



Vision Project Connect

Release 1.5

Client Install Guide

Vision Project Connect provides seamless integration of Deltek Vision's resource and project planning functionality with Microsoft Project.

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Introduction

This document describes how to perform a first time install of the Vision Project Connect software and how to perform an upgrade to a new release of the software on an existing installation.

Intended Audience

The intended audience for this document includes application administrators who will have the responsibility to install, configure and maintain the product on the server.

Using This Guide

Throughout the guide, you will see call out boxes with different symbols. These provide important information that is being highlighted so that it is not missed. Here is each of the callout types:



This will cause an error or introduce data integrity issues. Don't do it!



Vision Project Connect documentation is delivered in a set of purpose-scoped documents. This refers to another document within the set.



This is a recommendation or best practice that will help make the Vision Project Connect software easier to use and maintain. Do these!

Product Overview

Vision Project Connect provides packaged integration between Deltek Vision and Microsoft Project. This creates the capability for project managers to leverage the resource planning benefits of Deltek Vision while managing the complexities of the schedule in Microsoft Project with relationships, constraints and critical paths.

Vision Project Connect implements a set of pre-packaged integration processes designed specifically with project management to ERP integration best practices and the advanced resource planning features of Deltek Vision in mind. The data mappings and information flow provided create an out-of-the-box business process integration for managing projects externally to Deltek Vision.

The integration processes use an information management approach to data transfer as opposed to ETL (Extract, Transform and Load) style data synchronization. This allows data to be managed in context of the project lifecycle, as information. The product provides information management processing for projects, plans, actual labor, resources, and cost.

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The product provides packaged composite applications for interactive and on-demand integration processes.

Please Read the Instructions First

Before proceeding with the installation and configuration of this product, please thoroughly read the following sections of this document based on your installation.



Do not proceed with the actual install until you have read and understand the instructions and have assembled and validated the information and access required to successfully complete the installation.

Performing a New Install

To perform a new install of Vision Project Connect, read and follow the following steps in order.

1. [Preparing the Server for the Install](#)
2. [Installing Vision Project Connect](#)
3. [Configure the Vision Project Connect Software](#)
4. [Installing Vision Project Connect Services](#)
5. [Starting Vision Project Connect Services](#)
6. [Verify Vision Project Connect Installation](#)

Performing an Upgrade Install

To perform an upgrade to an existing Project Vision Connect installation, read and follow the following steps in order.

1. [Stopping Vision Project Connect Services](#)
2. [Uninstalling Vision Project Connect Services](#)
3. [Backing Up Vision Project Connect](#)
4. [Installing Vision Project Connect](#)
5. [Configure the Vision Project Connect Software](#)
6. [Clearing Cache and Logs](#)
7. [Applying a Configuration Set](#)
8. [Installing Vision Project Connect Services](#)
9. [Starting Vision Project Connect Services](#)
10. [Verify Vision Project Connect Installation](#)

Preparing the Server for the Install



You will need Administrator privileges on the server you will be installing the Vision Project Connect software.



Vision Web link provides pertinent configuration information regarding your Vision installation.

Create an Administrative User Account

Create a user account named “ProjectConnect” and provide administrative privileges to this account.

This is the account that the Vision Project Connect services will run under.

Confirm Port Availability

Ensure that the following ports are not blocked, not being utilized by another service or application, and that they are available for use by Vision Project Connect.

Port Use	Ports
HTTP	8080, 8180, 8280, 8380, 8480
JNDI	1099, 1199, 1299, 1399, 1499
JDBC	9005
JDBC (Vision)	1433 or your company’s SqlServer configuration
Vision Web Services	80 or your company’s configuration of Vision
Microsoft Project Server Web Services	80 or your company’s Project Server configuration.

Data Access Service Connectors

Deltek Vision 6.x

Vision Project Connect utilizes both Web Services API calls and JDBC to provide the connection to Deltek Vision. To configure the connector you will need the following information:

JDBC Connector Information:

Parameter	Description	Value
Database Server	Either the fully qualified DNS name or the IP Address of the SqlServer instance hosting the Deltek Vision Database.	

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Database Name	The Name of the targeted Vision Database.	
Database Username	A database user with authorizations for Create, Read, Update and Delete on the Vision Schema.	
Database Password	The password for the Username to login to the database via JDBC.	

Web Services Connector Information:

Parameter	Description	Value
Vision Web Service URI	The fully qualified URI to the Vision Web Service interface.	
Vision Web Services Database	The database instance of Vision that the Vision Web Services should use.	
Web Services Username	The user account that is provided to the Web Service interface.	
Web Services Password	The password for the Username to login to the Web Services.	
Integrated Windows Security Username	The user account that is provided for the Integrated Windows Security.	
Integrated Windows Security Password	The password for the Username to login to the Integrated Windows Security.	



Project Connect is the recommended username to create and use for these connectors.

Microsoft Project Server

Vision Project Connect supports Microsoft Project Server 2007 and Microsoft Project 2007 desktop SP2 editions. If your company is using Microsoft Project Server 2007, then you will need to configure the Vision Project Connect server to interface with your company's project server. If your company is using the desktop version of Microsoft Project, then you will be able to upload and download Microsoft Project XML files through the interactive user interface and no connector configuration for Microsoft Project Server is required.

To connect to the Project Server Web Service you will need the following information:

Microsoft Project Server Web Service:

Parameter	Description	Value
Project Server Project Web Services WSDL URL	Fully qualified URL for the Microsoft Project Server Project WSDL interface.	
Username	A web service user with authorizations for Create, Read, Update and Delete on the Vision Schema.	
Password	The password for the Username to login to the web service.	

To connect to the Project Server Reporting Database, you will need the following information:

Microsoft Project Server Reporting Database:

Parameter	Description	Value
Database Server	Either the fully qualified DNS name or the IP Address of the SqlServer instance hosting the Microsoft Project Server.	
Database Name	The Name of the targeted Microsoft Project Server Database.	
Database Username	A database user with authorizations for Read on the Microsoft Project Server Schema.	
Database Password	The password for the Username to login to the database.	



Project Connect is the recommended username to create and use for this purpose.

Installing Vision Project Connect

Download the Vision Project Connect Distribution Package

Download the Vision Project Connect software from the software distribution site to a staging area on the server. You should have received an email from support with instructions and credentials to accomplish this step.

Vision Project Connect is delivered in a ZIP archive. Ensure that you have a ZIP extraction/decompression tool available on the host system to extract the Vision Project Connect software during installation.

Extract Vision Project Connect

Using the Vision Project Connect Distribution Package you downloaded in the previous step, extract the archive to a desired location on your file system.



You can unzip the software in your local or logical root, the software creates and extracts into a directory named “SOALOGIX” within the specified directory to extract to.

Ensure that the newly created “SOALOGIX” directory and all children have read and write access for the “ProjectConnect” administrative account.

The physical install for the Vision Project Connect software is now complete.

Configure the Vision Project Connect Software

Configure the Project Connect System Options

Project Server Configuration Settings

Project Connect v 1.5 provides the following configurable features for managing updates to Microsoft Project Server based on data changes in Vision.

Ref	Configurable Option	Description
1	The TPD consolidation period possible values: DAY daily WEEK weekly FORTNIGHT by-weekly MONTH monthly	The admin user has the capability to establish the integration time phase data disruption option in the installation and configuration phase, this option will determine the time distribution in Vision plan (in daily, Weekly, Bi-weekly or Monthly).
2	Enable MS Project Server to Vision: Time Phased Data	Required Configuration to tiger the Timephase data options.
3	Enable MS Project Server to Vision: Validate Tasks require Resource Assignment	Configuration to require Microsoft Tasks which are Non-Summary or not defined as a Milestone Task to have an associated Resource Assignment.
4	Enable Vision to MS Project Server: Update Planned Data	Configuration to restrict the update to MS Project to 'only' the Resource Assignment. This to include not updating Planned hours and dates.
5	Enable Vision to MS Project Server: Update Actual Data	Configuration to disable the update to MS Project Actual. This includes Actual Start Date, % Complete, and Actual Work.
6	Enable Vision to MS Project Server: Enforce 1 to 1 Task Assignment mapping	Configuration to surface a condition where a Vision Task exists with no corresponding MS Project Resource Assignment. And not create any if it doesn't exist in MS Project.
7	Enable Vision to MS Project Server: Validate 'In Progress' Tasks Update	Configuration to restrict the update to MS Project to not modify the Resource Assignment where the task has been progressed. Project Connect will surface an error in the log if this condition is encountered.
8	Enable Vision to MS Project Server: Validate Multiple Resource Assignment	Configuration to surface an error condition during the Vision to MS Project Server update where greater than 1 of the same resource has been assigned to a Vision Task. Prior releases did not reflect this condition.

Instructions:

On your file system, navigate to:

[INSTALL_LOCATION]/SOALOGIX/confero/soappliance/config/datapath/adaptor

- Config_mspserver_to_deltkvision.xml

Open the file using a standard text editing program.

Modify the value field to desired setting. Acceptable values are "true" or "false"

Save the file.

1. Enable MS Project Server to Vision: Time Phased Data

```
upload time-phased data from Microsoft project to DELTEK Vision
-->
<property name="uploadTimePhasedData" value="false" />
- <!--

    The TPD consolidation period
    possible values:
    DAY daily
    WEEK weekly
    FORTNIGHT by-weekly
    MONTH monthly

-->
```

2. Time Phased Data Options selections (DAY,WEEK,FORTNIGHT or MONTH):

```
<property name="timePhasedDataPeriod" value="WEEK" />
- <!--
```

3. Enable MS Project Server to Vision: Validate Tasks require Resource Assignment

```
Task without assignment shall not be transferred to Deltek
Vision if it's not summary or milestone task
-->
```

4. Enable Vision to MS Project Server: Update Planned Data

```
<property name="uploadTaskWithoutAssignment" value="true" />
- <!--
download planned data (work, start time etc) from DELTEK
Vision to Microsoft project
-->
```

5. Enable Vision to MS Project Server: Update Actual Data

```
<property name="downloadPlannedData" value="false" />
- <!--
download actual data (work, start time etc) from DELTEK Vision
to Microsoft project
-->
```

6. Enable MS Project Server to Vision: Enforce 1 to 1 Assignment mapping

```
<property name="downloadActualData" value="false" />
- <!--
enforce the checking of one to one mapping for assignment
-->
```

7. Enable Vision to MS Project Server: Validate 'In Progress' Tasks Update

```
<property name="downloadEnforceOneToOneAssignmentMapping"
value="false" />
- <!--
In progress or completed assignment shall not updated by
changing the resource
-->
```

8. Enable Vision to MS Project Server: Validate Multiple Resource Assignment

```
<property name="downloadInProgressAssignmentWithRsrcSwap"
value="true" />
- <!--
check if a resource being assigned to an task more than once
```

Project Desktop Configuration Settings

Project Connect v 1.5 provides the following configurable features for managing updates to Microsoft Project Desktop based on data changes in Vision.

Ref	Configurable Option	Description
1	Enable MS Project to Vision: Time Phased Data	Required Configuration to tiger the Timephase data options.
2	Enable Vision to MS Project: Update Planned Data	Configuration to restrict the update to MS Project to 'only' the Resource Assignment. This to include not updating Planned hours and dates.
3	Enable Vision to MS Project: Update Actual Data	Configuration to disable the update to MS Project Actual. This includes Actual Start Date, % Complete, and Actual Work.

Instructions:

On your file system, navigate to:

[INSTALL_LOCATION]\soalogix\soappliance\config\datapath\rules\config_mspxml_to_deltekvision.xml

- config_mspxml_to_deltekvision.xml

Open the file using a standard text editing program.

Modify the value field to desired setting. Acceptable values are "true" or "false"

Save the file.

1. Time Phased Data Options selections

```
<<!-- upload time-phased data from Microsoft project to DELTEK
Vision -->
  <property name="uploadTimePhasedData" value="true"/>
```

2. Enable Vision to MS Project Server: Update Planned Data

```
<property name="uploadTaskWithoutAssignment" value="true" />
- <!--
  download planned data (work, start time etc) from DELTEK Vision
  to Microsoft project
-->
```

3. Enable Vision to MS Project Server: Update Actual Data

```
<property name="downloadPlannedData" value="false" />
- <!--
  download actual data (work, start time etc) from DELTEK Vision to
  Microsoft project
-->
```

Additional features for configuration are not currently supported in the Desktop version of Project Connect

Starting the Configurator

Vision Project Connect provides a setup utility to configure the connections for Deltek Vision, and if you are using it, Microsoft Project Server 2007. To access the configurator:

On your file system, navigate to:

[INSTALL_LOCATION]/SOALOGIX/confero/soappliance/setup

Run the script:

- setup.bat

This will launch the Configurator application.

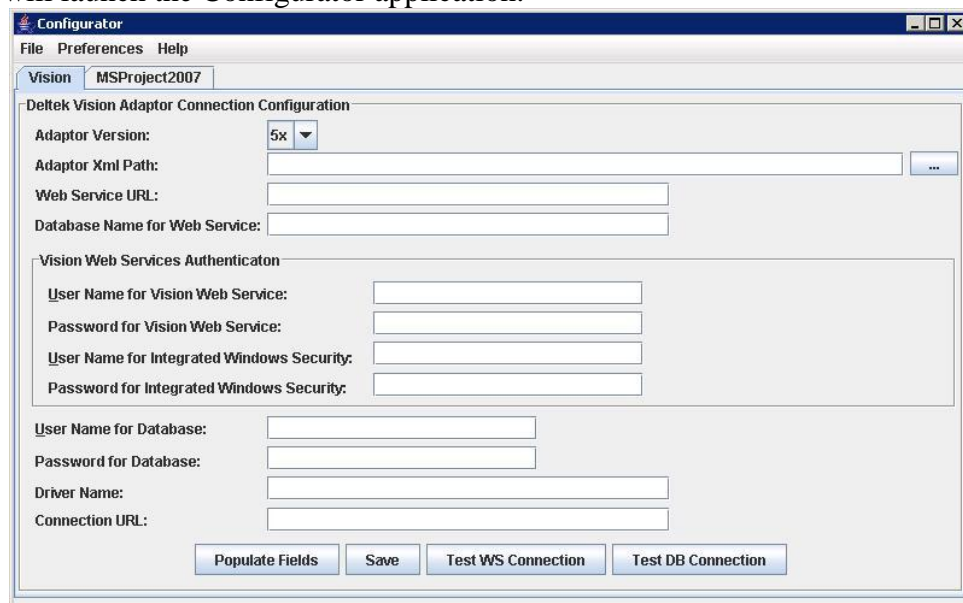



Figure 1: The Project Connect Configurator Application

Using the Configurator

The Configurator provides common functions across each of the tabs that act on the form of the visible tab.

Populate Fields


The  button loads any existing configuration data from disk into the form. Configuration data is not loaded by default into the form, so this should be the first action performed if you are maintaining an existing configuration of Vision Project Connect.

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Save


The  button saves the content of the form to the configuration data on disk. This should be the last action performed before closing the Configurator if you wish to keep any changed data on the form.

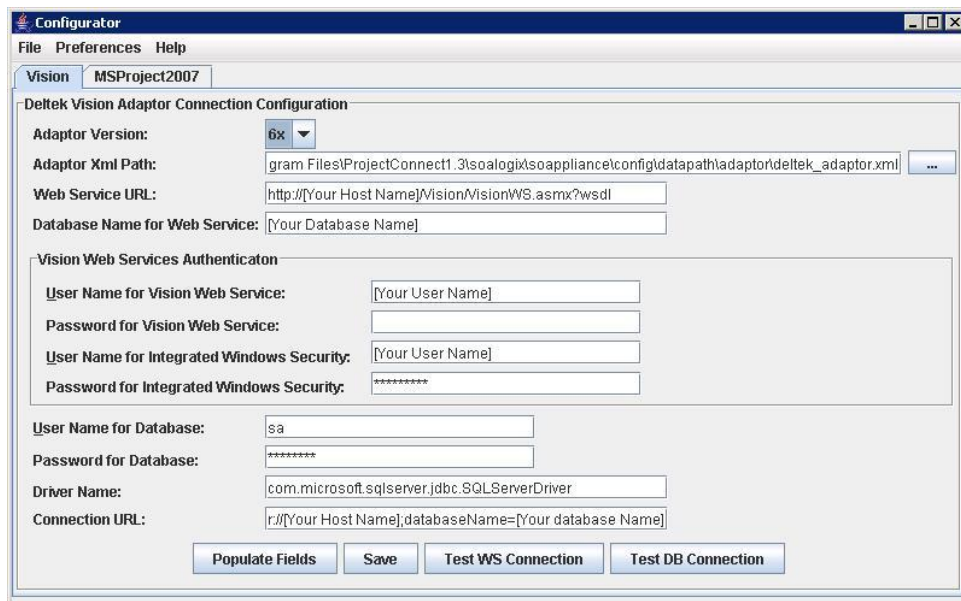
Test ... Connection

The  button allows you test the connection with the currently entered data in the form. Each tab has specific buttons for testing connections depending on the number of and connection types for the interface.

Configure the Deltek Vision Connections

Start the Configurator, if it is not already running, and ensure that you are on the “Vision” tab and that the correct Deltek Vision Version (6.x) is selected.

Press the  button to load the factory defaults in the form.



The screenshot shows the 'Configurator' application window with the 'Vision' tab selected. The 'MSProject2007' sub-tab is active. The 'Deltek Vision Adaptor Connection Configuration' section includes fields for 'Adaptor Version' (set to 6x), 'Adaptor Xml Path' (a file path), 'Web Service URL' (http://[Your Host Name]/Vision/VisionWS.asmx?wsdl), and 'Database Name for Web Service' ([Your Database Name]). The 'Vision Web Services Authentication' section has fields for 'User Name for Vision Web Service' ([Your User Name]), 'Password for Vision Web Service' (empty), 'User Name for Integrated Windows Security' ([Your User Name]), and 'Password for Integrated Windows Security' (masked with asterisks). The 'Database' section includes 'User Name for Database' (sa), 'Password for Database' (masked), 'Driver Name' (com.microsoft.sqlserver.jdbc.SQLServerDriver), and 'Connection URL' (r://[Your Host Name].databaseName=[Your database Name]). At the bottom are buttons for 'Populate Fields', 'Save', 'Test WS Connection', and 'Test DB Connection'.

Figure 2: The Project Connect Configurator Application after Populate Fields



Note: Default information presented after clicking Populate Fields will vary based on installation version and installation directory. These are only to be used as references.


Using the information you collected during the preparation, complete the configuration settings for each of the following parameters:

1

Adaptor Version:

Select the Deltek Vision version associated with your Project Connect installation.

Adaptor Xml Path

Complete the setting for the **Adaptor Xml Path**. This is the location of the configuration data for the Vision connector. You simply need to make sure that the path is updated to reflect your install location. You can also use the  button to browse for the file location instead of typing it.

Note: this will pre-populate the path where the Project Connect software was 'unzipped and should not require you to alter the setting.

Parameter	Example
Adaptor XML Path	C:\ProgramFiles\ProjectConnect1.4\soappliance\config\ datapath\adaptor\deltek_adaptor.xml

Web Service URL

Complete the setting for the **Web Service URL**. This is how Vision Project Connect will invoke Web Services offered by Vision.

Parameter	Example
Web Service URL	http://deltek-qa2/Vision/VisionWS.asmx?wsdl



You can use your Web Browser to test the URL of the Vision Web Services. If they are working, you should get an HTML document back that describes the Web Services of that interface.

Database Name for Web Service

Complete the setting for the **Database Name for Web Service**. This is the database instance that the Vision Web Services will transact information with.

Parameter	Example
Database Name for Web Service	VisionDemo61 (Deltek-QA2)



The Database Name for Web Services should match exactly the name of the Database that shows in the Deltek Vision Login screen or the 'Current Database' found via Vision Weblink.

Configure the Vision Web Services Authentication**Username for Vision Web Service**

Complete the setting for the **Username for Web Service**. This is the username that will be used to authenticate with the Vision Web Service and needs to be a valid Vision user account.

Parameter	Example
Username for Vision Web Service	ADMIN

Password for Vision Web Service

Complete the setting for the **Password for Web Service**. This is the password that will be used with the Vision Web Service username.


Username for Integrated Windows Security

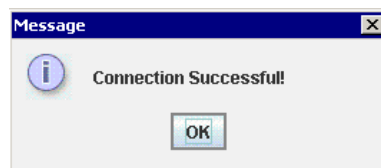
Complete the setting for the **Username for Integrated Windows Security**. This is the username that will be used to authenticate with Integrated Windows Security and needs to be a valid Windows user account configured for use with the Vision services.

Parameter	Example
Username for Integrated Windows Security	deltek-qa2\Administrator

Password for Integrated Windows Security

Complete the setting for the **Password for Integrated Windows Security**. This is the password that will be used with the Integrated Windows Security username.

Press the  button on the Vision panel. If all is working correctly, a success dialog will be displayed.

**Configure the Vision Database Connection (JDBC)****User Name for Database**

Complete the setting for the **User Name for Database**. This is the username used to authenticate with the Vision database. Since Vision does not provide Web Services interfaces for all required integration points, Vision Project Connect performs some integration operations directly with the Vision database.

Parameter	Example
User Name for Database	SA

Password for Database

Complete the setting for the **Password for Database**. This is the password that will be used to authenticate with the User Name for Database.

Driver Name

If necessary, modify the setting for **Driver Name**. This is the fully qualified name of the Jdbc driver being used to provide connectivity with the Vision database. Under normal circumstances, it should not be required to change this from the factory default.

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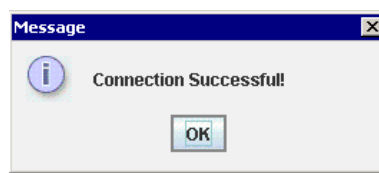
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Connection URL

Complete the setting for the **Connection URL**. This is the mechanism by which Project Connect knows which database to connect to. The general form of this URL is: `jdbc:sqlserver://<database_host>:<database_port>;databaseName=<vision_database_name>`

Parameter	Example
Connection URL	<code>jdbc:sqlserver://deltek-qa2;databaseName=VisionDemo61</code>

Press the **Test DB Connection** button on the Vision panel. If all is working correctly, a success dialog will be displayed.



Press the **Save** button on the Vision panel to save your connection configuration.

Congratulations, you have completed the connection configuration for Deltek Vision.

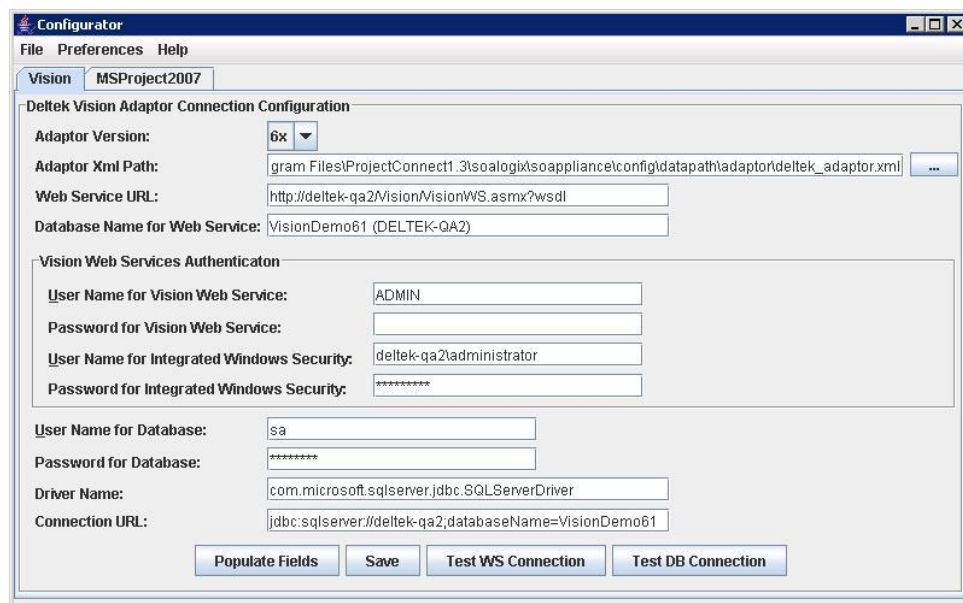


Figure 3: Project Connect Configurator Application after Configuration

Configure the Microsoft Project Server 2007 Connections

Start the Configurator if it is not already running and ensure that you are on the "MSProject2007" tab. This data will only be required if you are configuring Project Connect for MS Project Server 2007.

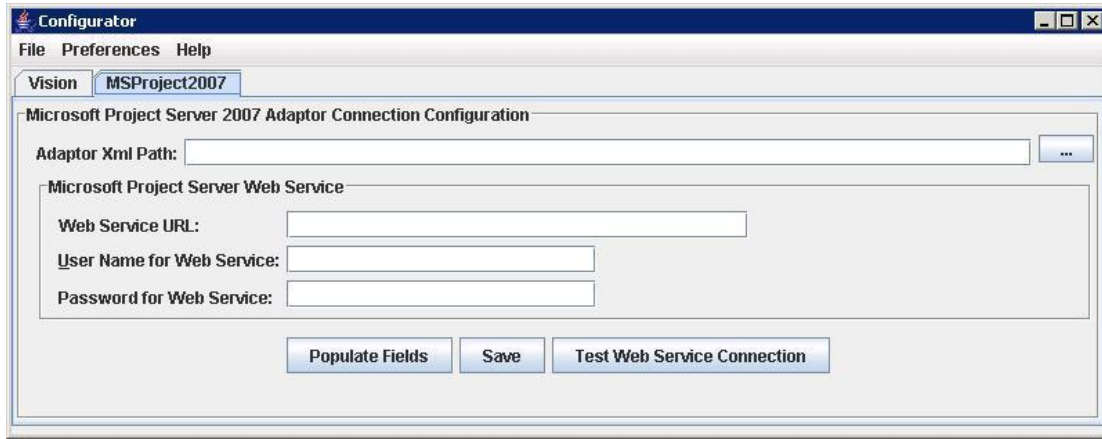



Figure 4: Project Connect Configurator: MSProject2007

Press the  button to load the factory defaults in the form. Depending upon the settings defined during the Project Connect configuration, the required information will be presented in the MSProject2007 configurator tab. Specifically, the Database connection will be required if you have selected to move Time Phased Data from MS Project to Vision.

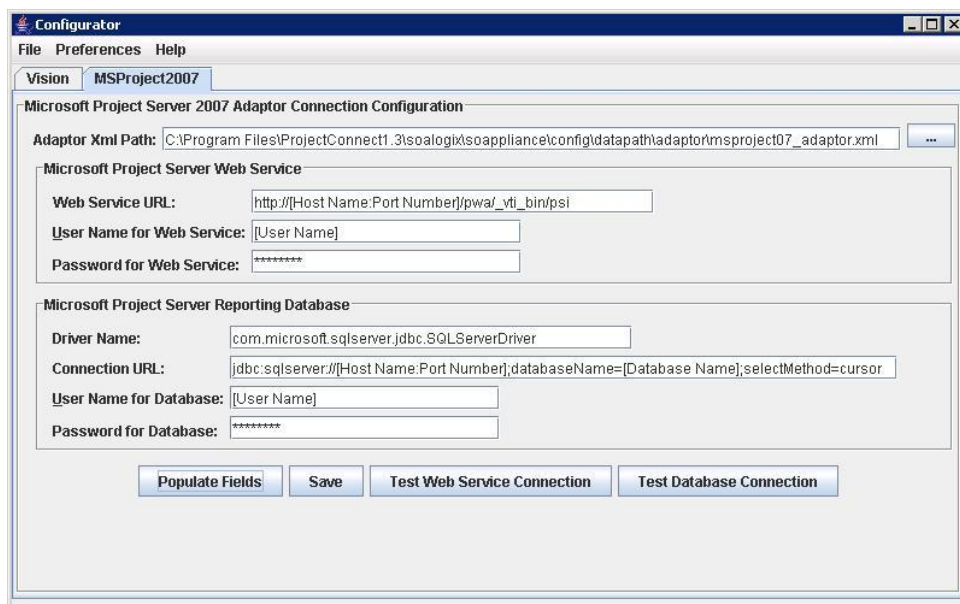



Figure 5: Project Connect Configurator: MSProject2007 after Populate Fields

Using the information you collected during the preparation step, complete the configuration settings for each of the following parameters:

Complete the **Adaptor XML Path** setting. This is the location of the configuration data for the Microsoft Project Server connector. You simply need to make sure that the path is updated to reflect your install location. You can also use the  button to browse for the file location instead of typing it.

Parameter	Example
Adaptor XML Path	C:\Program Files\ProjectConnect1.4\SOALOGIX\soappliance\config\datapath\adaptor\project07_adaptor.xml

Configure the MS Project Web Services Authentication

Web Service URL

Complete the setting for the **Web Service URL**. This is how Vision Project Connect will invoke Web Services offered by Microsoft Project Server.

Parameter	Example
Web Service URL	http://projserverst/pwa/_vti_bin/psi



You can use your Web Browser to test the URLs of the WSDL documents. If they are working, you should get an XML document back for each one that describes the Web Services of that interface. To test for Project Server, append “?wsdl” to the Web Service URL:

http://projserverst/pwa/_vti_bin/psi/Project.asmx?wsdl

User Name for Web Service

Complete the setting for the **User Name for Web Service**.


Parameter	Example
Username for Web Service	domain/username

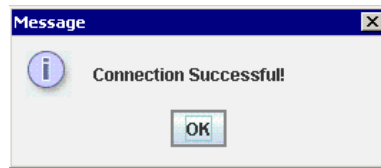
Password for Web Service

Complete the setting for the **Password for Web Service**.

Figure 6: Project Connect Configurator: MSProject2007 after Populating Field Data

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Press the  button on the MSProject2007 panel. If all is working correctly, a success dialog will be displayed.



Configure the Microsoft Project Server Reporting Database

Driver Name

If necessary, modify the setting for **Driver Name**. This is the fully qualified name of the Jdbc driver being used to provide connectivity with the MS Project database. Under normal circumstances, it should not be required to change this from the factory default.

Connection URL

Complete the setting for the **Connection URL**. This is the mechanism by which Project Connect knows which database to connect to. The general form of this URL is: jdbc:sqlserver://<database_host>:<Port #>;databaseName=<MS Project_database_name>

Parameter	Example
Connection URL	jdbc:sqlserver://projserverst:2198;databaseName=PWA_Reporting


User Name for Database

Complete the setting for the **User Name for Database**. This is the username used to authenticate with the Microsoft Reporting database. Since MS Project does not provide Web Services interfaces for all required integration points, Project Connect performs some integration operations directly with the Microsoft Project Reporting database. *Note: this user needs to have Read access to the Database.*

Parameter	Example
User Name for Database	SA

Password for Database

Complete the setting for the **Password for Database**. This is the password that will be used to authenticate with the User Name for Database.

Press the  button on the Vision panel. If all is working correctly, a success dialog will be displayed.



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Press the  button on the MSProject2007 panel to save your connection configuration.

Congratulations, you have completed the connection configuration for Deltek Vision.

Managing Vision Project Connect Services

Vision Project Connect can run as a service on Windows. This section provides information on the installation, starting, stopping, and uninstall of Vision Project Connect services.

Installing Vision Project Connect Services

On your file system, navigate to:

[INSTALL_LOCATION]\SOALOGIX\soappliance\setup\services

Run the script:

- install-all-services.bat

The script installs the following services:

- SOALogix database Service
- SOALogix datapath Service
- SOALogix portal Service

Configure DataPath Service

Before starting the Project Connect services, you need to configure the DataPath Services (usually found in **Control Panel | Administrative Tools | Services**) so that the service is logged on using an Administrative account on the server.



The DataPath Service must be configured to use a Domain administrative account to log on, otherwise the connection will fail.

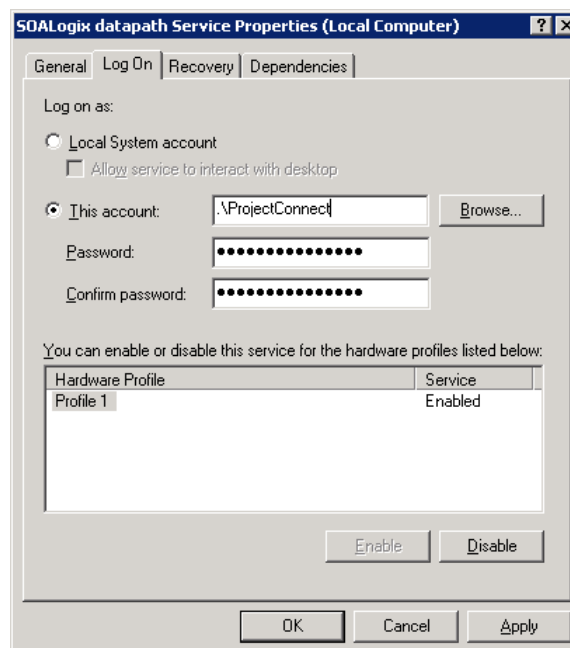


Figure 7: Datapath Service Log on Domain Account

Starting Vision Project Connect Services

To start Vision Project Connect services, use one of these 2 methods:

- Access your computer's Services window, (usually found in **Control Panel | Administrative Tools | Services**) and start the SOA LOGIX services. They all have SOA LOGIX in their service name. Start them in the following order:
 1. SOA Logix database Service
 2. SOA Logix datapath Service
 3. SOA Logix portal Service

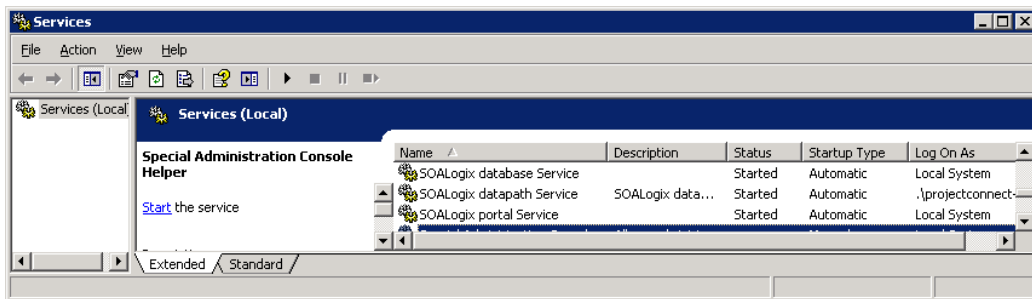


Figure 8: Project Connect Services

- On your file system, navigate to:
[INSTALL_LOCATION]\SOA LOGIX\soappliance\bin and
 - Run the script:
services-start.bat

When Vision Project Connect is running in service mode the console output is redirected to the files:

```
[INSTALL_LOCATION]\SOA LOGIX\soappliance\logs\<domain_name>-service.log
[INSTALL_LOCATION]\SOA LOGIX\soappliance\logs\<domain_name>-service-error.log
```

You can inspect the files for messages during service startup.

Stopping Vision Project Connect Services

To stop Vision Project Connect services, use one of these 2 methods:

- Access your computer's Services window, (usually found in **Control Panel | Administrative Tools | Services**) and stop the SOA LOGIX services. They all have SOA LOGIX in their service name.
- On your file system, navigate to:

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[INSTALL_LOCATION]\SOALOGIX\soappliance\bin and

- Run the script:
services-stop.bat

Uninstalling Vision Project Connect Services

To uninstall the Vision Project Connect Services, first make sure the Services are stopped and then navigate to:

- On your file system, navigate to:
[INSTALL_LOCATION] \SOALOGIX\setup\services and
- Run the script:
Uninstall-all-services.bat

Backing Up Vision Project Connect

Back up your current installation in preparation for an upgrade or major configuration change.

- On your file system, navigate to:
[INSTALL_LOCATION]
 - Archive or copy the “SOALOGIX” folder and all its children to a different location of your choice.

Applying a Configuration Set

1. When upgrading Vision Project Connect software, you will want to retain various configuration settings and implementation data into the new release

On your file system, navigate to:

[INSTALL_LOCATION]\soalogix\soappliance\config\datapath\adaptor\config_mspserver_to_deltekvision.xml

Please DO NOT copy files from previous installation to ProjectConnect1.5 release.

Stopping Vision Project Connect previous installation Services

2. Stopping Vision Project Connect Services

Uninstalling Vision Project Connect previous installation Services

3. [#Uninstalling Vision Project Connect previous installation Services](#)

Connector Configuration

4. The connector configuration provides Vision Project Connect the ability to interact with your integrated systems. To restore your existing connector configuration after an upgrade or other disruptive event, Please copy the information in your communicator interface to the new Version communicator interface

Portal Data

5. The other user data, such as Users data, WBS mapping and company setting, from the backup location to the following new release install directory, Copy from previous installations:

On your file system, navigate to:

[INSTALL_LOCATION]\soappliance\data\hypersonic\ (SysDB.properties, Sysdb.sql, Sysdb.log and SysDB.script) and [INSTALL_LOCATION]\soappliance\data\userdata



The whole Data folder ***CAN NOT*** be copied to the ProjectConnect1.5 release; from previous releases **ONLY** the recommended above component.

Installing Vision Project Connect Services

6. [#Installing Vision Project Connect Services](#)

Starting Vision Project Connect Services

7. [#Starting Vision Project Connect Services](#)

Clearing Cache and Logs

The Vision Project Connect persistent cache and logs should be cleared after performing an upgrade or after a disruptive event.

Using your file system, navigate to:

[INSTALL_LOCATION]/SOALOGIX/confero/soappliance/bin

Run the scripts:

- services-stop.bat
- delete-jboss-temp-files.bat
- delete-logs.bat
- services-start.bat

Verify Vision Project Connect Installation

Ensure that the Vision Project Connect services are installed and running before beginning the verification process.

Verify the Vision Project Connect Integration Service

Verify the Web Service Interface

Open Internet Explorer and navigate to:

http://<ip_address>:8180/datapath/DataPath?wsdl

If all is well, you will get an XML response in the browser containing the Web Services interface information.

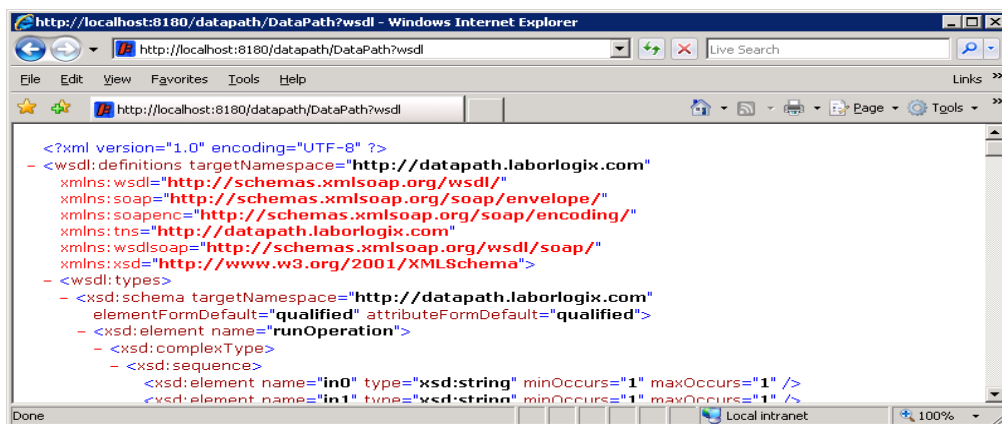


Figure 9: Web Service Interface Response

If you do not get a WSDL document or you get an error, then you will need to troubleshoot the installation and configuration for Vision Project Connect.

Verify the WOA/RESTful Interface

Open Internet Explorer and navigate to:

http://<ip_address>:8180/datapath/rest/users/test/services/RetrieveTestString

If all is well, you will get a CIM (Canonical Information Model) response in XML format with a test message.

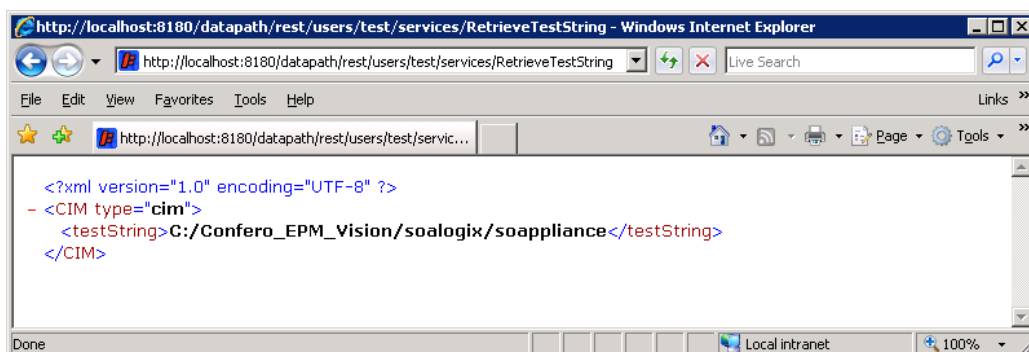


Figure 10: Restful Interface Response

Vision Project Connect

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SAP

If you do not get a CIM XML document or you get an error, then you will need to troubleshoot the installation and configuration of Vision Project Connect.

Verify the Vision Project Connect Portal Service

Open Internet Explorer and navigate to:

http://<ip_address>:8280

If the Vision Project Connect Portal is running, the Sign In portlet displays in a portal window as in the image below.

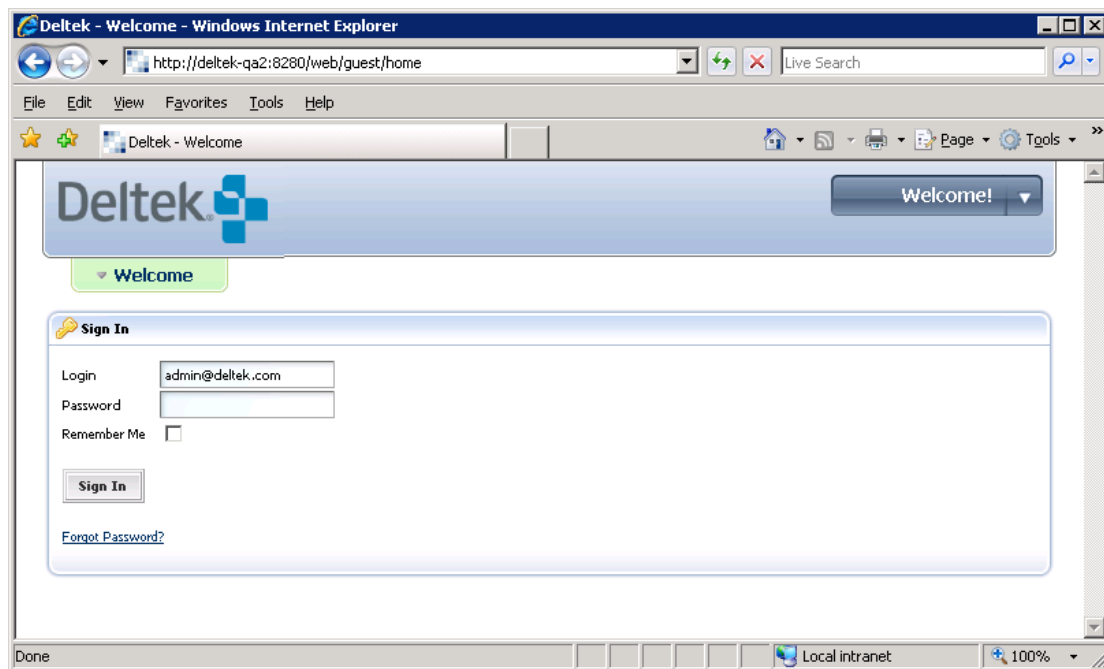


Figure 11 Project Connect Portal Login Page

Log into the portal with the following credentials:

Login: admin@deltek.com

Password: VisionRaptor

You should be successfully logged into the portal as the Vision Project Connect administrator.



For more information about what you can do as the Vision Project Connect Administrator, see the Vision Project Connect 1.4 Administrator's Guide.

Vision Project Connect Toolbar Installation for Microsoft Project Desktop.

Go to the Add-In software in to you local machine from the delivered ProjectConnect package.

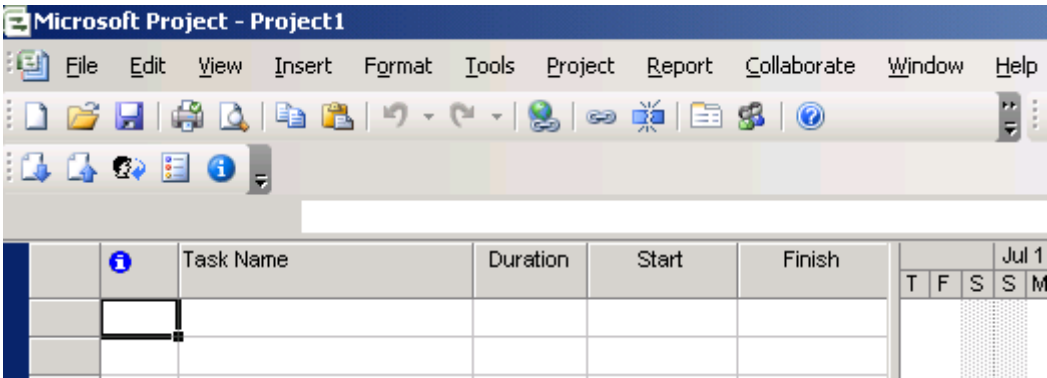
Name	Type
Project2k7_Add-in	File Folder
confero_epm_vision_delivera...	WinRAR ZIP archive

Name	Size	Type
Application Files		File Folder
Office2007PIARedist		File Folder
Deltek Vision Project Connect...	6 KB	VSTO Deployment ...
setup.exe	992 KB	Application

Open the
Project2k7_Add-in
folder

Run setup.exe and follow the installation instruction as populated.

After the installation is completed open Microsoft Project,



The ProjectConnect Add-in has added to Microsoft Toolbar

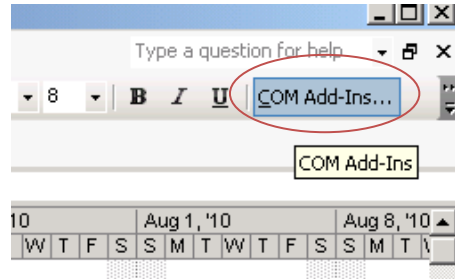


For more information about how to configure ProjectConnect Toolbar, see the Vision Project Connect 1.5 User's Guide.

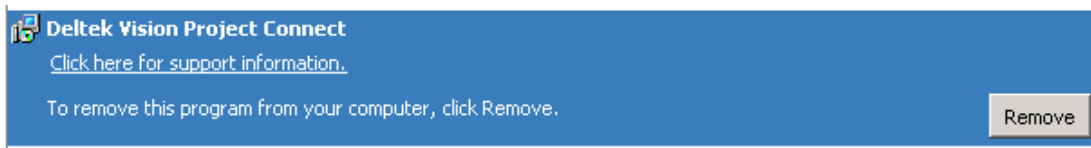
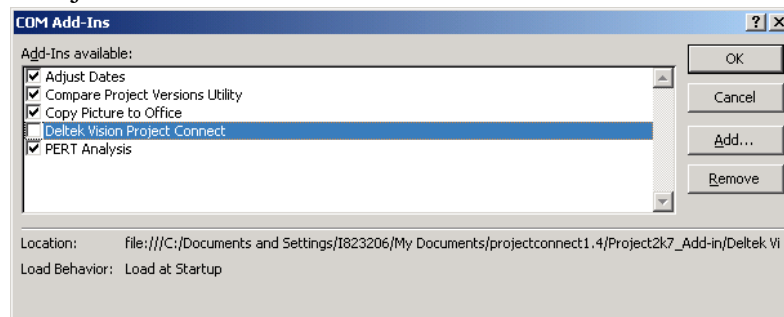
Vision Project Connect Toolbar Upgrade

In order to upgrade the Toolbar add-in for a newer version please follow the instruction below:

On Microsoft Project Toolbar double click
On Com Add-Ins



Uncheck Deltek Vision Project Connect



Go to Control Panel – Add or Remove programs and remove Deltek Vision Project Connect.

Go to local Sitting on your machine

- Windows XP location: ([SystemDrive]:\Documents and Settings\User\Local Settings\Apps\2.0)
- Windows 7 location
[SystemDrive]:\Users\[UserProfile]\AppData\Local\Apps\2.0

Now you are ready to install the new Add-In from (Project2k7_Add-in folder) on your local machine.



For more information about how to install ProjectConnect Toolbar, see Vision Project Connect Toolbar Installation for Microsoft Project Desktop page 26.