Deltek wInsight® 6.5.1

Installation and Conversion Guide

August 12, 2013

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Installation Overview

Welcome to wInsight 6.5.1. This installation and conversion guide will help you successfully install wInsight 6.5.1 on your system and make it work efficiently according to your organization's business structure.

Installation Prerequisites

You must have administrator rights to install and uninstall wInsight 6.5.1. If you are not sure whether you have administrator rights for a machine, check with your system administrator.

To install and use wInsight, you need the following items:

- Windows Vista; or Windows XP Professional with SP2; or Windows 7.
- At least 80MB of memory.
- For best performance, Deltek recommends that Internet Explorer 7/8 or Firefox 3.0/3.5 be installed for viewing and printing of reports. It need not be your default browser.
- wInsight supports Oracle® 10g/11g, SQL Server™ 2005/2008, or Access 2007 databases.
- 38MB of free hard disk space for wInsight and the sample database. Space requirements for each installable component and for the system files are as follows:
    - Program Files – 16MB
    - Utility Files – 8342KB
    - Help Files – 4600KB
    - Sample Database – 3457KB
    - Automation Samples – 37KB
- In addition, you may want to purchase wInsight Administrator, which provides contract maintenance, import/ export, data recalculation, and database re-indexing functions.

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, complete the following steps:

1. On the Reader toolbar, click **Comment** at 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.

> 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.

If You Need Assistance

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

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

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

Customer Care Connect Site

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

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

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

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

Access Customer Care Connect

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

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

	If you do not have a username and password for the Customer Care Connect site, contact your firm's wInsight Administrator. If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

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

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

Downloading Deltek Products using Deltek Software Manager

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

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

Accessing DSM Directly

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

1. Launch Deltek Software Manager by taking one of the following actions:
    - Click here.
    - On your desktop, click **Start » All Programs » Deltek Software Manager**.

2. In the Deltek Software Manager logon dialog box, enter your Deltek Customer Care **User ID** and **Password**, and click **Logon**.

3. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.

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

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

    > You can change this folder anytime on the Settings dialog box.

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

    > If you clicked the link in step 1 to access DSM, the application automatically selects wInsight for you.

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

7. In the table, select the check box that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.

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

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

Accessing DSM from within the Customer Care Connect Site

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

1. In your Web browser, go to http://support.deltek.com.

2. Enter your Customer Care Connect **Username** and **Password**, and click **Log In.**

3. When the Customer Care Connect site displays, click the Product Downloads tab.

   You are automatically logged into Deltek Software Manager.

4. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.

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

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

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

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

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

8. In the table, select the check box that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.

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

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

DSM Documentation and Troubleshooting

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

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

Installing wInsight

Use the following procedures to install wInsight 6.5.1. First-time installation options are different from re-installation options.
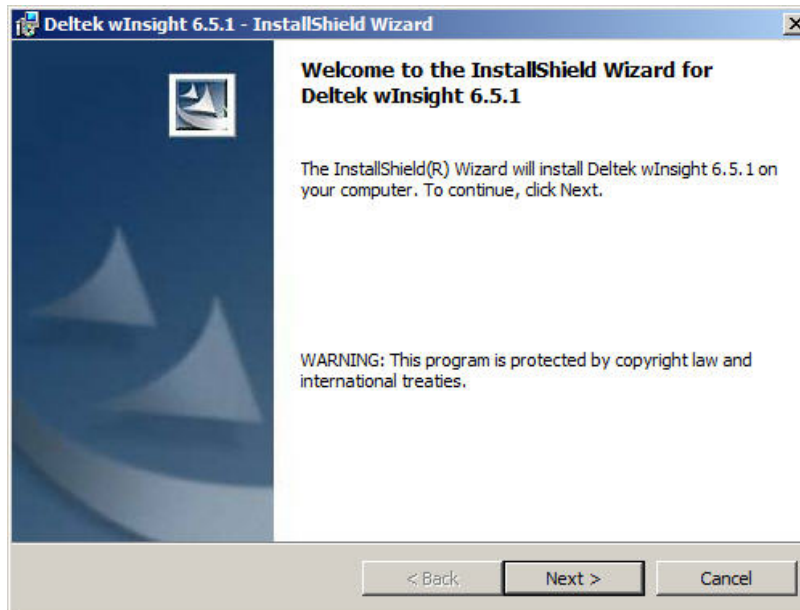
> If you are re-installing wInsight, see Modifying, Repairing, and Uninstalling wInsight.

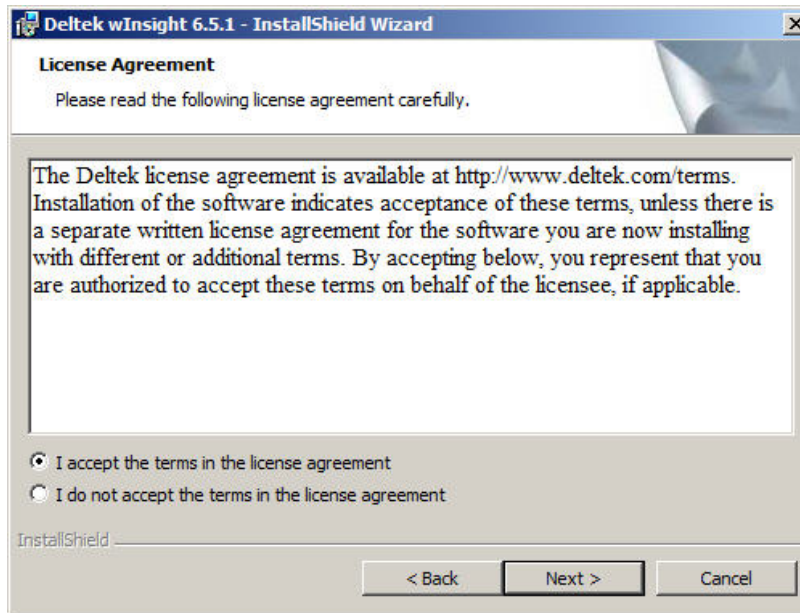If you are upgrading from an earlier version of wInsight:

- Make sure you have recently backed up your wInsight data, especially if it is stored in the Sample data source, which uses **Sample.mdb**; the default directory is **C:\Program Files\Deltek\wInsight 6.5\data**. This database is installed by default and might overwrite the existing one, thereby deleting your data.
- You should back up your custom **wInsight 6.5 Views**, **Filters**, and **Charts** using the **File » Export Custom Items** command. This command creates a **WSCUSTOM.XML** file. After installation, use **File » Import Custom Items** to restore the custom items.

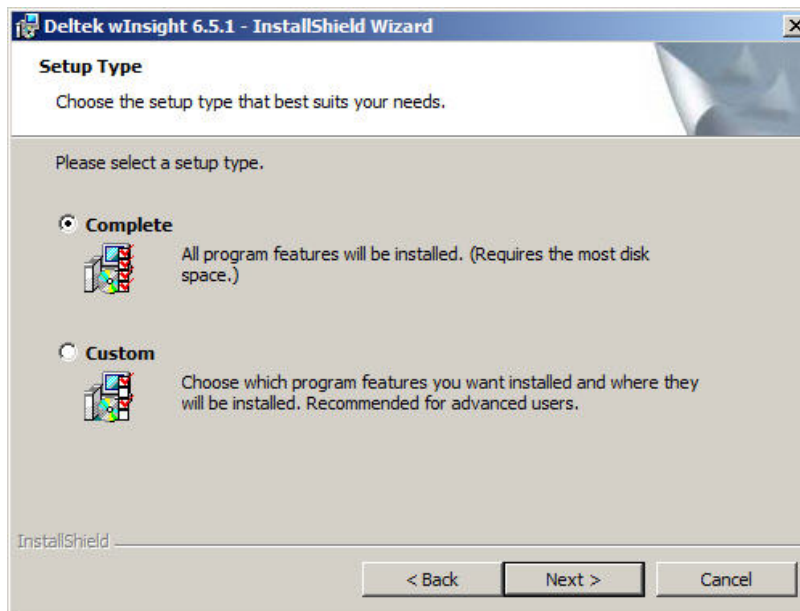**To install wInsight, complete the following steps:**

1. Download the wInsight software, using the instructions in the Downloading Deltek Products using Deltek Software Manager section.
2. Go to the location where you saved the wInsight installer.
3. Double-click **DeltekwInsight651.exe** to launch the Deltek wInsight 6.5.1 InstallShield Wizard.
4. On the Welcome page, click the **Next** button.

5. On the License Agreement page, select the **I accept the terms in the license agreement** option and click the **Next** button.
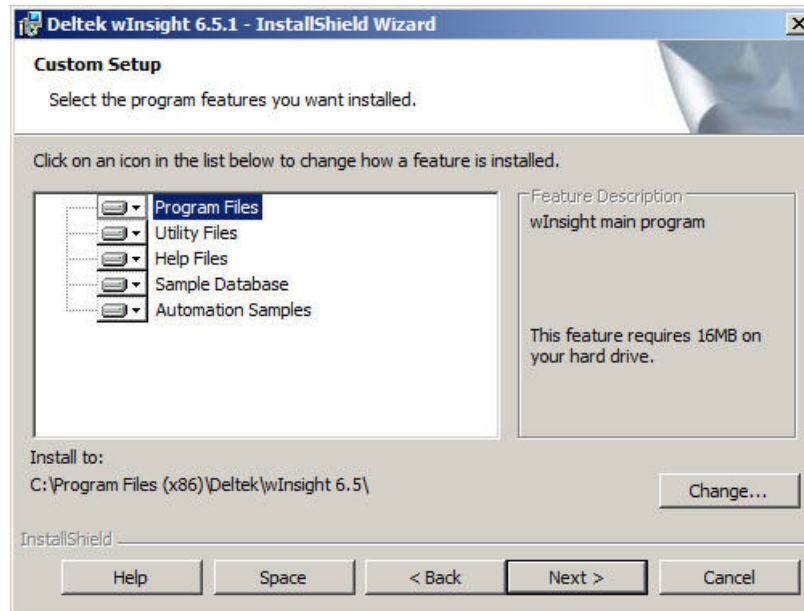
6. On the Setup Type page, select one of the following options and then click the **Next** button:
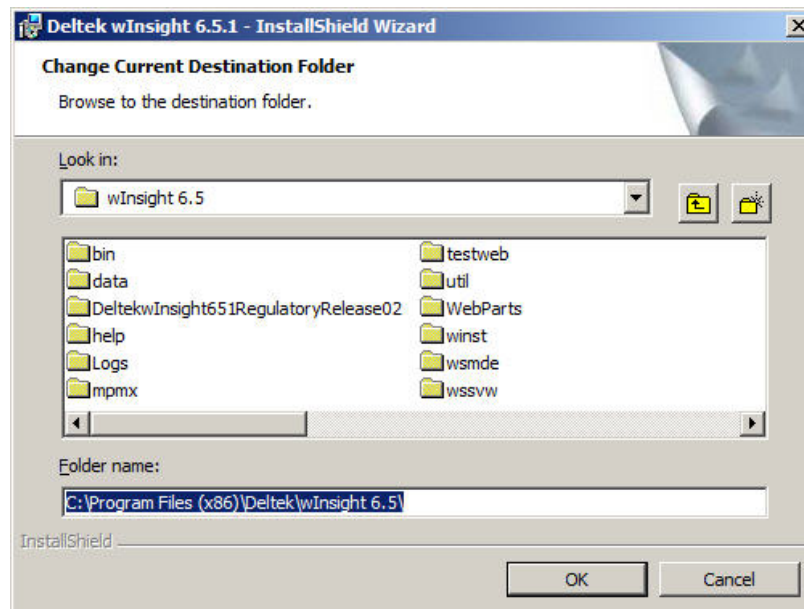

- **Complete —** Installs all wInsight components. wInsight will be installed in the **C:\Program Files\Deltek\wInsight 6.5** directory by default. Skip to step 7.

- **Custom —** Installs only certain wInsight components. This option also allows you to change the location where wInsight is to be installed.

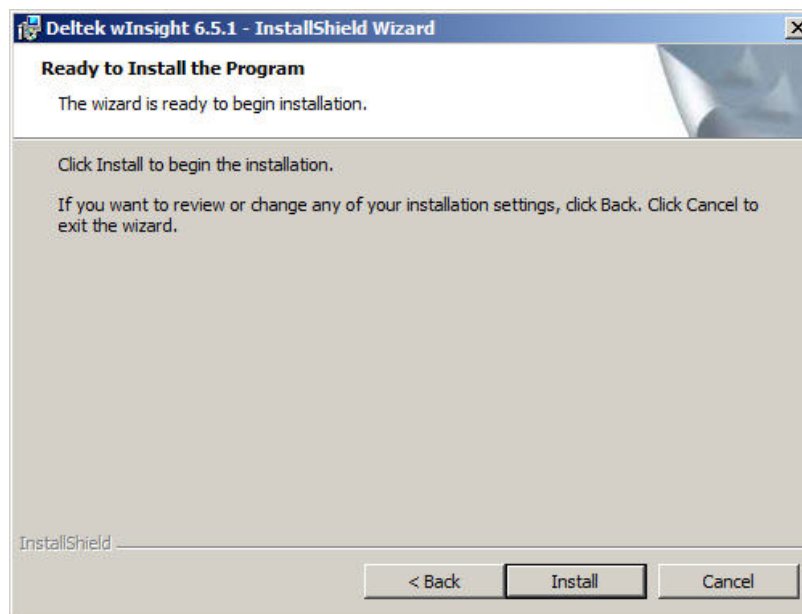If you selected the **Custom** option, the Custom Setup page displays.

Click the **Change** button if you want to change the directory where wInsight is to be installed and then click **OK**. The default directory is **C:\Program Files\Deltek\wInsight 6.5**.
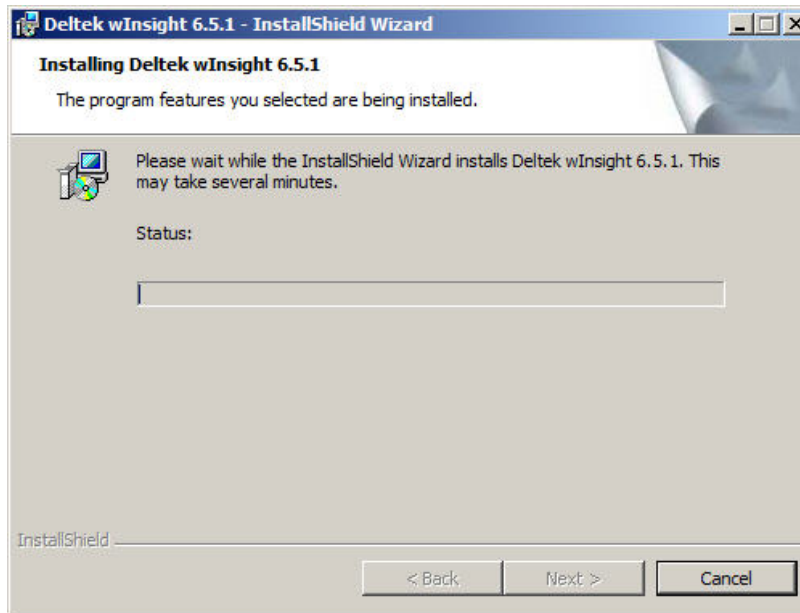

7. Back to the Custom Setup page, click one of the icons to change the features installed for any of the following components:

- **Program Files** — Installs the wInsight 6.5.1 program files in the destination directory and updates essential Windows system files. The default directory is **C:\Program Files\Deltek\wInsight 6.5\winst**.

- **Utility Files** — Installs the wInsight 6.5.1 Convert utility (Convert.exe), which converts earlier wInsight contracts into a wInsight 6.5.1 database, and other utilities. The default directory is **C:\Program Files\Deltek\wInsight 6.5\util**.

- **Help Files** — Installs online help for wInsight 6.5.1. The default directory is **C:\Program Files\Deltek\wInsight 6.5\help**.

- **Sample Database** — Installs the sample MOH-2 contract, contained in the sample.mdb database file. The default directory is **C:\Program Files\Deltek\wInsight 6.5\data**.

- **Automation Samples** — This option installs a number of Excel spreadsheets containing various macros illustrating wInsight's Automation interface. The default folder is **C:\Program Files\Deltek\wInsight 6.5\util**.

8. Click the **Next** button when you finish selecting the components to install and/or identifying the installation directory. The Ready to Install the Program page informs you that you are ready to start the installation.
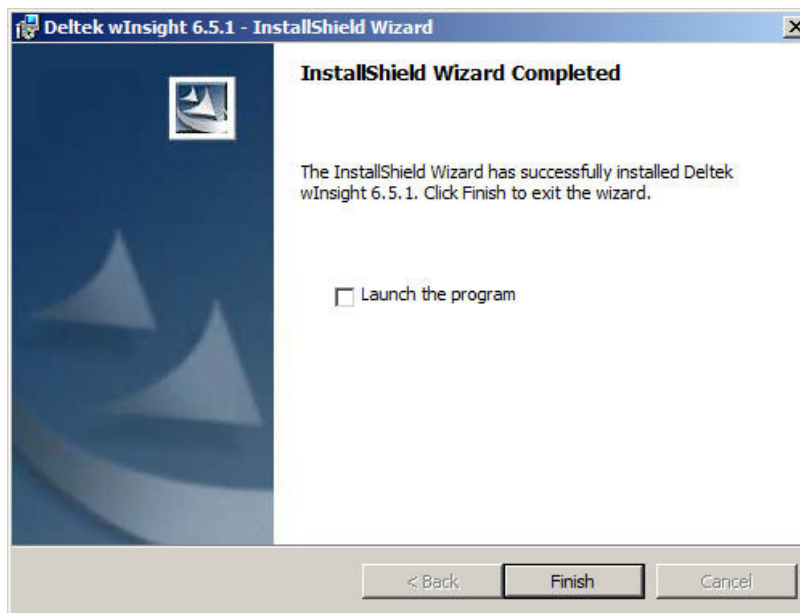

9. Click the **Install** button to start the installation process.The Installing Deltek wInsight 6.5.1 page displays the installation progress.

After successfully installing wInsight, the InstallShield Wizard Completed page displays.

10. Click the **Finish** button to exit the InstallShield Wizard. You can select the check box to launch the application after installation is completed.

> The wInsight 6.5.1 database has changed. You must convert your database to the 6.5.1 format before you can access data with wInsight 6.5.1. For more information, see Conversion Overview.

If you are upgrading from an earlier version of wInsight, you may need to restore custom views, filters, and charts. To do this, click **File » Import Custom Items**.

Upgrading from wInsight 6.5

Installing wInsight 6.5.1 automatically removes your wInsight 6.5 installation.

You can also uninstall wInsight 6.5 by using any of the following methods:

- Use Windows' Programs and Features to remove wInsight 6.5.

- Run the wInsight 6.5 installer, select the **Remove** option on the Program Maintenance page, and click the **Next** button to uninstall the program.

After uninstalling wInsight 6.5, run the wInsight 6.5.1 installer to install wInsight 6.5.1.

Using the blank651.mdb Database File

Whether or not you installed the sample database, wInsight installs a **blank651.mdb** database file (the default directory is **C:\Program Files\Deltek\wInsight 6.5\data\Access**. This database file contains no contracts. Use it when you want to start a new group of contracts, without having to delete existing ones.

Use wInsight Administrator to add contracts to a new database. For more information on setting up a new database and building a data source connection to it, see the *Maintaining Databases* section of the online help.

Customizing Functions at Startup

You can customize certain wInsight functions at startup.

> For information about these options, see Advanced Set-Up Options.

Installing wInsight on a Client/Server Setup

Installation Procedures

You can install wInsight 6.5.1 files (.exe, .dll, .htm) and other related files on an application server and then run from a client PC. The software executes on the client PCs even though all wInsight files are stored on the server.

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

Use the following procedure to set up wInsight to run from an application server. This setup requires you to install wInsight only on the application server and not on the client PCs.

To perform a manual installation, complete the following steps:

1. Install wInsight on the application server (see Installing wInsight).

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

2. On the client PC, create a mapped drive to the wInsight folder (**C:\Program Files\Deltek\wInsight 6.5**) on the application server.

    To map a network drive:

    a. Open **My Computer**.

    b. On the **Tools** menu, click **Map Network Drive**. The Map Network Drive page displays.

    c. In the **Drive** drop-down list, enter or select the drive letter to map the shared resource.

    d. In the **Folder** drop-down list, enter the application server name and the share name, for example, **\\server name\share name**. You can also click **Browse** to locate the resource.

    e. Click **Finish**.

3. Download **DeltekwInsightClientRequirements.exe** from https://support.deltek.com and run on the client PC.

4. From the client PC, locate and run the **DoRegAll.bat** file in the **C:\Program Files\Deltek\wInsight 6.5\bin** folder on the application server.

5.   From the client PC, locate the **Winst.exe** file in the **C:\Program Files\Deltek\wInsight 6.5\winst** folder on the application server and create a shortcut on the client PC.

Installation Issues

Installing wInsight on an application server on a Local Area Network (LAN) brings up a number of issues:

- Regardless of where the application files are installed, the wInsight database can be located on a file server accessing a shared MS Access .MDB file or on a database server running Oracle or SQL Server. An MS Access .MDB file can even be accessed if it resides on the client PC.

- Users do not need any write privileges on the application server, unless they need to create a data source. In that case, they need to be able to write to the WSDATA.INI file stored in the BIN folder (the default folder is **C:\Program Files\Deltek\wInsight 6.5\bin**). However, users do need Read, Write, Create, and Delete privileges to the directory storing the wInsight MS Access (.MDB) database.

- A metering software that provides the ability to protect the WSMDE.exe file is required. This commercially available software protects the file from being used at the same time by more than the authorized number of users, so as not to violate your license agreement. Windows NT also provides the ability to restrict the number of concurrent users given access to the executable file.

  For more information, please consult your NT network administrator.
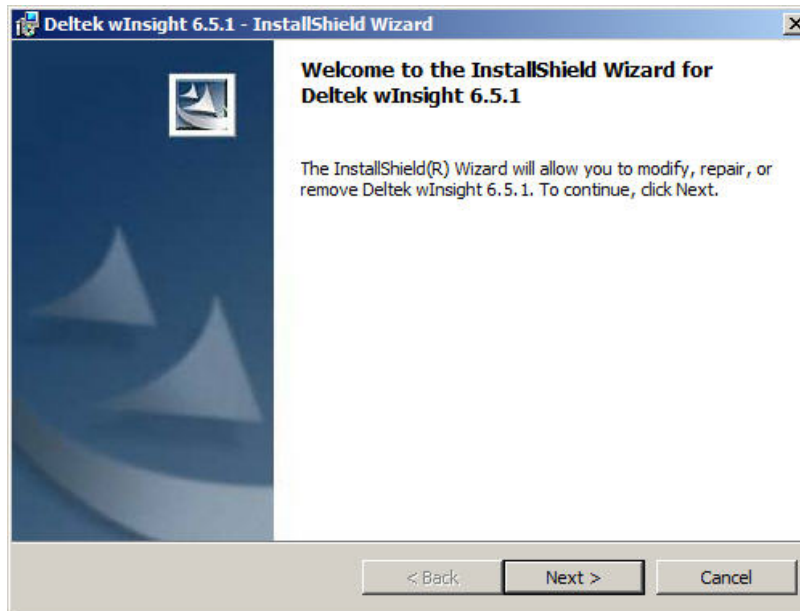
Installation Notes

- The Microsoft Windows Installer can perform an administrative installation of an application or product to a network for use by a workgroup. Administrators can run an administrative installation from the command line by using the "/a" command line option. Then, users can install the product from the network to run the application. Users can choose to "run-from-source" and the installer will use most of the product's files directly from the network.
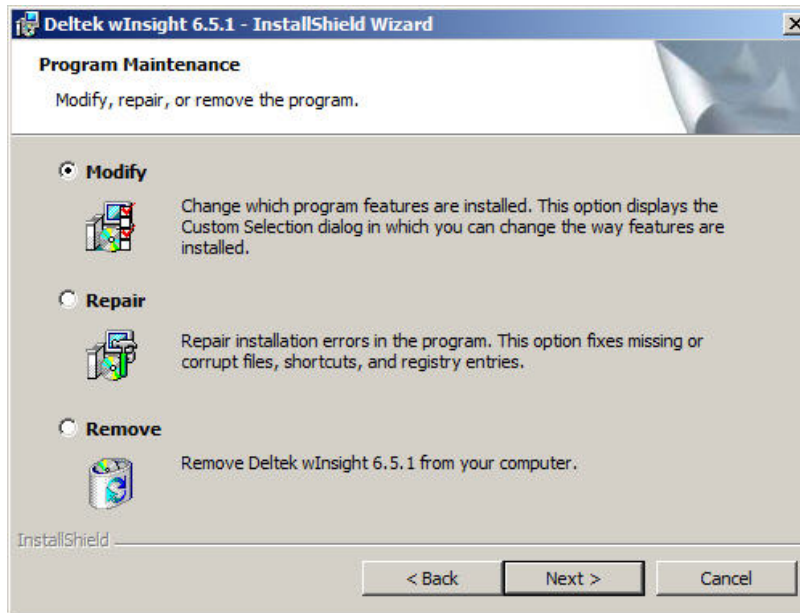
Modifying, Repairing, or Uninstalling wInsight

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

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

1. Go to the location where you saved the wInsight installer.

2. Double-click **DeltekwInsight651.exe** to launch the Deltek wInsight 6.5.1 InstallShield Wizard.

3. On the Welcome page, click the **Next** button.

4. On the Program Maintenance page, select one of the following options, depending on the task that you want to do:

- **Modify** — Select this option to change your wInsight installation structure. Selecting this option displays the Custom Setup page, except that no **Change** button is available. To change the directory where wInsight is installed, you must first uninstall wInsight, then re-install in a different directory (see Installing wInsight).

- **Repair** — Select this option to repair installation errors by re-installing the wInsight components. Selecting this option displays the Ready to Repair the Program page. Click **Next** to continue repairing wInsight.

- **Remove** — Select this option to uninstall wInsight from your machine. Selecting this option displays the Remove the Program page. Click **Next** to continue uninstalling wInsight.

5. Click **Install** (for Modify or Repair) or **Remove**. The installation or uninstallation progress displays.

6. When the process is completed, click the **Finish** button to exit the InstallShield Wizard.

Advanced Set-Up Options

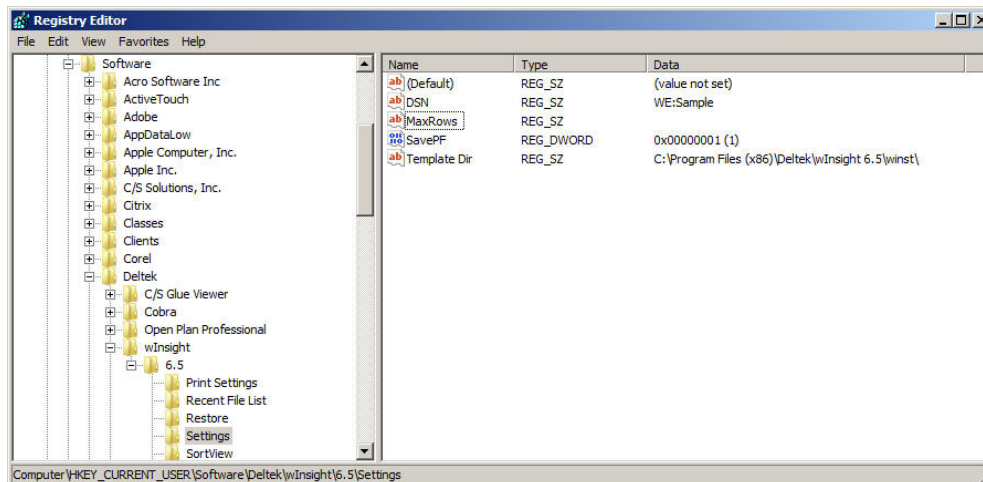## Configuring wInsight to Use Long Element Descriptions

Configuring wInsight to use the **Long Description** field requires two steps:

1. For Sort windows, you must insert the **Long Description** field (LongDesc) into the Sort window or a view that uses the **Long Description** field. For more information, see the *Sort Windows Overview* section of the online help.

2. For charts and reports, you must create a Registry setting (a task which should be performed by someone familiar with the Registry). The following table identifies the Registry setting that controls which description is used.
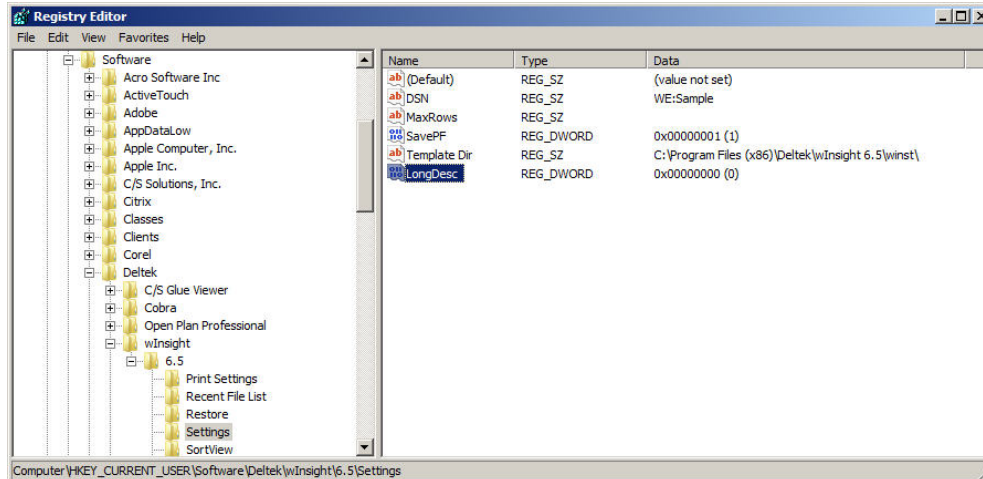
Description Option	Parameter & Settings
15 character description	No Registry Parameter or Setting (default)
50 character description	LongDesc=1

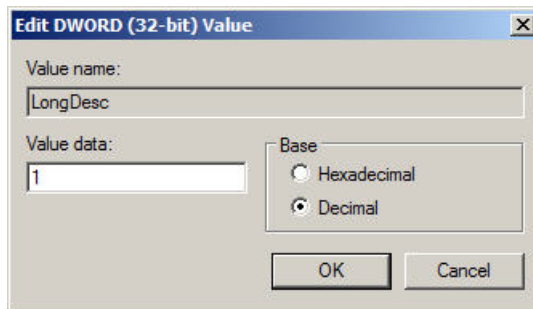**To create a long description registry setting, complete the following steps:**

1. Click **Start » Run** to display the Run dialog box.

2. Enter either **regedit.exe** or **regedt32.exe** and then click the **OK** button to open the Registry Editor.

3. Navigate to the **HKEY_CURRENT_USER\Software\Deltek\wInsight\6.5\Settings** key folder.
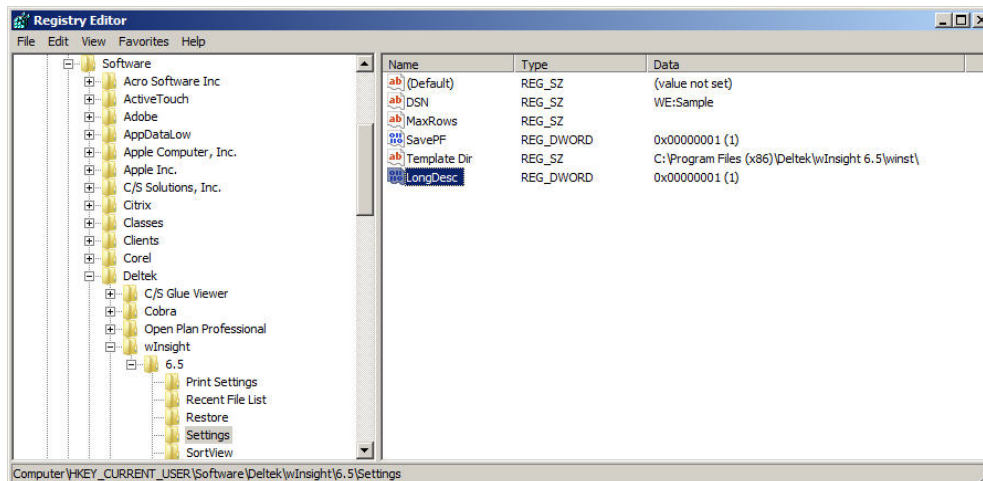

4. Click **Edit » New » DWORD Value**. A **New Value #1** entry is highlighted in the right-hand window of the Registry Editor.

5. Type **LongDesc** and then press **ENTER**. The name **New Value #1** should be replaced with **LongDesc**.

6. Double-click the **LongDesc** item to open the Edit DWORD Value dialog box.

7. Under the **Base** group box, select the **Decimal** option, enter **1** in the **Value Data** field, and click the **OK** button.

A "1" at the end of the string of 0's should appear in the **Data** column on the right side.

8. Click **File » Exit** to close the Registry Editor.

Conversion Overview

The purpose of this chapter is to describe how to populate a 6.5.1 database with your existing 6.5 data, so that you can use wInsight 6.5.1.

Use the instructions in this chapter to:

- Convert 6.5 data to 6.5.1
- Recalculate a contract, to check the results of the conversion
- Back up and restore 6.5 data into a 6.5.1 database

> If you are upgrading from the previous Hot Fix, you do not need to apply any database updates.
>
> If you are upgrading from a different upgrade path (for example, 6.5.1 Regulatory Release 01 and 6.5.1 Regulatory Release 02), refer to the previous Hot Fix ReadMes, which you can download from the **Documents** tab of the specific hot fix in the Deltek Software Manager.

Converting 6.5 Data to 6.5.1

This conversion process modifies your existing 6.5 database and changes it into a 6.5.1 database, It does not copy data from an earlier database to a 6.5.1 database.

> No one should be using the database during the conversion process. Deltek recommends that you back up your wInsight 6.5 contract(s) before performing the conversion.

Overall Process

Each subsequent version of the wInsight 6.x database has changed slightly.

Starting with your current version number, you must convert each wInsight 6.x database sequentially to the next version before converting to 6.5.1. For example, if you are currently running wInsight 6.3, you start by updating the 6.3 database to 6.3.1, then 6.3.1 to 6.4, then 6.4 to 6.5.

The conversion instructions in this section are organized by database type:

- Oracle
- MS SQL Server
- MS Access

Converting an Oracle Database

The update scripts used in this procedure call other provided scripts, which must be in the same folder as the update scripts. The default location is **C:\Program Files\Deltek\wInsight 6.5\data\Oracle**.

To convert an Oracle database, you need:

- wInsight Administrator 6.5.1 installed
- A 6.5 database
- A data source connection to that database

> Backing up and restoring your data is an alternative to converting your 6.x database. For more information, see Backing Up 6.5 and Restoring into 6.5.1.

To convert 6.5 data to 6.5.1 on an Oracle database, have your database administrator take one of the following actions:

- If you are upgrading from the previous Hot Fix, you do not need to apply any database updates.

- If you are upgrading from a different upgrade path (for example, 6.5.1 Regulatory Release 01 and 6.5.1 Regulatory Release 02), refer to the previous Hot Fix ReadMes, which you can download from the **Documents** tab of the specific hot fix in the Deltek Software Manager.

> To create a clean wInsight 6.5.1 Oracle database, run the **build_winst.sql** master script. This script calls the **connect.sql**, **ws651.sql**, **cal.sql**, **cols.sql**, **maint.sql**, **recalcs_glbls.sql**, **cd_reclacs.sql**, **cc_reclacs.sql**, and **security.sql**. All of these scripts must be in the same folder when you run build_winst.sql.

Converting an MS SQL Server Database

No one should be using the database during the conversion process. Deltek recommends that you back up your wInsight 6.5 contract(s) before performing the conversion. The default location for all scripts is **C:\Program Files\Deltek\wInsight 6.5\data\MSSQL**.

> For more information, see *wInsight Administrator Online Help*.

To convert an MS SQL database, you need:

- wInsight Administrator 6.5.1 installed

- A 6.5 database

- A data source connection to that database

> Backing up and restoring your data is an alternative to converting your 6.x database. For more information, see Backing Up 6.5 and Restoring into 6.5.1.

To convert 6.5 data to 6.5.1 on an MS SQL Server database, have your database administrator take one of the following actions:

- If you are upgrading from the previous Hot Fix, you do not need to apply any database updates.

- If you are upgrading from a different upgrade path (for example, 6.5.1 Regulatory Release 01 and 6.5.1 Regulatory Release 02), refer to the previous Hot Fix ReadMes, which you can download from the **Documents** tab of the specific hot fix in the Deltek Software Manager.

> To create a clean wInsight 6.5.1 SQL database, run the **ws651.sql**, **cal.sql**, **cols.sql**, **maint.sql**, and **recalc_procs.sql** scripts.

Converting an MS Access Database

To convert an MS Access database, you need:

- wInsight 6.5.1 or wInsight Administrator 6.5.1 installed
- A 6.5 database
- A data source connection to that database

> Backing up and restoring your data is an alternative to converting your 6.x database. For more information, see Backing Up 6.5 and Restoring into 6.5.1.

To convert 6.5 data to 6.5.1 on an MS Access database, have your database administrator take one of the following actions:

- If you are upgrading from the previous Hot Fix, you do not need to apply any database updates.
- If you are upgrading from a different upgrade path (for example, 6.5.1 Regulatory Release 01 and 6.5.1 Regulatory Release 02), refer to the previous Hot Fix ReadMes, which you can download from the **Documents** tab of the specific hot fix in the Deltek Software Manager.

> To create a clean wInsight 6.5.1 Access database, use **blank651.mdb**.

What's Next?

Now you should recalculate a contract to check that the conversion process completed successfully.

> For more information, see Recalculating a Contract.

Recalculating a Contract

Deltek recommends that you recalculate one of the contracts after the conversion process is complete to check that the data converted successfully.

To recalculate the database, complete the following steps:

1. Start wInsight 6.5.1.

2. Click **File » Select Database** and select the same data source that you used previously.

3. Click the **OK** button.

4. Click **Utilities » Recalculate** to display the Recalculate dialog box.

5. In the **Contract** list, select one of the contracts just converted.

6. In the **Period** list, select **<All Periods>**.

7. Click **Options** to display the Recalculate Options dialog box.

8. Click the **OK** button.

Your data is now ready for use with wInsight 6.5.1 or wInsight Administrator 6.5.1.

Backing Up 6.5 and Restoring into 6.5.1

As an alternative to converting your 6.5 database, you can back up your contracts from your 6.5 database and restore them into a 6.5.1 database.

To back up your database:

1. Start wInsight 6.5.

2. Click **File » Select Database** and select the database with the 6.5 contract(s) to back up.

3. Click **Utilities » Backup** to back up your contract(s). Note the location (folder) where the wInsight 6.5 archive file (.WSA) was saved.

4. Exit wInsight 6.5.

To restore your 6.5 data into a 6.5.1 database, complete the following steps:

1. Start wInsight 6.5.1.

2. Click **File » Select Database** to select a 6.5.1 data source.

> For more information about setting up and connecting to a database, see the *Create a New (Blank)* and *Create a wInsight Data Source* sections of the wIInsight Online Help.

3. Click **Utilities » Restore** to select your wInsight 6.x archive file (.WSA) and restore your 6.x contract(s).

What's Next?

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

> For more information, see Recalculating a Contract.

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