prompt** and select **Run as Administrator**.



- b. Use the “net use” command to map the drive (for example, **Z:\**, but it could be any drive available for mapping). This action ensures that you (as an Admin user) can see the drive because you are the one mapping it.

```

Administrator: Command Prompt
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.
C:\Windows\system32>net use Z: "\\server name\WInsight Analytics"
    
```

c. Press **Enter**.

```

Administrator: Command Prompt
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.
C:\Windows\system32>net use Z: "\\server name\WInsight Analytics"
The command completed successfully.

C:\Windows\system32>z:
Z:\>
    
```

d. Go to the mapped drive, and run **DoRegAll.bat**.

```

Administrator: Command Prompt
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.
C:\WINDOWS\system32>net use Z: "\\server name\WInsight Analytics"
The command completed successfully.

C:\WINDOWS\system32>z:
Z:\>DoRegAll.bat
    
```

e. Press **Enter**.



- f. Click **OK** until all the .DLL files included in the batch are registered.
  - i. If UAC is enabled, go to step #3.
  - ii. If UAC is not enabled, skip step #3 and continue with step #4.
3. If UAC is enabled, on the client PC, create a mapped drive to the wInsight Analytics 8.1.1 folder (**C:\Program Files (x86)\Deltek\wInsight Analytics**) on the server.

To map a network drive, complete the following steps:

- a. Open **My Computer**.
- b. On the **Tools** menu, click **Map Network Drive**. The Map Network Drive page displays.
- c. In the **Drive** drop-down list, type or select the drive letter to map the shared resource (this should be the same drive you selected in Net Use command from step #2).
- d. In the **Folder** drop-down list, type the server name and the share name, for example, **\\server name\share name**. You can also click the **Browse** button to locate the resource.
- e. Click the **Finish** button.

After mapping the network drive, continue with step #4.

4. From the client PC, locate the **Wsmde.exe** file in the **C:\Program Files (x86)\Deltek\wInsight Analytics** folder on the server, using the mapped drive, and create a shortcut on the client PC.

## Modify, Repair, or Uninstall wInsight Analytics Administrator

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

**To modify, repair, or remove your wInsight Analytics Administrator installation, complete the following steps:**

1. Go to the location where you saved the wInsight Analytics Administrator installer.
2. Double-click **DeltekwInsightAnalyticsAdministrator811.exe** to launch the Deltek wInsight Analytics Administrator 8.1.1 InstallShield Wizard.
3. On the Welcome page, click the **Next** button.
4. On the Program Maintenance page, select one of the following options, depending on the task that you want to do:
  - **Modify** — Select this option to change your wInsight installation structure. Selecting this option displays the Custom Setup page, except that no **Change** button is available. To change the directory where wInsight Analytics Administrator is installed, you must first uninstall wInsight Analytics Administrator, then re-install in a different directory (see [Install wInsight Analytics Administrator](#)).
  - **Repair** — Select this option to repair installation errors by re-installing the wInsight Analytics Administrator components. Selecting this option displays the Ready to Repair the Program page. Click **Next** to continue repairing wInsight Analytics Administrator.
  - **Remove** — Select this option to uninstall wInsight Analytics Administrator from your machine. Selecting this option displays the Remove the Program page. Click **Next** to continue uninstalling wInsight Analytics Administrator.
5. Click **Install** (for **Modify** or **Repair**) or **Remove**. The installation or uninstallation progress displays.
6. When the process is completed, click the **Finish** button to exit the InstallShield Wizard.

## Installation Notes

This section discusses additional details for installing wInsight Analytics Administrator on a server on a Local Area Network (LAN):

- The Microsoft Windows Installer can perform an administrative installation of an application or product to a network for use by a workgroup. Administrators can run an administrative installation from the command line by using the "/a" command line option. Then, users can install the product from the network to run the application. Users can choose to "run-from-source" and the installer will use most of the product's files directly from the network.
- Regardless of where the application files are installed, the wInsight Analytics database can be located on a file server accessing a shared MS Access .MDB file or on a database server running Oracle or SQL Server. An MS Access .MDB file can even be accessed if it resides on the client PC.
- Users do not need any write privileges on the server, unless they need to create a data source. In that case, they need to be able to write to the **datasources.dat** file stored in **C:\Program Files (x86)\Deltek\wInsight Analytics** by default. However, users need Read, Write, Create, and Delete privileges to the directory storing the wInsight MS Access (.MDB) database.
- Users can share the data sources used to access wInsight Analytics data by specifying the location of the datasources.dat file (which contains the connection details) in **config.dat**. If you use other Deltek products (such as Cobra and Open Plan) and store all of your data in a single database, you can create a single list of database connections in one shared **datasources.dat** file.

The **config.dat** file must reside in the wInsight Analytics folder, but the shared **datasources.dat** can be placed in a network shared folder and accessed by all users. This allows all users to easily connect to the databases configured by their system administrator.

To update **config.dat**, open the file in a text editor (such as Notepad, specify the location of the shared **datasources.dat**, and restart the application.

```
[SYSTEM]
```

```
DataSources=<path>\<filename>
```



The **config.dat** file is installed into **C:\Program Files (x86)\Deltek\wInsight Analytics** by default.

- For Oracle database, wInsight Analytics no longer supports **Microsoft OLE DB Provider for Oracle** (MSDAORA.DLL). To connect to a database, it now uses **Oracle Provider for OLE DB** (OraOLEDB.Oracle.1). In case **Oracle Provider for OLE DB** is not included in the **OLE DB Provider** list on the Data Link Properties dialog box, download and install Oracle Data Access Components (ODAC), depending on the Oracle database version you are using.

Part of this change is the conversion of the LONG data type into CLOB (or Character Large Object) data type. CLOBs allow you to store and manipulate large blocks of unstructured data and provide efficient access to the data. In addition, Oracle recommends that you use CLOBs over LONG data types.



For more information, see  
<http://www.oracle.com/technetwork/topics/dotnet/downloads/net-downloads-160392.html>.

---

## Customize Functions at Startup

You can customize certain wInsight Analytics Administrator functions at startup.

---



For information about these options, see the [Advanced Set Up Options](#) section in this document.

---

## Create wlnsight Backup of Contracts Automatically in an Access Database

*This only applies to the 6.5.1 thru 8.0.2 versions of the Access database.*

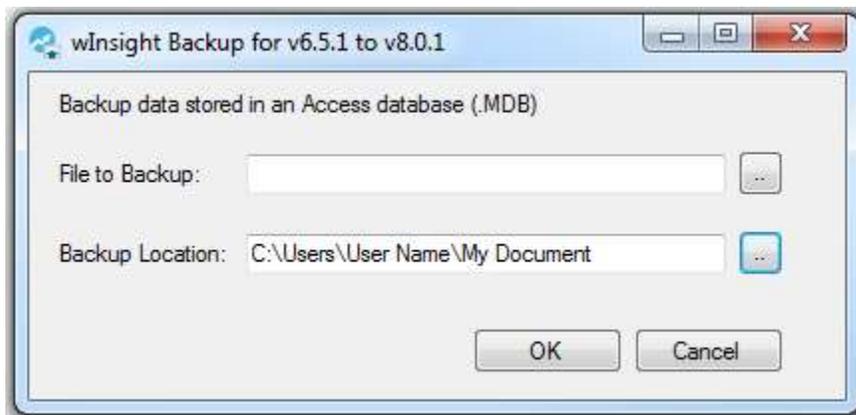
Use the **BackupMDB.exe** tool to automatically create a wlnsight backup of all contracts in an Access database formatted for an earlier version of wlnsight (version 6.5.1 to v8.0.1). When the backup process is complete, a single .WSA file is created and can be easily restored into wlnsight version 8.1.1.



The **BackupMDB.exe** tool is installed when you install wlnsight Analytics Administrator or wlnsight Analytics Desktop.

**To create the backup file automatically, complete the following steps:**

1. Open **BackupMDB.exe**, which is located in **C:\Program Files (x86)\Deltek\wlnsight Analytics\util\BackupMDB** by default. Alternatively, you can click **Start » All Programs » Deltek wlnsight Analytics » Deltek wlnsight BackupMDB**. If you have recently accessed the tool, you can also open its shortcut from the main **Start** menu.
2. On the wlnsight Backup for v6.5.1 to v8.0.1 dialog box, in the **File to Backup** field, click  and navigate to the location where you saved the .MDB file to back up.



3. In the **Backup Location** field, enter or select the folder where you want to save the file. By default, the backup file is saved in **C:\Users\<User Name>\My Documents** and uses the **<database name>.wsa** file name.
4. Click **OK**.
5. When the backup process is done, a message displays informing you whether the backup was successful and asking if you need to back up another database. Clicking **Yes** allows you to perform another backup. Clicking **No** closes the wlnsight Analytics Backup for v6.5.1 to v8.0.1 dialog box.



When the backup process is complete, the tool creates a log file in the same location where it saves the backup file. The log file uses the **<database name>.txt** format.



As a reminder, all Access .MDB files located under the installation folder are automatically backed up during the upgrade installation. For more information, see the [Back Up Copies of Existing MDB Files](#) section in this document.

---

# Set Up and Create a New Database

The purpose of this chapter is to describe how to set up and create several types of databases.

## Set Up a Database

To set up a new database, complete the following steps:

1. Create one of the following types of databases.
  - Microsoft Access®
  - Oracle®
  - Microsoft SQL Server®
2. Build a data source connection to that database.



You can use [wInsight Analytics Administrator](#) to add contracts to the new database manually or to add contracts to the new database by importing transfer files. For more information about data source connection, see the [Appendix A: Data Tool](#) section in this document.

## Create a Database

The wInsight Analytics installer provides batch files to assist with the creation of a new wInsight database. The batch files are saved in **C:\Program Files (x86)\Deltek\wInsight Analytics\data** and are database-specific. You can also create the wInsight Analytics database by running the scripts individually during the installation process.

### Create an MS Access Database

Whether or not you installed the sample database, wInsight Analytics Administrator installs a **blank811.mdb** database file, which is located in of **C:\Program Files (x86)\Deltek\wInsight Analytics\data\Access** by default. This database file contains no contracts. Use it when you want to start a new group of contracts, without having to delete existing ones first.

Use wInsight Analytics Administrator to add contracts to a new database.



When performing an upgrade installation, wInsight Analytics automatically backs up any existing .MDB files (for example, blank\*.mdb) it finds in the installation folder. It saves these files in the Backup folder, which is located in **C:\Program Files (x86)\Deltek\wInsight Analytics\Backup** by default.

To create a clean MS Access database, complete the following steps:

1. Open Windows Explorer and search for **blank811.mdb**, which is located in **C:\Program Files (x86)\Deltek\wInsight Analytics\data\Access** by default.
2. Copy the file to a desired location.
3. In Windows Explorer, rename the copy of **blank811.mdb**.

## Create an MS SQL Server Database

The scripts mentioned in this procedure only create the wlnsight Analytics schema. Your database administrator (DBA) should have already created the necessary database and tablespaces.



By default, the scripts and batch file discussed in this section are located in **C:\Program Files (x86)\Deltek\wlnsight Analytics\data\MSSQL**.

### To create a clean Microsoft SQL Server database, complete the following steps:

1. Make sure that your DBA has created the database and tablespaces that will contain the wlnsight Analytics objects (user, tables, indexes, and stored procedures) and wlnsight Analytics database user that will be used to access them. You can check this in the Query Analyzer or an equivalent tool.
2. Connect to the SQL database as the wlnsight Analytics user.
3. Run the following scripts in the order listed in this step (except for the last two scripts, which you can run in any order).



Alternatively, you can automatically run the scripts specified in this step using the **RunAllCreateScripts\_SQLServer.bat** file from the Windows command line. For more information, see the [Run the All Create Scripts Batch File](#) section in this document.

- WST\_Tables\_SqlServer.sql
- WST\_Upgrade\_SqlServer.sql
- WST\_Data\_SQLServer.sql
- WA\_Tables\_SqlServer.sql
- WA\_Data\_SqlServer.sql
- WA\_Procedures\_SqlServer.sql



You must run these scripts in the wlnsight Analytics database that you created.

## Create an Oracle Database

The scripts mentioned in this procedure only create the wlnsight Analytics schema. Your database administrator (DBA) should have already created the necessary database and tablespaces.



By default, the scripts and batch file discussed in this section are located in **C:\Program Files (x86)\Deltek\wlnsight Analytics\data\Oracle**.

### To create a clean Oracle database, complete the following steps:

1. Make sure your DBA has created the database and tablespaces that will contain the wlnsight Analytics objects (user, tables, indexes, and stored procedures) and wlnsight Analytics database user that will be used to access them. You can check this in the Query Analyzer or an equivalent tool.
2. The wlnsight Analytics database user requires the following privileges:

- CREATE ANY TABLE
- CREATE SEQUENCE

These privileges must be applied directly to the database user. It is not sufficient for these privileges to be available through granted roles assigned to the user. You can use the **WA\_User\_Oracle.sql** script to grant the said privileges. Deltek recommends that these privileges are granted before executing any of the wlnsight Analytics scripts mentioned in step 4.

3. Connect to the Oracle database as the wlnsight Analytics user.
4. Run the following scripts in the order listed in this step (except for the last two scripts, which you can run in any order).



Alternatively, you can automatically run the scripts specified in this step using the **RunAllCreateScripts\_Oracle.bat** file from the Windows command line. If you choose to run the .bat file, the **WST\_Oracle\_CI\_Indexes.sql** script is also automatically run. This script creates CI and regular indexes for the WST tables in wlnsight Analytics.

For more information on running the batch file, see the [Run the All Create Scripts Batch File](#) section in this document.

- WST\_Tables\_Oracle.sql
- WST\_Oracle\_CI\_Indexes.sql
- WST\_Upgrade\_Oracle.sql
- WST\_Data\_Oracle.sql
- WA\_Tables\_Oracle.sql
- WA\_Data\_Oracle.sql
- WA\_Procedures\_Oracle.sql



You must run these scripts in the wlnsight Analytics database that you created.

## Run the All Create Scripts Batch File

The following table describes several ways to run the **RunAllCreateScripts\_SQLServer.bat** (for SQL) and **RunAllCreateScripts\_Oracle.bat** (for Oracle) files.

| Method                                | Description   | Example  |
|---------------------------------------|---|--|
| Run the batch file with no parameters | This method runs the scripts against the default <b>winst</b> database. | C:\<installation location>\RunAllCreateScripts_SqlServer.bat   |
|                                       |   | C:\<installation location>\RunAllCreateScripts_Oracle.bat ORADB\ORC1<br><i>For Oracle, however, you need to include the server name\instance name.</i> |

| Method   | Description  | Example   |
|--|--|---|
| Run the batch file with the <b>[database name] [server name]</b> parameters  | This method uses Windows authentication to log on to the database server. This could be used to set up a database named <b>winst</b> or a custom database.   | C:\<installation location>\RunAllCreateScripts_SqlServer.bat WINST81 SQLDB  |
|  |  | C:\<installation location>\RunAllCreateScripts_Oracle.bat WINST81 ORADB\ORC1  |
| Run the batch file with the <b>[database name] [server name/instance name] [database user ID] [database password]</b> parameters | <p>This uses the SQL Server Authentication or Authentication by Oracle Database to log on to the database server. This could be used to set up a database named <b>winst</b> or a custom database.</p> <ul style="list-style-type: none"> <li>▪ If SQL authentication is being used for the connection, users need to have been created and associated with the database with appropriate rights to create and update the tables.</li> <li>▪ For SQL, if you do not enter the user name and password, the script uses <b>winst</b> as the default database name and Windows authentication to log on to the database.</li> <li>▪ For Oracle, if you do not enter the user name and password, the script uses <b>winst</b> as the default database name, and <b>winst/winst</b> as the default user name/password.</li> </ul> | C:\<installation location>\RunAllCreateScripts_SqlServer.bat WINST81 SQLDB\MSSQL2012R2 SA SAPWD   |
|  |  | <p>C:\&lt;installation location&gt;\RunAllCreateScripts_Oracle.bat ORADB\ORC1 SA SAPWD</p> <p><i>Oracle, however, only uses three parameters.</i></p> |



By default, the installation location for SQL is **C:\Program Files (x86)\Deltek\wInsight Analytics\data\MSSQL** and for Oracle is **C:\Program Files (x86)\Deltek\wInsight Analytics\data\Oracle**.

**To run the .bat file when a blank SQL or Oracle database has been created for wInsight 8.1.1, complete the following steps:**

1. Open Command Prompt as an administrator (right-click **Command Prompt** and select **Run as administrator**).
2. If the User Account Control dialog box displays, click **Yes**.
3. In the Command Prompt window, type `cd/` and press ENTER.
4. Enter `cd` followed by the installation location of the .bat file, and press ENTER.



For example:

- `cd Program Files (x86)\Deltek\wInsight Analytics\data\MSSQL`
- `cd Program Files (x86)\Deltek\wInsight Analytics\data\Oracle`

5. Enter the .bat file name, and press ENTER. The format, however, varies depending on the method you are using.



For example, if you are running it with the **[bat file] [database name] [server name/instance name] [user ID] [password]** parameters, enter one of the following depending on your database:

- `RunAllCreateScripts_SQLServer.bat WINST81 SQLDB\MSSQL2012R2 SA SAPWD`
- `RunAllCreateScripts_Oracle.bat ORADB\ORC1 SA SAPWD`

## Convert a wlnsight Analytics 8.1 or Earlier Database to 8.1.1

The purpose of this section is to describe how to populate a wlnsight Analytics 8.1.1 database with your existing wlnsight Analytics data, so that you can use wlnsight Analytics Administrator 8.1.1.



In this section, earlier databases cover those from the 6.5.1 thru 8.0.2 versions.

The instructions in this section are organized by database type:

- Microsoft Access®
- Oracle®
- Microsoft SQL Server®

The conversion process modifies your existing 8.1 or earlier database and changes it into an 8.1.1 database. It does not copy data from an earlier database to an 8.1.1 database.



*This note only applies to the 6.5.1 thru 8.0.2 versions.*

When you install wlnsight Analytics Administrator, the **ConvertWSDATA.exe** tool is also installed in the **C:\Program Files (x86)\Deltek\wlnsight Analytics** folder. This tool allows wlnsight Analytics Administrator to automatically convert your existing **wldata.ini** into the new **datasources.dat**, which contains the list of data sources that you see when you log on to wlnsight Analytics. After the conversion process, the data source **[WE:Sample]** becomes **[Sample]**.

Backing up and restoring your data is an alternative to converting your database. For more information, see the [Upgrade from an Earlier Version of wlnsight Analytics Administrator](#) section in this document.

## Convert an MS Access Database or Back Up and Restore Data to an Access Database

For Access database, you either (a) convert an MS Access database or (b) create a backup of wlnsight contracts and then restore it, depending on which version you are coming from.

- **If you are upgrading 8.1 to 8.1.1**, the process involves running the upgrade script against the created database.



For more information, see the [Convert an MS Access Database](#) section in this document.

- **If you are upgrading 6.5.1 thru 8.0.2 to 8.1.1**, the process involves creating wlnsight backup of contracts and then restoring the .WSA file to an 8.1.1 database.



For more information, see the [Create wlnsight Backup of Contracts Automatically in an Access Database](#) and [Restore a .WSA File to an 8.1.1 Database](#) sections in this document.

## Convert an MS Access Database

No one should be using the database during the conversion process. Deltek recommends that you back up your wlnsight Analytics 8.1 contracts before performing the conversion.



For more information on how to back up contracts, see the *Back Up a Contract* section of the *Deltek wlnsight Analytics Desktop and wlnsight Analytics Administrator Online Help*.

To convert an MS Access database, you need:

- wlnsight Analytics Administrator 8.1.1 installed
- A fully working or verified operation database
- A data source connection to that database

**To convert an MS Access Database, complete the following steps:**

1. Using Query Analyzer or the equivalent, connect to an existing wlnsight database (the default login name is **Admin** and password is blank).
2. Click **File » Open**, and select the **WA811\_Upgrade\_Access.qry** script.



By default, the script is located in **C:\Program Files (x86)\Deltek\wlnsight Analytics\data\Access**.

3. Click  to run the convert query.

## Convert an MS SQL Server Database

No one should be using the database during the conversion process. Deltek recommends that you back up your wlnsight Analytics 8.1 or earlier contract(s) before performing the conversion.

To convert an MS SQL database, you need:

- wlnsight Analytics Administrator 8.1.1 installed
- A fully working or verified operation database
- A data source connection to that database

**To convert 8.1 or earlier data to 8.1.1 on an MS SQL Server database, have your database administrator complete the following steps:**

1. Using Query Analyzer or the equivalent, connect to an existing wlnsight database (the default login name and password are **winst** and **winstpwd**).
2. Click **File » Open** to open the corresponding upgrade script, depending on which version you are coming from.



By default, the scripts specified in this step are located in **C:\Program Files (x86)\Deltek\wlnsight Analytics\data\MSSQL**.

- **If you are upgrading from 8.1**, run the **WA811\_Upgrade\_SqlServer.sql** script against the created database.
- **If you are upgrading an early version (from 6.5.1 thru 8.0.2)**, complete the following steps (a-g):

- a. Select and run the following scripts (in the order listed in this step) against the created database:
  - WST\_Tables\_SqlServer.sql
  - WST\_Upgrade\_SqlServer.sql
  - WST\_Data\_Sql Server.sql
  - WA81\_Upgrade\_SqlServer.sql
- b. The upgrade script (**WA81\_Upgrade\_SqlServer.sql**) reports user or group names that exceed 20 characters in the wInsight Analytics table. In this case, copy the part of the message with the RENAME lines.  
 For example:  

```

      RENAME_USER( 'USERMORETHAN20CHARACTERS', 'NEWUSERNAME',
      fail, invalid );

      RENAME_OSAUTHUSER(
      'DOMAIN\DOMAINUSERMORETHAN20CHARACTERS',
      'DOMAIN\NEWDOMAINUSERNAME', fail, invalid );

      RENAME_GROUP( 'GROUPMORETHAN20CHARACTERS',
      'NEWGROUPNAME', fail, invalid );
      
```
- c. Open the rename script (**WA81\_Rename\_SqlServer.sql**), and paste the lines you copied in the previous step below the existing RENAME lines of the rename script.
- d. Change the use or group names using not more than 20 characters. In our example, NEWUSERNAME, DOMAIN\NEWDOMAINUSERNAME, or NEWGROUPNAME.
- e. Run the rename script (**WA81\_Rename\_SqlServer.sql**), which now contains the renamed user or group names.
- f. After you successfully run the rename script, you need to run the **WA81\_Upgrade\_SqlServer.sql** script again to upgrade the SQL database from 8.0.1 or earlier to version 8.1.
- g. Run the **WA811\_Upgrade\_SqlServer.sql** script to upgrade the SQL database from 8.1 to 8.1.1.



To create a clean wInsight 8.1.1 SQL database, see the [Create an MS SQL Server Database](#) section in this document.

## Convert an Oracle Database

No one should be using the database during the conversion process. Deltek recommends that you back up your wInsight Analytics 8.1 or earlier contract(s) before performing the conversion.

To convert an Oracle database, you need the following:

- wInsight Analytics Administrator 8.1.1
- A fully working or verified operation database
- A data source connection to that database

**To convert 8.1 or earlier data to 8.1.1 on an Oracle database, have your database administrator complete the following steps:**

1. Using SQL Plus or the equivalent, connect to an existing wlnsight database (the default login name and password are **winst** and **winstpwd**).
2. Click **File » Open** to open the corresponding upgrade script, depending on which version you are coming from.



By default, the scripts specified in this step are located in **C:\Program Files (x86)\Deltek\wlnsight Analytics\data\Oracle**.

- **If you are upgrading from 8.1**, run the **WA811\_Upgrade\_Oracle.sql** script against the created database.
- **If you are upgrading from an early version (from 6.5.1 thru 8.0.2)**, complete the following steps (a-g):
  - a. Open and run the following scripts (in the order listed in this step) against the created database:
    - WST\_Tables\_Oracle.sql
    - WST\_Upgrade\_Oracle.sql
    - WST\_Data\_Oracle.sql
    - WA81\_Upgrade\_Oracle.sql
  - b. The upgrade script (**WA81\_Upgrade\_Oracle.sql**) reports user or group names that exceed 20 characters in the wlnsight Analytics table. In this case, copy the part of the message with the RENAME lines.  
For example:  

```

RENAME_USER( 'USERMORETHAN20CHARACTERS', 'NEWUSERNAME',
fail, invalid );

RENAME_OSAUTHUSER(
'DOMAIN\DOMAINUSERMORETHAN20CHARACTERS',
'DOMAIN\NEWDOMAINUSERNAME', fail, invalid );

RENAME_GROUP( 'GROUPMORETHAN20CHARACTERS',
'NEWGROUPNAME', fail, invalid );
          
```
  - c. Open the rename script (**WA81\_Rename\_Oracle.sql**), and paste the lines you copied in the previous step below the existing RENAME lines of the rename script.
  - d. Change the use or group names using not more than 20 characters. In our example, NEWUSERNAME, DOMAIN\NEWDOMAINUSERNAME, or NEWGROUPNAME.
  - e. Run the rename script (**WA81\_Rename\_Oracle.sql**), which now contains the renamed user or group names.
  - f. After you successfully run the rename script, you need to run the **WA81\_Upgrade\_Oracle.sql** script again to upgrade the Oracle database from 8.0.1 or earlier to version 8.1.
  - g. Run the **WA811\_Upgrade\_Oracle.sql** script to upgrade the Oracle database from 8.1 to 8.1.1.



To create a clean wInsight 8.1.1 Oracle database, see the [Create an Oracle Database](#) section in this document.

---

## What's Next?

### Recalculate a Contract

Deltek recommends that you recalculate a contract to check that the conversion process completed successfully.

---



For more information, see the Recalculate a Contract section of the *wInsight Analytics Desktop and wInsight Analytics Administrator Online Help*.

---

## Restore a .WSA File to an 8.1.1 Database

This section discusses how to restore the contracts that you backed up from your 8.1 or earlier (6.5.1 thru 8.0.2) database into an 8.1.1 database.



For all 8.1 databases, it may be easier to convert them to 8.1.1 rather than restore archive files. For more information, see the [Convert a wlnsight Analytics 8.1 or Earlier Database to 8.1.1](#) section in this document.

Before you can restore the contracts contained in a wlnsight archive file (.WSA), you need:

- A wlnsight archive file (.WSA) (see the [Backup 8.1 or Earlier](#) and/or [Create wlnsight Backup of Contracts Automatically in an Access Database](#) sections in this document)
- wlnsight Analytics Administrator 8.1.1 installed (see the [Install wlnsight Analytics Administrator](#) section in this document).
- A wlnsight Analytics 8.1.1 database (see the [Create a New Database](#) or [Convert a wlnsight Analytics 8.1 or Earlier Databases](#) sections in this document)
- A data source connection to the 8.1.1 database (see the [Appendix A: Data Tool](#) section in this document)

**To restore the contracts contained in your wlnsight archive file, complete the following steps:**

1. Start wlnsight Analytics Administrator 8.1.1.
2. Click **File » Login**, and select the 8.1.1 database.
3. Click **Utilities » Restore** to select your archive file (.WSA) and restore your contract(s).
4. Recalculate **<All Periods>** of all contracts. Make sure to select the appropriate options for each contract.



For more information, see the [Recalculate a Contract](#) section in the *wlnsight Analytics Desktop and wlnsight Analytics Administrator Online Help*.

## Advanced Setup Options

### Log Manual Changes

Use the following procedure to configure wlnsight Analytics Administrator to create and log any manual changes (input, deletes, and updates) that were made to the data in wlnsight Analytics Administrator. You can activate this feature via registry keys (under HKEY\_LOCAL\_MACHINE, which means logging will be on or off for any user on that machine).

The resulting file is a tab-delimited text file that records the following information:

- what changed
- who changed It
- when it changed
- what the old value was
- what the new value is

**To create and log manual changes that were made to the data in wlnsight Analytics Administrator, complete the following steps:**

1. Click **Start » Run** to display the Run dialog box.
2. Enter either **REGEDIT.EXE** or **REGEDT32.EXE** and click **OK** to open the Registry Editor.
3. Create the following key folder depending on your operating system:
  - *For 32-bit machines:*  
**HKEY\_LOCAL\_MACHINE\SOFTWARE\Deltek\wlnsight Administrator**
  - *For 64-bit machines:*  
**HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Deltek\wlnsight Administrator**
4. Create a new key, **8.1.1**, under **wlnsight Administrator**:
  - a. Click **wlnsight Administrator**.
  - b. Select **Edit » New » Key**. A **New Key #1** entry is highlighted in the left window of the Registry Editor.
  - c. Delete **New Key #1** and then rename the new key **8.1.1**.
5. Create a new key, **Manual Change Log**, under **8.1.1**:
  - a. Click **8.1.1**.
  - b. Select **Edit » New » Key**. A **New Key #1** entry is highlighted in the left window of the Registry Editor.
  - c. Delete **New Key #1** and then rename the key **Manual Change Log**.
6. Create the **Change Log** entry:
  - a. Click **Manual Change Log**.
  - b. Select **Edit » New » DWORD (32-bit) Value** or **QWORD (64-bit) Value** depending on your operating system. A **New Value #1** is highlighted in the right window of the Registry Editor.

- c. Delete **New Value #1** and rename the value **LogChanges**.
7. Set the **Change Log** entry.
  - a. Click **LogChanges**.
  - b. Select **Edit » Modify**. The Edit DWORD (32-bit) Value or Edit QWORD (64-bit) dialog box displays, depending on your operating system.
  - c. In the **Base** group box, select the **Decimal** option.
  - d. Set the **Value Data** field appropriately:
    - To turn on change logging, enter a **1**.
    - To turn off change logging, enter a **0**.
  - e. Click **OK** to close the Edit DWORD (32-bit) Value or Edit QWORD (64-bit) dialog box. Depending on the entry, either a **1** or a **0** should display at the end of the string of **0**'s in the **Data** column on the right side.
8. Create the **Change Log File** entry:
  - a. Click **Manual Change Log**.
  - b. Select **Edit » New » String Value**. A **New Value #1** is highlighted in the right window of the Registry Editor.
  - c. Delete **New Value #1** and rename the value **LogFile**.
9. Specify the path and filename for the **Change Log File** that will be created to capture changes that are made in wInsight Analytics Administrator:
  - a. Click **LogFile**.
  - b. Select **Edit » Modify**. The Edit String dialog box displays.
  - c. In the **Value Data** field, enter **C:\Temp\Change.log** (sample path and file name).
  - d. Click **OK** to close the Edit String dialog box. The path and filename should displays in the **Data** column on the right side.
10. Select **File » Exit** to close the Registry Editor.

## Appendix A: Data Tool

The Data Tool allows you to add new, edit, and delete data source. If you have more than one database, you can specify additional databases using the Data Tool. It is installed when you install the wInsight Analytics Desktop or wInsight Analytics Administrator application.

### Add a Data Source

This procedure allows you to add a data source.

To add a wInsight Analytics data source, complete the following steps:

1. Click **Start » All Programs » Deltek wInsight Analytics » Deltek wInsight Analytics Data Tool**.
2. On the Data Sources dialog box, click **Add**.
3. On the Data Link Properties dialog box, select the OLE DB provider that matches the database in which your data is stored. The options in this step are provided for documentation purposes only. You can select the appropriate driver for your environment.
  - MS Access — **Microsoft Office 12.0 Access Database Engine OLE DB Provider** or **Microsoft Office 15.0 Access Database Engine OLE DB Provider**
  - Oracle — **Oracle Provider for OLE DB**
  - MS SQL Server — **Microsoft OLE DB Provider for SQL Server** or **Microsoft SQL Server Native Client**



For Oracle, in case you cannot find Oracle Provider for OLE DB in the OLE DB Provider list, download and install Oracle Data Access Components (ODAC), depending on the Oracle database version you are using. For more information, see <http://www.oracle.com/technetwork/topics/dotnet/downloads/net-downloads-160392.html>.

4. Click **Next** or the Connection tab.
5. On the Connection tab, enter or select appropriate information. The contents of this tab vary depending on the database provider.
6. Select a database:
  - MS Access — Click the ellipses (...) button to browse and select a wInsight .MDB file.
  - Oracle — Obtain the Server Name and Database Name from your IT representative.
  - SQL Server — Obtain the Server Name and Database Name from your IT representative.
7. Enter the corresponding user name and password for a database.
  - MS Access — Enter **Admin** in the **User Name** field, leave the **Password** field blank, and select the **Blank Password** option.
  - Oracle — Obtain the user name and password from your IT representative. If there is a password, do not select the **Blank Password** option.
  - SQL Server — Obtain the user name and password from your IT representative. If there is a password, do not select the **Blank Password** option.



Always select the **Allow saving password** option to encrypt the password and save it on disk.



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:

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

8. Deltek recommends that you click the **Test Connection** option to verify that the connection to your database works. The Microsoft Data Link message box displays, confirming the database connection.
9. Click **OK** to save the information, and close the Data Link Properties dialog box.
10. On the Edit Data Source dialog box, enter a descriptive name in the **Database Name** field.



The **Database is Unicode** field is not used by wInsight Analytics.

11. If you selected a database name on the Connection tab of the Data Link Properties dialog box, leave the Database Name (Schema) field blank.
12. Click **OK**. The new data source is added to the list on the Data Sources dialog box.
13. Click **OK** to close the Data Sources dialog box.

## Edit a Data Source

This procedure allows you to edit a data source.

To edit a wInsight Analytics data source, complete the following steps:

1. Click **Start » All Programs » Deltek wInsight Analytics » Deltek wInsight Analytics Data Tool**.
2. On the Data Sources dialog box, select a data source, and click **Edit**.
3. On the Edit Data Source dialog box, click **Data Link Properties**.



The **Database is Unicode** field is not used by wInsight Analytics.

4. On the Data Link Properties dialog box, use the tabs to enter or select your new preferences.
5. When you are done, click **OK** to save your modifications and close the Data Link Properties dialog box.
6. Click **OK** to close the Edit Data Source dialog box.
7. Click **OK** to close the Data Sources dialog box.

## Delete a Data Source

This procedure allows you to delete an existing data source. If you delete a data source that is being used in wInsight Analytics Administrator or wInsight Analytics Desktop, the wInsight Analytics application prompts users to select a different data source the next time they try to access the application.

**To delete a wInsight Analytics data source, complete the following steps:**

1. Click **Start » All Programs » Deltek wInsight Analytics » Deltek wInsight Analytics Data Tool**.
2. On the Data Sources dialog box, select the data source that you want to delete, and click **Delete**.
3. On the confirmation dialog box, click **Yes**.
4. Click **OK** to close the Data Sources dialog box.

## Appendix B: EPM Security Administrator

The EPM Security Administrator (EPM SA) allows you to define the security rights for wlnsight Analytics users. It also allows you to add a new data source or edit an existing one.



To access EPM SA, click **Start » All Programs » Deltek wlnsight Analytics » Deltek EPM Security Administrator**. For more information, see the *Deltek EPM Security Administrator Online Help*.

### Add and Delete Users

Users are individuals who are given rights to log in to the application's system. Initially, there are two default users that can access wlnsight Analytics: SYSADMIN (default password is PASSWORD) and GUEST (blank password). By default, their primary roles are not defined. Make sure that you define the roles for these user IDs (see [Define User and Group Roles](#)).

Use EPM SA to add more users and grant them access to wlnsight Analytics. You can also delete a user ID.



Make sure that each user is associated with wlnsight on the Products tab to indicate that the user is permitted to access the wlnsight Analytics database.

#### To add a user ID, complete the following steps:

1. On the Explorer pane, click the Users folder or expand the Users folder.
2. Right-click the Users folder to display a context menu, and click **Add**. Alternatively, on the EPM SA menu bar, click **Edit » Add**.
3. Change the value of the **User ID** field from **NEWUSER** to a unique name.



The user ID can have a maximum of 20 alphanumeric characters, including spaces. You can only change a newly added user ID, not an existing one.

4. On the **User Details** form that displays on the **Properties** pane, enter the information for the user. Change the password for the new user from the default PASSWORD to a unique password.



You can also import users from an ASCII file, a Microsoft Outlook contacts folder, or Windows Active Directory Services.

#### To delete a user, complete the following steps:

1. On the Explorer pane, expand the Users folder then select the user to delete.
2. In the Users folder, right-click the user then click **Delete** on the context menu. Alternatively, on the EPM SA menu bar, click **Edit » Delete**.
3. On the confirmation dialog box, click **Yes**.
4. On the Explorer pane, expand the Users folder.

## Change a User Password

### To change a user password:

1. On the Explorer pane, expand the Users folder then select a user whose password you want to change. Alternatively, you can click the Users folder to display the **Users** form on the right pane, and double-click a user whose password you want to change.
2. On the General tab, click the **Password** button.
3. On the Change Password dialog box, in the **New Password** field, enter a new password for the user.



You can use up to 128 alphanumeric and special characters. You can also set the password to blank if the value of the minimum password length is set to zero (0). If this is the case, leave the **New Password** field blank.

4. In the **Confirm New Password** field, re-enter the new password. Leave this field blank if you set the new password to blank.
5. Click **OK**. The new password takes effect the next time you log on to the EPM Security Administrator.

## Create, Delete, and Rename Roles

Roles define the operations a user can perform. You can define access permissions for each role and assign each user to a primary role.

### To create a role, complete the following steps:

1. On the Explorer pane, click the Roles folder and click **Edit » Add** on the menu bar. Alternatively, you can right-click the Roles folder to display a context menu, and select **Add**.
2. Change the role ID from NEWROLE to a unique ID for the role, and press ENTER.
3. On the Role Details form, enter the necessary information for the new role on the General tab.

- On the wlnsight tab, right-click a menu item in the list and select or clear the **Visible** and **Enabled** options for that function. Use the table below as a reference:

| Icon  | Visible? | Enabled? | Effect  |
|---|----------|----------|---|
|  | Yes      | Yes      | Users and groups assigned the role being edited can both see and use the menu item.   |
|  | Yes      | No       | Users and groups assigned the role being edited can see the menu item, but cannot use it.<br><br>A menu item with this setting is shaded.   |
|  | No       | Yes      | Users and groups assigned the role being edited cannot see the item in the menu, but they can perform the corresponding action via another process (for example, they can perform recalculate as part of the import but not directly through the menu). |
|  | No       | No       | Users and groups assigned the role being edited can neither see nor use the menu item.  |

**To delete a role, complete the following steps:**

- On the Explorer pane, expand the Roles folder.
- Right-click the role you want to delete and select **Delete** on the context menu. Alternatively, you can click the role and click **Edit » Delete** on the menu bar.
- On the confirmation dialog box, click **Yes**.

**To rename a role, complete the following steps:**

- On the Explorer pane, expand the Roles folder and select the role you want to rename.
- Click the highlighted role and enter the new role.
- Press **Enter** to apply the new role.

## Create, Delete, and Rename Groups

Groups represent major programs or projects within an organization, or functional groups, such as the project management office. You assign users to groups, which you then assign to data objects (such as projects) within the applications. Users can have different roles within a group.

**To add a group:**

- On the Explorer pane, click the Groups folder and click **Edit » Add** on the menu bar. Alternatively, you can right-click the Groups folder to display a context menu, and select **Add**
- Change the Group ID from NEWGROUP to a unique ID for the group.
- On the Group Details form, enter the information for the group.

**To delete a group, complete the following steps:**

1. On the Explorer pane, expand the Groups folder.
2. Right-click the group you want to delete and select **Delete** on the context menu. Alternatively, you can click the group and click **Edit » Delete** on the menu bar.
3. On the confirmation dialog box, click **Yes**.

**To rename a group, complete the following steps:**

1. On the Explorer pane, expand the Groups folder and select the group you want to rename.
2. Click the highlighted group and enter the new group name.
3. Press **Enter** to apply the new group.

## Add and Remove Users to/from a Group

Follow one of the procedures below to add or remove users from a group.

**To add users to a group using the Groups folder, complete the following steps:**

1. On the Explorer pane, expand the Groups folder and select a group ID.
2. On the General tab, click **Add**.
3. Add Users dialog box, select the user IDs to include in the group. You can hold down **Shift** while you click to select multiple user IDs.
4. Click **Yes** to add the selected user IDs to the group.

**To add users to a group using the Users folder, complete the following steps:**

1. On the Explorer pane, expand the Users folder and select a user ID.
2. Click the Groups tab and click **Add**.
3. On the Add Group dialog box, select the group IDs to which to associate this user ID. You can hold down **Shift** while you click to select multiple group IDs.
4. Click **Yes** to associate this user ID to the selected group IDs.

**To remove users from a group using the Groups folder, complete the following steps:**

1. On the Explorer pane, expand the Groups folder and select a group ID.
2. On the General tab, select a user ID from the table window and click **Remove**. A confirmation dialog box displays.
3. Click **Yes** to remove the selected user ID from this group.

**To remove users from a group using the Users folder, complete the following steps:**

1. On the Explorer pane, expand the Users folder and select a user ID.
2. Click the Groups tab and select a group ID from the table window.
3. Click **Remove**. A confirmation dialog box displays.
4. Click **Yes** to remove the group ID from the table window.

## Define User and Group Roles

Follow one of the procedures below to assign a role to a user or group.

**To define a role for a user, complete the following steps:**

1. On the Explorer pane, expand the Users folder and select a user ID.
2. On the General tab, select a role ID in the **Primary Role** drop-down list.

**To define a role for a group, complete the following steps:**

1. On the Explorer pane, expand the Groups folder and select a group ID.
2. On the General tab, select a role ID in the **Primary Role** drop-down list.

## Appendix C: For Additional Information

### Customer Care Connect Site

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

The following are some of the many options that the Customer Care Connect site provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Access Cloud specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Use Quick Chat to submit a question to a Customer Care analyst online



For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

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### 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 **Username** and Password.
3. Click Log In.



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

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## Available Documentation for this Release

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

| Document Name  | Description   |
|--|---|
| Deltek wInsight Analytics Administrator 8.1.1 Release Notes                              | This document contains a summary of the technical considerations, major features, enhancements, software issues resolved, and known issues of the application.  |
| Deltek wInsight Analytics Desktop and wInsight Analytics Administrator 8.1.1 Online Help | This document contains detailed information and instructions on how to use various features of both applications.   |
| 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. |



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