

# Deltek wInsight® Analytics

## Module 8.3.4

Administration Guide



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## Overview

System administration tasks include setting up security, configuring module data, loading wlnsight data periodically, setting up collaboration tools, and a variety of other miscellaneous tasks to maintain the module and support the analytics users. You will perform most or all these tasks during the implementation of the wlnsight Analytics Module. After you make the module available to those who will use the analytics, the primary ongoing task is to load fresh wlnsight data periodically.

This document uses **<installation location>** to indicate the installation path that you selected during the installation of the wlnsight Analytics Module. Here are the default locations.

| Folder  | Default Path for Server Installation       | Default Path for Standalone Installation  |
|---|--|---|
| <b>QlikView Application</b><br>It contains the Directory Service Connector, Distribution Service, Examples, Management Service, QvPlugin, QvProtocol, Server, Support Tools, Themes, and Web sub-folders and corresponding files. | C:\Program Files\QlikView                  | C:\Program Files\QlikView   |
| <b>wlnsight Application</b><br>It contains the bin and WSWebSvc sub-folders and corresponding files.  | C:\Program Files\Deltek\wlnsight Analytics | Not Applicable. The standalone version does not use wlnsight Application (Web service) files. |
| <b>wlnsight Data</b><br>It contains the admin, Backups, data, Database, datapull, extension, final, Logs, publish, qvds, setup, Support, and translate sub-folders and corresponding files.                                       | C:\ProgramData\Deltek\wlnsight Analytics   | C:\Users\<User name>\My Documents\Deltek\Analytics  |

## Security

The wInsight Analytics Module uses security information in PPM Administration or EPM Security Administrator to determine who can use the module and which contracts they have access to. Because the module's security is based on wInsight Analytics security, you should focus on it early in the implementation process, particularly if wInsight Analytics security is not already in place. Also, while you can implement security at any time, Deltek has found that the best practice is to implement it before you begin loading wInsight Analytics data into the data model.

## Configuration

wInsight Analytics includes a separate application that you use to specify the configuration settings. Configuration settings determine several important wInsight Analytics characteristics. They also affect what data is loaded into the analytics data model from the wInsight Analytics database and how that data is transformed for the analytics.

Before you load wInsight Analytics data from the database into the wInsight Analytics Module data model the first time, you select the configuration settings. After the implementation is complete and you make wInsight Analytics generally available to users, changes to configuration settings should be minimal. Generally, once you select the initial configuration settings, you only need to change those settings if you decide that your original selection is not what you want or, in some cases, if data changes in the wInsight Analytics database.

## Data Load

Before you can begin using the wInsight Analytics Module, you must load the initial set of wInsight Analytics data into the analytics data model. After you implement and begin using the wInsight Analytics Module, you must load data periodically to make the latest wInsight Analytics data available in the wInsight Analytics Module.

When you load data from the wInsight Analytics database, the process loads all relevant data for the periods you specify in wInsight Analytics backup duration, including user-defined fields and calculated fields.

## Collaboration Tools

If you have a server installation of wInsight Analytics, you can set up the wInsight Analytics Module so that analytics users can annotate the charts and tables, and others can view those annotations. And one analytics user can share his or her wInsight Analytics session in real time with one or more other users. These features are not available if you have a standalone installation of wInsight Analytics.


## Configuration

wInsight Analytics includes a separate application that you use to specify the configuration settings. Configuration settings determine several important wInsight Analytics characteristics. They also affect what data is loaded into the analytics data model from the wInsight Analytics database and how that data is transformed for the analytics.

Before you load wInsight Analytics data from the database into the wInsight Analytics Module data model the first time, you select the configuration settings. You may also need to modify the information in the wInsight\_Analytics\_Setup.xlsx file in the **C:\ProgramData\Deltek\Analytics\Setup** folder.

After the implementation is complete and you make wInsight Analytics generally available to users, changes to configuration settings should be minimal. Generally, once you select the initial configuration settings, you only need to change those settings if you decide that your original selection is not what you want or, in some cases, if data changes in the wInsight Analytics database.

In most cases, if you make a configuration change, you can implement that change by running Load\_wInsight\_Data.bat to load data for all projects or the selected project based on the new configuration.

**Note:** If you make any changes to the configuration settings, it is very important that you both click **Save Settings** for wInsight Analytics and click  on the toolbar to save the current configuration settings before you run the data load process. If you do not do both, the data load may not use the most current configuration settings.

### Specify Configuration Options

Use wInsight Analytics Configuration to specify the configuration options that determine important characteristics of the analytics, what data is loaded from the wInsight Analytics database, and how that data is transformed for the analytics.



**Attention:** There are two ways to load data, one is running a batch file from the server (using wInsight Analytics Configuration) and the other from the QlikView AccessPoint (using the Project Load tab). For more information, see the [Data Load](#) section in this document.

#### To specify configuration options for the wInsight Analytics Module:

1. On the server or standalone computer on which you installed the wInsight Analytics Module, go to the **C:\ProgramData\Deltek\Analytics\admin** folder.
2. Double-click wInsight\_Analytics\_Config.qvw to open wInsight Analytics Configuration.

3. Click **Update from wInsight Database**. The wInsight Analytics Configuration imports data from the wInsight Analytics database that you need to specify configuration settings (for example, the list of units).

When this process is completed, you receive a message that confirms that the wInsight Analytics data has been imported successfully into wInsight Analytics Configuration.

4. Use wInsight Analytics Configuration to specify the configuration settings you want. Click  periodically to save your work.
5. Click **Save Settings for wInsight Analytics**. When this process is completed, wInsight Analytics displays a message that confirms that the settings have been updated successfully.
6. If you have unsaved entries, click  to save them in wInsight\_Analytics\_Config.qvw.

When you have saved the settings in wInsight Analytics Configuration, you are ready to run the process to load data into the analytics data model.

## wInsight Analytics Database

Use wInsight Database to specify the type of database in which the wInsight Analytics data is stored.

### Purpose

To extract the data from the wInsight Analytics database and load it into the analytics data model, the data load process needs to know what type of database you use.

|                          |             |
|--------------------------|-------------|
| <b>wInsight Database</b> |             |
| Database Type            | SQLServer ▾ |

### Initial Configuration

In Database Type under wInsight Analytics Database, indicate if your wInsight data is stored in an Oracle, Microsoft SQL Server, or Microsoft Access database.

### Ongoing Administration

Normally, you do not change this setting after the initial configuration. However, you can change it at any time, if you change the type of database in which wInsight Analytics data is stored.

### Current Period

Use Current Period to specify the latest period for which you want to display wInsight Analytics data in the analytics.

### Purpose

The selection in **Actuals Up Through** under Current Period determines the latest wInsight Analytics period for which data is loaded into the analytics data model.

| Current Period     |              |
|--------------------|--------------|
| Actuals Up Through | 2031-04-30 ▼ |

This entry and the entry in Number of Periods Back under Historical Data Load control which periods are loaded. For example, if you select 11-30-2015 in **Actuals Up Through** and select 60 in Number of Periods Back, the data load process loads wInsight Analytics data for the period ending on 11-30-2015 and for the 59 previous periods.

In addition, this entry and the entry in Number of Versions Back under Forecast Data Load control how many versions of future period forecast and budget data are loaded. For example, if you select 11-30-2015 in **Actuals Up Through** and select 5 in **Number of Versions Back**, the data load process loads wInsight Analytics future period forecast and budget data from the period ending on 11-30-2015 and 4 previous periods.

## "Latest" Option

The list of period end dates in **Actuals Up Through** also includes a Latest option. If you normally want to load data through the most recent period in the wInsight database, you can select this option. If you do that, you only must change this setting in the future if for some reason you want to load data for earlier periods but not for the most recent period.

### Current Period Option on the By Project Tab

The By Project tab has an identical Current Period option. The two options have the same purpose but function independently. The option on the By Project tab only applies to the partial data loads for selected projects that you initiate from that tab, while the option on the wInsight Analytics Configuration tab only applies to full data loads that include all projects.

## Initial Configuration

For the initial configuration, select either Latest or the end date of the latest wInsight Analytics period for which you want to load initial data into the analytics data model. This period need not be the latest period for which data exists in wInsight Analytics if you are not ready to load the most current data.

## Ongoing Administration

If you select Latest in **Actuals Up Through** and you set **Number of Periods Back** to 1, the data load process automatically loads data for the latest period for which data is available in wInsight, so you do not normally need to change this selection from month to month.

If you select a specific period end date instead of Latest in **Actuals Up Through**, you need to change the selected date each time you are ready to start including a new period in the data load.

Entering 1 in Number of Periods Back minimizes the time it takes to load the data because only one period's data is processed. However, if you want to load more than one period, enter the appropriate number in Number of Periods Back.

If your data load includes new or updated user-defined filters, make sure that you set the options in wlnsight Analytics Configuration so that data is loaded for all months for which you want to use those filters.

## Historical Data Load

Use Historical Data Load to specify the number of past monthly periods for which you want to load data.

### Purpose

Your entry in Number of Periods Back under Historical Data Load controls the number of historical wlnsight Analytics periods for which data is loaded into the analytics data model when you run the data load process.

| Historical Data Load   |      |
|------------------------|------|
| Number of Periods Back | 15 ▼ |

This entry and the entry in **Actuals Up Through** under Current Period control which periods are loaded. For example, if you select 11-30-2014 in **Actuals Up Through** and select 24 in **Number of Periods Back**, the data load process loads wlnsight Analytics data for the period ending on 11-30-2014 and for the 23 previous monthly periods.

**Note:** If a contract uses periods other than monthly (weekly, for example), this setting still loads the specified number of months of data.

### Historical Data Load Option on the By Project Tab

The By Project tab has an identical Historical Data Load option. The two options have the same purpose but function independently. The option on the By Project tab only applies to the partial data loads for selected projects that you initiate from that tab, while the option on the wlnsight Analytics Configuration tab only applies to full data loads that include all projects.

### Preparation

In **Actuals Up Through** under Current Period, select the latest period for which you want to load wlnsight Analytics data into the analytics data model. If you normally want to load data through the most recent period in the wlnsight database, it is recommended that you select Latest rather than a specific period end date.

## Initial Configuration

When you set up wInsight Analytics, you load all the historical wInsight Analytics data that you want to be available when you begin using the analytics. To do that, use the Number of Periods Back field under Historical Data Load to enter or select the number of historical periods for which you want to load data.

For example, select 24 if you want to load data for the period selected in **Actuals Up Through** and for the 23 previous periods.

The maximum entry is 99 but if you need to go back further, you can select an earlier period in **Actuals Up Through**, load that data, and then select a more recent period in **Actuals Up Through** and load the later data.

## Ongoing Administration

To minimize or eliminate ongoing maintenance of this option and the related **Actuals Up Through** option, select Latest in **Actuals Up Through** and set Number of Periods Back to 1. If you do that, the data load process automatically loads data for the latest period for which data is available in wInsight, so you do not normally need to change either of these selections from month to month.

Even if you prefer to specify a specific period end date in **Actuals Up Through** when you are ready to load data for a new period, you should not normally need to change the value in **Number of Periods Back** from month to month.

Entering 1 in Number of Periods Back minimizes the time it takes to load the data because only one period's data is processed. However, in rare cases, you may find it necessary to load more than one period of new data. To do that, select the appropriate number of periods in Number of Periods Back.

If your data load includes new or updated user-defined filters, make sure that you set the options in wInsight Analytics Configuration so that data is loaded for all months for which you want to use those filters.

## Forecast Data Load

Use Forecast Data Load to specify the number of past periods from which you want to load future period forecast and budget data.

## Purpose

Your entry in Number of Versions Back under Forecast Data Load controls the number of historical versions of future period forecast and budget data that are loaded into the analytics data model when you run the data load process. You can compare the different versions of forecasts

and future period budgets on the Future Forecasts tab in the wInsight Analytics Module.

This entry and the entry in **Actuals Up Through** under Current Period control the periods from which future period data are loaded. For example, if you select 11-30-2014 in **Actuals Up Through** and select 6

in **Number of Versions Back**, the data load process loads future period data for the period ending on 11-30-2014 and for the 5 previous periods.

## Forecast Data Load Option on the By Project Tab

The By Project tab has an identical Forecast Data Load option. The two options have the same purpose but function independently. The option on the By Project tab only applies to the partial data loads for selected projects that you initiate from that tab, while the option on the wInsight Analytics Configuration tab only applies to full data loads that include all projects.

## Preparation

In **Actuals Up Through** under Current Period, select the latest period for which you want to load wInsight Analytics data into the analytics data model.

## Initial Configuration

When you set up wInsight Analytics, you load all the historical versions of future period forecast and budget data that you want to be available when you begin using the analytics. To do that, use the Number of Versions Back field under Forecast Data Load to enter or select the number of periods for which you want to load future period data. The maximum entry is 12.

## Ongoing Administration

To minimize or eliminate ongoing maintenance of this option and the related **Actuals Up Through** option, select Latest in **Actuals Up Through** and set Number of Versions Back to 1. If you do that, the data load process automatically loads the future period forecasts and budget data for the latest period for which data is available in wInsight, so you do not normally need to change either of these selections from month to month.

Even if you prefer to specify a specific period end date in **Actuals Up Through** when you are ready to load future period data for a new period, you should not normally need to change the value in **Number of Versions Back** from month to month.

Entering 1 in Number of Versions Back minimizes the time it takes to load the data because only one period's data is processed. However, in rare cases, you may find it necessary to load more than one period of new future period data (because of corrections made to the data, for example). To do that, select the appropriate number of periods in Number of Versions Back.

## Work Package Control Account

Use Work Package Control Account to indicate which element types are at either the control account level or the work package level.

## Purpose

In wInsight Analytics, each firm can define element types in whatever way fits its needs. The wInsight Analytics Module, however, needs to use the element types to identify which elements are at the control account level and which are at the work package level. To make that possible, you need to use the Work Package Control Account settings to indicate which element types belong in each of these categories.

| Work Package Control Account |        |
|------------------------------|--------|
| Element Type                 | C or W |
| C                            | C      |
| W                            | W      |

## Initial Configuration

When you configure the wInsight Analytics Module initially, select C in C or W next to each element type that is assigned to control accounts and W next to each element type that is assigned to work packages.

## Ongoing Administration

Normally, you do not change these settings after the initial configuration. However, you can change them at any time.

### Unit Used as Element of Cost

Use Unit Used as Element of Cost to identify units that wInsight Analytics should consider elements of cost and define the corresponding unit of measure (Dollars, Hours, or EQP) for each EOC entry.

| Unit Used As Element of Cost |          |           |          |
|------------------------------|----------|-----------|----------|
| ID                           | Name     | EOC (Y/N) | EOC Unit |
| 1                            | Dollars  | N         |          |
| 2                            | Hours    | N         |          |
| 3                            | EQP      | N         |          |
| 4                            | LABOR    | Y         | Dollars  |
| 5                            | MATL     | Y         | EQP      |
| 6                            | ODC      | Y         | Dollars  |
| 7                            | Overhead | Y         | Dollars  |

## Purpose


wInsight Analytics optionally allows Elements of Cost (EOCs) to be represented as Units in the same way as true Units (Hours, Dollars, etc.) to support analysis by EOC. The wInsight Analytics Module, however, needs to be able to distinguish between units and elements of cost so that EOCs are not included in the EOC Units selection lists, and units are not included in charts and tables that display EOC data.

## Initial Configuration

When you configure the wInsight Analytics Module initially, wInsight Analytics Configuration displays default values for each of the types of units: Y (yes) for those units it assumes are elements of cost and N (no) for those it assumes are not EOCs. If those defaults are correct, you do not need to make any entries in this table.

When you first run wInsight Analytics Configuration, the EOC Unit column is empty by default. You need to specify the appropriate EOC unit for each unit identified as an EOC. You can only enter EOC units that match the standard units, which are displayed in the Name column (Dollars, Hours, and EQP) on lines flagged as units. For example, if the EOC unit of LABOR is in dollars, you need to enter Dollars, not Dollar. The wInsight Analytics Configuration utility does not allow you to save the wrong EOC unit. The application then remembers any saved settings the next time you run it.

### If one or more of the defaults are incorrect:

1. Hover over the first EOC cell in the Unit Used as Element of Cost table that contains an incorrect value, and click the button displayed at the right end of the cell:  
  
Note: If you accidentally click in the cell rather than on the button, that action selects that row of the table and the other rows no longer display. If that happens, click  Clear on the toolbar to display all rows again.
2. Enter Y if that wInsight unit is actually an EOC. Enter N if it is not an EOC.
3. Use the TAB key to move to the next incorrect EOC cell, or hover and click the button in that cell.
4. Repeat steps 2 - 3 for each wInsight unit for which the default value in EOC is incorrect.
5. In the EOC Unit column of an EOC row, hover, click the button, and enter the appropriate unit. Only the EOC units that you define in this table are displayed on the EOC Unit table on the Element of Cost tab in wInsight Analytics. In addition, the unit entered for an EOC must match one of the true units in the table (for example, Hours or Dollars). Otherwise, an error displays on saving.

## Ongoing Administration

Normally, you do not change these settings after the initial configuration. However, you can change them at any time (for example, if you add a new type of unit in wInsight).

### WBS OBS Link

Use the WBS OBS Link option to indicate if you want to display the WBS OBS View analytics in wInsight Analytics - Multi-Project.

## Purpose

The WBS OBS Link option controls whether the WBS OBS View tab is available in the Multi-Project analytics. The primary consideration is whether the WBS-to-OBS mapping information is available in the wInsight Analytics database. If the required WBS-to-OBS mapping information has not been set up in wInsight Analytics Administrator, you cannot use the WBS OBS View tab.

| WBS OBS Link            |   |
|-------------------------|---|
| Use WBS/OBS link? (Y/N) | Y |

## Initial Configuration

When you configure the wInsight Analytics Module initially, select Y (yes) if the WBS-to-OBS mapping information is available in the database and you want to analyze that information in the WBS OBS View analytics.

Select N (no) if the WBS-to-OBS mapping information is not available or, for some other reason, you do not want the WBS OBS View tab to be available. If you select N, the WBS OBS View tab is not displayed. (It is also not displayed if you select Y but no mapping data exists in the wInsight Analytics database.)

## Ongoing Administration

Normally, you do not change these settings after the initial configuration. However, you can change them at any time (for example, if you later start mapping the two structures).

# Implement the WBS OBS View Analytics

Before you can use the WBS OBS View tab, you must complete several prerequisite setup tasks.

The primary prerequisite is that the wInsight database must contain the WBS-to-OBS mapping information. If the required WBS-to-OBS mapping information is not available in wInsight Analytics Administrator, you cannot use the WBS OBS View tab. In that case, either use WBS Mapper to create the mapping information, or leave WBS OBS Link in wInsight Analytics Configuration, set to N so that the WBS OBS View tab will not be displayed.


If the required WBS-to-OBS mapping information is available, the remaining tasks basically establish a common set of organizations for all contracts so that the data aggregated across multiple contracts can be compared meaningfully. This is necessary because each contract potentially uses a different OBS in wInsight, so you need to define how the OBS elements from different contracts should be consolidated.


## To implement the WBS OBS View analytics:

1. If you have not already done so, map WBS elements to OBS elements in wInsight Analytics Administrator.
2. In wInsight Analytics Configuration, either wait until after the next scheduled data load process, or click Run Data Load Batch File to load wInsight data, including the WBS-to-OBS mapping information.  
  
This process takes some time; how long it takes depends on the size of your database and how many projects and periods you are loading. When it is completed, a message displays that confirms that the data model has been updated with the current wInsight Analytics data, based on your configuration settings.
3. On the server or standalone computer on which you installed the wInsight Analytics Module, use Windows Explorer to go to the <installation location>\Translate folder and open Data\_Model\_wInsight.qvw.
4. Do one of the following:
  - If you use the same OBS structure for all projects, copy the contents of the Method 1: Consistent OBS Mapping table.
  - If the OBS structure is not the same for all projects, copy the contents of the Method 2: Different OBS by Contract table. To copy the contents of either table, right-click anywhere on the table and click **Copy to Clipboard » Table Data Area**.
5. On the server or standalone computer on which you installed the wInsight Analytics Module, use Windows Explorer to go to the <installation location>\Setup folder and open the wInsight\_Analytics\_Setup.xlsx file in Microsoft Excel®.
6. On the OBS\_Org\_Mapping sheet, click the A2 cell and paste the data that you copied from the table in Data\_Model\_wInsight.qvw.
7. Do one of the following:

- If you use the same OBS structure for all projects, copy the contents of the OBS Name column of the spreadsheet and paste that in the Mapped Organization column. Make sure that the Contract Name column is empty for all rows.
- If the OBS structure is not the same for all projects, use the Mapped Organization column to enter the organization to which you want to map data for each project-specific OBS code. The goal is to define a common set of organizations to which all project-specific OBS codes are mapped. For example, if E400 for Project A is equivalent to ENG111 for Project B, you could enter Engineering for both of those rows to map data for those two OBS codes to a single organization in the WBS OBS View analytics. If you use this method, you must make an entry in Mapped Organization for every row in the spreadsheet.

The names in the Mapped Organization column display on the WBS OBS View tab when you display data at the lowest OBS level.

8. Save the wInsight\_Analytics\_Setup.xlsx file.
9. Go to the Org\_Hierarchy sheet.
10. In Mapped Organization, enter or copy-and-paste each of the organization names you set up in the Mapped Organization column on the OBS\_Org\_Mapping sheet. Each name should only appear once on this sheet.
11. Determine how you want to roll up the OBS data from the level defined in the Mapped Organization column to two higher levels of organizational elements.
12. In Higher Level, enter the name of the second-level organizational element to which you want to assign each organization in Mapped Organization. To roll up multiple organizations in Mapped Organization into one second-level organizational element for analysis purposes, enter the same organizational element name for each organization.
13. In Top Level, enter the name of the top-level organizational element to which you want to assign each organization in Mapped Organization. To roll up multiple organizations in Mapped Organization into one top-level organizational element for analysis purposes, enter the same organizational element name for each organization.
14. Save the wInsight\_Analytics\_Setup.xlsx file.
15. On the wInsight Analytics Configuration tab of the Configuration application, select Y (yes) in WBS OBS Link to activate the WBS OBS View tab.
16. Click **Save Settings for wInsight Analytics**.  
When this process is completed, wInsight Analytics displays a message that confirms that the settings have been updated successfully.
17. Click  on the toolbar to save the setting in wInsight\_Analytics\_Config.qvw.

**Important:** If you make any changes to the configuration settings, it is very important that you both click Save Settings for wInsight Analytics and click  on the toolbar to save the current configuration settings before you run the data load process. If you do not do both, the data load may not use the most current configuration settings.


The next time that the data load process runs, the data model and the Multi-Project Analytics user interface are updated to reflect the WBS-to-OBS mapping implementation. You can wait for your next scheduled data load process, or you can click Run Data Load Batch File on the wInsight Analytics Configuration tab of the Configuration application to run it yourself. To verify the implementation without having to run the data load process, open wInsight\_Analytics\_MultiProject.qvw in Qlikview for Windows and click **File » Reload**. The wInsight\_Analytics\_MultiProject.qvw file is in the **<installation location>\Final** folder.

## Override Period End Dates

By default, wInsight Analytics assigns periods to a month based on each period's end date. However, if you have a period that starts in one month and ends early in the next, it is likely that assigning that period to a month based on the end date would be incorrect. If you have contracts for which this situation exists, you can use the wInsight\_Analytics\_Setup.xlsx Microsoft Excel® spreadsheet to map those periods to end dates in the correct months.


For example, if a contract calendar has a period with a 3/02/2013 end date, the data load process, by default, assigns that period to the March monthly period for analysis, but that data probably should be considered February data.


### To map selected period end dates to months other than the default months:

1. On the server or standalone computer on which you installed the wInsight Analytics Module, use Windows Explorer to go to the **<installation location>\Setup** folder.
2. Open the wInsight\_Analytics\_Setup.xlsx file in Microsoft Excel.
3. In Windows Explorer, go to the **<installation location>\Admin** folder.
4. Run wInsight\_Analytics\_Config.qvw to open wInsight Analytics Configuration.
5. Click the wInsight Analytics Utility tab.
6. Click  in the upper-right corner of the Export Period EndDate list. The list of period end dates is displayed in Microsoft Excel.
7. Select and copy all of the period end dates, and paste them in the End Date column on the EndDate\_Override sheet in the wInsight\_Analytics\_Setup.xlsx file.

For each period end date that needs to be overridden to associate it with the correct monthly period, enter a date from the correct month (the last day of the month for example) in the End Date Override column. For period end dates that do not need to be overridden, you can leave the End Date Override column blank.

8. Save the wInsight\_Analytics\_Setup.xlsx file.
9. On the wInsight Analytics Configuration tab of the Configuration application, make sure the Current Period and Historical Data Load options are set to include all the periods for which you need to load data.
10. Click **Save Settings** for wInsight Analytics. When this process is completed, wInsight Analytics displays a message that confirms that the settings have been updated successfully.

11. If you have unsaved entries, click  to save them in wlnsight\_Analytics\_Config.qvw.

**Important:** If you make any changes to the configuration settings, it is very important that you both click Save Settings for wlnsight Analytics and click  on the toolbar to save the current configuration settings before you run the data load process. If you do not do both, the data load may not use the most current configuration settings.

When you have saved the settings in wlnsight Analytics Configuration, you are ready to run the process to load data into the analytics data model. That process will use the period end date override information you entered to assign those periods to monthly periods in the analytics data model.

**Note:** If you only have a few period end dates to override, you do not have to export all of your end dates to Excel and then copy them into wlnsight\_Analytics\_Setup.xlsx. You can just open wlnsight\_Analytics\_Setup.xlsx, manually enter each of those dates in End Date, and enter the override dates in End Date Override. The spreadsheet only needs to contain the period end dates you want to override.

## Load Additional Fields


For the most part, the data load process loads all fields from several key tables related to earned value performance that are referenced in the ColumnN table. However, standard analytics do not use some of those fields so, by default, they are excluded from the data load to reduce the size of the data model. If you decide that you would like any of those fields to be available in the analytics data model, you can override the decision to exclude them on a field-by-field basis.


To review the list of fields that are excluded by default, open the wlnsight\_INTERNAL.xlsx file and go to the Fields\_To\_Bring\_In sheet. The wlnsight\_INTERNAL.xlsx file is in the **<installation location>\Translate** folder.

### To include fields in the data load that are excluded by default:

1. On the server or standalone computer on which you installed the wlnsight Analytics Module, use Windows Explorer to go to the **<installation location>\Translate** folder.
2. Open the wlnsight\_INTERNAL.xlsx file in Microsoft Excel®.
3. Go to the Fields\_To\_Bring\_In sheet.
4. For each field that you want to include in the data load process, enter Y in Bring In (Y/N).
5. Save the wlnsight\_INTERNAL.xlsx file.
6. On the wlnsight Analytics Configuration tab of the Configuration application, make sure the Current Period and Historical Data Load options are set to include all the periods for which you want to load data for the newly included fields.
7. Click **Save Settings** for wlnsight Analytics.

When this process is completed, wInsight Analytics displays a message that confirms that the settings have been updated successfully.

8. If you have unsaved entries, click  to save them in wInsight\_Analytics\_Config.qvw.

**Important:** If you make any changes to the configuration settings, it is very important that you both click Save Settings for wInsight Analytics and click  on the toolbar to save the current configuration settings before you run the data load process. If you do not do both, the data load may not use the most current configuration settings.

When you have saved the settings in wInsight Analytics Configuration, you are ready to run the process to load data into the analytics data model. That process will include the fields that you selected for inclusion.

## Manage Data Validation Checks

By default, wInsight Analytics applies a standard set of validity checks to the data for the period you select and alerts you to errors, warnings, unrealistic forecasts, or other conditions of interest. However, you can control which of the available validation checks your firm will use. You can also assign the validation checks to different validation types, rename validation types, modify validation check descriptions, or add entirely new validation checks.


To review the list of default data validation checks, open the wInsight\_Analytics\_Setup.xlsx file and go to the Data\_Validation sheet. The wInsight\_Analytics\_Setup.xlsx file is in the


**<installation location>\Setup** folder.

**Note:** Before you make any changes to the data validation check information, Deltek recommends that you back up the original spreadsheet.

### To disable a data validation check or to make changes or additions to data validation check information:

1. On the server or standalone computer on which you installed the wInsight Analytics Module, use Windows Explorer to go to the **<installation location>\Setup** folder.
2. Open the wInsight\_Analytics\_Setup.xlsx file in Microsoft Excel®.
3. Go to the Data\_Validation sheet.
4. If you are making changes to an existing data validation check, scroll to that row. If you are adding a new data validation check, scroll to the first empty row or insert a blank row.
5. To change the validation type to which a validation check is assigned, enter the validation type in **RiskType**, change the validation type to which a validation check is assigned, enter the validation type in **RiskType**. To add a new validation type, enter it in **RiskType** for one or more validation checks.

6. To change the description of a validation, check that appears on the Data Validation tab, edit the description in **RiskDesc**.
7. If you are adding a new validation check, enter a unique ID in **RiskID**.
8. To change the validation expression, edit the information in Validation  
Any fields that you reference in the expression must exist in the EarnedValue table in wInsight and must have been included in the wInsight Analytics Module data model.
9. To change the set of fields that are displayed in the Validation table on the Data Validation tab when the validation check returns an alert for an element, edit the comma-delimited list in **FieldList**.  
Any fields that you reference in **FieldList** must exist in the EarnedValue table in wInsight and must have been included in the wInsight Analytics Module data model.
10. To disable a data validation, check so that it is not applied to your data and does not appear on the Data Validation tab, enter **Y** in Disabled (Y/N).
11. Save the wInsight\_Analytics\_Setup.xlsx file.
12. On the wInsight Analytics Configuration tab of the Configuration application, make sure the Current Period and Historical Data Load options are set to include all of the periods for which you want to apply the modified or new data validation checks.
13. Click **Save Settings for wInsight Analytics**.  
When this process is completed, wInsight Analytics displays a message that confirms that the settings have been updated successfully.
14. If you have unsaved entries, click  to save them in wInsight\_Analytics\_Config.qvw.

**Important:** If you make any changes to the configuration settings, it is very important that you both click Save Settings for wInsight Analytics and click  on the toolbar to save the current configuration settings before you run the data load process. If you do not do both, the data load may not use the most current configuration settings.

When you have saved the settings in wInsight Analytics Configuration, you are ready to run the process to load data into the analytics data model. That process will apply the modified or new data validation checks to the data for the period included in the data load.

## Data Load

The data in the wInsight Analytics Module data model is loaded periodically from the main wInsight Analytics database.


**Note:** The locations specified in this section refer to the default installation locations. If you installed the wInsight Analytics Module in a different location, go to the respective folders in your installation location.

### Data Load Overview

Before you can begin using the wInsight Analytics Module, you must load the initial set of wInsight Analytics data into the analytics data model. After you implement and start using the wInsight Analytics Module, you must load data periodically to make the latest wInsight Analytics data available in the analytics.

### wInsight Analytics Data

Before you load the data the first time, use wInsight Analytics Configuration to specify and save the configuration settings you want. When you load data from the wInsight Analytics database, the process loads all relevant data for the periods you specify in wInsight Analytics Configuration, including user-defined fields and calculated fields. The data load process also loads the views and user-defined filters that have been included in the .ini file in the wInsight Analytics setup folder.

**Note:** If you make any changes to the configuration settings, it is very important that you both click **Save Settings for wInsight Analytics** and click  on the toolbar to save the current configuration settings before you run the data load process. If you do not do both, the data load may not use the most current configuration settings.

There are two ways to load data, one is running a batch file from the server (using wInsight Analytics Configuration) and the other from the QlikView AccessPoint (using the Project Load tab).

**Attention:** For more information, see the [Load Data from the Server](#) and [Load Data from the QlikView AccessPoint](#) sections.

### When to Load wInsight Analytics Data

Normally, you load data into the wInsight Analytics data model at the following times:

- As part of the implementation of the wInsight Analytics Module, to load the initial set of data

- On whatever regular schedule works best for your wInsight Analytics users (for example, nightly)

## Load Data from the Server

You have the option to load data for all projects or the selected project from the server. Most firms load data for all projects on a regular schedule (for example, nightly). However, most also need the ability to load data for the selected project from time to time. For example, if you notice issues with the data loaded for one project after a full data load and want to reload that data after correcting it in wInsight Analytics or Cobra, you can select just that project for processing to make the corrected data available quickly to your analytics users.

**Attention:** If you want to load data for all projects from the server, see the [Load Data for All Projects](#) section. If you want to load data for the selected project, see the [Load Data for the Selected Project](#) section.

## Delete Existing .QVD Files Before Loading Data for All Projects

To prevent any potential errors, **you must delete existing QVD files before loading data for all projects** (full load). To delete the .QVD files, run **DeleteQVDs.bat**. If this is the first time you are loading data for all projects, you do not need to perform this task.

By default, the **DeleteQVDs.bat** file is installed in **C:\ProgramData\Deltek\Analytics\admin**

## Data Load Programs

wInsight Analytics provides the .bat files described below for loading and updating data from the server. These .bat files are located in the **C:\ProgramData\Deltek\Analytics\admin** folder by default.

**Note:** To run the .bat files to load data, you must log on to the wInsight Analytics server or standalone computer as the DeltekAnalytics user or as another QlikView-licensed user that you have set up.

| Program                | Description  |
|------------------------|--|
| Load_wInsight_Data.bat | <p>This process loads data either for all projects (full data load) or the selected project, depending on which tab of wInsight_Analytics_Config.qvw you start the process.</p> <p>To run this file, click <b>Run Data Load Batch File</b> (for all projects) on the wInsight Analytics Configuration tab or <b>Run Data Load By Project Batch File</b> (for the selected project) on the By Project tab.</p> <p>This file does the following tasks:</p> |

| Program                                 | Description   |
|---|---|
|   | <ul style="list-style-type: none"> <li>Updates the wInsight Analytics data model, based on your configuration and security settings.</li> <li>Loads additional setup information from the <b>wInsight_Analytics_Setup.xlsx</b> file in the <b>C:\ProgramData\Deltek\Analytics\setup</b> folder by default.</li> <li>Loads views and user-defined filters from a copy of the WSCUSTOM.xml file.</li> </ul>   |
| Load_winsight_data_with_Acumen.bat      | <p>Deltek recommends that you run this if you are using Acumen functionality and exporting. DCDE data from Acumen into wInsight Analytics.</p> <p>This process loads wInsight data and Acumen metric data and wInsight data for all projects.</p>   |
| Load_wInsight_Data_without_Datapull.bat | <p>This process is the same as Load_wInsight_Data.bat except that it does not load data from the wInsight Analytics database and loads data for all projects.</p>   |
| Load_Acumen_Only.bat                    | <p>This process loads data from the wInsight Analytics database into the wInsight_Metrics.QVW file for all projects.</p> <p>The data that it loads consists of control account and work package originally from Cobra, task data from a scheduling system, and metrics defined and calculated in Acumen. This data resides in the wInsight Analytics database and is the result of importing a .DCDE file, which has been exported from Acumen.</p> |

**Note:** If you want to load views and user-defined filters, copy the current **WSCUSTOM.xml** file from wInsight to the **C:\ProgramData\Deltek\Analytics\Setup** folder. If you load new or updated filters, make sure that you set the options in wInsight Analytics Configuration so that data is reloaded for all months for which you want to use those filters.


### Who Can Load Data

wInsight Analytics provides no internal security for the configuration applications or the data load .bat files. Be sure that only the appropriate persons have access to the network folders or standalone computer folders in which you installed the wInsight Analytics Module.

### Load Data for All Projects


This process corresponds to selecting the **Load All Projects** option in QlikView AccessPoint.

## To load data for all projects:

1. On the server or standalone computer on which you installed the wInsight Analytics Module, log on as the DeltekAnalytics user or as another QlikView-licensed user that you have set up.
2. Double-click wInsight Analytics Configuration, which is in the **C:\ProgramData\Deltek\Analytics\admin** folder by default.
3. Review the configuration settings on the wInsight Analytics Configuration tab to make sure they are correct.
4. Set the values in **Current Period**, **Historical Data Load**, and **Forecast Data Load** on the wInsight Analytics Configuration tab to determine which periods are included.
5. Click , and click **Save Settings for wInsight Analytics**.
6. Click **Run Data Load Batch File**. This process takes some time; how long it takes depends on the size of your database and how many projects and periods you are loading. When it is completed, a message displays confirming the data model has been updated with the current wInsight Analytics data, based on your configuration settings.
7. If you want to load views and user-defined filters, copy the current WSCUSTOM.xml file from wInsight to the **C:\ProgramData\Deltek\Analytics\Setup** folder. If you load new or updated filters, make sure that you set the options in wInsight Analytics Configuration so that data is reloaded for all months for which you want to use those filters.
8. *This step is not necessary to update user-defined filters. It is only required for views.* If you load new or updated views, take the following actions:
  - a. In QlikView for Windows, open wInsight\_Analytics.qvw. The file is in the **C:\ProgramData\Deltek\Analytics\final** folder by default.
  - b. Click **File » Reload**.
  - c. Save the file.
  - d. Repeat steps a – c for wInsight\_Analytics\_MultiProject.qvw.

## Load Data for the Selected Project

### To load data for the selected project:

1. On the server or standalone computer on which you installed the wInsight Analytics Module, log on as the DeltekAnalytics user or as another QlikView-licensed user that you have set up.
2. Double-click **wInsight Analytics Configuration**.
3. Review the configuration settings on the wInsight Analytics Configuration tab to make sure they are correct.
4. On the By Projects tab, set the values in **Current Period**, **Historical Data Load**, and **Forecast Data Load** on that tab to determine which periods are included.
5. Click , and click **Save Settings for wInsight Analytics**.
6. Click **Run Data Load By Project Batch File**. This process takes some time; how long it takes depends on the size of your database and how many projects and periods you are loading. When

it is completed, a message displays confirming the data model has been updated with the current wInsight Analytics data, based on your configuration settings.

7. If you want to load views and user-defined filters, copy the current WSCUSTOM.xml file from wInsight to the **C:\ProgramData\Deltek\Analytics\Setup** folder. If you load new or updated filters, make sure that you set the options in wInsight Analytics Configuration so that data is reloaded for all months for which you want to use those filters.
8. *This step is not necessary to update user-defined filters. It is only required for views.* If you load new or updated views, do the following:
  - a. In QlikView for Windows, open wInsight\_Analytics.qvw.
  - b. Click **File » Reload**.
  - c. Save the file.

## Schedule the Data Load Process

If you install the wInsight Analytics Module and you want to load data for all projects automatically on a set schedule, use the Task Scheduler in Windows to set up the corresponding scheduled task manually for the **Load\_wInsight\_Data.bat** file.

### Set Up a Scheduled Task

If you wish to see the batch file run, select the **Run only when user is logged on** option on the General tab.

#### To set up the scheduled task:

1. Click **Control Panel » Administrative Tools** and double-click **Task Scheduler » Task Scheduler Library**.
2. On the Task Scheduler dialog box, create a scheduled task by clicking **Actions » Create a Task**.
3. On the Create Task dialog box, enter **DeltekwInsightAnalyticsReload** in the **Name** field on the General tab.
4. On the Actions tab, click **New** to create a Start a program action.
5. In the **Program/script** field, enter the path and file name of the Load\_wInsight\_Data.bat file. For example, **C:\ProgramData\Deltek\Analytics\admin\Load\_wInsight\_Data.bat**.
6. In the **Start in** (optional) field, enter the complete path to the folder containing the .bat file (for example, **C:\ProgramData\Deltek\Analytics\admin**), and click **OK**.
7. On the Triggers tab, click **New** and set the schedule for the task. Make sure the **Enabled** checkbox is selected.
8. Click **OK**.
9. Click **OK** again.

## Load Data from the QlikView AccessPoint

wInsight Analytics allows you to perform loading data for of all projects or the selected project directly from the wInsight Analytics Module via QlikView AccessPoint. You can only run this load data process if you have appropriate rights. In this method, you do not need access to the server or a QlikView Standalone installation. Before loading all projects the first time, however, make sure the configuration settings have been completed and saved.

**Important:** If you are using an Access database, make sure that the database and wInsight Analytics Module are installed on the same server.

If you decide to run the first full data load from QlikView AccessPoint and not from the server, you need to run the **SetWebServicesURL.bat** file after the QlikView for Windows has been licensed so that when **wInsight\_Analytics.qvw** is opened for the first time in QlikView AccessPoint, the Project Load page has the Web services URL already set.

**Note:** A Cookie Settings dialog box displays the first time you access the wInsight Analytics Module via QlikView AccessPoint, explaining that necessary authentication cookies are stored temporarily and either deleted when the browser closes or retained for future sessions, depending on your browser settings. Click OK to continue using wInsight Analytics Module without interruption.

Cookie deletion and retention depend on how your browser is configured. If your browser is set to clear cookies when it closes, or if you switch to a different browser and access the wInsight Analytics Module (via QlikView AccessPoint) for the first time, the Cookie Settings dialog box displays again.

## Project Load Tab in wInsight Analytics – Single Project

You can only use the Project Load tab if you have appropriate rights, which your administrator sets in the PPM Administrator or EPM SA.

**Attention:** For more information, see the [Deltek PPM Administrator Online Help](#) or [Deltek EPM Security Administrator Online Help](#).

To access this tab, in QlikView for Windows, open wInsight\_Analytics.qvw and click **Project Load**.

## Run Data Load for All Projects from QlikView AccessPoint

Use this procedure to run data load for all projects directly from the wInsight Analytics database into the wInsight Analytics - Single Project. You can also use this procedure to load DCMA EVAS metrics from Acumen for all projects.

**Note:** Selecting this method is the same as clicking the **Run Data Load Batch File** button on the wlnsight Analytics Configuration tab of wlnsight\_Analytics.Config.qvw from the server.

**To run data load for all projects from QlikView AccessPoint:**

1. On the Master Dashboard tab, select a contract in the **Contract** list.
2. On the Project Load tab, select the **Load All Projects**.
3. If you are loading all projects the first time, enter the Web Service URL, which you set up during the wlnsight Analytics Module installation, and click **Connect**.
4. Review the values or select the appropriate values from the drop-down lists or options to define the data that you need to load.

| Drop-Down List/Option                | Description   |
|--------------------------------------|---|
| <b>wlnsight Database</b>             | Select the type of database where wlnsight Analytics data is stored.  |
| <b>Current Period</b>                | Select the latest period you want to load data for.   |
| <b>Historical Data Load</b>          | Select the number of past monthly periods for which you want to load data.  |
| <b>Forecast Data Load</b>            | Select the number of past periods from which you want to load future period forecast and budget data.   |
| <b>Work Package Control Account</b>  | Use this table to indicate which element types are at either the control account level or the work package level.   |
| <b>Unit Used as Element of Cost</b>  | Use this table to identify units that wlnsight Analytics should consider elements of cost and define the corresponding unit of measure (Dollars, Hours, or EQP) for each EOC entry. |
| <b>Apply Security</b>                | Select this option to apply the security set up in PPM Administrator or EPM SA to the wlnsight Analytics Module and load the security information into the data model.              |
| <b>WBS OBS Link</b>                  | Select this option if you want to display the WBS OBS View analytics in wlnsight Analytics – Multi-Project.   |
| <b># of Levels of WBS to Support</b> | Select the amount of detail that is loaded into the wlnsight Analytics Module if your wlnsight database is very large.  |

| Drop-Down List/Option                | Description   |
|--------------------------------------|---|
| <b>Update from wInsight Database</b> | Click this button to import data from the wInsight Analytics database that you need to specify configuration settings (for example, the list of units).   |
| <b>Load Metrics</b>                  | Select this option to load metrics for all projects. It is the same as running the <b>Load_wInsight_data_with_Acumen.bat</b> file found in the <b>C:\ProgramData\Deltek\Analytics\admin</b> folder.       |
| <b>Delete QVDs</b>                   | Select this option to delete existing QVD files before performing a full data load to prevent any potential errors. If this is your first time to run a full load, you do not need to select this option. |

5. Click **Save Settings** to save the current configuration settings before you run the data load process.
6. When you are done, click the **Run Data Load** button. You can view the status of the load process in the **Data Load Status** field below.

## Run Data Load for the Selected Project from QlikView AccessPoint

Use this procedure to run data load for the selected project directly from the wInsight Analytics database into the wInsight Analytics - Single Project. The **Load Selected Project** option, however, only becomes enabled after initially running **Load All Projects**.

**Note:** Selecting this method is the same as clicking the **Run Data Load By Project Batch File** button on the **By Project** tab of **wInsight\_Analytics.Config.qvw** from the server.

### To run data load from QlikView AccessPoint:

1. On the Master Dashboard tab, select a contract in the **Contract** list.
2. On the Project Load tab, select the **Load Selected Project** option.
3. Review the values or select the appropriate values from the drop-down lists or options to define the data that you need to load.

| Drop-Down List/Option       | Description  |
|-----------------------------|--|
| <b>Current Period</b>       | Select the latest period you want to load data for.                        |
| <b>Historical Data Load</b> | Select the number of past monthly periods for which you want to load data. |

| Drop-Down List/Option     | Description   |
|---------------------------|---|
| <b>Forecast Data Load</b> | Select the number of past periods from which you want to load future period forecast and budget data. |

- When you are done, click **Run Data Load**. You can view the status of the load process in the **Data Load Status** field below.

### Permanent Exclude Projects from the Data Load

If your core wInsight Analytics database includes projects for which you never want to load data into the wInsight Analytics Module data model, you can set them up so that they are always excluded.

For example, some firms set up projects in wInsight Analytics so that they can track performance for both weekly and monthly periods. In the wInsight Analytics Module, however, they are only interested in the monthly data.

In wInsight Analytics Administrator 7.0.1, an **AnalyticsLoad** column was added to the Contracts table. The value in **AnalyticsLoad** for a contract controls whether it is eligible to be included in the data load process. By default, that column contains **Y** (Yes) for all contracts.

If you want to exclude a project from the data load process, set **AnalyticsLoad** to **N** for that contract in wInsight Analytics Administrator. Alternatively, you can use the database query tools for your core wInsight Analytics database to change the value of **AnalyticsLoad** to **N** for that contract in the ColumnN table.

# Security for the wInsight Analytics Module

The wInsight Analytics Module uses security information in PPM Administrator or EPM SA to determine who can use the module and which contracts they have access to. The EPM SA tool is installed when you install wInsight Analytics Administrator.

## Enable Security

Security in the wInsight Analytics Module is based on security set up in PPM Administrator or EPM SA. To enable security, select **Windows** in the **Authentication Mode field** in your security tool. This option requires users to use Windows Authentication when logging on to the application, which is the supported authentication by wInsight Analytics Module.

**Attention:** For more information, see the [Deltek PPM Administrator Online Help](#) or [Deltek EPM Security Administrator Online Help](#).

After enabling security in PPM Administrator or EPM SA, run the data load process in wInsight Analytics Module.

**Attention:** For more information, see the [Data Load Overview](#) section.

## Setting Up Users

If security is enabled for the wInsight Analytics Module, the data load process loads all wInsight Analytics users who are set up for Windows authentication, whether those users are domain users or are set up for Windows authentication on the wInsight Analytics server. The wInsight Analytics Module does not support access for users who are not set up for Windows authentication.

To add a new module user, set that person up in wInsight Analytics as a Windows authentication user, and give them the appropriate access to contracts. Then run the data load process to add their access information to the analytics data model.

## User Authentication

When a person runs the wInsight Analytics Module, Windows authentication determines whether they gain access to the module.

## Access to Contracts

A wInsight Analytics user is granted access to contracts either individually or through a user group. The data load process loads that access information into the analytics data model. In most cases, a user automatically has access to data for the same set of contracts in the wInsight Analytics Module as he or she does in wInsight Analytics.

## Users Created During Installation

The two administrative users created during the installation process (DeltekAnalytics and DelteAnalyticsCW) are not automatically users within the wInsight Analytics database and have no automatic access to projects within the database. If security is turned on in wInsight Analytics then a person logged in using one of these user names would not see any projects after loading data. These users can either be added to the wInsight Analytics database or wInsight Analytics security can be turned off in PPM Administrator or EPM SA while the initial data load is run and checked before being turned back on for production purposes.

## Security for wInsight Analytics Configuration

wInsight Analytics provides no internal security for the configuration applications and related administrative files. Be sure that only the appropriate people have access to the network or standalone computer folders in which you installed wInsight Analytics.

If you are loading data using wInsight\_Analytics\_Config.qvw, the **Apply Security** setting in the **Security** section on the wInsight Analytics Configuration tab indicates whether you want to use wInsight Analytics Module security and save the security status (whether you set **Apply Security** to **Yes**), which wInsight\_Analytics.qvw uses in the authentication process.

# wInsight Web Services

wInsight Analytics Web services are the underlying mechanism required to support a number of wInsight Analytics capabilities including Narrative entry and the displaying of Gantt charts, wInsight Analytics reports, and wInsight Analytics charts.

## wInsight Analytics Web Services Overview

wInsight Analytics Web Services communicate over the SOAP (Simple Object Access Protocol) Protocol. The interface to the wInsight Analytics Web Services are described by its WSDL (Web Service Description Language), which is a XML document that specifies the location and operations the service exposes. The wInsight Analytics Web Services are published with the UDDI (Universal Discovery Description and Integration) protocol which enables applications to look up and find the wInsight Analytics Web Services.

## Enable Required .NET Framework Features

Before running the wInsight Analytics Module web services, make sure the following .NET features are enabled on your Windows Server. Enabling these Windows Features is a separate and required step from installing .Net Framework 4.8.

### Enable .NET Framework 3.5

.NET 3.5 must be explicitly turned on as a Windows Feature because it installs a separate runtime (CLR 2.0) that is not included by default. QlikView Server and its components — including QlikView Management Console (QMC), AccessPoint, and QlikView services — were built on this runtime and will not load without it.

### Enable .NET Framework 4.7 Features

Installing the .NET 4.8 runtime and enabling the .NET Framework 4.7 Windows Feature are two different things. The .NET Framework 4.7 Features entry in Add Roles and Features controls critical IIS integration components — including ASP.NET 4.7 and WCF HTTP Activation — that are required for .NET 4.x services to run correctly. Installing .NET 4.8 upgrades the runtime but does not automatically enable these feature entries, so they must be turned on manually.

### To enable these features:

1. On your Windows Server, open Server Manager.
2. In Server Manager, click **Manage**, then select **Add Roles and Features**.
3. Select **Role-based or feature-based installation** and click **Next**.
4. Select your server from the server pool and click **Next**. Skip the **Server Roles** screen by clicking **Next** again.


5. On the **Features** screen, locate and expand the following:
  - **.NET Framework 3.5** (includes .NET 2.0 and 3.0)
  - **.NET Framework 4.7 Features** (including **ASP.NET 4.7** and **WCF Services » HTTP Activation**)
6. Click **Next** through the remaining screens, then click **Install**. Wait for the installation to complete.
7. Once the installation is complete, click **Close**.

## Add the wInsight Analytics Web Services Test Tab

The Web Services Test tab does not display in wInsight Analytics Module by default. You need to add it to the view using QlikView for Windows.

**Note:** The Web service must be deployed on the same machine with the same port as QlikView. If a client wants to deploy the Web service to a different port on the same machine or a different machine, the client's IT team will be responsible for configuring the Web server with the necessary IIS settings.

### To add the Web Services Test tab to the view:

1. In QlikView for Windows, double-click wInsight\_Analytics.qvw. This file is located in the **<installation location>\Final** folder.
2. On the View menu, verify that WebView is turned on.
3. Click  to create the new sheet.
4. On the new sheet, right-click anywhere and then select New Sheet Object.
5. In the Extension Objects list, select wInsightWebServicesTest and drag it onto the sheet.

# Narrative Input Template

wInsight Analytics Module allows you to create custom narrative input templates that it can use for all wInsight Analytics Module contracts.

## Custom Narrative Input Template Overview

wInsight Analytics Module uses several input templates for the narrative that each template supports. These input templates are stored in the **<installation location> \bin\** folder.

| File Name                 | Description               |
|---------------------------|---------------------------|
| Eacnarr_template.htm      | Element EAC Narrative     |
| Fmt5_template.htm         | Format 5 Narrative        |
| Tripwirenarr_template.htm | Program Tripwires Summary |
| Sow_template.htm          | Scope of Work             |
| Usernarr_template.htm     | User Narrative            |

## Create a Custom Narrative Input Template

Use this procedure to create a custom narrative input template that is used for all wInsight Analytics Module contracts.

### To create a custom narrative input template:

1. Use an HTML editor, such as Microsoft FrontPage, to edit the appropriate template.
2. Add the appropriate fields to the desired narrative input template. To determine the wInsight Analytics field name, proceed to step 3. Otherwise, skip the next step and proceed to step 4.
3. On the wInsight Desktop menu, click **Options » Column » Insert**. In the Column Definition dialog box, review the items in the drop-down list, and then return to the HTML editor.
4. Save your changes.
5. Close the HTML editor.

## Add a wInsight Analytics Contract Name to a Template Name

wInsight Analytics Module supports contract-specific narrative input templates. This is accomplished by adding the wInsight Analytics contract name to the beginning of a template name (for example, MOH-2\_fmt5\_template.htm). The added contract-specific narrative input template must be stored in the wInsight Analytics bin folder, which default location is **<installation location> \bin\**.

**To add the contract name to the beginning of a template name:**

1. Make a copy of the desired template identified above.
2. Modify it by following the steps in the Create a Narrative Input Template section.
3. Add the contract name to the beginning of the filename, followed by an underscore. For example, for the MOH-2 contract the template name would be MOH-2\_FMT5\_TEMPLATE.HTM. If there are spaces in the contract name, there should be spaces in the input template name.

## Collaboration

If you have a server installation of wInsight Analytics, you can take advantage of two powerful collaboration tools: annotations and session collaboration.

### Notes and Session Collaboration Overview

If you have a server installation of wInsight Analytics, analytics users can annotate the charts and tables, and others can view those annotations. And one analytics user can share his or her wInsight Analytics session in real time with one or more other users.

These features are not available if you have a standalone installation of wInsight Analytics. Notes Feature

If you enable the Notes feature, wInsight Analytics users can attach their own notes to charts, tables, or lists. They can also take a snapshot of the analytics and save it along with the note to provide context. Other users with access to the analytics can display those notes, use the snapshot to view the analytics as they appeared when the note was saved, and add their comments to the notes, including their own snapshot of the data.

The snapshot option for notes is similar in some ways to the bookmark feature. However, while the bookmark is intended to provide a way to save a view that you want to return to on a regular basis, the snapshot provides a quick way to capture a view temporarily to enhance a specific discussion of the data and then be discarded.

### Session Collaboration Feature

If you enable the Session Collaboration feature, users connected to the wInsight Analytics server and using the Full Browser client can invite others to share their wInsight Analytics session for collaboration purposes. Any of those sharing the session can interact with the analytics, and all others in the session immediately see the results of that interaction on their laptop or mobile device. Those invited to share a session must have access to the wInsight Analytics server but need not be licensed to use wInsight Analytics.

You enable collaboration for each set of analytics individually. For example, you could enable it for wInsight Analytics - Multi-Project but not for wInsight Analytics – Single Project.

**Note:** The Session Collaboration feature is not available to those using the Internet Explorer plugin client.

### Implement the Session Collaboration Feature

Use QlikView Management Console to implement the Session Collaboration feature. If you enable this feature, users connected to the wInsight Analytics server and using the Full Browser client can invite others to share their wInsight Analytics session for collaboration purposes. Any of those sharing the

session can interact with the analytics, and all others in the session immediately see the results of that interaction.

The Session Collaboration feature is not available to those using the Internet Explorer plugin client. You must use the Full Browser client.

### To implement the Session Collaboration feature:

1. Run QlikView Management Console.
2. Click the System tab and the Setup subtab.
3. In the left pane, expand QlikView Servers, and select the wInsight Analytics server.
4. In the right pane, click the Documents tab.
5. Select **Allow Session Collaboration**.
6. Click **Apply**.
7. At the top of the QlikView Management Console, click the Documents tab and the User Documents subtab.
8. In the left pane, select the first set of analytics for which you want to enable collaboration.
9. In the right pane, click the Server tab and the Availability subtab.
10. Select **Session Collaboration**.
11. Click **Apply**.
12. To enable collaboration for more sets of analytics, select each one and repeat steps 10 –11.

### Implement the Notes Feature

Use QlikView Management Console to implement the Notes feature. If you enable the Notes feature, wInsight Analytics users can attach their own notes to charts, tables, or lists. They can also take a snapshot of the analytics and save it along with the note to provide context.

### To implement the Notes feature, complete the following steps:

1. Run QlikView Management Console.
2. Click the System tab and the Setup subtab.
3. In the left pane, expand QlikView Servers, and select the wInsight Analytics server.
4. In the right pane, click the Documents tab.
5. Select **Allow Server Annotations**.
6. Click **Apply**.

## Additional Administration Topics and Notes

This section contains additional topics and miscellaneous notes of interest to a system administrator.

### Lease a License from the Server for QlikView for Windows

If you install the wInsight Analytics Module on a server and you need to set up additional users with access to the analytics from QlikView for Windows, each of those users must lease a license from the server.

Note also that if you do not open any .QVW files on the server using QlikView for Windows for 30 days, your leased server license expires. The next time you try to open a .QVW file, you receive a message indicating that you are using a Personal Edition of QlikView. If that happens, you need to cancel the message and lease a license again using the procedure below.

#### To lease a QlikView license from the server:

1. Run QlikView for Windows.
2. On the **File** menu, click **Open in Server**.
3. In the list at the bottom of the Connect to Server dialog box, select any .QVW file.
4. Click **Open**. This leases a license from the server so you can open .QVW files on the server using QlikView for Windows.

### Administration Notes

The system administrator should read these notes during product implementation to determine which apply to his or her system.

### Make the wInsight Analytics Module Available to Network Users

After you install and configure wInsight Analytics on a server, you have several options for making the analytics available to those who will use them. The following are some possibilities:

- Provide each user with the link to the wInsight Analytics site: **http://<server name>/QlikView**. From there, they can open the analytics. You can email the link to them, or you can push it to their local computers as a browser bookmark.
- Copy the wInsight Analytics link that the installation creates on the Start menu of the server (**Start » All Programs » Deltek wInsight Analytics » wInsight Analytics**) to the users' Windows desktops.

The configuration application and other wInsight Analytics administrative tools are always run locally on the wInsight Analytics server, either through direct access to the server or using a Windows Remote Desktop Connection.

## Make wlnsight Analytics Module Server a Trusted Site

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

## Pop-Up Blockers and wlnsight Analytics Help

The wlnsight Analytics Module help opens in a separate browser window. If a pop-up blocker is active on a user's computer, the help window may not open. We recommend that all users who use pop-up blockers change the settings for the pop-up blocker to allow pop-ups from the wlnsight Analytics server.

## Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using wInsight Analytics Module, 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 Module Installation Guide        | This guide contains the instructions for installing the wInsight Analytics Module as a standalone application or as a server-based application.  |
| Deltek wInsight Analytics Administrator Installation Guide | This guide describes how to install and configure the wInsight Analytics Administrator.  |
| Deltek wInsight Analytics Product Overview                 | This guide briefly outlines the wInsight Analytics product architecture and describes each of the component modules. The descriptions include guidelines to help you determine which of the modules your firm or organization needs. |