

Deltek wInsight® Analytics Administrator 8.3.4

Installation Guide



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Overview

Welcome to the wInsight Analytics Administrator 8.3.4 Installation Guide. Use this document to install wInsight Analytics Administrator on your system.

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:

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

Note: 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.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, cumulative updates, and sub-releases. You can access DSM through the Deltek Support Center or use Deltek Software Manager Lite to download Deltek products.

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

1. In your Web browser, go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password** and click **Login**.
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products and click **OK**.

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

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

6. In the left pane, 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.

Options include:

- **Complete**
- **Cumulative Updates**
- **HotFixes**
- **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.

Note: 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 to download the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite:

1. In your Web browser, go to <https://dsm.deltek.com/DeltekSoftwareManagerLite>.
2. Enter your Deltek Support Center **Username** and **Password** and click **Logon**.
3. When the Deltek Software Manager Lite page displays, select a product from the drop-down list.
4. Click the product type that you want to download.

Note: The download behavior and download folder may differ depending on the browser and browser settings that you are using.

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](#).

Note: When you click a link, you will be asked to log into DSM if you aren't already logged in.

Before You Begin Deployment

Before you begin deployment, it is important to understand the following:

Logical Tiers Overview

The wInsight Analytics product suite uses multitier (n-tier) architecture. Various parts of a wInsight Analytics product are distributed to logical tiers for performance and scalability. The logical tiers are as follows:

- **Client/Application Tier:** This tier performs wInsight Analytics functional process logic and provides the user interface layer. It can be a workstation or a Citrix/Terminal Server.
- **Database Tier:** This tier consists of database servers where the wInsight Analytics data is stored and retrieved.

Note: Deltek recommends, as part of best practice, to install all products in the PPM suite into the same database. The installations apply schema changes (tables, views, stored procedures, and so on) to your existing database to support the integration. While it is highly recommended that you install wInsight Analytics and Acumen into the same database, the integration between PM Compass, Open Plan, and Cobra requires it.

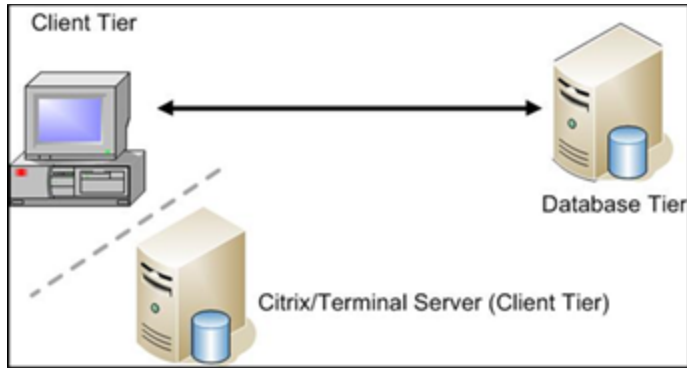
Deployment Models

Stand-Alone Deployment

Deltek wInsight Analytics Administrator and wInsight Analytics Desktop have a stand-alone deployment model. In a stand-alone deployment model, the applications are installed locally to the user's PC or laptop and can connect to a local Access database. This deployment mode can be useful where a single user is managing and reporting data for a small number of contracts.

Client/Server Deployment

In the client/server model, you install the client/application tier on workstations that directly connect to a database server. However, when a client workstation that is connected to the database goes through a WAN or VPN, this type of setup can yield poor performance. The applications can be deployed in a Citrix/Terminal Server environment to improve performance over a WAN or VPN.



In addition, the application can be installed such that the application files reside on a network share on a machine and a shortcut is created on each workstation.

Questions to Ask Before You Begin

You should answer the following questions before installing wInsight Analytics Administrator:

- Are you upgrading from an earlier version of wInsight Analytics Administrator? For steps, see the [Upgrade from an Earlier Version of wInsight Analytics Administrator](#) section.
- Are you performing a fresh install of the wInsight Analytics Administrator on a local machine? For steps, see the [Install wInsight Analytics Administrator](#) section.
- Do your client workstations and servers meet hardware and software requirements? For steps, see the [System Requirements](#) section.
- Are you using Microsoft Access, Oracle, or Microsoft SQL as your database platform? For steps, see the [Set Up and Create a New Database](#) section.

Installation Steps

Follow this sequence to successfully install wInsight Analytics Administrator:

Important: To enhance application security and ensure a more controlled access environment, there have been significant changes to access rights pertaining to the **\\wInsight Analytics** directory. Before you proceed with the installation, make sure to read [Directory and File Permissions](#).

Step	Description	
1	Make sure that your system meets the hardware requirements to install the required software.	System Requirements
2	Download the wInsight Analytics Administrator installer from the Deltek support site.	Downloading Deltek Products using Deltek Software Manager
3	Prior to installing the new version of wInsight Analytics Administrator, protect your existing data making backups of your database. Have your Database Administrator back up	Back Up Contracts from an Earlier Version of the wInsight Analytics Database

Step	Description	
	your Oracle/SQL databases or make copies of your Access .mdb database files.	
4	Install the wInsight Analytics Administrator.	
	<ul style="list-style-type: none"> If you are upgrading from an earlier version of wInsight Analytics Administrator, make sure that you have recently backed up your wInsight Analytics data. 	Upgrade from an Earlier Version of wInsight Analytics Administrator
	<ul style="list-style-type: none"> Perform a new installation of wInsight Analytics Administrator. 	Install wInsight Analytics Administrator or Install wInsight Analytics Administrator on a Network Share Setup
5	Perform one of the following steps to create or upgrade the database tables.	
	<ul style="list-style-type: none"> Upgrade your existing database by running upgrade scripts. 	Convert an Earlier Version of the wInsight Analytics Administrator Database
	<ul style="list-style-type: none"> Create a new database. 	Create a Database
6	Run the data tool to set up a connection to the database used to store wInsight Analytics data.	Appendix A: Data Tool
7	Download and install PPM Administrator 1.0 or EPM SA 8.6 (if not already installed), then launch it to define security rights to wInsight Analytics users.	Appendix B: PPM Security Tools
	<div style="border: 1px solid #0070C0; padding: 10px;"> <p>Note: Once you install PPM Administrator 1.0 or EPM SA 8.6, you can use it across all PPM products. If you use PPM Administrator, you can access it via a URL because it is a web-based tool. If you use EPM SA 8.6, you can only access it on the computer where you installed it</p> </div>	

System Requirements

Your organization has made a substantial commitment to ensure it has a fully integrated earned value management (EVM) solution. To support that commitment, Deltek recommends that you carefully consider the hardware requirements necessary to run a wlnsight Analytics product properly.

Hardware Sizing Considerations

There are several factors that go into sizing an appropriate server infrastructure. The number of concurrent users accessing the system at any given time, amount of data being analyzed, and growth expectations all have an impact on the initial sizing plans. The hardware profiles provided in the previous sections are intended as a starting point for deployment. It is expected that our clients will use the product in many different ways, such as planning for future release and client customizations.

Memory Requirements for a Typical/Average Use

Below are details on the memory footprint of the product. This can be helpful when sizing a client tier that runs in a virtual environment, Citrix®, or Terminal Server.

Tier	Memory*
Client/Application Tier	2 GB (assuming the wlnsight Analytics Module is being run as a server application).
Database Tier	Database instance memory should be 10%–15% of the database size. For example, if database size is expected to be 500 GB, then allocate 50 GB–75 GB memory.

Definition of Typical/Average Use

Sample details for a typical small/medium data sizing:

- Number of Contracts: 50
- Number of Element Records: 50,000
- Number of Earned Value Records: 1,200,000
- Number of Past and Future Period Records: 75,000,000

Hardware Requirements

The following table lists the recommended minimum hardware and software requirements for a deployment in a stand-alone or client/server environment.

Tier	Hardware Required	Determining Factors
Client/Application Tier	<ul style="list-style-type: none"> ▪ Intel Core 2.0 Duo or higher ▪ 4 GB RAM (Depending on data volumes, more may be required.) ▪ 80 GB Hard Drive (More may be required if wInsight Analytics uses a Microsoft Access database to store data on the local machine) 	<ul style="list-style-type: none"> ▪ Database Size ▪ Database Growth

Software Requirements

Note: Supported versions are the currently actively tested versions of technologies used to deploy wInsight Analytics. Except for the Deltek Integrated Products, these technologies are not directly supported by Deltek. Changes to these technologies occur at the discretion of the individual technology vendors.

Compatible versions are the recent previously supported and tested technologies used to deploy wInsight Analytics. These are not actively being tested but are believed to be compatible with wInsight Analytics. Deltek does not recommend these technologies for new deployments but will make its best effort to answer questions concerning these technologies. These technologies may not be available for troubleshooting at Deltek.

For a complete list of the recommended minimum software requirements, see the Deltek Product Support Compatibility Matrix document that you can download from the [Deltek Support Center](#).

Supported Deployment Technology

The table below outlines the supported deployment technologies for stand-alone and network share installations.

Supported Deployment Technology	
Operating System	<p><i>Microsoft Windows</i></p> <ul style="list-style-type: none"> Microsoft Windows 11 <p><i>Microsoft Windows Server</i></p> <ul style="list-style-type: none"> Microsoft Windows Server 2019 Microsoft Windows Server 2022 Microsoft Windows Server 2025 Microsoft Windows Server 2022 Azure Edition
VMWare Horizon	VMWare Horizon 8
Database	<p><i>Microsoft SQL Server</i></p> <ul style="list-style-type: none"> Microsoft SQL Server 2019 (also supported on Linux and Unix) Microsoft SQL Server 2022 (also supported on Linux and Unix) Microsoft Azure SQL Server <p><i>Microsoft SQL Server Express</i></p> <ul style="list-style-type: none"> Microsoft SQL Server Express 2019 Microsoft SQL Server Express 2022 <p><i>Microsoft Access</i></p> <ul style="list-style-type: none"> Microsoft Access 2016 Microsoft Access 2019 Microsoft Access 2021 <p><i>Oracle</i></p> <ul style="list-style-type: none"> Oracle 19.3 Oracle is also supported on Linux, Unix and Exadata <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>Note: If the database instance does not support Unicode character set, the Unicode flag (@unicode) in the database table creation scripts should be set to 0.</p> </div>

Supported Deployment Technology	
Database Drivers	<div style="border: 1px solid #0056b3; padding: 5px; margin-bottom: 10px;"> <p>Note: wInsight Analytics applications support 32-bit and 64-bit drivers, depending on the version of the application you are using.</p> </div> <ul style="list-style-type: none"> ▪ Oracle Provider for OLE DB ▪ Microsoft SQL Server 2012 Native Client, version 11.4.7001.0 or higher ▪ Microsoft OLE DB Driver for SQL Server, version 18.2.2.0 or higher ▪ Microsoft OLE DB Provider for Jet ▪ Microsoft ACE OLEDB 15 ▪ Microsoft ACE OLEDB 16
Scheduling Tools	<p><i>Microsoft Project Standard</i></p> <ul style="list-style-type: none"> ▪ Microsoft Project Standard 2021 (32-bit only) ▪ Microsoft Project Standard 2024 (32-bit only) <p><i>Microsoft Project Professional</i></p> <ul style="list-style-type: none"> ▪ Microsoft Project Professional 2021 (32-bit only) ▪ Microsoft Project Professional 2024 (32-bit only) <p><i>Microsoft Project Server</i></p> <ul style="list-style-type: none"> ▪ Microsoft Project Server 2016 <p><i>Oracle Primavera</i></p> <ul style="list-style-type: none"> ▪ Primavera P6 20.12 ▪ Primavera P6 21.12 ▪ Primavera P6 22.12 ▪ Primavera P6 23.12 ▪ Primavera P6 24.12
Microsoft Office	<p><i>Microsoft Excel</i></p> <ul style="list-style-type: none"> ▪ Microsoft Excel 2021 (32-bit only) ▪ Microsoft Excel 2024 (32-bit only) ▪ Microsoft Excel 365 (32-bit only) <p><i>Microsoft PowerPoint</i></p> <ul style="list-style-type: none"> ▪ Microsoft PowerPoint 2021 (32-bit only)

Supported Deployment Technology	
	<ul style="list-style-type: none"> Microsoft PowerPoint 2024 (32-bit only)
Embedded Technologies	<ul style="list-style-type: none"> Visual C++ 2017 Redistributable Package (x86) Visual C++ 2015-2022 Redistributable Package (x86) Visual C++ 2017 Redistributable Package (x64) Visual C++ 2015-2022 Redistributable Package (x64) MSXML 6.0 Service Pack 2 (Microsoft XML Core Services)
.NET Framework	<ul style="list-style-type: none"> Microsoft .Net Framework 4.8 Microsoft .Net Framework 4.8.1 <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Attention: You can download the Microsoft.NET Framework from Microsoft's Web site at http://www.microsoft.com/en-us/download/details.aspx?id=17718. For instructions for adding it using Server Manager, see your Microsoft Windows documentation.</p> </div>

Supported PPM Product Versions

The table below outlines the PPM product versions compatible with wInsight Analytics 8.3.4. The versions listed below are the minimum supported versions. Subsequent cumulative update (CU) releases within the listed major/minor release will be supported unless otherwise specified. Subsequent major/minor releases are not supported.

Supported PPM Product Versions	
Deltek Acumen	<ul style="list-style-type: none"> 8.10 8.11
Deltek Cobra	<ul style="list-style-type: none"> 8.6 8.7
Deltek Open Plan	<ul style="list-style-type: none"> 8.6 8.7 8.8
PPM Administrator	<ul style="list-style-type: none"> 1.0

Supported PPM Product Versions	
EPM Security Administrator	<ul style="list-style-type: none"> 8.6

Compatible Deployment Technology

The table below outlines the compatible deployment technologies.

Compatible Deployment Technology	
Operating System	<ul style="list-style-type: none"> Microsoft Windows Server 2016
Database	<ul style="list-style-type: none"> Microsoft SQL Server 2016 Microsoft SQL Server 2017 Microsoft SQL Server Express 2016 Microsoft SQL Server Express 2017 Oracle 12.2
Scheduling Tools	<ul style="list-style-type: none"> Microsoft Project Standard 2013 Microsoft Project Professional 2013 Microsoft Project Server 2013 Primavera P6 17.12 Primavera P6 18.8 Primavera P6 19.12
Deltek Integrated Product	<ul style="list-style-type: none"> Deltek MPM 3.5

Open Source Software Included with wlnsight Analytics

wlnsight Analytics includes the following open source software:

Software	Company
Zlib 1.3.1	SourceForge
jpeg.lib	Independent JPEG Group

Integrate wInsight Analytics with Other PPM Products

Before integrating wInsight Analytics with any PPM products, including Acumen, Cobra, Open Plan, and PM Compass, Deltek recommends that you consider the following:

- Verify that you are installing the supported version of each PPM product.

Attention: For more information, see [“Supported PPM Product Versions”](#) under System Requirements in this guide.

- For a new installation on a shared database, where wInsight Analytics 8.3.4 is installed first, older versions of other PPM products that do not support the encryption protocol will neither function nor integrate with wInsight Analytics 8.3.4.

Note: wInsight Analytics started using the encryption model in wInsight Analytics 8.3.2.

- You should consider installing or upgrading all products in the Deltek PPM suite to versions that support the new encryption model.

Attention: For more information on the encryption model, see [“Appendix E: PPM Encryption Conversion Utility”](#) in this guide.

This table lists the versions that support the new encryption model:

Product	Version
Acumen	8.9 or later
Acumen Touchstone	8.2 or later
Cobra	8.5 or later
Open Plan	8.6 Cumulative Update 05 or later
PM Compass	8.4 Cumulative Update 02 or later
wInsight Analytics	8.3.2 or later

- If you are installing wInsight Analytics on a database that already contains another Deltek PPM application that is not configured to use Unicode, you must first update the existing database tables to use Unicode structures before installing wInsight Analytics 8.3.4.

- If you are setting up a new database that will include the Open Plan 8.7 (CU 05 or earlier) or 8.6 (CU 10 or earlier), you need to run the Open Plan scripts prior to running scripts for other PPM products.
- Run any recommended installation and upgrade database scripts.

Attention: For installation details, see the Installation Guide of each PPM product.

Directory and File Permissions

Significant modifications have been made to access rights pertaining to the **\wInsight Analytics** directory. These changes are intended to enhance application security and ensure a more controlled access environment.

Local Administrators Group

Members of the local Administrators group have Full Read and Write access to the directory. This implies that they can view, modify, and delete any files or subdirectories within the directory.

Everyone Group

Members of Everyone group who do not have administrative rights are now denied permissions to the application directory so they will not be able view or open the directory.

Local Users Group

Members of the local Users group who do not have administrative rights now have Read and Execute access to the application directory. This means they can open files and run programs, but they cannot make any modifications at the directory level. However, exceptions apply for the following subdirectories within the **\wInsight Analytics** directory:

- **\csprj**
- **\data**
- **\log**
- **\mpmx**
- **\prjconn**
- **\winst**
- **\wsmde**
- **\xlconn**

Users from this group also have Write access to these specific subdirectories, allowing them to make necessary modifications.

Remote Desktop Users

Members of the Remote Desktop Users group who do not have administrative rights are restricted from copying and opening the following tools within the \wInsight Analytics directory:

- DataTool.exe
- DeltekEPMSA86x86.msi or DeltekEPMSA86x64.msi
- DeltekPPMAdministrator<build number>.msi
- PPMEncryptionConverter.exe

This is a security measure to prevent unauthorized usage or potential misuse of these tools from remote access.

Deltek strongly recommends that you add any user who will install and configure any wInsight Analytics application as a member of the local Administrators group. Alternatively, you can create a custom group that is a member of the local Administrators group and then add the user to the said custom group.


Install wInsight Analytics Administrator

Use this procedure to perform a fresh install of wInsight Analytics Administrator.

Attention: If you are re-installing/upgrading the wInsight Analytics Administrator, see [Upgrade from an Earlier Version of wInsight Analytics Administrator](#).

If you want to install wInsight Analytics Administrator to run from a server, perform the steps below on the server only. You will need to perform additional steps after you complete the installation. For more information, see [Install wInsight Analytics Administrator on a Network Share Setup](#).

To install wInsight Analytics Administrator:

1. Download the wInsight Analytics Administrator installer from DSM. For steps, see [Downloading Deltek Products using Deltek Software Manager](#).
2. Navigate to the location where you saved the installer and double-click one of the following to launch the InstallShield Wizard:
 - For 64-bit: **DeltekwInsightAnalyticsAdministrator834x64.exe**
 - For 32-bit: **DeltekwInsightAnalyticsAdministrator834.exe**
3. On the Welcome page, click **Next**.
4. On the Setup Type page, do one of the following:
 - Select **Complete** to install all components and click **Next**.
By default, the wInsight Analytics Administrator is installed in any of the following locations:
 - For 64-bit: **C:\Program Files\Deltek\wInsight Analytics**
 - For 32-bit: **C:\Program Files(x86)\Deltek\wInsight Analytics**
 - Select **Custom** to choose program features to install and click **Next**.
 - On the Custom Setup page, click **Change** to change the folder where the application will be installed or one of the  icons to change the features installed, and click **Next**.
5. On the Ready to Install the Program page, click the **Install** button to start the installation process. The Installing Deltek wInsight Analytics Administrator page displays the installation progress.
6. On the InstallShield Wizard Completed page, click the **Finish** button to exit the InstallShield Wizard. You can select the check box to launch the application after installation is completed.

Install wInsight Analytics Administrator on a Network Share Setup

You can install wInsight Analytics Administrator files (.exe, .dll, or .htm) and other related files on a server and run wInsight Analytics Administrator from a client PC. The software runs on the client PCs even though all wInsight Analytics Administrator files are stored on the server. Certain files, however, 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 Analytics Administrator.

Note: This setup requires you to install wInsight Analytics Administrator only on the server and not on the client PCs.

To set up wInsight Analytics Administrator to run from a server:

1. Install wInsight Analytics Administrator on the server. For steps, see [Install wInsight Analytics Administrator](#).
2. Share the wInsight Analytics Administrator installation folder.

Note: There are different ways to do this. For example, in Windows Server 2016, you can create a file share using the New Share wizard on the File and Storage Services page of the Server Man.

3. From the client PC, locate and run the **DoRegAll.bat** file, which is in **C:\Program Files (x86)\Deltek\wInsight Analytics** (for 32 bit) or **C:\Program Files\Deltek\wInsight Analytics** (for 64-bit), on the server.

To run:

- a. Open an Administrative Command Prompt. The location of the command prompt varies depending on the operating system. For example, In Windows 10:
 - i. Click **Start » All Programs » Accessories**.
 - ii. Right-click **Command Prompt** and select **Run as Administrator**.

```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.16299.1932]
(c) 2017 Microsoft Corporation. All rights reserved.

C:\Windows\system32>
```

- b. Use the "net use" command to map the drive (for example, **Z:**, but it could be any drive available for mapping). This step ensures that you can see the drive.

```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.16299.1932]
(c) 2017 Microsoft Corporation. All rights reserved.

C:\Windows\system32>net use Z: "\\server name\wInsight Analytics"
```

- c. Press **Enter**.

```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.16299.1932]
(c) 2017 Microsoft Corporation. All rights reserved.
C:\Windows\system32>net use Z: "\\server name\wInsight Analytics" _
The command completed successfully.

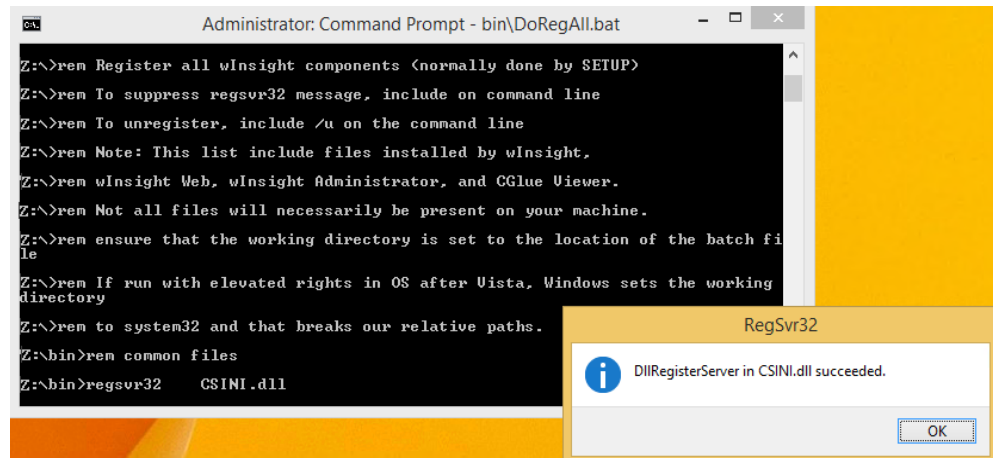
C:\Windows\system32>z:
Z:\>
```

- d. Go to the mapped drive and run **DoRegAll.bat**.

```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.16299.1932]
(c) 2017 Microsoft Corporation. All rights reserved.
C:\Windows\system32>net use Z: "\\server name\wInsight Analytics" _
The command completed successfully.

C:\Windows\system32>z:
Z:\> DoRegAll.bat _
```

- e. Press **Enter**.



- f. Click **OK** until all the .DLL files included in the batch are registered.
 - i. If UAC is enabled, go to step #4.
 - ii. If UAC is not enabled, skip step #4 and continue with step #5.
4. If UAC is enabled, on the client PC, create a mapped drive to the wInsight Analytics installation folder on the server.

To map a network drive:

- a. Open **My Computer**.
- b. On the **Tools** menu, click **Map Network Drive**.
- c. On the Map Network Drive page, in the **Drive** drop-down list, enter or select the drive letter to map the shared resource (this should be the same drive you selected in Net Use command from step #3).
- d. In the **Folder** drop-down list, enter the server name and share name, for example, **\\server name\share name**. You can also click **Browse** to locate the resource.
- e. Click **Finish**.
5. From the client PC, locate the **Wsmde.exe** file in the wInsight Analytics installation folder on the server using the mapped drive.
6. Create a shortcut on the client PC.

Installation Notes

This section discusses additional details for installing wInsight Analytics Administrator on a server on a Local Area Network (LAN):

- The Microsoft Windows Installer can perform an administrative installation of an application or product to a network for use by a workgroup. Your administrator can run an administrative installation from the command line by using the "/a" command line option. You can then install the product from the network to run the application. You can choose to "run-from-source" and the installer will use most of the product's files directly from the network.

- Regardless of where the application files are installed, a wInsight Analytics 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. You can access an MS Access .MDB file if it resides on the client PC.
- You do not need any write privileges on the server unless you need to create a data source. In that case, you must be able to write to the datasources.dat file which is stored in the installation directory by default. However, you need Read, Write, Create, and Delete privileges to the directory storing the wInsight MS Access (.MDB) database.
- You can share the data sources used to access wInsight Analytics data by specifying the location of the datasources.dat file (which contains the connection details) in config.dat. If you use other Deltek products (such as Cobra and Open Plan) and store all of your data in a single database, you can create a single list of database connections in one shared datasources.dat file.

The config.dat file must reside in the wInsight Analytics folder but the shared datasources.dat can be placed in a network shared folder and accessed by all users. This allows all users to easily connect to the databases configured by their system administrator.

To update config.dat, open the file in a text editor (such as Notepad), specify the location of the shared datasources.dat, and restart the application.

```
[SYSTEM]
```

```
DataSources=<path>\<filename>
```

Note: The config.dat file is installed into C:\Program Files (x86)\Deltek\wInsight Analytics or C:\Program Files\Deltek\wInsight Analytics by default.

- For an Oracle database, wInsight Analytics no longer supports **Microsoft OLE DB Provider for Oracle** (MSDAORA.DLL). To connect to a database, it now uses **Oracle Provider for OLE DB** (OraOLEDB.Oracle.1). If **Oracle Provider for OLE DB** is not included in the **OLE DB Provider** list on the Data Link Properties dialog box, download and install Oracle Data Access Components (ODAC) for the Oracle database version you are using.

Part of this change is the conversion of the LONG data type into CLOB (Character Large Object) data type. CLOBs allow you to store and manipulate large blocks of unstructured data and provide efficient access to the data. In addition, Oracle recommends that you use CLOBs over LONG data types.

Attention: For more information, see <http://www.oracle.com/technetwork/topics/dotnet/downloads/net-downloads-160392.html>.

Upgrade from an Earlier Version of wInsight Analytics Administrator

When you install the wInsight Analytics Administrator, the installer automatically removes the older version.

You can also uninstall earlier versions by using one of the following methods:

- Use Windows' Programs and Features to uninstall the wInsight Analytics Administrator.
- Run the older version installer and select the **Remove** option on the Program Maintenance page.

Attention: If you are performing a fresh install of wInsight Analytics Administrator, see [Install wInsight Analytics Administrator](#).

To upgrade an existing wInsight Analytics Administrator:

1. Before you upgrade, create a backup of your contracts in an MS SQL, Oracle, or MS Access database. For steps, see [Back Up Contracts from an Earlier Version of the wInsight Analytics Database](#).
2. Download the latest version of wInsight Analytics Administrator from DSM. For steps, see [Downloading Deltek Products using Deltek Software Manager](#).
3. Double-click the wInsight Analytics Administrator file and follow the installation instructions.
During the upgrade, any MS Access .MDB files found where the latest version is being installed will be moved to the backup folder which is <installation location>\Backup by default. For more information, see [Back Up Copies of Existing MDB Files](#).
4. Run the batch file or scripts to upgrade the database table. For steps, see [Convert an Earlier Version of the wInsight Analytics Database](#).
 - It retains all data sources (from 8.3/8.31/8.3.2/8.3.3), which you can use in the latest version.
 - It displays existing users (from 8.3/8.3.1/8.3.2/8.3.3) in PPM Administrator or EPM SA.

Back Up Contracts from an Earlier Version of the wInsight Analytics Database

Even though you can upgrade an earlier database version to the latest version, you may choose to back up your contracts from the earlier database version and restore them into the latest version.

Manually Create a Backup of Contracts in an MS SQL, Oracle, or MS Access Database

To back up your contracts manually:

1. Run the earlier version of wInsight Analytics Administrator.
2. Click **File » Login** and select the database with the contract to back up.
3. Click **Utilities » Backup** to back up your contracts. Note the location where the archive file (.WSA) of the older version was saved.
4. Exit wInsight Analytics Administrator.

Back Up Copies of Existing MDB Files

When performing an upgrade installation, any .MDB files found where the latest version is being installed will be moved to the backup folder which is in <installation location>\Backup by default.

Note: Make sure that your recent wInsight Analytics data is backed up, especially if it is stored in the Sample data source which uses sample.mdb. This database is installed by default in <installation location>\data and might overwrite the existing one, thereby deleting your data.

Modify, Repair, or Uninstall wInsight Analytics Administrator

wInsight Analytics Administrator provides facilities for changing which features are installed, repairing installation errors, and removing wInsight Analytics Administrator. Use this procedure to modify, repair, or remove your wInsight Analytics Administrator installation.

To modify, repair, or remove your wInsight Analytics Administrator installation:

1. Navigate to the location where you saved the installer and double-click the file to launch the InstallShield Wizard.
2. On the Welcome page, click **Next**.
3. On the Program Maintenance page, select one of the following options:
 - **Modify** — Select this option to change your wInsight installation. The Custom Setup page displays (without a **Change** button) where you can modify the features. Click **Install**.
To change the directory where wInsight Analytics Administrator is installed, you must first uninstall wInsight Analytics Administrator and then re-install it into a different directory (see [Install wInsight Analytics Administrator](#)).
 - **Repair** — Select this option to repair installation errors by re-installing the wInsight Analytics Administrator components. On the Ready to Repair the Program page, click **Install**.
 - **Remove** — Select this option to uninstall wInsight Analytics Administrator. On the Remove the Program page, click **Remove**.
4. When the process is complete, click **Finish** to exit the InstallShield Wizard.

Set Up and Create a New Database

The wInsight Analytics Administrator is installed and configured to use an MS Access database by default and does not require that you have an MS SQL Server or Oracle database to use the software. Installing the application also installs the sample.mdb database file which contains the sample MOH-2 contract.

The wInsight Analytics installer provides batch files to assist with the creation of a new wInsight Analytics database. These batch files are saved in <installation location>\data\ and are database-specific. You can also create the wInsight Analytics database by running the scripts individually during the installation process.

MS SQL Server and Oracle Databases

For an MS SQL Server or Oracle database, the Database Administrator (DBA) needs to run certain scripts in order for you to use the Run Script functionality under the **Utilities** menu in wInsight Analytics Administrator.

Attention: For more information, see [Appendix D: wInsight Analytics Administrator Run Script Setup](#).

If you want to share Users, Groups, Roles, and PPM Administrator or EPM SA between Deltek PPM products, these products need to share the same database. wInsight Analytics can be installed in the same database as the other Deltek PPM products. For more information, see [Appendix C: Using One EPM Security Administrator for All Deltek PPM Products](#).

For details on the sequence of scripts to be executed, see the Cobra, Open Plan, and PM Compass Installation Guides.

Steps for Setting Up a New Database

To use a new database, you must create an MS Access, Oracle, or MS SQL Server database and set up a data source.

1. Create a new database.
 - [Create an MS Access Database](#)
 - [Create an MS SQL Server Database](#)
 - [Create an Oracle Database](#)
2. Set up a data source. You can use the Data Tool to perform this task.

Attention: You can use wInsight Analytics Administrator to add contracts to the new database manually or to add contracts to the new database by importing transfer files. For more information about data source connection, see [Appendix A: Data Tool](#).

Create a New Database

Follow the steps that correspond to your database type.

Create an MS Access Database

Whether or not you installed the sample.mdb file, wInsight Analytics Administrator installs a blank833.mdb database file. This database file contains no contracts. Use it when you want to start a new group of contracts without having to delete existing ones first. Use wInsight Analytics Administrator to add contracts to a new database.

To create a clean MS Access database:

1. Open Windows Explorer and search for blank834.mdb, which is located in **<installation location>\data\Access** by default.
2. Copy the file to your preferred location.
3. In Windows Explorer, rename the copy of blank834.mdb.

Create an MS SQL Server Database

The scripts mentioned in this procedure only create the wInsight Analytics schema. Your Database Administrator (DBA) should have already created the necessary database and tablespaces.

Note: By default, the scripts and batch file discussed in this section are in **<installation location>\data\MSSQL**.

To create a clean Microsoft SQL Server database:

1. Make sure that your DBA has created the database and tablespaces that will contain the wInsight Analytics objects (user, tables, indexes, and stored procedures) and wInsight Analytics database user that will be used to access them. You can check this in the Query Analyzer or an equivalent tool.
2. Connect to the SQL database as the wInsight Analytics user.
3. Run the following scripts in the wInsight Analytics database that you created in the order listed in this step (you can run the last two scripts in any order).

Alternatively, you can run the scripts specified in this step using the RunAllCreateScripts_SQLServer.bat file from the Windows command line.

Note: For more information, see [Run the All Create Scripts Batch File](#).

- a. WST_Tables_SqlServer.sql
- b. WST_Upgrade_SqlServer.sql
- c. WST_Data_SQLServer.sql
- d. WA_Tables_SqlServer.sql
- e. WA_Data_SqlServer.sql
- f. WA_Procedures_SqlServer.sql

Create an Oracle Database

The scripts mentioned in this procedure only create the wInsight Analytics schema. Your Database Administrator (DBA) should have already created the necessary database and tablespaces.

Note: By default, the scripts and batch file discussed in this section are in **<installation location>\data\Oracle**.

To create a clean Oracle database:

1. Make sure your DBA has created the database and tablespaces that will contain the wInsight Analytics objects (user, tables, indexes, and stored procedures) and wInsight Analytics database user that will be used to access them. You can check this in the Query Analyzer or an equivalent tool.

Note: wInsight Analytics Oracle Database instances should be created as Non-Unicode.

2. The wInsight Analytics database user requires the following privileges:

- CREATE ANY TABLE
- CREATE SEQUENCE

These privileges must be applied directly to the database user. It is not sufficient for these privileges to be available through granted roles assigned to the user. You can use the WA_User_Oracle.sql script to grant the privileges. Deltak recommends that you grant these privileges before executing any of the wInsight Analytics scripts mentioned in step 4.

3. Connect to the Oracle database as the wInsight Analytics user.
4. Run the following scripts in the wInsight Analytics database that you created in the order listed in this step (you can run the last two scripts in any order).

Alternatively, you can run the scripts specified in this step using the RunAllCreateScripts_Oracle.bat file from the Windows command line. If you choose to run the .bat file, the WST_Oracle_CI_Indexes.sql script is also run automatically. This script creates CI and regular indexes for the WST tables in wInsight Analytics.

Note: For more information, see [Run the All Create Scripts Batch File](#).

- a. WST_Tables_Oracle.sql
- b. WST_Oracle_CI_Indexes.sql
- c. WST_Upgrade_Oracle.sql
- d. WST_Data_Oracle.sql
- e. WA_Tables_Oracle.sql
- f. WA_Data_Oracle.sql
- g. WA_Procedures_Oracle.sql

Note: If support is required for Unicode character sets this can be achieved by setting the Unicode flag (@unicode) in the database table creation scripts to 1.

Run the “RunAllCreateScripts” Batch File

When you create a new database, you have the option to manually run the scripts or automatically run the scripts using the RunAllCreateScriptsSQLServer.bat (for SQL) or RunAllCreateScriptsOracle.bat (for Oracle) file from the Windows command line. The .bat file automatically runs the following scripts (in this order):

Oracle Scripts	SQL Scripts
<p>When you run the Oracle .bat file, the WST_Oracle_CI_Indexes.sql script is also automatically run. This script creates CI and regular indexes for the WST tables in wInsight Analytics.</p> <ol style="list-style-type: none"> 1. WST_Tables_Oracle.sql 2. WST_Oracle_CI_Indexes.sql 3. WST_Upgrade_Oracle.sql 4. WST_Data_Oracle.sql 5. WA_Tables_Oracle.sql 6. WA_Procedures_Oracle.sql 7. WA_Data_Oracle.sql 	<ol style="list-style-type: none"> 1. WST_Tables_SqlServer.sql 2. WST_Upgrade_SqlServer.sql 3. WST_Data_SQLServer.sql 4. WA_Tables_SqlServer.sql 5. WA_Procedures_SqlServer.sql 6. WA_Data_SqlServer.sql

The following table describes several ways to run the RunAllCreateScripts_SQLServer.bat and RunAllCreateScripts_Oracle.bat files.

Note: If you manually ran the above scripts when you created the database, you do not need to run the RunAllCreateScripts batch file.

Method	Description	Example
Run the batch file with no parameters	This method runs the scripts against the default winst database.	<pre>C:\<installation location>\RunAllCreateScripts_SqlServer.bat</pre> <pre>C:\<installation location>\RunAllCreateScripts_Oracle.bat</pre> <p>ORADB\ORC1</p> <p>For Oracle, however, you need to include the server name\instance name.</p>
Run the batch file with the [database name] [server name] parameters	This method uses Windows authentication to log on to the database server. This could be used to set up a database named winst or a custom database.	<pre>C:\<installation location>\RunAllCreateScripts_SqlServer.bat WINST SQLDB</pre> <pre>C:\<installation location>\RunAllCreateScripts_Oracle.bat WINST ORADB\ORC1</pre>
Run the batch file with the [database name] [server name/instance name] [database user ID] [database	<p>This uses the SQL Server Authentication or Authentication by Oracle Database to log on to the database server. You can use this method to set up a database named winst or a custom database.</p> <ul style="list-style-type: none"> If you are using SQL authentication for the connection, you must have created and associated users with the 	<pre>C:\<installation location>\RunAllCreateScripts_SqlServer.bat WINST SQLDB\MSSQL2012R2 SA SAPWD</pre>

Method	Description	Example
password] parameters	<p>database with appropriate rights to create and update the tables.</p> <ul style="list-style-type: none"> For SQL, if you do not enter the user name and password, the script uses winst as the default database name and Windows authentication to log on to the database. For Oracle, if you do not enter the user name and password, the script uses winst as the default database name, and winst/winst as the default user name/password. 	<pre>C:\<installation location>\RunAllCreateScr ipts_Oracle.bat ORADB\ORC1 SA SAPWD</pre> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: Oracle only uses three parameters.</p> </div>

Note: By default, the installation location for MS SQL is C:\Program Files (x86)\Deltek\wInsight Analytics\data\MSSQL and for Oracle is C:\Program Files (x86)\Deltek\wInsight Analytics\data\Oracle.

Blank MS SQL Server or Oracle Database

To run the .bat file when a blank MS SQL or Oracle database has been created for wInsight Analytics:

1. Open Command Prompt as an Administrator (right-click **Command Prompt** and select **Run as administrator**).
2. If the User Account Control dialog box displays, click **Yes**.
3. In the Command Prompt window, type `cd /` and press ENTER.
4. Enter `cd` followed by the installation location of the .bat file, and press ENTER.

Example:

```
cd Program Files (x86)\Deltek\wInsight Analytics\data\MSSQL
cd Program Files (x86)\Deltek\wInsight Analytics\data\Oracle
```

5. Enter the .bat file name, and press ENTER. The format, however, varies depending on the method you are using.

Example: if you are running it with the **[bat file] [database name] [server name/instance name] [user ID] [password]** parameters, enter one of the following depending on your database:

```
RunAllCreateScripts_SQLServer.bat WINST SQLDB\MSSQL2012R2 SA SAPWD
```

```
RunAllCreateScripts_Oracle.bat ORADB\ORC1 SA SAPWD
```

Convert an Earlier Version of the wInsight Analytics Database

Use this procedure to convert an earlier version of the wInsight Analytics database to the latest version.

Attention: Backing up and restoring your data is an alternative to converting your database. For more information, see [Upgrade from an Earlier Version of wInsight Analytics Administrator](#).

The instructions in this section are organized by database type:

- [Convert an MS Access Database](#)
- [Convert an MS SQL Server Database](#)
- [Convert an Oracle Database](#)

Convert an MS Access Database

For an MS Access database, you either convert the database or create a backup of wInsight Analytics contracts and restore it, depending on which version you are coming from.

Upgrade from the Previous Version

No one should be using the database during this conversion process. Deltek recommends that you back up your wInsight Analytics contracts before performing the conversion.

Attention: For more information, see [Manually Create a Backup of Contracts in an MS SQL, Oracle, or MS Access Database](#) section.

To convert an MS Access database, you need:

- wInsight Analytics Administrator (latest version) installed
- A fully working or verified operational database
- A data source connection to that database


Attention: To create a clean MS Access database, see [Create an MS Access Database](#).

To convert an MS Access Database:

1. Using Query Analyzer or the equivalent, connect to your existing wInsight Analytics database.
2. Click **File » Open** to open the corresponding upgrade script, depending on which version you are coming from.

Note: By default, the script is in `<installation location>\data\Access`.

Upgrade from	Do this
8.3 / 8.3.1/ 8.3.2 /8.3.3	Select and run WA834_Upgrade_Access.qry against the created database.

3. Click  to run the convert query.
4. Deltek recommends that you recalculate a contract to check that the conversion process completed successfully.

Attention: For more information, see [Recalculate a Contract in the wInsight Analytics Desktop and wInsight Analytics Administrator Online Help](#).

Convert an MS SQL Server Database

No one should be using the database during the conversion process. Deltek recommends that you back up your wInsight Analytics contract before performing the conversion.

Attention: For more information, see [Manually Create a Backup of Contracts in an MS SQL, Oracle, or MS Access Database](#) section.

To convert an MS SQL database, you need:

- wInsight Analytics Administrator (latest version) installed
- A fully working or verified operational database
- A data source connection to that database

Attention: To create a clean MS SQL database, see [Create an MS SQL Server Database](#).

To convert an earlier version of the MS SQL Server database:

1. Using Query Analyzer or the equivalent, connect to an existing wInsight Analytics database.

Note: By default, the login name and password are **winst** and **winstpwd**.

2. Click **File » Open** to open the corresponding upgrade script, depending on which version you are coming from.

Note: By default, the scripts specified in this step are in **<installation location>\data\MSSQL**.

Upgrade from	Do this
8.3 / 8.3.1/ 8.3.2 / 8.3.3	Select and run the following scripts (in the order listed in this step) against the created database: <ol style="list-style-type: none"> 1. WST_Upgrade_SqlServer.sql 2. WA834_Upgrade_SqlServer.sql

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

Attention: For more information, see [Recalculate a Contract in the *wInsight Analytics Desktop and wInsight Analytics Administrator Online Help*](#).

Convert an Oracle Database

No one should be using the database during the conversion process. Deltek recommends that you back up your wInsight Analytics contracts before performing the conversion.

Attention: For more information, see [Manually Create a Backup of Contracts in an MS SQL, Oracle, or MS Access Database](#).

To convert an Oracle database, you need the following:

- wInsight Analytics Administrator (latest version) installed
- A fully working or verified operational database
- A data source connection to that database

Attention: To create a clean Oracle database, see [Create an Oracle Database](#).

To convert an earlier version of the Oracle database:

- Using SQL Plus or the equivalent, connect to an existing wlnsight Analytics database.

Note: By default, the login name and password are **winst** and **winstpwd**.

- Click **File » Open** to open the corresponding upgrade script, depending on which version you are coming from.

Note: By default, the scripts specified in this step are in **<installation location>\data\Oracle**.

Upgrade from	Do this
8.3 / 8.3.1 / 8.3.2 / 8.3.3	Select and run the following scripts (in the order listed in this step) against the created database: <ol style="list-style-type: none"> WST_Upgrade_Oracle.sql WA834_Upgrade_Oracle.sql

- Delttek recommends that you recalculate a contract to check that the conversion process completed successfully.

Attention: For more information, see *Recalculate a Contract* in the *wlnsight Analytics Desktop and wlnsight Analytics Administrator Online Help*.

Troubleshooting wInsight Analytics Administrator

This section provides information on how to contact Deltek if problems occur during installation. It also includes a list of errors that may occur during installation as well as viable solutions.

Contact Technical Services

While Deltek has worked hard to ensure an easy installation, in certain situations installation can be complex, and may require special consideration. The complexity can increase, for example, with multiple server installation, database replication, or other complex deployments. In such cases, we recommend contacting Deltek Technical Services to schedule your wInsight Analytics Administrator installation.

Deltek's team of technical consultants can assist you with your installation in a timely manner. When you contact the Technical Services department, technical specialists schedule a phone and Microsoft Live Meeting appointment to walk your IT staff through your wInsight Analytics Administrator installation. Deltek's involvement ensures that all applications are installed properly, regardless of the complexity of the deployment scenario.

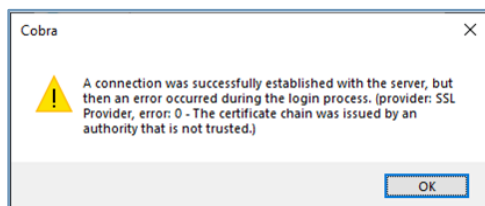
The Technical Services department's assistance is billed on a time and materials basis. While installation assistance is not required, it is recommended that you optimize your investment in wInsight Analytics Administrator from the time of installation. Many Deltek clients have benefited from the Deltek Technical Services department's experience and knowledge of the wInsight Analytics Administrator installation process.

Send Files to Deltek

If you encounter any problems while installing wInsight Analytics Administrator, contact [Deltek Support Center](#) for assistance. To help us resolve your installation issues as quickly as possible, send the installation logs to Deltek when requesting assistance with troubleshooting the installation.

Error Encountered When Using the SQL.NET Framework Database Provider

When using the SQL.NET Framework as your database provider, you may encounter an SSL certificate validation error during login, similar to the following.



If you encounter this error, Deltek recommends that you consult your database administrator and ensure that your server instances are configured with the certificates required by Microsoft.

Attention: For more information, refer to the following Microsoft article: "[Encryption and Certificate Validation in Microsoft.Data.SqlClient.](#)"

Appendix A: Data Tool

Use this tool to add new, edit, and delete data source. If you have more than one database, you can specify additional databases using this tool. The data tool is installed when you install the wInsight Analytics Desktop or wInsight Analytics Administrator application.

Add a Data Source

Use this procedure to add a data source.

Attention: You can add a new data source using the Data Tool or EPM SA. For more information about adding a data source using EPM SA, see [Switch to Another Data Source](#).

To add a wInsight Analytics data source using the Data Tool:

1. Click **Start » All Programs » Deltek wInsight Analytics » Deltek wInsight Analytics Data Tool**.
2. On the Data Sources dialog box, click **Add**.
3. On the Data Link Properties dialog box, select the OLE DB provider that matches the database in which your data is stored.

The OLE DB providers in the table below are only examples. You must select the appropriate driver for your environment.

Database	OLE DB Provider
MS Access	<ul style="list-style-type: none"> ▪ Microsoft Office 15.0 Access Database Engine OLE DB Provider ▪ Microsoft Office 16.0 Access Database Engine OLE DB Provider
Oracle	<ul style="list-style-type: none"> ▪ Oracle Provider for OLE DB
MS SQL Server	<ul style="list-style-type: none"> ▪ Microsoft OLE DB Provider for SQL Server, Microsoft SQL Server Native Client ▪ Microsoft OLE DB Driver for SQL Server

Attention: For Oracle users, if you cannot find the Oracle Provider for OLE DB in the OLE DB Provider list, download and install Oracle Data Access Components (ODAC) for the Oracle database version you are using. For more information, see <http://www.oracle.com/technetwork/topics/dotnet/downloads/net-downloads-160392.html>.

4. Click **Next** or the Connection tab.

5. On the Connection tab, enter or select appropriate information. The contents of this tab may vary depending on the database provider.
6. Select a database and provide the necessary connection details.

Database	Connection Details
MS Access	<ul style="list-style-type: none"> ▪ Click the ellipses (...) button to browse and select a wInsight .MDB file. ▪ Enter Admin in the User Name field ▪ Leave the Password field blank. ▪ Select the Blank Password option
Oracle	<p>Obtain the following from your IT:</p> <ul style="list-style-type: none"> ▪ Server Name ▪ Database Name ▪ User Name ▪ Password <p>If there is a password, do not select the Blank Password option.</p>
MS SQL Server	<p>Obtain the following from your IT Administrator.</p> <ul style="list-style-type: none"> ▪ Server Name ▪ Database Name ▪ User Name ▪ Password <p>If there is a password, do not select the Blank Password option.</p>

Note: Always select the **Allow saving password** option to encrypt the password and save it on disk.

Note: If you use **SQL Server Native Client**, you must set **Persist Security Info** to **True** on the All tab of the Data Link Properties dialog box. To do this:

- a. On the Data Link Properties dialog box, click the All tab.
- b. Scroll down and double-click **Persist Security Info**.
- c. Select **True** in the **Property Value** field on the Edit Property Value dialog box.

7. Deltek recommends that you click the **Test Connection** option to verify that the connection to your database works.
8. On the Microsoft Data Link message box, click **OK** to save the information and close the Data Link Properties dialog box.
9. On the Edit Data Source dialog box, in the **Database Name** field, enter a descriptive name.

Note: The **Database is Unicode** field is not used by wInsight Analytics.

10. If you selected a database name on the Connection tab of the Data Link Properties dialog box, leave the **Database Name (Schema)** field blank.
11. Click **OK**. The new data source is added to the list on the Data Sources dialog box.
12. On the Data Sources dialog box, click **OK**.

Edit a Data Source

Use this procedure to edit the properties of an existing data source.

To edit a wInsight Analytics data source:

1. Click **Start » All Programs » Deltek wInsight Analytics » Deltek wInsight Analytics Data Tool**.
2. On the Data Sources dialog box, select a data source and click **Edit**.
3. On the Edit Data Source dialog box, click **Data Link Properties**.

Note: The **Database is Unicode** field is not used by wInsight Analytics.

4. On the Data Link Properties dialog box, enter or select your new preferences on the tabs.
5. Click **OK** to save your modifications and close the Data Link Properties dialog box.
6. Click **OK** to close the Edit Data Source dialog box.
7. Click **OK** to close the Data Sources dialog box.

Delete a Data Source

Use this procedure to delete an existing data source. If you delete a data source that is used in wInsight Analytics Administrator or wInsight Analytics Desktop, the system prompts users to select a different data source the next time they try to access the application.

To delete a wInsight Analytics data source:

1. Click **Start » All Programs » Deltek wInsight Analytics » Deltek wInsight Analytics Data Tool**.
2. On the Data Sources dialog box, select the data source that you want to delete and click **Delete**.
3. On the confirmation dialog box, click **Yes**.
4. Click **OK**.

Appendix B: Using the PPM Security Tools

PPM provides security tools that are crucial for managing various aspects of the PPM solutions.

The Deltek EPM Security Administrator and Deltek PPM Administrator enable you to manage license keys, users, groups, roles, and access to various PPM applications. Download either tool (PPM Administrator 1.0 or EPM SA 8.x) separately from DSM before installing it.

Attention: Deltek strongly recommends installing either PPM Administrator 1.0 or EPM SA 8.6, but not both, as running them together could enable incompatible features, such as multiple licenses.

Once you install PPM Administrator 1.0 or EPM SA 8.6, you can use it across all PPM products. If you use PPM Administrator, you can access it via a URL because it is a web-based tool. If you use EPM SA 8.6, you can only access it on the computer where you installed it.

For more information on these security tools, see their respective Installation Guides and Help Systems.

Appendix C: Using One EPM Security Administrator for All Deltek PPM Products

Note: This section only applies to MS SQL Server and Oracle databases.

Deltek PPM Products can be configured to use a shared database. This allows the Users, Groups, and Roles in the database to be shared across those products and for security information to be maintained centrally using one EPM Security Administrator (EPM SA). To do this, the database scripts for all products that will share security information must be run against the same database.

Note: Ensure that the version of the Deltek PPM products being used are compatible with the wlnsight Analytics version being installed. See the Installation Guide for each PPM product for installation details.

Step	Topic	
1	Install a Deltek PPM product.	<p>For wlnsight Analytics Administrator, see Install wlnsight Analytics Administrator or Upgrade from an Earlier Version of wlnsight Analytics Administrator.</p> <p><i>For the other Deltek PPM products, see the corresponding installation section of each product's Installation Guide.</i></p>
2	<p>Run the scripts created during installation on the same database.</p> <p>Deltek recommends that you run all of the Cobra, Open Plan, or PM Compass database scripts followed by the wlnsight Analytics scripts.</p>	<p><i>For Cobra, see the Establish a Database section of the Deltek Cobra Installation Guide.</i></p> <p><i>For Open Plan, see the Setup a Database section of the Deltek Open Plan Installation Guide.</i></p> <p><i>For PM Compass, see the Appendix E: Using Oracle with PM Compass and Appendix F: Using Microsoft SQL Server with PM Compass sections of the Deltek PM Compass Installation Guide.</i></p>

Step		Topic
		For wInsight Analytics Administrator, see Set Up and Create a New Database .
3	In Data Tool, add a data source pointed to the newly created shared database.	Appendix A: Data Tool
4	<p>Download and install EPM SA 8.6 (if not already installed), then launch it to add users, groups, and roles, and assign users to the PPM products on the shared database.</p> <p>You can only access EPM SA on the computer where you installed it.</p>	Appendix B: Deltek EPM Security Administrator

Database User Accounts

Database	User Account Type
MS SQL Server	Use the built-in SA account to create a shared database and create a login account to the said database with the dbo schema as well as the db_owner and db_securityadmin role memberships.
Oracle	Use the built-in SYSTEM account to create an Oracle user/schema having the connect, create session, resource, dba, create any table, and create sequence privileges.

Note: Deltek recommends that you contact the respective database administrators for each Deltek PPM product.

Appendix D: wInsight Analytics Administrator Run Script Setup

Note: This section only applies to MS SQL Server and Oracle databases.

Your Database Administrator (DBA) needs to run the following scripts for you to be able to use the **Run Script** option in the **Utilities** menu in wInsight Analytics Administrator:

Script	Run Script Option
apply_load.sql	Apply Fee/Load
calc_indirects.sql	Set Indirects
change_blanks_to_zeros.sql	Change Blanks to Zeros
derive_bac_eac.sql	Derive BAC/EAC
settgt_stru.sql	Set Linked Period Data and Set Linked Future Data

These setup scripts are saved in the wsmde\Scripts\MSSQL or wsmde\Scripts\Oracle folder.

Attention: For more information, see *Provided Scripts* in the Deltek wInsight Analytics Desktop and wInsight Analytics Administrator Online Help.

Appendix E: PPM Encryption Conversion Utility

This section only applies to system administrators.

The PPM Encryption Conversion Utility is designed to scan a computer for all copies of installed PPM products and validate if the PPM products have been upgraded to compatible versions that support the new protocols. It also validates that any configuration files and databases that are shared by the PPM products are eligible to be upgraded to support the new protocols.

These validations are designed to ensure that the upgrade is performed only when all installed PPM products are compatible with the new protocols, which guarantees that environments with a mix of new PPM products and older PPM products will continue to function properly until all installed versions of PPM products are compatible with the new protocols.

If configuration files and databases that are shared by PPM products are eligible to be upgraded, the PPM Encryption Conversion Utility performs the necessary upgrades to the configuration files and databases to enable the use of the new protocols.

Important: Check to see if the PPM product you are integrating with wInsight Analytics has support for PPM Encryption Conversion Utility. This will help you make sure the right installation steps are taken, avoiding any potential problems. For more information, see [“Integrate wInsight Analytics with Other PPM Products”](#) in this guide.

Note:

- The PPM Encryption Conversion Utility must be run on all computers that have PPM Product configuration files on them to upgrade the configuration files to support.
- Each PPM product is shipped with this tool (**PPMEncryptionConverter.exe**) and its location may vary per product. For more information, see [“Run the PPM Encryption Conversion Utility”](#) in this guide.

Upgrading from Older Versions

When you upgrade from older versions of PPM Products to new versions, PPM Products will continue to use the previous protocols by default to ensure compatibility with older versions of PPM Products. Therefore, a separate conversion process is required to upgrade existing PPM Product configuration files and data sources to enable the use of the new protocols.

To support the conversion process, PPM products include a new PPM Encryption Conversion Utility application.

Note: Deltek strongly recommends that you run the new PPM Encryption Conversion Utility application to upgrade existing PPM Product configuration files and data sources to enable the use of the new protocols.

Note: New installations of PPM Products and data sources are pre-configured to use the new protocols by default. New installations do not need to run the PPM Encryption Conversion Utility.

Run the PPM Encryption Conversion Utility

You need to run this tool under the following conditions:

- You have an environment with existing PPM products.
- All PPM products have been upgraded to a version that supports the new hashing and encryption protocols.

Note: You do not need to run the tool when all files and databases have already been converted.

- The **UserID** and **Password** value in each data source are encrypted with AES1 protocol (the value starts with 000001).
- All configuration files and data sources on the details screen are disabled and the **Errors** column displays "File/Datasource has already been converted."
- The **WST_UPD** table in the database contains the **_PASSWORDHASHPROTOCOL = 1** and **_ENCRYPTIONPROTOCOL = 4** categories.

To run the conversion utility tool:

1. Navigate to the location of the PPM Encryption Conversion Utility.
 - For 64-bit: C:\Program Files\Deltek\wInsight Analytics\
 - For 32-bit: C:\Program Files(x86)\Deltek\wInsight Analytics\
2. Double-click **PPMEncryptionConverter.exe** or click the corresponding shortcut from the **Start** menu.

The utility automatically detects all installed PPM products on your machine and determines whether the installed products are compatible (meet minimum supported version) to determine if their files and databases are eligible for upgrade.

Note: When you launch the utility, it creates the PPM Encryption Converter folder for backup files in C:\Users\\Documents\Deltek\PPM Encryption Converter. This folder contains <Backup> folders using the **yyyymmdd_hhmmss** name format, which refers to the date and time when the conversion utility is launched (for example, 20221116-194029). Each <Backup> folder contains the Backup subfolder and the PPMEncryptionConverter.log (which is created after the conversion process).

3. On the first screen of the PPM Encryption Conversion Utility dialog box, click **Next**.

Note: This screen contains the **Products** grid, which displays all installed PPM products in your machine. The grid is read-only.

- The corresponding version and compatibility status of each installed product also display. Products with the **Compatible** column set to **Yes** indicate that they meet the minimum compatible version.
- When you hover your mouse cursor over a product in the list, it displays the installation location of the that product.

4. On the second screen, select the database configuration files and data sources you need to upgrade.

Selecting a configuration file in the **Files** grid displays all the databases in the **Datasources** grid and checks whether they can be converted. Alternatively, you can click the **Check all datasources** button to verify the status of all data sources in all of the files instead of selecting the files one by one.

Note: You cannot select and upgrade the configuration files and data sources of those PPM products that do not meet the minimum compatible version.

Attention: Different icons display beside the available files and data sources to indicate their conversion status. For more information, see the *Conversion Status Icons* section of the Deltek PPM Encryption Conversion Utility Guide.

If you need to add more encrypted files to convert, click **Add**.

Attention: PPM products have different locations (or containers) where encrypted and hashed data is stored. For more information, see the [Updated Files and Data](#) section in this document.

5. Click **Process**.

Note: During the conversion process, the PPM Encryption Conversion Utility creates a copy of the database configuration file in the Backup folder. The backup name has the **<n>.<filename>** format, where **<n>** represents a number starting from 1 to make the backup files unique (such as, 1.datasources.dat, 2.ideablade.ibconfig, and 3.databases.enc).

It also creates a file named FileMapping.txt, which contains the mappings of both the backup and original files. The mapping follows the **<backup file> (<original file>)** format. For example, 1.datasources.dat (C:\Program Files (x86)\Deltek\Cobra\datasources.dat).

After the conversion process, the WST_UPD (*for all products*), WST_CFG (*for Cobra and Open Plan*), and WST_UPF (*for Acumen Touchstone and Open Plan*) tables are updated.

Updated Files and Data

PPM products use different files to store encrypted and hashed data. For wInsight Analytics, the updated files are Datasources.dat and SQL Databases.

Attention: For more information, see the *Updated Files and Data* section of the Deltek PPM Encryption Conversion Utility Guide.

Changing Passwords

After a PPM data source has been upgraded by the PPM Encryption Conversion Utility, users are prompted to update their password the very first time they log on to the converted data source using a PPM product. This is a necessary step to update the users' stored password to use the new password protocol for storing user passwords.

The first time the users log on to the converted data source with a PPM product, the product displays the Change Password dialog box to allow them to enter their existing password again or create a new password.

Note: Users are permitted to enter their existing password again, if desired. It is not necessary to create an entirely new password.

Note: Users must complete the Change Password step to use the PPM product with the converted data source. If they choose to cancel the Change Password step, they return to the Login dialog box.

Data Tool

When the Data Tool encrypted the Data Tool password using the old protocol, the password was not case-sensitive, and it was stored in uppercase. When users entered their password in the Data Tool

Login dialog box, the Data Tool converted the entered password to uppercase and then compared it with the stored password.

When the PPM Encryption Conversion Utility converts the stored password, it still stores the password in uppercase. The Data Tool now recognizes that the stored password is using the new protocol. As a result, it no longer converts the entered password to uppercase before comparing it to the stored password.

Appendix F: If You Need Assistance

If you need assistance installing, implementing, or using wInsight Analytics Administrator, 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 wlnsight Analytics Administrator Release Notes	This document contains a summary of the technical considerations, major features, enhancements, software issues resolved, and known issues of the application.
Deltek wlnsight Analytics Desktop and wlnsight Analytics Administrator Help	This document contains detailed information and instructions on how to use various features of both applications.
Deltek wlnsight Analytics Product Overview	This document provides a high-level overview of the product together with some guidance as to which modules should be installed to meet the needs of individual users. Most users would not need access to all modules.
Deltek PPM Encryption Conversion Utility Guide	This document provides instructions for upgrading the hashing and encryption protocols

Document Name	Description
	used to store passwords and other sensitive credentials that are used to access network resources.