

Deltek wInsight® Analytics Module 8.3.4

Preinstallation Upgrade Checklist

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Upgrade Checklist for Existing Customers

The checklist discussed in this document is developed to assist you in planning for your upgrade to wInsight Analytics and deploying the new wInsight Analytics Module.

This checklist was mainly developed to assist you in determining the types and number of licenses. Once you have reviewed the checklist, contact your Deltek Account Manager to request the appropriate licenses you need based on how you plan to deploy the product.

Note: If you do not intend to deploy the new wInsight Analytics Module, which utilizes the QlikView business intelligence software, then you do not need to read this document or obtain license keys for QlikView. In this case, do not select the **Complete** option in the **Download** area, but instead download the required legacy tools under the additional sub-releases or cumulative updates areas in DSM.

Initial Questions

How do you intend to deploy wInsight Analytics Module?

- a. On a Web server so it can be used as a multi-user browser-based application, where all data is in a shared Oracle or SQL Server database.
- b. As a standalone desktop application where each user has their own Access database with their own projects in that database.

If response to above is **a**, then continue with the Server Installation section; otherwise proceed to the Standalone Installation section.

Server Installation

1. How many users do you have?
Request this number of server licenses from your account manager.
2. How many users would need access to the server to load data or develop shared dashboard content for users?
Request this number of QlikView Client licenses from your account manager.
3. You will receive a Production Server license. Do you also need a test and/or development server license?
Request these from your account manager.
4. Have you reviewed the server requirements?
 - a. Is the server adequate for the number of users and amount of data you have?
 - b. The server cannot be a domain server.
 - c. Are there other applications running on the server which may impact/be impacted by this application.

Note: Deltek recommends a dedicated server or one that is only used for wInsight administration.

Standalone Installation

1. How many standalone license keys do you require?
Request this number of QlikView Client licenses from your account manager.
2. Do all your users have 64-bit desktop or laptop computers?
The wInsight Analytics module requires 64-bit.

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 document provides instructions for the installation of the wInsight Analytics Module.
Deltek wInsight Analytics Module Administration Guide	This document contains detailed information and instructions on how to use various features of the wInsight Analytics Module.
Deltek wInsight Analytics Module Release Notes	This document contains a summary of the technical considerations, new features, enhancements, and known issues of the application.