

Deltek wInsight® Analytics Ancillary Applications 8.3.4

Installation Guide



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Contents

- OVERVIEW 1**
 - ADDING CUSTOM NOTES TO THIS GUIDE 1
- DOWNLOADING DELTEK PRODUCTS USING DELTEK SOFTWARE MANAGER..... 3**
 - ACCESSING DSM FROM WITHIN THE DELTEK SUPPORT CENTER 3
 - ACCESSING DSM LITE 4
 - DSM DOCUMENTATION AND TROUBLESHOOTING 4
- BEFORE YOU BEGIN DEPLOYMENT 5**
 - LOGICAL TIERS OVERVIEW 5
 - DEPLOYMENT MODELS 5
 - Stand-Alone Deployment 5
 - Client/Server Deployment 5
 - INSTALLATION STEPS 6
- SYSTEM REQUIREMENTS 7**
 - HARDWARE SIZING CONSIDERATIONS 7
 - Memory Requirements for a Typical/Average Use 7
 - Definition of Typical/Average Use 7
 - HARDWARE REQUIREMENTS 8
 - SOFTWARE REQUIREMENTS 8
 - Supported Deployment Technology 9
 - Supported PPM Product Versions 11
 - Compatible Deployment Technology 12
 - Open Source Software Included with wInsight Analytics 13
 - INTEGRATE WINSIGHT ANALYTICS WITH OTHER PPM PRODUCTS 13
- INSTALL A WINSIGHT ANALYTICS ANCILLARY APPLICATION..... 15**
- UPGRADE FROM AN EARLIER VERSION OF THE WINSIGHT ANALYTICS ANCILLARY APPLICATION 17**
- APPENDIX A: IF YOU NEED ASSISTANCE 18**
 - CUSTOMER SERVICES 18
 - DELTEK SUPPORT CENTER 18
 - ACCESS DELTEK SUPPORT CENTER 19
 - ADDITIONAL DOCUMENTATION 19

Overview

Welcome to the wInsight Analytics Ancillary Applications 8.3.4 Installation Guide. Use this document to install the ancillary applications.

The wInsight Analytics ancillary applications include:


- wInsight Analytics Briefing Wizard
- wInsight Analytics C/S Glue Viewer
- wInsight Analytics C/S Glue for Project
- wInsight Analytics Excel Connect
- wInsight Analytics MPM Connect
- wInsight Analytics Project Connect

Note: You cannot run these ancillary applications from a network share. They must be installed locally to function correctly.

Adding Custom Notes to This Guide

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

To add a custom note using Adobe Reader X:

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

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

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

Downloading Deltek Products using Deltek Software Manager

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

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

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

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

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

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

Options include:

- **Complete**
- **Cumulative Updates**
- **HotFixes**
- **Sub-Release**

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

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

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

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

Accessing DSM Lite

To access Deltek Software Manager Lite:

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

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

DSM Documentation and Troubleshooting

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

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

Before You Begin Deployment

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

- Logical Tiers
- Deployment Models
- Hardware and Software Requirements

Logical Tiers Overview

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

- **Client/Application Tier** — This tier performs wInsight Analytics 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 wInsight Analytics data is stored and retrieved.

Note: Deltek recommends, as part of best practice, to install all products in the PPM suite into the same database. The installations apply schema changes (tables, views, stored procedures, and so on) to your existing database to support the integration. While it is highly recommended that you install wInsight Analytics and Acumen into the same database, the integration between PM Compass, Open Plan, and Cobra requires it.

Deployment Models

Stand-Alone Deployment

The ancillary wInsight Analytics applications have a stand-alone deployment model. In a stand-alone deployment model, the applications are installed locally to the user's PC or laptop and can connect to a local Access database. This deployment mode can be useful where a single user is managing and reporting data for a small number of contracts.

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 can yield poor performance.

Installation Steps

Follow this sequence to install your wInsight Analytics ancillary application:

Step	Description	
1	Make sure that your system meets the hardware requirements to install the required software.	System Requirements
2	Download the wInsight Analytics ancillary application installer from the Deltek support site.	Downloading Deltek Products using Deltek Software Manager
3	Install the wInsight Analytics ancillary application.	
	Upgrade from an earlier version.	Upgrade from an Earlier Version of the wInsight Analytics Ancillary Application
	Perform a first-time installation.	Install a wInsight Analytics Ancillary Application

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.

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, 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.

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/Application Tier	2 GB (assuming the wlnsight Analytics Module is being run as a server application).
Database Tier	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.

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

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

Tier	Hardware Required	Determining Factors
Client/Application Tier	<ul style="list-style-type: none"> ▪ Intel Core 2.0 Duo or higher ▪ 4 GB RAM (Depending on data volumes, more may be required.) ▪ 80 GB Hard Drive (More may be required if wInsight Analytics uses a Microsoft Access database to store data on the local machine) 	<ul style="list-style-type: none"> ▪ Database Size ▪ Database Growth

Software Requirements

Note: Supported versions are the currently actively tested versions of technologies used to deploy wInsight 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 wInsight Analytics. These are not actively being tested but are believed to be compatible with wInsight 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](#).

Supported Deployment Technology

The table below outlines the supported deployment technologies for stand-alone and network share installations.

Supported Deployment Technology	
Operating System	<p><i>Microsoft Windows</i></p> <ul style="list-style-type: none"> Microsoft Windows 11 <p><i>Microsoft Windows Server</i></p> <ul style="list-style-type: none"> Microsoft Windows Server 2019 Microsoft Windows Server 2022 Microsoft Windows Server 2025 Microsoft Windows Server 2022 Azure Edition
VMWare Horizon	VMWare Horizon 8
Database	<p><i>Microsoft SQL Server</i></p> <ul style="list-style-type: none"> Microsoft SQL Server 2019 (also supported on Linux and Unix) Microsoft SQL Server 2022 (also supported on Linux and Unix) Microsoft Azure SQL Server <p><i>Microsoft SQL Server Express</i></p> <ul style="list-style-type: none"> Microsoft SQL Server Express 2019 Microsoft SQL Server Express 2022 <p><i>Microsoft Access</i></p> <ul style="list-style-type: none"> Microsoft Access 2016 Microsoft Access 2019 Microsoft Access 2021 <p><i>Oracle</i></p> <ul style="list-style-type: none"> Oracle 19.3 Oracle is also supported on Linux, Unix and Exadata <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>Note: If the database instance does not support Unicode character set, the Unicode flag (@unicode) in the database table creation scripts should be set to 0.</p> </div>

Supported Deployment Technology	
Database Drivers	<div style="border: 1px solid #0056b3; padding: 5px; margin-bottom: 10px;"> <p>Note: wInsight Analytics applications support 32-bit and 64-bit drivers, depending on the version of the application you are using.</p> </div> <ul style="list-style-type: none"> ▪ Oracle Provider for OLE DB ▪ Microsoft SQL Server 2012 Native Client, version 11.4.7001.0 or higher ▪ Microsoft OLE DB Driver for SQL Server, version 18.2.2.0 or higher ▪ Microsoft OLE DB Provider for Jet ▪ Microsoft ACE OLEDB 15 ▪ Microsoft ACE OLEDB 16
Scheduling Tools	<p><i>Microsoft Project Standard</i></p> <ul style="list-style-type: none"> ▪ Microsoft Project Standard 2021 (32-bit only) ▪ Microsoft Project Standard 2024 (32-bit only) <p><i>Microsoft Project Professional</i></p> <ul style="list-style-type: none"> ▪ Microsoft Project Professional 2021 (32-bit only) ▪ Microsoft Project Professional 2024 (32-bit only) <p><i>Microsoft Project Server</i></p> <ul style="list-style-type: none"> ▪ Microsoft Project Server 2016 <p><i>Oracle Primavera</i></p> <ul style="list-style-type: none"> ▪ Primavera P6 20.12 ▪ Primavera P6 21.12 ▪ Primavera P6 22.12 ▪ Primavera P6 23.12 ▪ Primavera P6 24.12
Microsoft Office	<p><i>Briefing Wizard</i></p> <ul style="list-style-type: none"> ▪ Microsoft PowerPoint 2021 ▪ Microsoft PowerPoint 2024 <p><i>Excel Connect</i></p> <ul style="list-style-type: none"> ▪ Microsoft Excel 2021 (32-bit only)

Supported Deployment Technology	
	<ul style="list-style-type: none"> ▪ Microsoft Excel 2024 (32-bit only) ▪ Microsoft Excel 365 (32-bit only) <p><i>Project Connect</i></p> <ul style="list-style-type: none"> ▪ Microsoft Project Standard 2021 (32-bit only) ▪ Microsoft Project Standard 2024 (32-bit only) ▪ Microsoft Project Professional 2021 (32-bit only) ▪ Microsoft Project Professional 2024 (32-bit only) <p><i>Microsoft Excel</i></p> <ul style="list-style-type: none"> ▪ Microsoft Excel 2021 (32-bit only) ▪ Microsoft Excel 2024 (32-bit only) ▪ Microsoft Excel 365 (32-bit only) <p><i>Microsoft PowerPoint</i></p> <ul style="list-style-type: none"> ▪ Microsoft PowerPoint 2021 (32-bit only) ▪ Microsoft PowerPoint 2024 (32-bit only)
Embedded Technologies	<ul style="list-style-type: none"> ▪ Visual C++ 2017 Redistributable Package (x86) ▪ Visual C++ 2015-2022 Redistributable Package (x86) ▪ Visual C++ 2017 Redistributable Package (x64) ▪ Visual C++ 2015-2022 Redistributable Package (x64) ▪ MSXML 6.0 Service Pack 2 (Microsoft XML Core Services)
.NET Framework	<ul style="list-style-type: none"> ▪ Microsoft .Net Framework 4.8 ▪ Microsoft .Net Framework 4.8.1 <div style="border: 1px solid #0056b3; padding: 10px; margin-top: 10px;"> <p>Attention: You can download the Microsoft.NET Framework from Microsoft's Web site at http://www.microsoft.com/en-us/download/details.aspx?id=17718. For instructions for adding it using Server Manager, see your Microsoft Windows documentation.</p> </div>

Supported PPM Product Versions

The table below outlines the PPM product versions compatible with wInsight Analytics 8.3.2. The versions listed below are the minimum supported versions. Subsequent cumulative update (CU) releases

within the listed major/minor release will be supported unless otherwise specified. Subsequent major/minor releases are not supported.

Supported PPM Product Versions	
Deltek Acumen	<ul style="list-style-type: none"> ▪ 8.10 ▪ 8.11
Deltek Cobra	<ul style="list-style-type: none"> ▪ 8.6 ▪ 8.7
Deltek Open Plan	<ul style="list-style-type: none"> ▪ 8.6 ▪ 8.7 ▪ 8.8
PPM Administrator	<ul style="list-style-type: none"> ▪ 1.0
EPM Security Administrator	<ul style="list-style-type: none"> ▪ 8.6

Compatible Deployment Technology

The table below outlines the compatible deployment technologies.

Compatible Deployment Technology	
Operating Systems	<ul style="list-style-type: none"> ▪ Microsoft Windows Server 2016
Database	<ul style="list-style-type: none"> ▪ Microsoft SQL Server 2017 ▪ Microsoft SQL Server 2016 ▪ Microsoft SQL Server Express 2017 ▪ Microsoft SQL Server Express 2016 ▪ Oracle 12.2
Scheduling Tools	<ul style="list-style-type: none"> ▪ Primavera P6 17.12 ▪ Primavera P6 18.8 ▪ Primavera P6 19.12

Compatible Deployment Technology	
Deltek Integrated Product	<ul style="list-style-type: none"> Deltek MPM 3.5

Open Source Software Included with wInsight Analytics

wInsight Analytics includes the following open-source software:

Software	Company
zlib 1.3.1	SourceForge
jpeg.lib	Independent JPEG Group

Integrate wInsight Analytics with Other PPM Products

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

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

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

- For a new installation on a shared database, where wInsight Analytics 8.3.4 is installed first, older versions of other PPM products that do not support the new encryption protocol will neither function nor integrate with wInsight Analytics 8.3.4.
- You should consider installing or upgrading all products in the Deltek PPM suite to versions that support the new encryption model.

Attention: For more information on the encryption model, see [“Appendix E: PPM Encryption Conversion Utility”](#) in the *wInsight Analytics Administrator Installation Guide*.

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

Product	Version
Acumen	8.9 or later
Acumen Touchstone	8.2 or later
Cobra	8.5 or later

Product	Version
Open Plan	8.6 Cumulative Update 05 or later
PM Compass	8.4 Cumulative Update 02 or later
wInsight Analytics	8.3.2 or later

- If you are installing wInsight Analytics on a database that already contains another Deltek PPM application that is not configured to use Unicode, you must first update the existing database tables to use Unicode structures before installing wInsight Analytics 8.3.4.
- If you are setting up a new database that will include the Open Plan 8.7 (CU 05 or earlier) or 8.6 (CU 10 or earlier), you need to run the Open Plan scripts prior to running scripts for other PPM products.
- Run any recommended installation and upgrade database scripts.

Attention: For installation details, see the Installation Guide of each PPM product.

Install a wInsight Analytics Ancillary Application

Use the following procedure to install the wInsight Analytics ancillary application.

Attention: If you are re-installing/upgrading the wInsight Analytics ancillary application, see [Upgrade from an Earlier Version of the wInsight Analytics Ancillary Application](#).


To install the wInsight Analytics ancillary application:

1. Download the wInsight Analytics ancillary application installer from DSM. For steps, see [Downloading Deltek Products using Deltek Software Manager](#).
2. Navigate to the location where you saved the installer and double-click the file to launch the InstallShield Wizard. The wInsight Analytics ancillary application file names are as follows:
 - For 64-bit:
 - **DeltekwInsightAnalyticsCSGlueViewer834x64.exe**
 - For 32-bit:
 - **DeltekwInsightAnalyticsBriefingWizard834.exe**
 - **DeltekwInsightAnalyticsCSGlueViewer834.exe**
 - **DeltekwInsightAnalyticsCSGlueforProject834.exe**
 - **DeltekwInsightAnalyticsExcelConnect834.exe**
 - **DeltekwInsightAnalyticsMPMConnect834.exe**
 - **DeltekwInsightAnalyticsProjectConnect834.exe**
3. On the Welcome page, click **Next**.
4. On the Setup Type page, do one of the following:
 - Select **Complete** to install all components and click **Next**.

The wInsight Analytics ancillary application is installed in the **C:\Program Files (x86)\Deltek\wInsight Analytics** directory by default.

Deltek Analytics C/S Glue Viewer, however, is installed in any of the following default locations:

- For 64-bit: **C:\Program Files\Deltek\wInsight Analytics**
- For 32-bit: **C:\Program Files(x86)\Deltek\wInsight Analytics**
- Select **Custom** to choose program features to install and click **Next**.

On the Custom Setup page, click **Change** to change the folder where the application will be installed or one of the  icons to change the features installed and click **Next**.

5. On the Ready to Install the Program page, click **Install** to start the installation process. The Installing Deltek wInsight Analytics <Ancillary Application> page displays the installation progress.
6. On the InstallShield Wizard Completed page, click **Finish** to exit the Installation Wizard.

Upgrade from an Earlier Version of the wInsight Analytics Ancillary Application

When you install the wInsight Analytics ancillary application, the installer automatically removes the older version.

Attention: If you are performing a fresh install of the wInsight Analytics ancillary application, see [Install a wInsight Analytics Ancillary Application](#).

You can also uninstall earlier versions by using one of the following methods:

- Use Windows' Programs and Features to uninstall the wInsight Analytics ancillary application.
- Run the older version installer and select the **Remove** option on the Program Maintenance page.

To upgrade an existing wInsight Analytics ancillary application:

1. Download the wInsight Analytics ancillary application from DSM. For steps, see [Downloading Delttek Products using Delttek Software Manager](#).
2. Double-click the wInsight Analytics ancillary application file and follow the installation instructions.

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using wInsight Analytics, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

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

- Extensive self-support options through the Deltek Support Center
- Phone and email support from Deltek Support Services analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the [Deltek Support Center](#).

Deltek Support Center

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

The following are some of the many options that the Deltek Support Center provides:

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

- Initiate a Chat to submit a question to a Deltek Support Services analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

Additional Documentation

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

Document Name	Description
Deltek wInsight Analytics Ancillary Applications Release Notes	This document contains a summary of the technical considerations, major features, enhancements, software issues resolved, and known issues of the ancillary applications.
Deltek wInsight Analytics 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 will not need access to all modules.