

**Deltek Vision®**

**Deploying Deltek Vision 6.1 at a  
Hosting Provider**

**June 26, 2009**



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## Overview

This guide contains technical installation and setup information for the staff at your company who maintain the hardware and software required to deploy Deltek Vision at a Hosting Provider.

### About This Guide

This guide contains the information that you need to deploy Deltek Vision at a Hosting Provider. We revise this document regularly to provide the most up-to-date technical information and instructions. Visit the Knowledge Center tab of the Deltek Customer Care Connect site, <https://support.deltek.com>, to determine if your copy is the latest copy, and to download the most recent copy if necessary.

### Customer Services

For over 20 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 hot fixes



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 <https://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In**.



If you do not have a username and password for the Customer Care Connect site, contact your firm's System Administrator.

If you forget your username 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 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 Vision Getting Started Guide	This guide contains an introduction to the Vision Web interface and all the Vision applications, with tips for how to navigate through the system, use the dashboard, and find and open records.
Deltek Vision Concepts Guide	This guide describes the concepts underlying the basic accounting, project control, and customer relationship management (CRM) functions of the Vision application.
Deltek Vision Technical Installation Guide	This guide contains detailed instructions for how to install all the technical components of Vision, including the servers, the database, and the application itself.
Deltek Vision Implementation Guide	This guide contains information about how to configure and set up Vision applications and features.
Deltek Advantage to Deltek Vision Migration Guide	This guide contains information about how to migrate from Advantage to Vision, including the steps in the migration process and an overview of Vision features.
Deltek CRM and Proposals to Deltek Vision Migration Guide	This guide contains information about how to migrate from CRM and Proposals to Vision, including the steps in the migration process and an overview of Vision features.

Document Name	Description
Deltek Sema4 to Deltek Vision Migration Guide	This guide contains information about how to migrate from Sema4 to Vision, including the steps in the migration process and an overview of Vision features. (Implementation Services provides this guide prior to the migration.)
Deltek Vision Configure Vision Analysis Cubes	This guide details the prerequisites and steps required to configure your database server when you use Vision Analysis Cubes.
Deltek Vision Configure Vision Analysis Cubes for Internet	If you want users to access Vision Analysis Cubes and Microsoft® Excel® via the Internet (from outside the corporate firewall), you must follow the configuration steps in this guide after you complete the configuration steps in the Configure Vision Analysis Cubes guide. This guide describes the two methods you can use to expose data for Internet users.
Deltek Vision Custom Reports and Microsoft® SQL Server Reporting Services	This guide explains how to create, deliver, and generate Vision custom reports with Microsoft® SQL Server® Reporting Services and its report writing tools.
Deltek Vision Document Management Technical Installation Guide	This guide contains detailed information on the necessary prerequisites, general configuration, and installation procedures required to use the Vision Document Management application.
Deltek Vision Mobile Application Suite (MAS) Installation Guide	This guide explains how to configure MAS on your Vision server, install prerequisite software components, and install and configure the MAS software. This guide also provides a list of all the mobile devices that can be used with the Deltek Vision Mobile Application Suite.
Deltek Vision Synchronization Server Installation and Maintenance for Nokia Intellisync	This guide contains an overview of the Vision Synchronization Server feature, as well as technical installation, setup, and maintenance information.
Deltek Vision Server Synchronization Implementation Guide	This guide provides planning and best practices information for clients who implement the Deltek Vision Server Synchronization application.
Deltek Vision Specification and Business Rules for Synchronization Guide	This document lists the fields mapped in each of the three areas of Vision (contacts, appointments and tasks/to-dos) for which you can use server synchronization to bi-directionally synchronize between Vision and your third-party groupware. This guide covers business rules and requirements, describes limitations, and discusses scenarios to watch for when you map data.

## Deploying Deltek Vision 6.1 at a Hosting Provider

To deploy Deltek Vision 6.1 at a hosting provider, you must complete all of the steps listed in this guide.

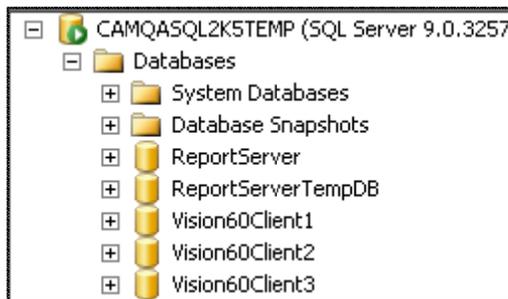
### Pre-requisites

Install Vision on all applicable tiers as documented in the Vision 6.1 Technical Installation Guide.

### SQL Server

**Connect to the Database Engine in SQL Server Management Studio and complete the following steps:**

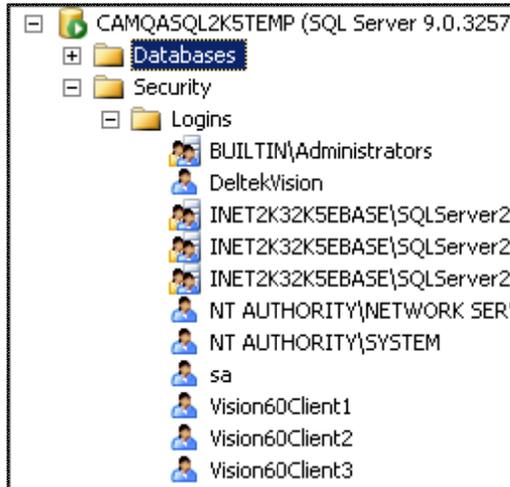
1. Configure SQL Server for Mixed Mode security, or use Windows authentication as the database connection account for each client's IIS application pool identity.
  - If you use Mixed Mode security, you must secure the **sa** account with a unique password.
2. Create a unique SQL Server database for each client.



3. Create a SQL Server Maintenance Plan for each client's database.

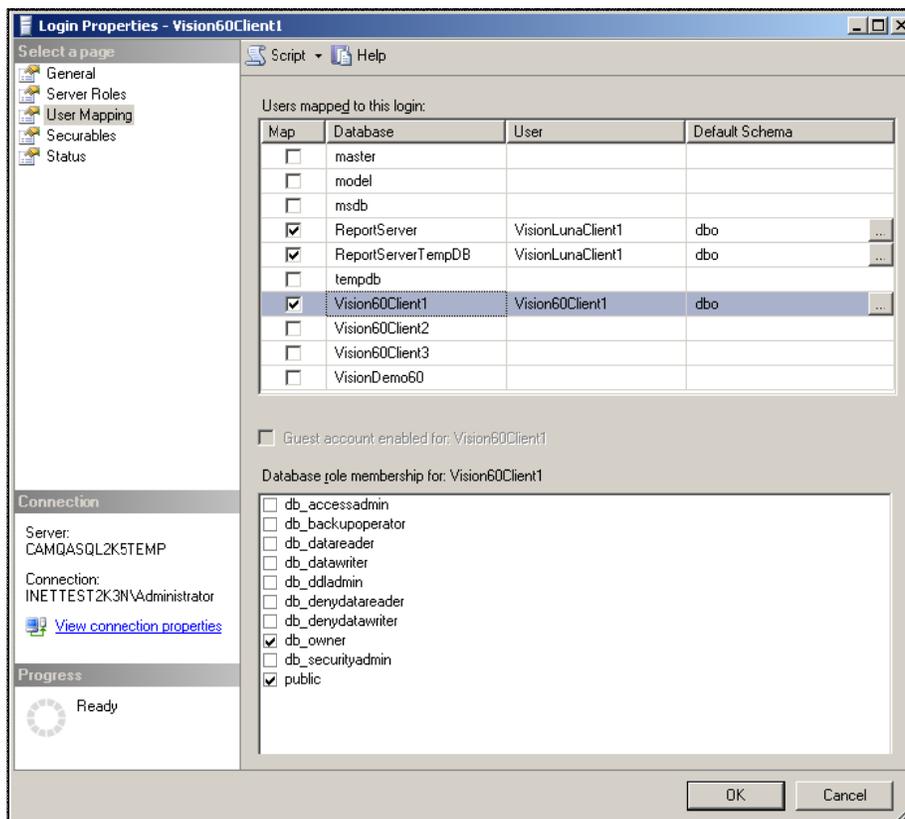
If you are using Microsoft® Exchange Server, you can also configure SQLAgentMail to notify an Administrator of the success or failure of each client's maintenance plans. Please refer to SQL Server Books online for more information.
4. Create a Backup Device for each client's database.

If you do not create a backup device, the client will not be able to use the backup database functionality found in the Vision Utilities menu.
5. Create a unique SQL Server login ID and password for each client. You can use either a SQL Login ID, or create unique Windows accounts for each client's database connection and then create SQL Windows logins.



You must:

- Grant each login dbo rights **only** to that client's Vision database, and dbo rights to the ReportServer and ReportServerTempDB databases.

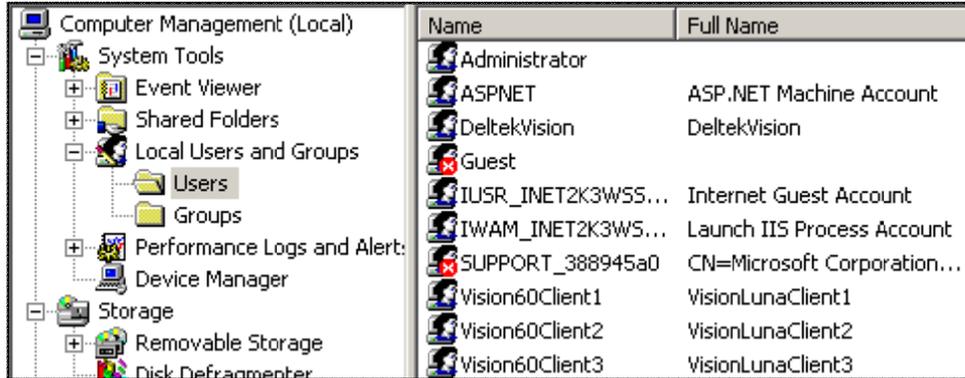


- Disable the DeltekVision SQL login ID (created by the Vision installation).
- Disable the DeltekVision local Windows account (created by the Vision installation).

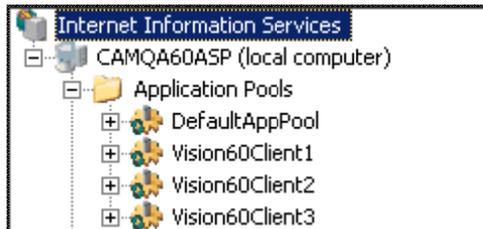
## Vision Web Server - IIS 6.0

### Complete the following steps on the Web Server:

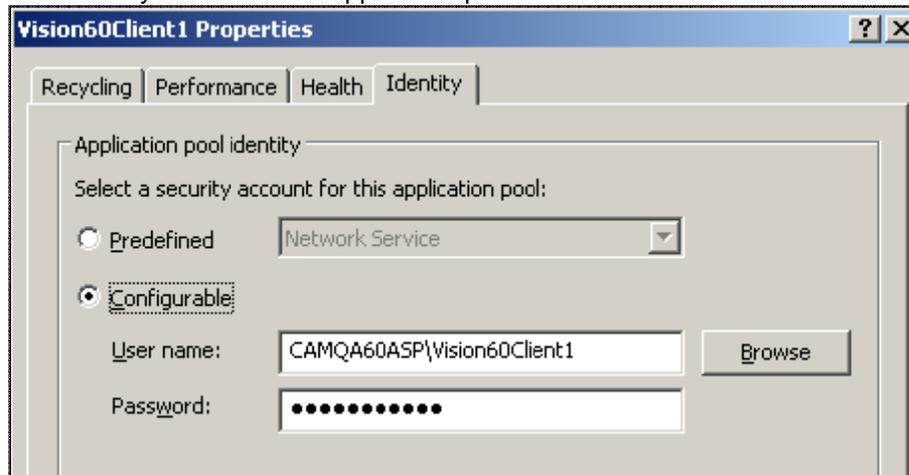
1. Create a unique local Windows® account for each client. This is used as the application pool identity.



- This account must be a member of the Local Administrators and the IIS\_WPG groups on the Vision Web server.
  - Disable the DeltekVision local windows account on the Web Server (created by the Vision installation).
2. Create a unique application pool for each client.

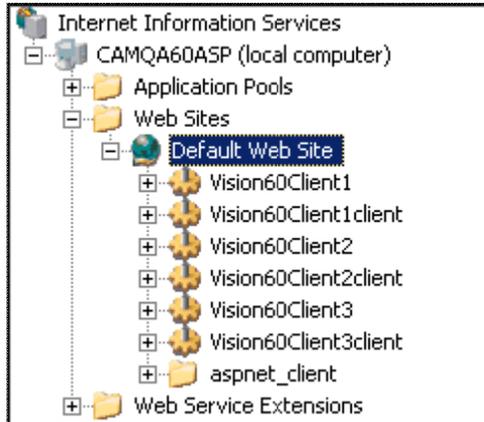


- You must assign the Local User account created for that client as the Application Pool Identity of that client's application pool:

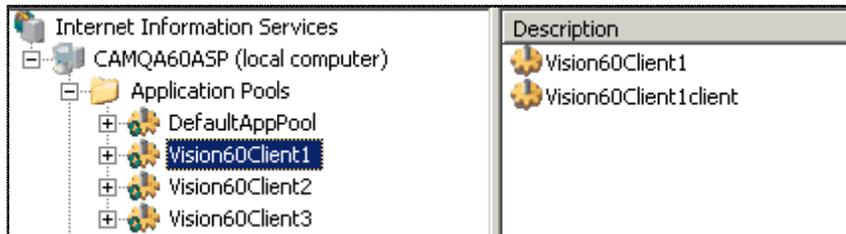


3. Create **two** unique virtual directories for each client:
  - One for the application, which points to **\\Program Files\Deltek\VisionWeb**.
  - One for the ClickOnce deployment, which points to **\\Program Files\Deltek\Vision\WebClient**.

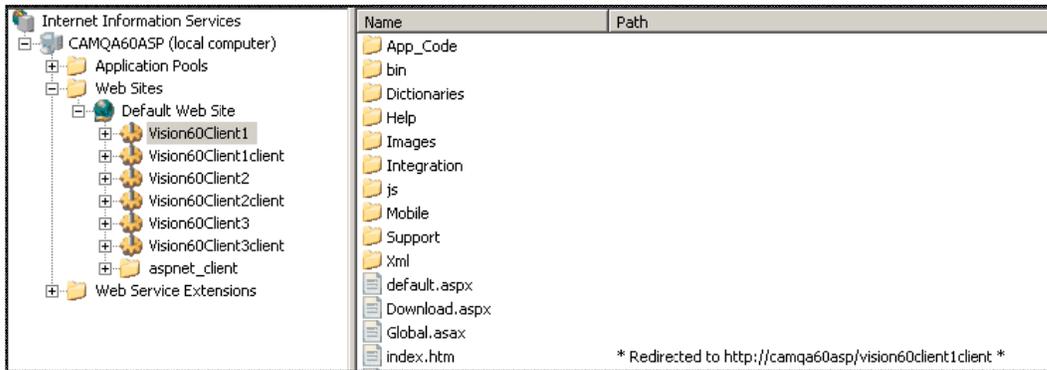
You can name the application virtual directory whatever you want, but the deployment virtual directory must match the name of the application virtual directory with **Client** appended to it (for example, Vision and Vision*Client*).



4. Add the client's virtual directories to that client's application pool.



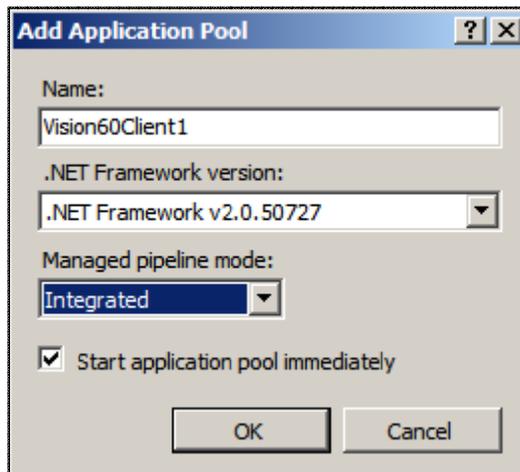
5. Modify each client's application virtual directory (for example, Vision) to ensure that index.htm is the default document. (This is a blank document used solely for redirection purposes below.)
6. At the root of each client's application virtual directory (for example, Vision), create an IIS redirect to that client's deployment virtual directory (for example, VisionClient).
  - The redirect calls to index.htm to the deployment virtual directory\default.htm (or DefaultGovWin.htm if using GovWin). This is the deployment virtual directories default document (for example, <http://server/vision60client1> redirects to <http://server/vision60client1client>).
  - The default installation of Vision also creates a redirect for Weblink. However, in a hosted environment it is not appropriate for clients to access Weblink, so you can remove that redirect (or not create it).



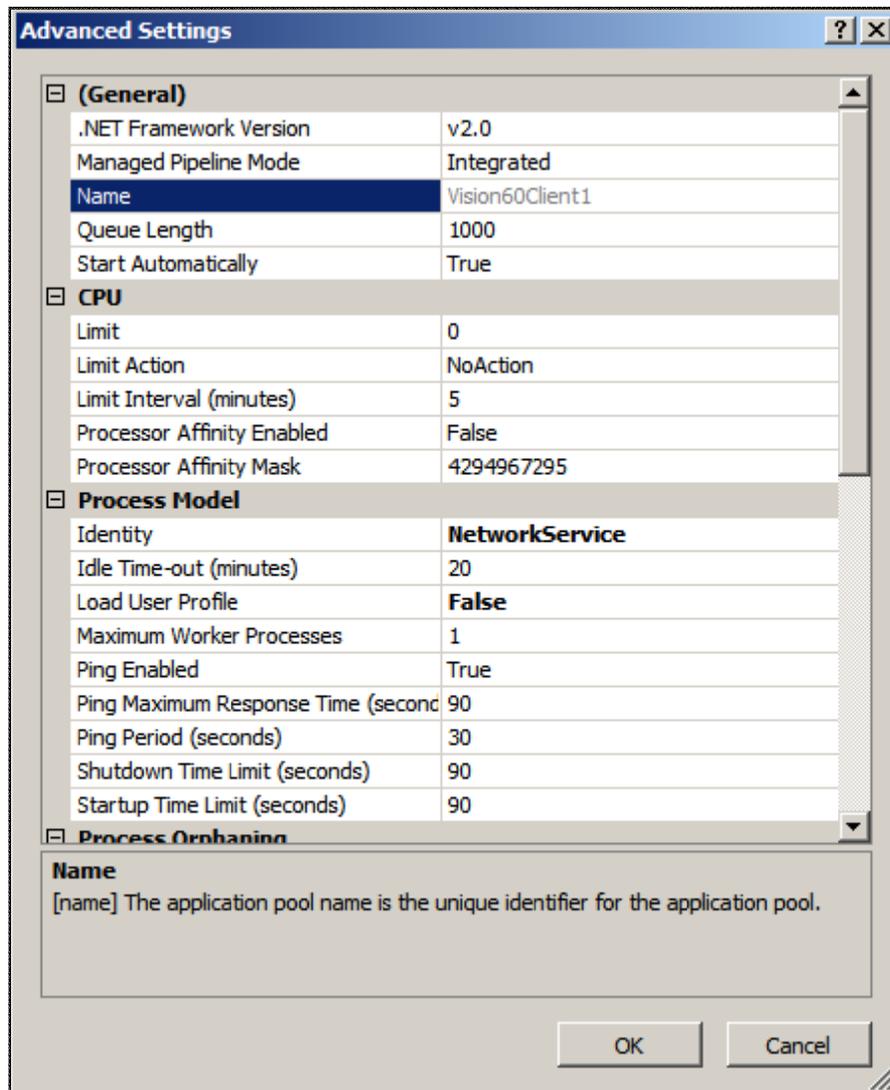
## Vision Web Server – IIS 7.0

### Perform the following steps on the Web Server:

1. Create a unique local Windows® account for each client. This is used as the application pool identity.
  - This account must be a member of the Local Administrators group on the Vision Web server.
  - Disable the DeltekVision local Windows account on the Web Server (created by the Vision installation).
2. Create a unique application pool for each client.
  - In the Add New Application Pool dialog box, enter a unique **Name** for the application pool.
  - Select **.NET Framework 2.0** as the **.NET Framework version**.
  - Set the **Managed pipeline mode** to either **Integrated** (default) or **Classic** (IIS 6.0 mode).



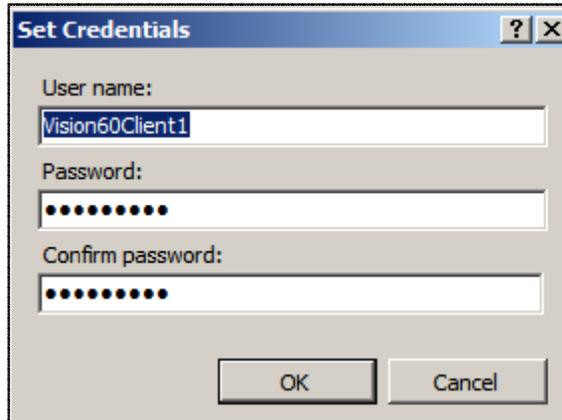
- Assign the Local User account created for that client as the Application Pool Identity of that client's application pool:



- Click  to change the Application Pool Identity.
- Select the **Custom account** option and click **Set**.

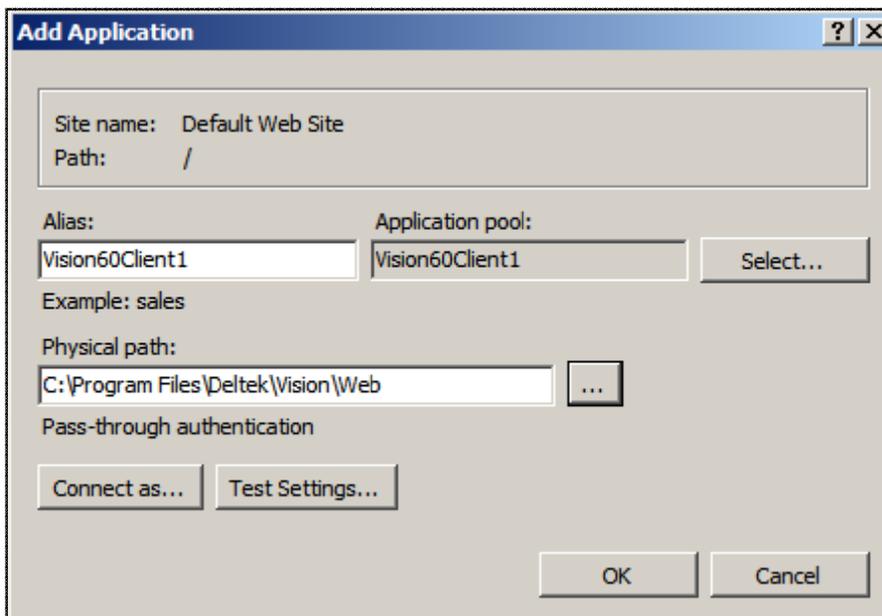


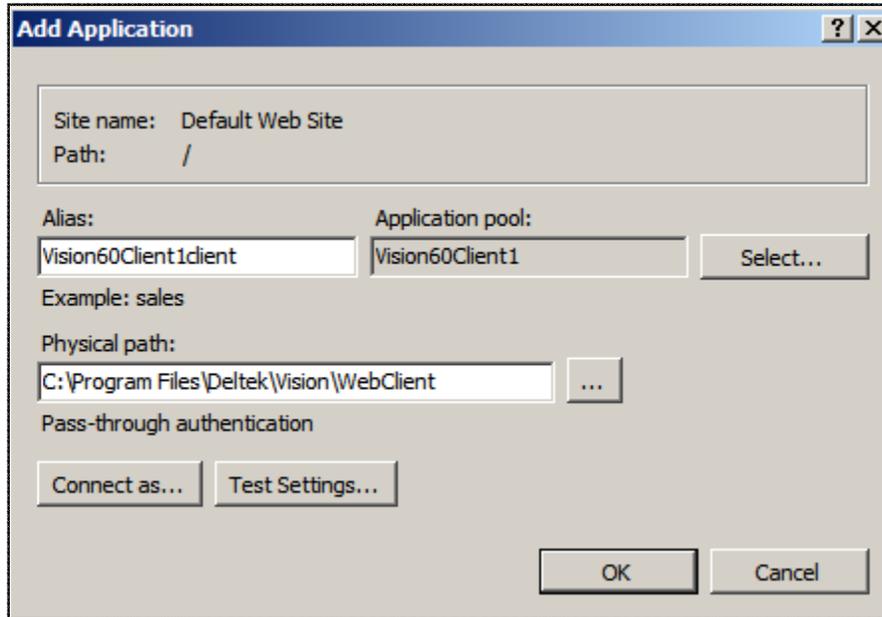
- Enter the credentials of the Windows account and click **OK** three times.



3. Create **two** unique virtual directories for each client and add the client's virtual directories to the client's application pool that you created earlier.
  - The first virtual directory is for the application and points to **\Program Files\Deltek\Vision\Web**.
  - The second virtual directory is for the ClickOnce deployment and points to **\Program Files\Deltek\Vision\WebClient**.

You can name the application virtual directory whatever you want, but the deployment virtual directory must match the name of the application virtual with **Client** appended to it (for example, *Vision* and *VisionClient*).





When you are done, you should have one unique application pool for each client and two unique virtual directories that are part of the application pool.

The next steps involve:

- Setting the default document for the Application virtual directory.
- Setting IIS redirects from the Application virtual to the Deployment virtual directory. These settings have changed significantly in IIS 7.0.

IIS 7.0 writes certain settings (default document, redirect, and so on) to the application Web.config file, which is associated with the **physical path** by default. Because Vision can support multiple virtual directories, each pointing to the same physical path (for example, C:\program files\deltek\vision\web), it is not possible to have these settings written to the web.config file. This new behavior in IIS 7.0 causes the redirect for each virtual directory to point to the **same** deployment virtual directory for all clients, which is not the behavior you want. The redirect must point to the specific deployment virtual directory for that client.

The following article explains this behavior:

<http://learn.iis.net/page.aspx/127/deep-dive-into-iis-7-configuration/>

The following steps show the settings that need to be written to the applicationhost.config file, located in C:\windows\system32\inetsrv\config. You can append these settings to the bottom of this file, above the </configuration> end tag.



Due to the Server 2008 UAC (User Access Control) settings, you must open Notepad using **Run as Administrator**.

### Complete these steps to set the default document for the Application virtual and setting IIS redirects from the Application virtual to the Deployment virtual directory:

1. Modify each application virtual directory to ensure that index.htm is the default document using the following settings:

```
<location path="Default Web Site/Vision60Client1">
```

```
<system.webServer>
  <defaultDocument>
    <files>
      <clear />
      <add value="index.htm" />
    </files>
  </defaultDocument>
</system.webServer>
</location>
```



You must apply these settings for the Application virtual directory for **each** client.

2. Modify each deployment virtual directory to ensure that default.htm (or defaultGovWin.htm if using GovWin) is the default document using the following settings:

```
<location path="Default Web Site/Vision60Client1 client">
  <system.webServer>
    <defaultDocument>
      <files>
        <clear />
        <add value="default.htm" />
      </files>
    </defaultDocument>
  </system.webServer>
</location>
```



You must apply these settings for the Application virtual directory for **each** client.

2. At the root of each application virtual you must also create an IIS redirect.
  - Each request to Index.htm will redirect to the Deployment virtual directory\default.htm (or DefaultGovWin.htm if using GovWin) which is this directories default document (for example, <http://server/vision60Client1> will redirect to <http://server/Vision60Client1 client>).
  - The default installation of Vision will also create a redirect for Weblink; however, in a hosted environment it is not appropriate for clients to access Weblink so that redirect can be removed (or not created).

Use the following example of the settings for the necessary redirects:

```
<location path="Default Web Site/VisionLunaClient1/index.htm">
  <system.webServer>
    <httpRedirect enabled="true" destination="http://<servername>/visionlunaclient1 client" />
  </system.webServer>
</location>
```



You must apply these settings for the Application virtual directory for **each** client.

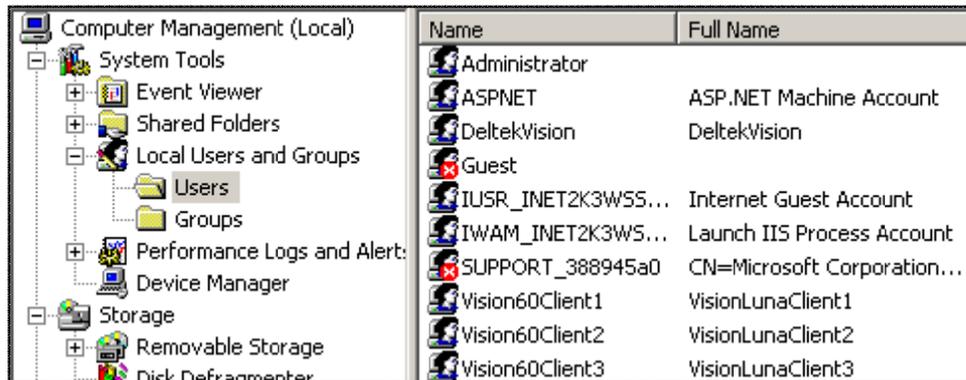
## Secure Weblink

Even though Weblink is password protected, in a hosted environment you will not want the Weblink application available to individual clients to access. Because the ClickOnce deployment folder must be configured for Anonymous access, in order to secure Weblink you must configure the Weblink.application file with NTFS permissions so that only local Administrators may access it.

## Vision Report Server – SQL Reporting Services

Perform the following steps on the Report Server in Windows:

1. Install and configure SQL Server Reporting Services. Refer to the Deltek Vision 6.1 Installation Guide for installation and configuration links.
2. Create a unique local Windows® account for each client to use as the Report Server Web service account.



- This account only needs to be a User account—it does not need to be a local Administrator on the Report Server.
- Add each client's Reporting Service Web service account to the following windows group:

***SQLServer2005ReportingServicesWebServiceUser\$<server>\$<instance>***

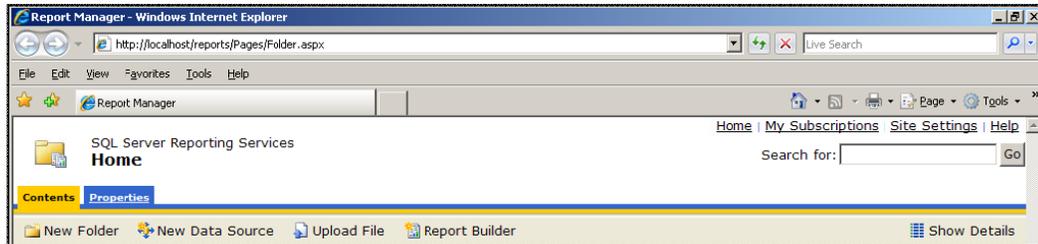


- Disable the DeltekVision local windows account on the Report Server (created by the Vision installation).

Connect to the Report Manager (Reporting Services Web application) and complete the following steps:

 It is necessary to use the Report Manager application and the functionality to perform these steps using SQL Server Management Studio has been removed with SQL Server 2008.

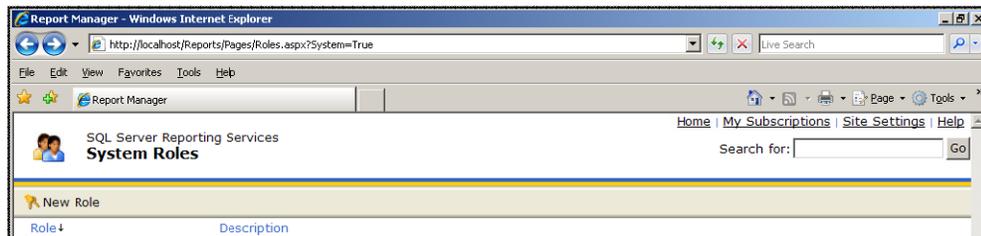
1. Connect to your server (for example, <http://<servername>/reports>).



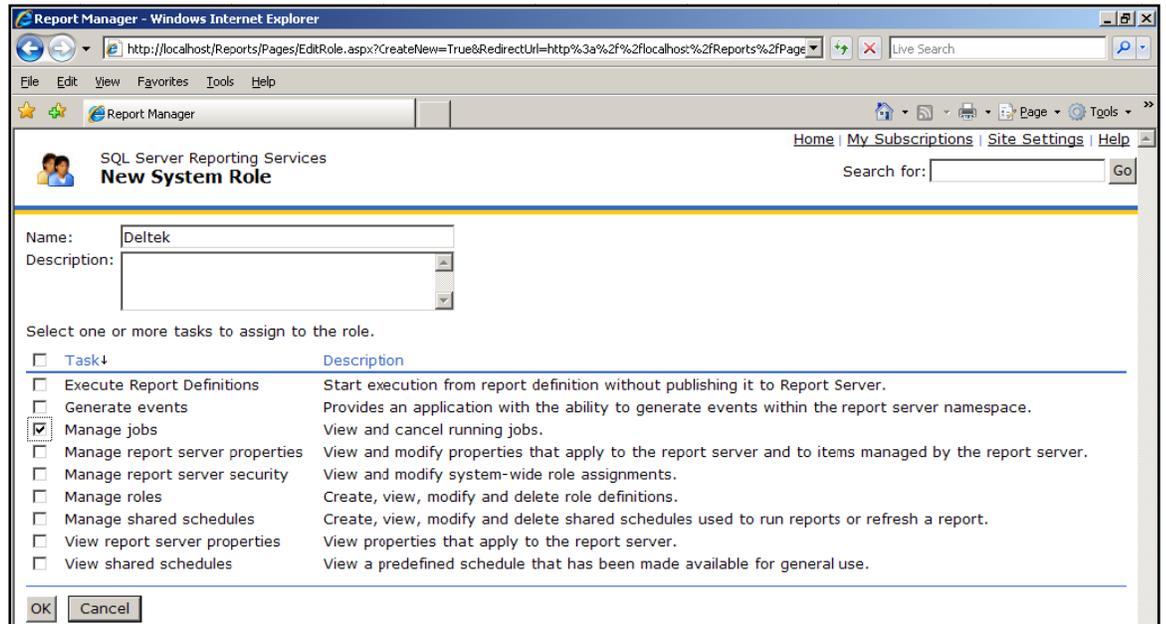
2. Create a new System Role named Deltek:
  - From the Reporting Services home page, click **Site Settings**.
  - Under the Security section, click **Configure system-level role definitions**:

**Security** \_\_\_\_\_  
[Configure site-wide security](#)  
[Configure item-level role definitions](#)  
[Configure system-level role definitions](#)

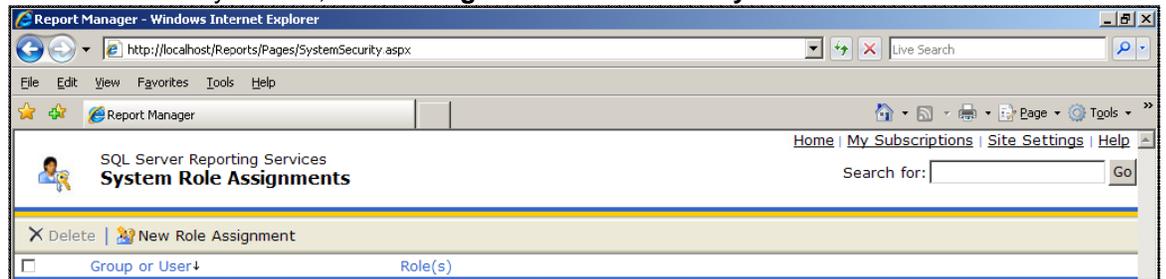
- Click **New Role**.



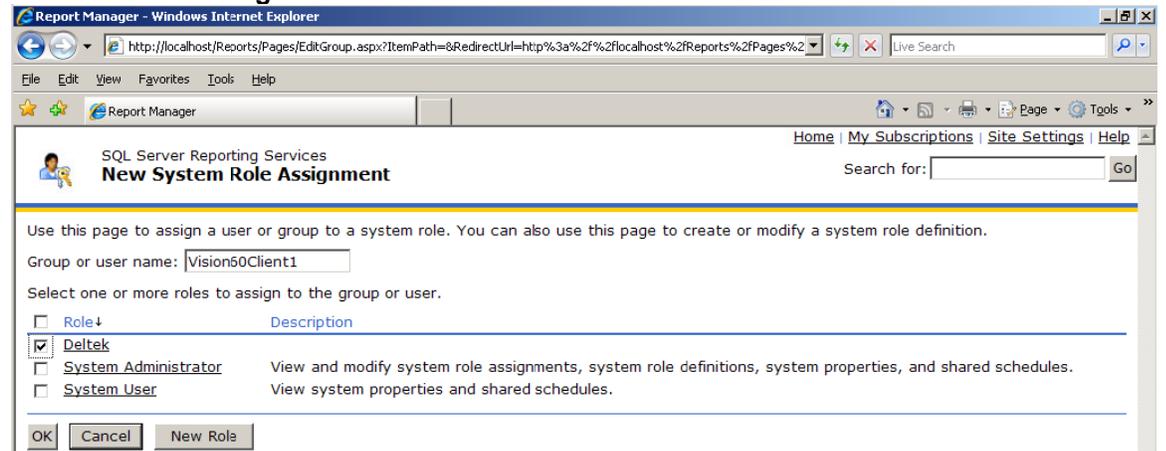
- Enter **Deltek** and the name for the role and select the **Manage jobs** option.



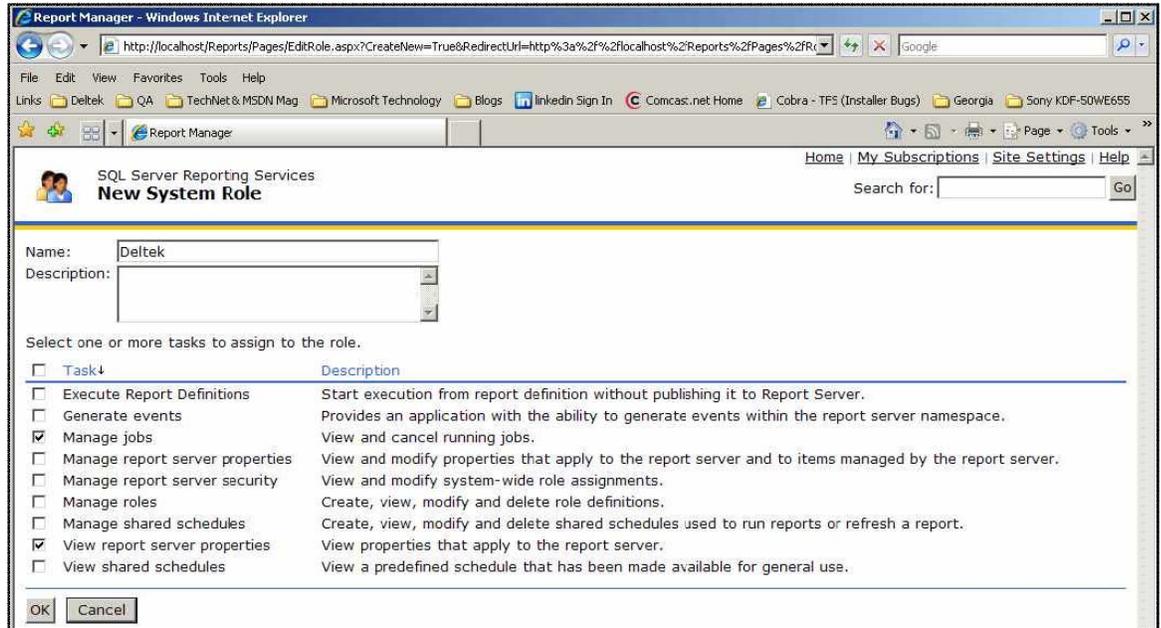
- Click **OK** to create the new role.
3. Add each client's user account to the new Deltek system role.
- From the Reporting Services home page, click **Site Settings**.
  - Under the Security section, click **Configure site-wide security**:



- Click **New Role Assignment**.

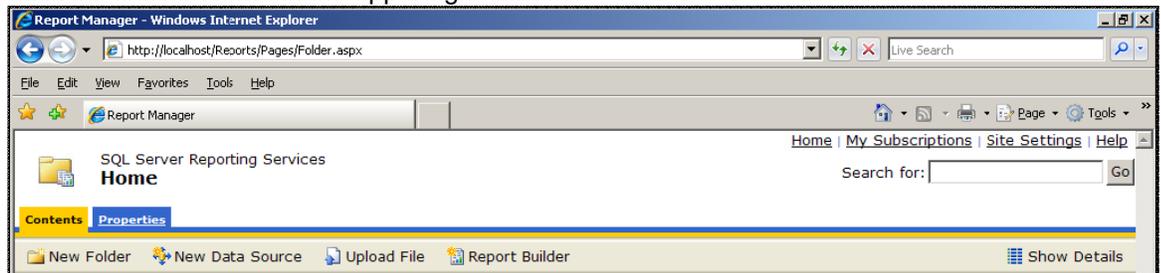


- Enter **Deltek** and the name for the role and select the **Manage jobs** and **View report server properties** options.

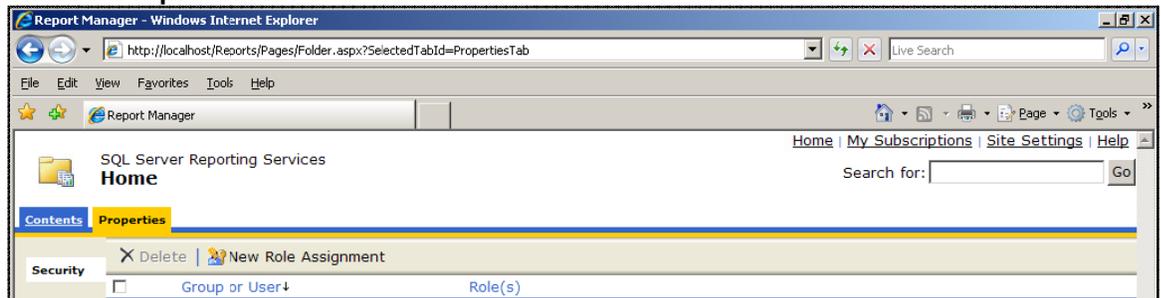


- Grant **Publisher** role rights to each client's Windows account to the Reporting Service Home folder. This ensures that the data source can be created by Weblink. (See the next section.)

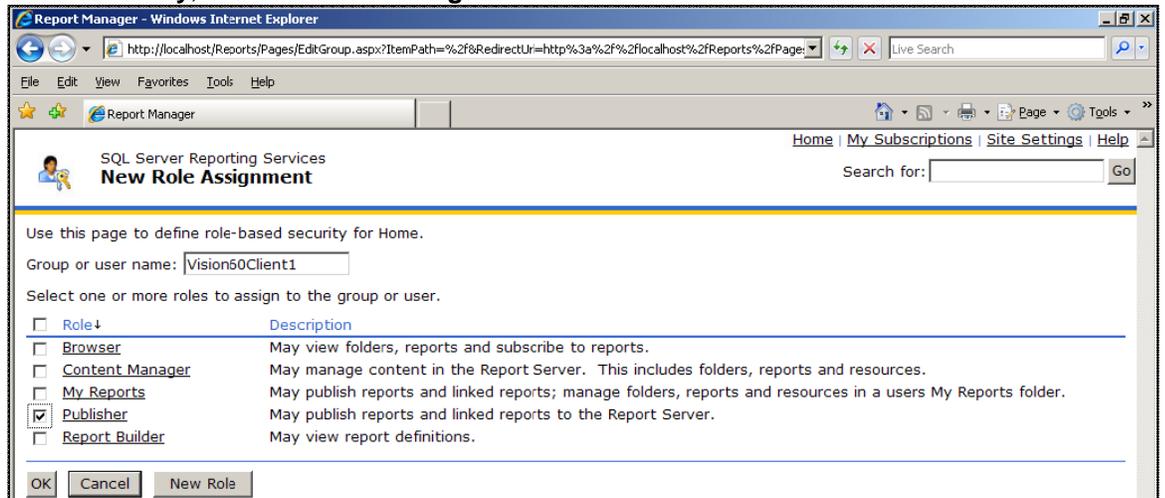
- Click the link for **Home** in the upper right corner.



- Click the **Properties** tab.



- Under **Security**, click **New Role Assignment**.



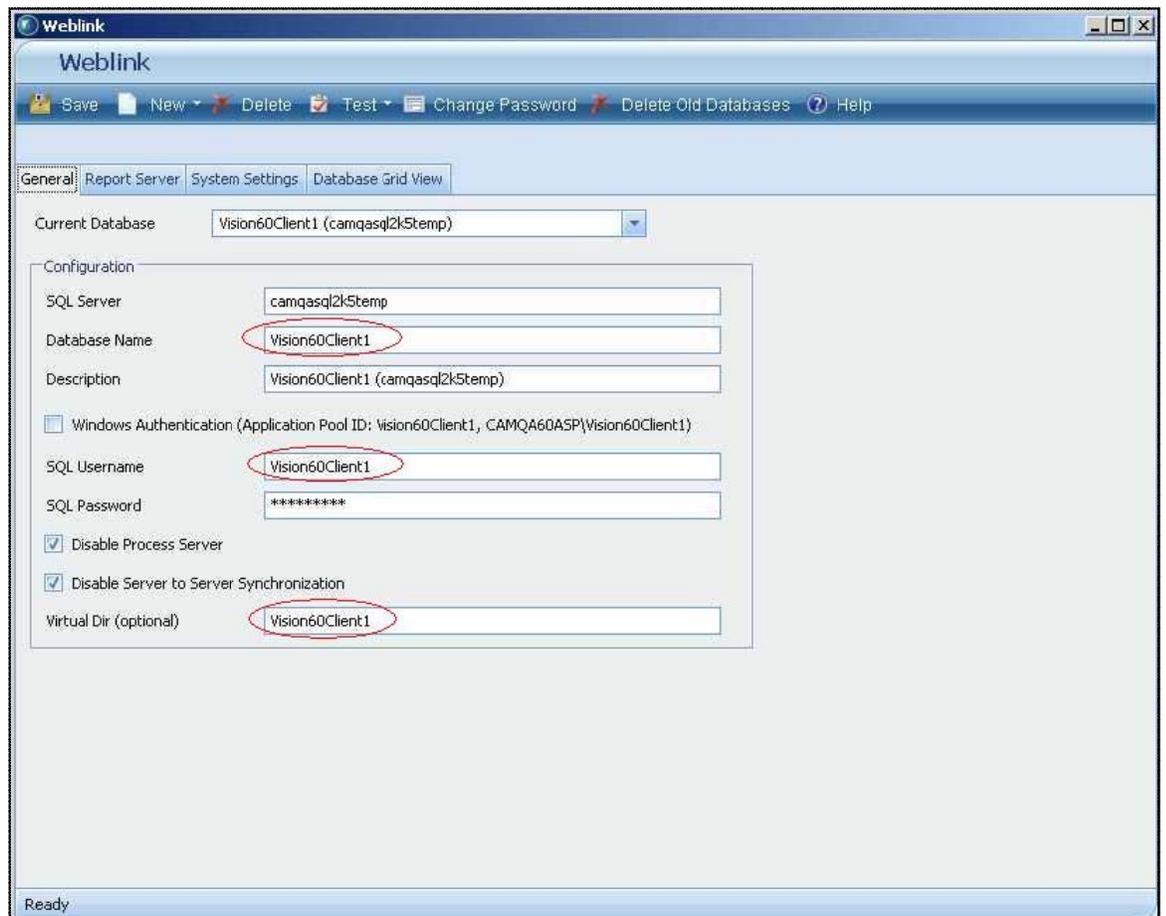
- Enter each client's local Windows account name, check the **Publisher** role and click **OK**.

Before you can continue with the Report Server configuration, you must create the database and report server entries in Weblink for each client. This process ensures the database connection and also creates the default data source object for each client's Root folder on the Report Server.

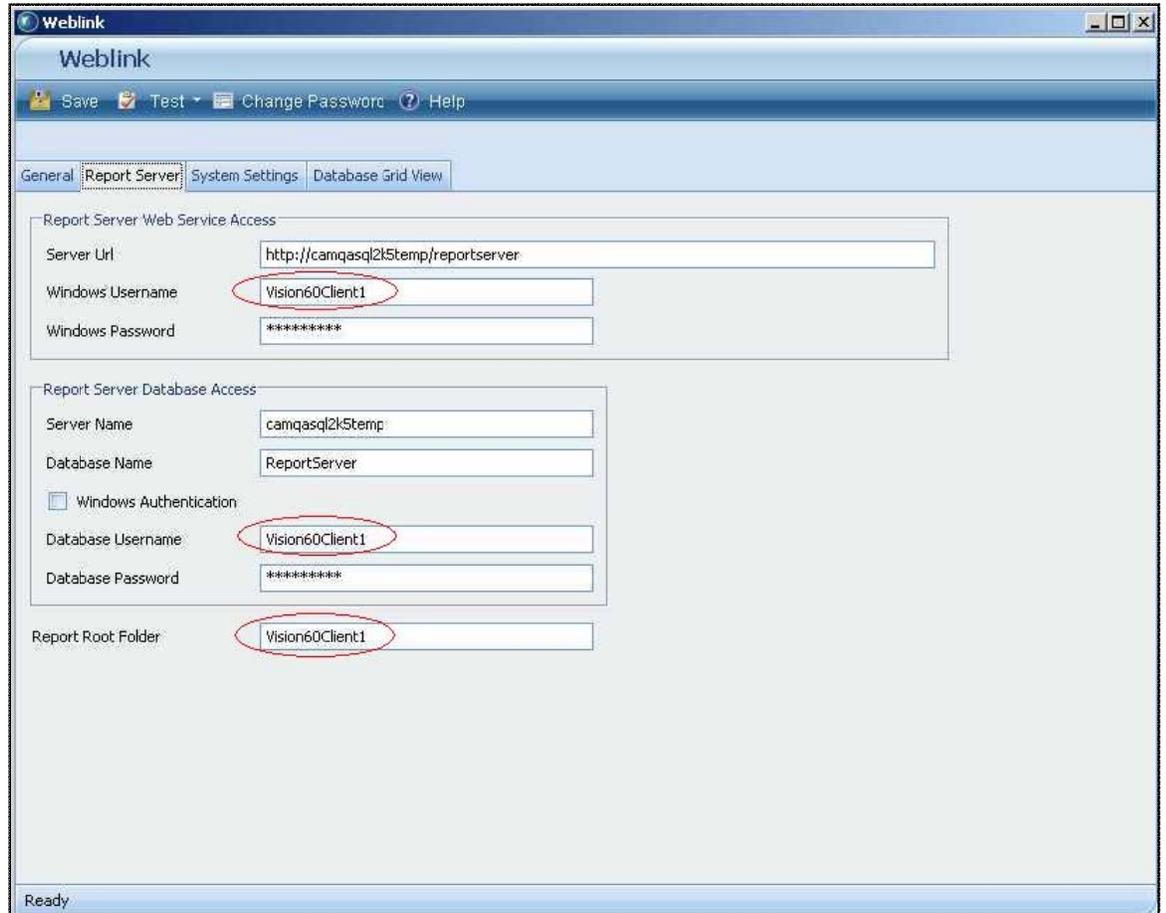
## Create Database Entries in Weblink

Complete the following steps on the Vision Web/Application server:

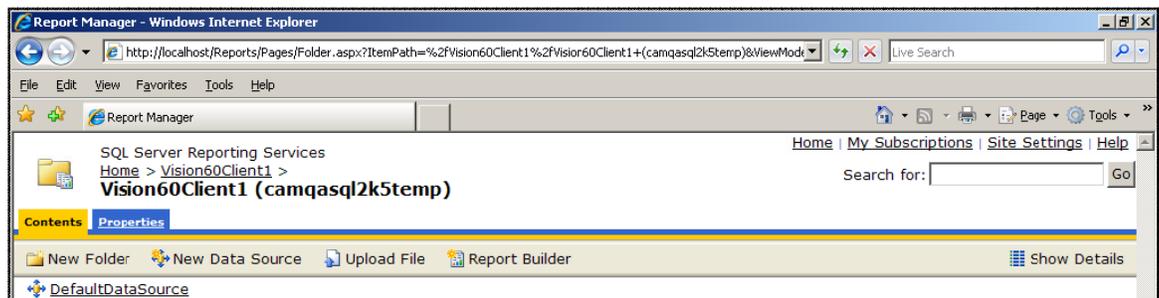
1. Create a new database entry for each client using the Weblink application:
  - From the Start menu, click Deltek Vision » Weblink to launch Weblink from the Web/Application server.
  - Add a new database entry.
  - Complete the fields on the General tab, entering each client's unique database name, SQL Login, and application virtual directory name (for example, Vision, not VisionClient). After you enter this information, click the **Test » Database Connection** button to ensure the information is correct and the proper rights have been granted.



- Complete the fields on the Report Server tab, entering each client's unique Report Server windows account information, Report Server database SQL Login ID, and Reports Root folder.



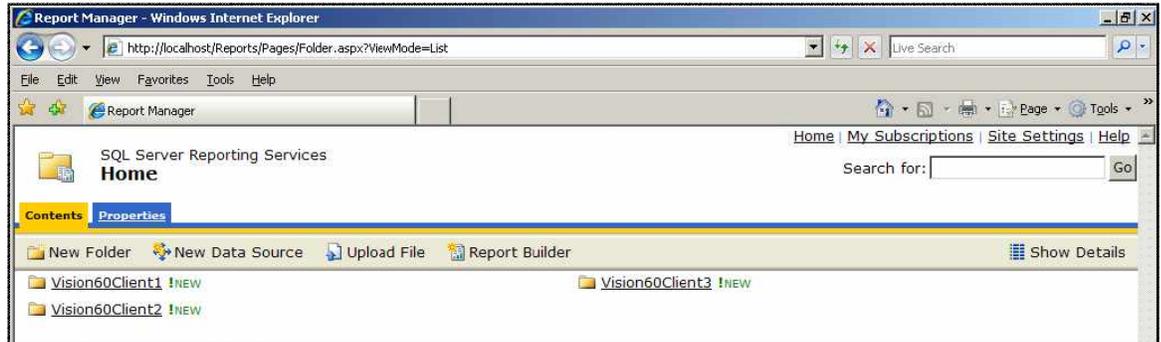
2. Click **Save**. The Report Server root folder is created for this client, as well as the default data source necessary for reports to connect to the client's Vision database:



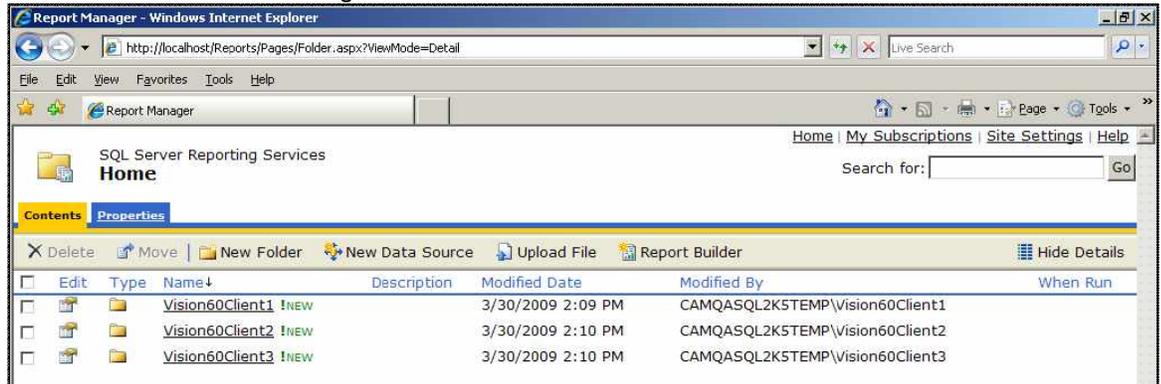
You can now continue with the Report Server configuration, which includes modifying permissions inherited from the Report Server **Home** folder. These steps are necessary to ensure that only the specified client has access to their reports.

**Complete the following steps while you are connected to Report Manager (Reporting Services Web application):**

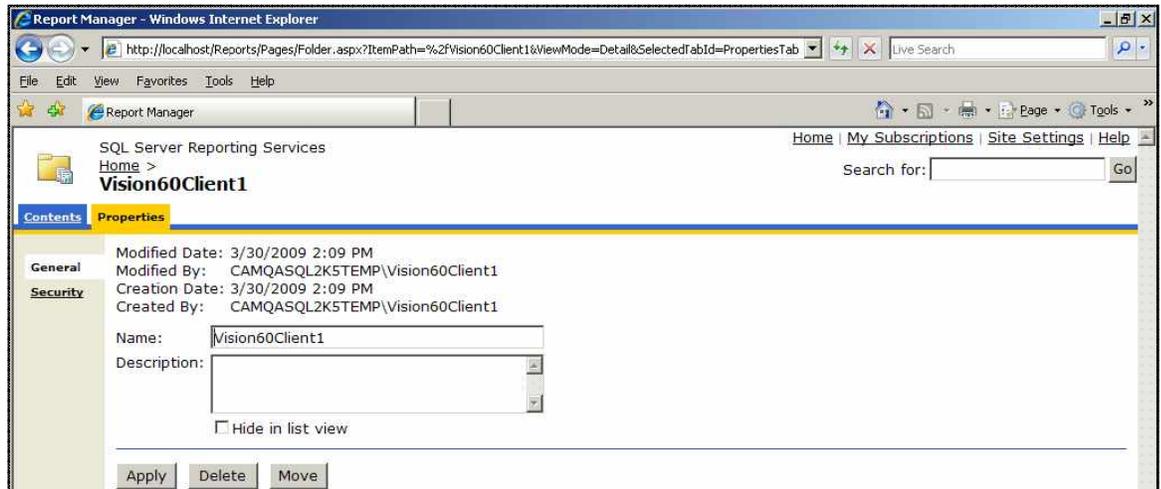
1. Grant Content Manager rights to each client's root folder and remove inherited permissions from the Report Server root folder. This must be performed for each client's report server root folder.
  - Click **Home** in the upper right corner.



- Click **Show Details** on the right side of the toolbar.



- Click **Edit** for each client's root folder.



- Click the link for **Security**.



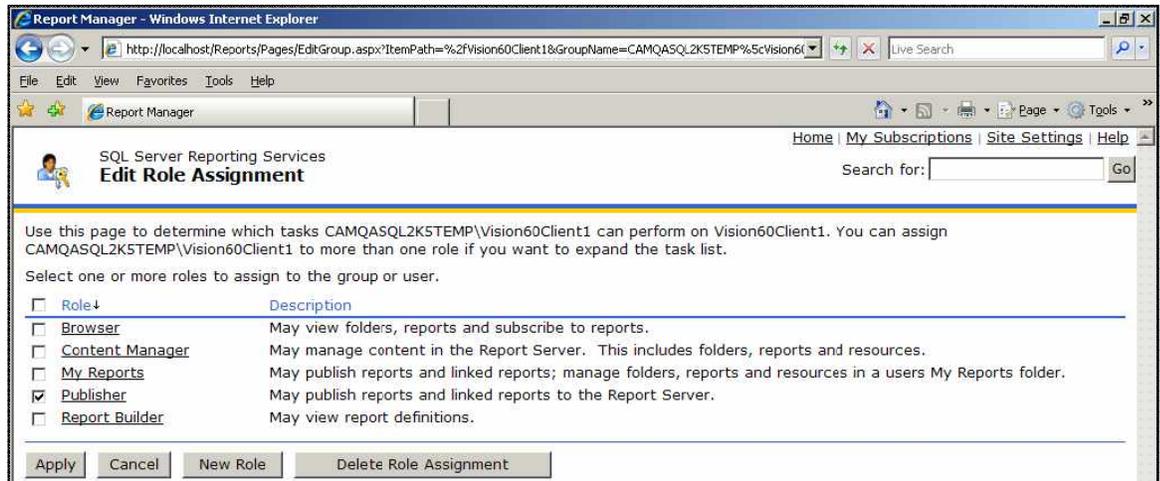
- Click **Edit Item Security**. The following is displayed:



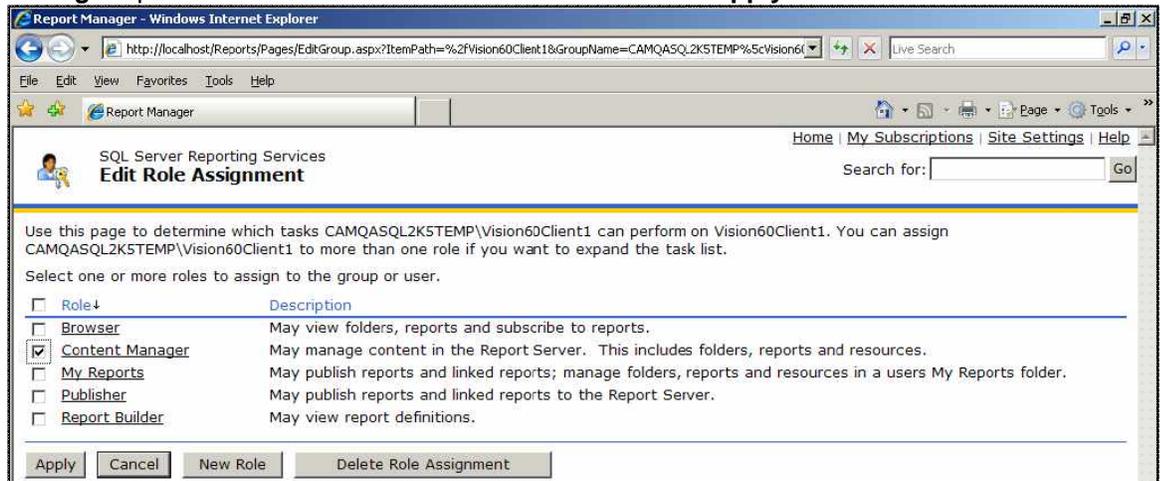
- Click **OK** to accept.
- Check the boxes for each client's Windows account that is **not** this client and click **Delete**.



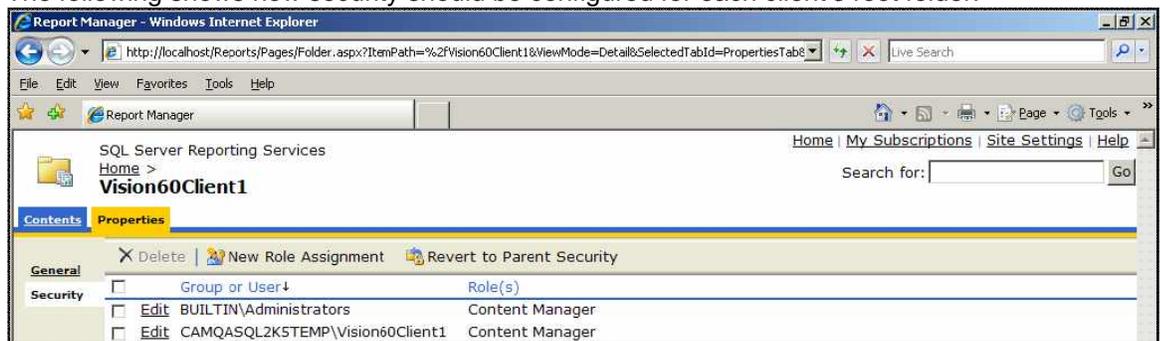
- Click **Edit** for this client's Windows account.



- Clear the **Publisher** role option for all user accounts and select the **Content Manager** option for the selected client's user account. Click **Apply**.



- The following shows how security should be configured for each client's root folder:



- Repeat Step 1 for each client's root folder.

## Import Vision Standard Reports into SQL Reporting Services

Each client must complete these steps from within the Vision application.

### To Load Vision Reports, complete the following steps:

1. Log on to the Vision application and then log on to the client's database.
2. From the Vision Applications menu, select **Utilities » Report Administration**.
3. On the Load Reports tab, confirm the Report Server and the Vision Root Folder as shown on the following screen. This ensures that Weblink is configured to point to the proper location to store reports in Actuate.

Report Server: camqasql2k5temp (Root Folder: VisionLunaClient1)

Load Reports | Report Printers | Current Activity | Report Logging

Location of reports on application server: C:\Program Files\Deltek\Vision\Reports

Report Type: Standard | Report Name: [ ]

Delete existing reports in each folder before loading

Load Report Files

Loaded Reports ▾

- Select **Standard** from the **Report Type** drop-down list.



See the next section for information about importing custom reports.

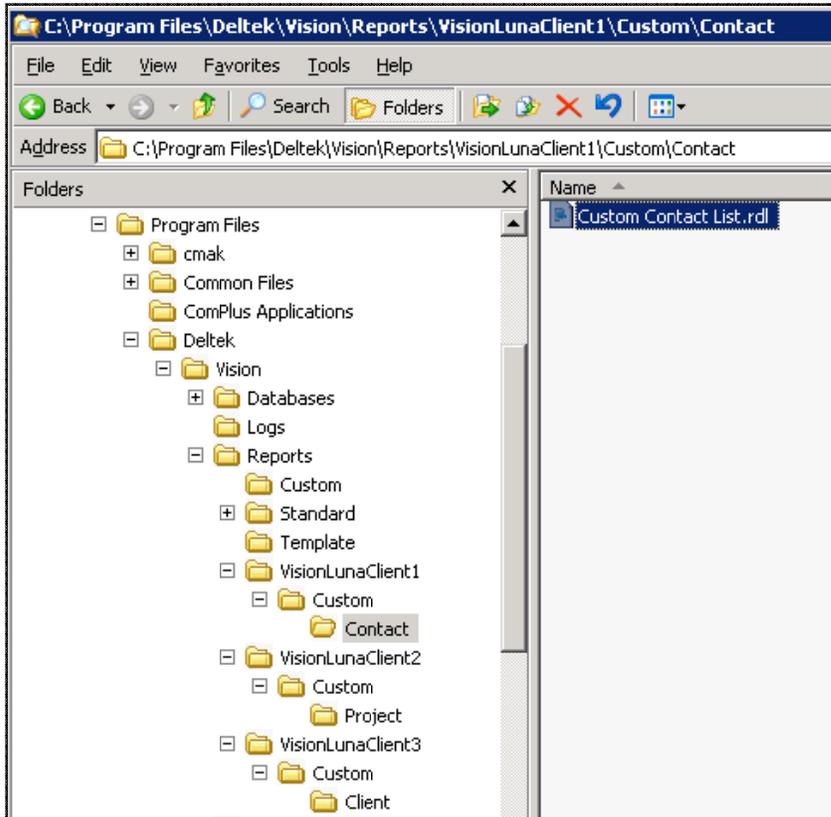
4. Click **Load Report Files** to load the Vision standard reports. This can take several minutes to complete. When completed you should see a structure similar to the following in Reporting Services:

Edit	Type	Name	Description	Modified Date	Modified By	When Run
<input type="checkbox"/>	Folder	DefaultReports		4/1/2009 3:06 PM	CAMQASQL2K5TEMP\Vision60Client1	
<input type="checkbox"/>	Folder	Vision60Client1 (camqasql2k5temp)		3/30/2009 2:09 PM	CAMQASQL2K5TEMP\Vision60Client1	

## Vision Custom Reports for ASP Clients

Because the majority of your clients have custom reports, you must develop a folder structure on the Vision Web/Application server to store each client's custom reports.

The following screen displays one way to set this up:



In this example, a client folder is created under **C:\Program Files\Deltek\Vision\Reports\<client folder>**. Under each client folder, you create a Custom folder and under that you create folders for the specific report type (for example, Client, Contact, Project, and so on). These report type folders must mirror the Report type folders under the Reports\Standard folder.

After you have the custom reports copied to the appropriate client folders, follow the steps below to load these custom reports to Vision.



You must complete these steps for each client database that has custom reports.

### To load custom reports to Vision, complete the following steps:

1. Log on to the client's Vision database with Administrative rights.
2. From the Vision Applications menu, select **Utilities » Report Administration**.
3. On the Load Reports tab, enter the exact location to this client's custom reports in the **Location of reports on application server** field, as shown on the following screen:

Report Server: camqasql2k5temp (Root Folder: VisionLunaClient1)

Load Reports | Report Printers | Current Activity | Report Logging

Location of reports on application server: C:\Program Files\Deltek\Vision\Reports\VisionLunaClient1

Report Type: Custom | Report Name: |

Delete existing reports in each folder before loading

Load Report Files

 Vision includes the custom sub-folds, so you only need to list the path to the client's folder.

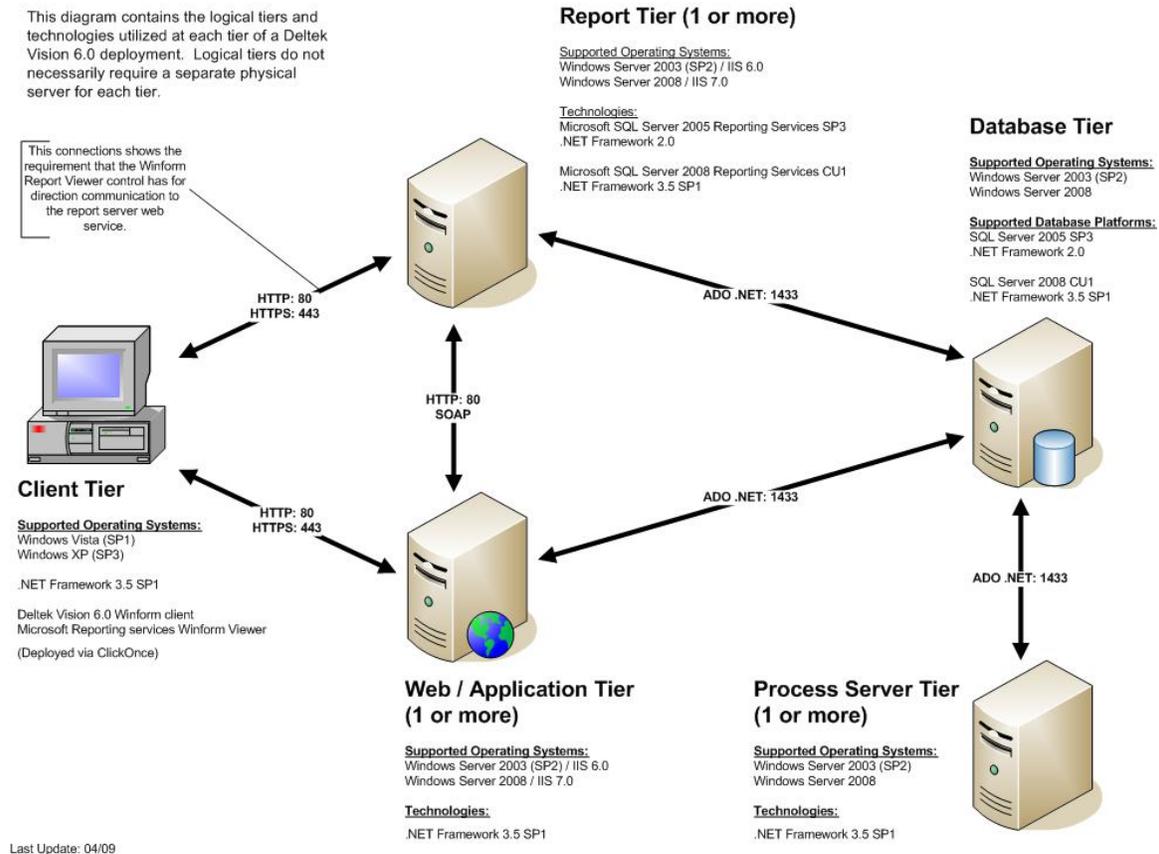
4. Use the drop-down to change the **Report Type** to **Custom**.
5. Click **Load Report Files**.

## Required Infrastructure Changes

The ReportViewer Winform control requires direct access to the Report Server Web service on the Report Server. For this reason, you must open port 80 inbound (or 443 if using SSL) to both the Vision Web/Application and SQL Reporting Services servers.

### Deltek Vision 6.0 Logical Tier Model (Core Application Tiers only)

This diagram contains the logical tiers and technologies utilized at each tier of a Deltek Vision 6.0 deployment. Logical tiers do not necessarily require a separate physical server for each tier.



An alternative is to use Windows Server 2008/IIS 7.0 as the Vision Web/Application server and deploy the Microsoft Application Request Routing (ARR) IIS 7.0 extension to deploy a reverse proxy. Please refer to "Creating a Reverse Proxy for SQL Reporting Services Using IIS 7.0 Application Request Routing (ARR)" available on the Deltek Customer Care Connect site (<https://support.deltek.com>) for detailed steps on deploying this solution.

## Deploying Deltek VPM at a Hosting Provider

The steps to deploy a single instance of Deltek VPM at a hosting provider are identical to the steps to deploy at a regular client site with the following exception: the Authentication method for the Performance Canvas software is Anonymous Access instead of the recommended NTLMv2 authentication. Please refer to the “Deltek Vision® 5.1/6.1 Performance Management Canvases Installation Guide” for the detailed steps to install and configure VPM, specifically:

- Unique Settings for Anonymous Access
- Known limitations when using Anonymous Access

A separate instance of the Performance Canvas software running on a different port is required for each client that licenses the VPM module. The steps necessary to install multiple instances to the same server are as follows:

1. Install the Performance Canvas software one time, and DO NOT configure this base installation. This is the installation that you will copy for each client.
2. When you copy the base installation for each client, enter a unique label for the installation directory. For example:

Base installation: C:\Program Files\Performance Canvas  
 Client installation: C:\Program Files\Performance Canvas - <Client>

3. Complete the following steps to modify the **zenith.properties** file to configure a unique tcp/ip port for each clients installation.
  - a. Open Windows Explorer and browse to the client's Performance Canvas installation folder.
  - b. Use Notepad to open the **zenith.properties** text file.
  - c. Change the **dsp.port value** from the default port (80), which conflicts with IIS. Typically, a port between 81 and 89 should be available on your server but any available port is sufficient.
4. Complete the following steps to modify the **service.properties** file to configure a unique Performance Canvas windows service name for each client installation.
  - a. Open Windows Explorer and browse to the client's Performance Canvas installation folder.
  - b. Open the **\bin** folder.
  - c. Use Notepad to open the **service.properties** text file.
  - d. Modify the following settings:
    - dsp.service.name=Performance Canvas - <Client>
    - dsp.service.description=Performance Canvas 1.3.0.5 - <Client>
    - dsp.service.minmem=128M: change to **256M**
    - dsp.service.maxmem=512M: change to **1024M**
  - e. Double click the InstallService.bat to install the windows service.
5. Update that client database entry in weblink with the Performance Canvas URL. Use the form of <http://<PerformanceCanvasServer>:<Port>>