

Deltek Vision® Navigator 1.5

Installation Guide

July 8, 2013

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Overview

This document describes the server prerequisites, client requirements, and installation information for Vision Navigator.

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.



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

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

Additional Documentation

The following Vision Navigator documentation is available for this release.

Document Name	Description
Vision Navigator Release Notes	The Release Notes list known issues, enhancements, and bug fixes for the current release.
Vision Navigator Integration Guide	This guide contains details on how the Vision application works with Vision Navigator, and descriptions of the changes to the Vision Online Help.
Vision Navigator FAQ Guide	This guide contains answers to frequently asked questions about Vision Navigator.

Before You Begin

Review the server installation and client requirements before you install Vision Navigator.

Server Installation Prerequisites

- Windows Server 2008 or Windows Server 2008 R2 are supported platforms.
- Deltek Vision 7.0 (SP1) (GA) or Deltek Vision 7.1 must be installed.
- Microsoft .NET Framework 4.0 must be installed on the Deltek Vision web/application server.
- You must be a local administrator on the Deltek Vision web/application server to run the setup.
- Vision Navigator must be installed on your Deltek Vision web/application server.

Client Requirements

Client Operating Systems

- Windows 7
- Windows 8
- Windows Vista (SP2)
- Windows XP (SP3)

Browser

- Internet Explorer 8 (Chrome frame plug in required)
- Internet Explorer 9
- Internet Explorer 10
- Chrome 18 or later
- Safari 5 or later
- Firefox 11 or later

Device

- Android Tablets
- iPad

Compatibility Matrix

Refer to the following table for compatibility information between Vision and Vision Navigator releases and builds.

Vision Release/Build	Vision Navigator Release/Build
7.0 (GA) HotFix #003 (Database Build 7.0.403) Vision7ServicesVersion - 7.0.603.603	1.0 (LA) Build 1.0.343
7.0 (SP1) (Database Build 7.0.700) Vision7ServicesVersion - 7.0.700.700	1.3 Build 1.3.398
7.0 (SP1) (GA) (Database Build 7.0.800) Vision7ServicesVersion - 7.0.800.800	1.4 Build 1.4.397
7.0 (SP1) GA (DatabaseBuild7.0.806) Vision7ServicesVersion - 7.0.800.800	1.5 Build 1.5.639
7.1 (Database Build 7.1.500) Vision71ServicesVersion - 7.1.0.0	1.5 Build 1.5.639

Installation

When you install Vision Navigator, the setup log automatically defaults to **C:\Users\<User>\AppData\Local\Deltek** and creates a temporary shortcut on your desktop.

To install Vision Navigator, complete the following steps:

1. Download **Vision Navigator15.exe** from [Deltek Software Manager \(DSM\)](#).
2. Run **VisionNavigator15.exe**. This displays on your Deltek Vision web/application server Welcome dialog box.
3. On the Welcome page of the installation wizard, click **Next**.
4. On the License Agreement page, select **I accept the terms of the license agreement**, and click **Next**.
5. On the Choose Destination Location page, click **Change** if you need to change the default installation location. Deltek recommends that you use the default installation directory.
6. Click **Next** to continue.
7. On the Deltek Vision Site page, specify your Deltek Vision web services site. The URL must end with **VisionServices.asmx**. Setup will validate this site for connectivity. The URL that you specify is only accessed from the Vision Navigator product to connect to Deltek Vision. Because Vision Navigator and Deltek Vision must be installed on the same web server, use the default specified URL.
8. Click **Next** to continue (the next page may take up to 10 seconds to display).
9. On the Customer Experience Improvement Program page, select the **Send installation data to Deltek** option if you want to send technical installation data to help Deltek plan future releases. No business data will be included if you select this option.
10. Click **Next** to continue.
11. On the Start Copying Files page, review the current settings, and click **Next** to continue. The Setup Status dialog box displays. Setup installs the files and configures the web server. When finished, the Installation Complete page displays. This page lists the URL that you must provide to users to run Vision Navigator.
12. Click **Finish** to complete the installation.



A new Navigator tab was added to Vision Roles in Vision 7.1. When you install Vision 7.1, this tab is automatically configured to grant each role the same access rights to Navigator that the role had before the installation. These access rights are defined on the General and Record Access tabs in **Configuration » Security » Roles**. After the installation, use the Navigator tab to modify Navigator access rights.

In addition, prior versions of Vision required access to Project Planning for a role to have access to Navigator's planning. This is no longer true with Vision 7.1, so review and update the General and Planning tabs in **Configuration » Security » Roles**, as needed.

Refer to **Configuration » Security » Roles** for additional information.

Installing Navigator in a Stand-Alone Environment

For certain installations, it may be necessary to implement Navigator without the Web/Application Server enabled. This is useful for running Navigator inside of a firewall.

Requirements

- Windows Server 2008/2008R2/2012 with IIS Installed/Configured
- Microsoft .NET Framework 3.5 (SP1)
- Microsoft .NET Framework 4.0
- Network Connectivity between servers (Port 80 or 443 if using SSL)
- DMZ web server

Installation

Complete this installation process on a stand-alone Navigator web server, presumably in a DMZ.

Install on a Stand-Alone Server

To install Vision Navigator on a stand-alone server, complete the following steps:

1. Run **DeltekNavigator15.exe /skipvisioncheck**. Navigator installs without the Vision-related checks.
2. Follow the prompts to complete the installation.

Vision Installations Using Integrated Security and Document Management

For Vision installations that also use the Vision Document Management application, there are additional required steps that will create a Service Principal Name for the Vision Application Pool Identity. This allows domain-based delegation to work between Vision Document Management and SharePoint.

Create a Server Principal Name

To create the Service Principal Name, complete the following steps:

1. Open IIS to change the Advanced Settings for Windows Integrated Authentication.
2. Select the **Vision Virtual Directory**.
3. Clear the check mark next to the **Enable Kernal Mode Authentication** option.

Potential Problems

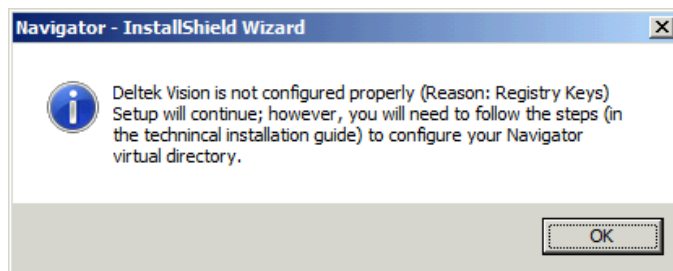
- The Navigator Application Pool identity defaults to a built-in ApplicationPoolIdentity account that does not have a valid SPN configured. This will cause you to receive a Windows Integrated Authentication prompt when accessing Navigator that will not accept any credentials, valid or not.
- If you are using a fully qualified custom DNS record for Vision (for example, <http://vision.company.com>), you may need to configure a Service Principal Name. This requires the same change to the Vision Application Pool as detailed in the "Create a Server Principal Name" procedure.

Solution

Configure the Navigator Application Pool identity to be the same domain account that is used for the Vision Application Pool (DeltekVisionAppPool).

Manually Set Up the Navigator Virtual Directory

If you receive the following Install Shield Wizard error during the installation process, complete the procedure in this section.

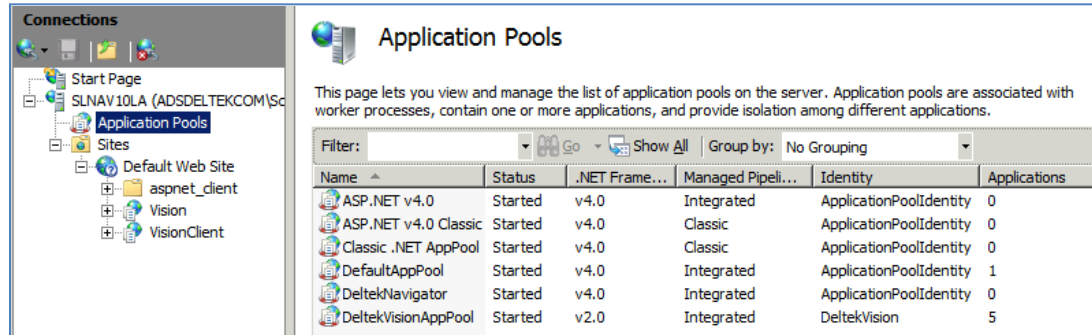


Prerequisite: For this procedure, you need to know your Navigator installation directory. The default installation directory is one of the following:

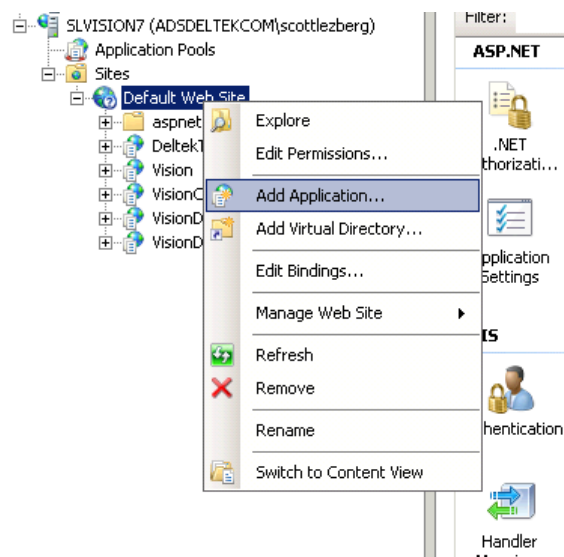
- C:\Program Files (x86)\Deltek\Navigator (on 64-bit servers)
- C:\Program Files\Deltek\Navigator (on 32-bit servers)

To configure the Navigator virtual directory and finish the installation, complete the following steps:

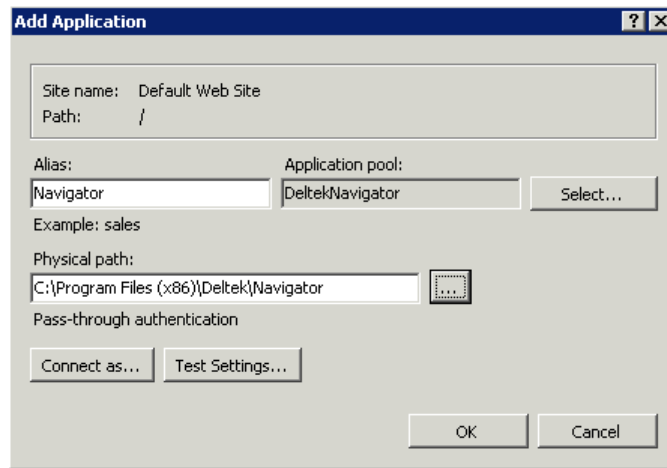
1. From the Navigator server, open Internet Information Services Manager.
2. Expand the Server and verify that a DeltekNavigator Application Pool was created and is using the v4.0 .NET Framework.



3. If the DeltekNavigator application pool does not exist, right-click **Application Pools** (under your server), and click **Add Application Pool** on the shortcut menu.
 - **Name** — DeltekNavigator
 - **.NET Framework Version** — NET Framework v4.0.30319
 - **Managed Pipeline Mode** — Integrated
4. Expand the Default Web Site, and check for the Navigator virtual directory. If it does not exist, continue to Step 5.



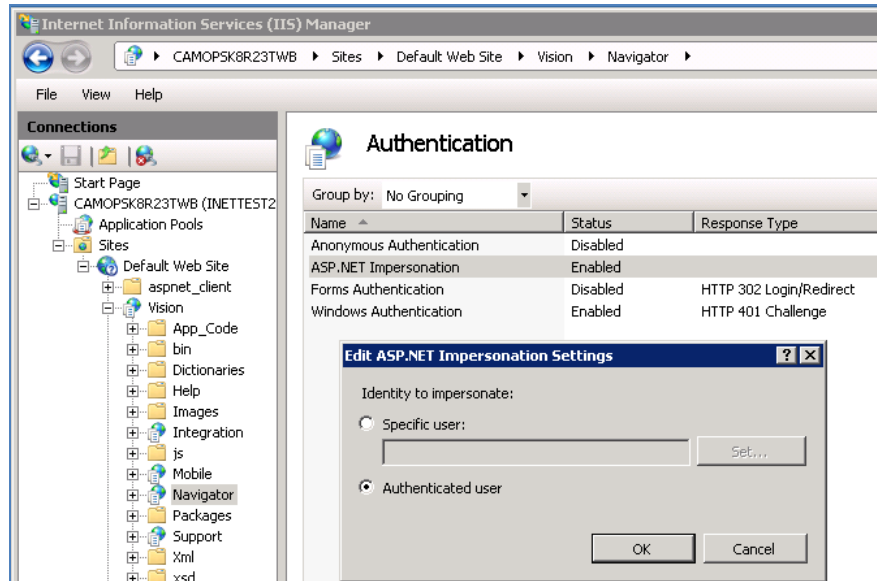
5. Right-click **Default Web Site**, and click **Add Application** on the shortcut menu. The Add Application dialog box displays.



6. On the Add Application dialog box, complete the fields as follows:
 - **Alias** — Navigator
 - **Application Pool** — Click the **Select** button, and select **DeltekNavigator** from the drop-down list.
 - **Physical Path** — Enter your installation directory for Navigator (for example, C:\Program Files (x86)\Deltek\Navigator).
7. Click **OK** to create the IIS Application.
8. Check the Authentication mode for your Vision virtual directory, and set it to the same for Navigator virtual directory. These must match for you to use the same security model in Vision.
9. Return to the Default Web Site, and select the **Navigator** virtual directory.
10. Ensure that ASP.NET Impersonation is enabled:
 - a. Select Navigator.
 - b. Select Authentication.
 - c. Review ASP.NET Impersonation status.



11. Select **ASP.NET Impersonation**. The Edit ASP.NET Impersonation Settings dialog box displays.



12. Select **Authenticated user**, and click **OK**.
13. Test Navigator by launching <http://localhost/Navigator>. The Vision Navigator logon dialog box displays.




If the Vision Navigator logon dialog box does not display, contact Deltek Customer Care.

Select the Type of Online Help System

Navigator offers two types of online help systems: Hosted and Local.

To configure the Navigator online help, complete the following steps:

1. In Vision, open the Miscellaneous tab in **Configuration » General » System Settings**.
2. In the **Type of Help** field, select one of the following:
 - **Hosted** — Select this option for online help that is updated automatically to match the version or release updates that apply. This help requires the Vision Administrator to save their Deltek Customer Care Connect credentials in Vision. This is a one-time requirement so that users can access the help seamlessly.
 - **Local** — Select this option to use online help that is installed locally as part of the Vision Navigator installation.
3. Enter the **Support Username**.
 This is the username that is used to access the Deltek Customer Care Connect site. This entry allows any Navigator user to access the hosted help for the version of Navigator that your firm is using.
4. Enter the **Support Password**.
 This is the password that is used with the username to access the Deltek Customer Care Connect side. This entry allows any Navigator user to access the hosted help for the version of Navigator that your firm is using.
5. Click **Save**.



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