

# **Deltek Open Plan™ 3.3.x**

## **Installation Guide**

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## Overview

Welcome to Deltek® Open Plan™ 3.3.x, your comprehensive solution to project planning and management tasks. Designed to cope with the most demanding requirements of project planners, Open Plan has the capability and the flexibility to handle even the largest projects. At the same time, Open Plan takes advantage of its graphical interface design to make its power accessible to even the most inexperienced user.

This guide provides information on the following topics:

- System requirements for Open Plan
- Procedures for installing single and multi-user versions of Open Plan
- Description of the Deltek program group
- Discussion on starting Open Plan for the first time
- Procedures for setting up Security Administrator
- Procedures for setting up a database
- Discussion of installations that include copies of both Open Plan Professional and Open Plan Desktop
- Requirements of the Microsoft Project Import/Export utilities
- Procedures for removing Open Plan from your computer
- Information on contacting Deltek technical support

This guide concludes with a discussion of the various types of documentation supplied with the Open Plan application.

## Contacting 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, load balancing, database replication, or other complex deployments. In such cases, we recommend contacting Deltek Technical Services to schedule your Open Plan 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 Open Plan 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 to ensure that you optimize your investment in Open Plan from the time of installation. Many Deltek clients have benefited from the Deltek Technical Services department's experience and knowledge of the Open Plan installation process.

To schedule your Open Plan installation, call 800.836.1600. See "Deltek Software Support," later in this document, for more information on Deltek's technical support services.

## System Requirements

To run Open Plan version 3.3.x successfully, your system must meet the following requirements:

- A Pentium-based personal computer
- Microsoft Windows XP or Windows 2003 and later
- The following amount of system RAM:
  - At least 128 MB of RAM for Windows XP (256 MB recommended)
  - At least 512 MB of RAM for Windows Vista (1 GB recommended)
- 125 MB of free disk space

## Installation

Open Plan 3.3 Service Pack 2 is available as a self-extracting executable for Web download (both as a full install and a patch upgrade for Open Plan 3.3), and as a full CD installation. Customers may request a CD containing the full installation by calling Deltek support. While not absolutely necessary, it is good practice to back up all software and data before installing any software product.

For new installations, start the installation process and follow the instructions.

### Upgrading From Previous Versions of Open Plan 3.3

Users upgrading to 3.3 Service Pack 2 from Open Plan 3.3 are recommended to use the patch upgrade method. This allows the upgrade of both standalone and network installations. Only the updated components of the installation are replaced and configuration files are not changed. Download and execute the update patch.

### Upgrading From Open Plan 3.2

If you are upgrading from version 3.2 or below, you must perform a full installation Open Plan 3.3 Service Pack 2 to a new folder rather than attempting to overwrite/upgrade an existing Open Plan installation. Open Plan 3.3 Service Pack 2 supports concurrent installation with previous versions of Open Plan, provided that:

- The user has Power User rights.
- The two versions do not share the same database because earlier versions of Open Plan will attempt to update the registry with the current installation folder location when the older versions are invoked.

This is necessary to enable the OLE Automation server components of Open Plan.

It is necessary to perform a new Workstation installation for users that access Open Plan from a shared server installation. The Workstation setup application is available in the Workstation Setup folder of the server installation folder.

### Upgrading the Open Plan Database

No database changes are required if you are upgrading from a previous version of Open Plan 3.3.

If you are upgrading from Open Plan 3.2 or earlier, you must upgrade the database to support new features. The system administrator can apply the appropriate upgrade script from the SQL folder.

The Open Plan 3.3 database is not backwards compatible with previous versions of Open Plan. For example, Open Plan 3.0, 3.1 and 3.2 cannot be used with an Open Plan 3.3 database and vice versa.



It is important that any briefcased projects are returned to the main database before performing an upgrade.



## The Open Plan Installation Wizard

Open Plan comes with an automated installation wizard that allows you to create the following types of installations:

- A complete installation of all the files that come with your Open Plan package
- A custom installation that copies only the features you plan to use
- A multi-user installation on a network drive for shared use by multiple workstations

After you have installed Open Plan, you can use the installation wizard to add features to your installation at any time.

## Installing a Single-User Version of Open Plan

This section describes how to install a single-user version of Open Plan on either a stand-alone PC or on a network drive.

### To install a single-user version of Open Plan

1. Insert the Open Plan 3.3.x CD into the CD-ROM drive. The Open Plan 3.3.x Launch screen is displayed.



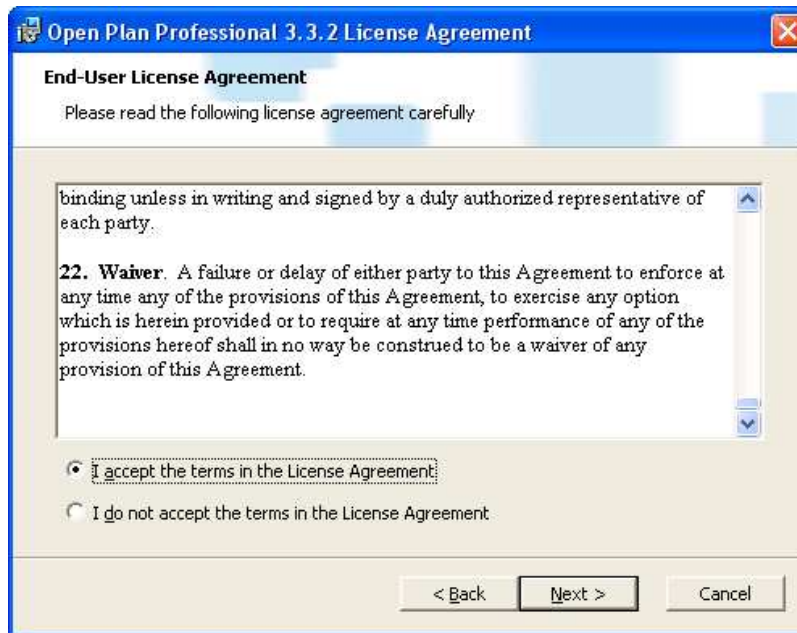
If the Open Plan 3.3.x setup screen does not automatically display, explore the contents of the CD and double-click the Default.hta icon.

The launch screen includes links to this installation guide, the Open Plan 3.3.x Release Notes, the installation wizard, the Deltek website, and the Deltek software license agreement. You can always return to this screen at a later time by re-inserting the CD into the CD-ROM drive.

2. Click **Install Open Plan** to start the installation.
3. On the **Welcome to the Open Plan 3.3.x Setup Wizard** page, click **Next**.



- On the **End-User License Agreement** page, select **I accept the terms in the License Agreement**.



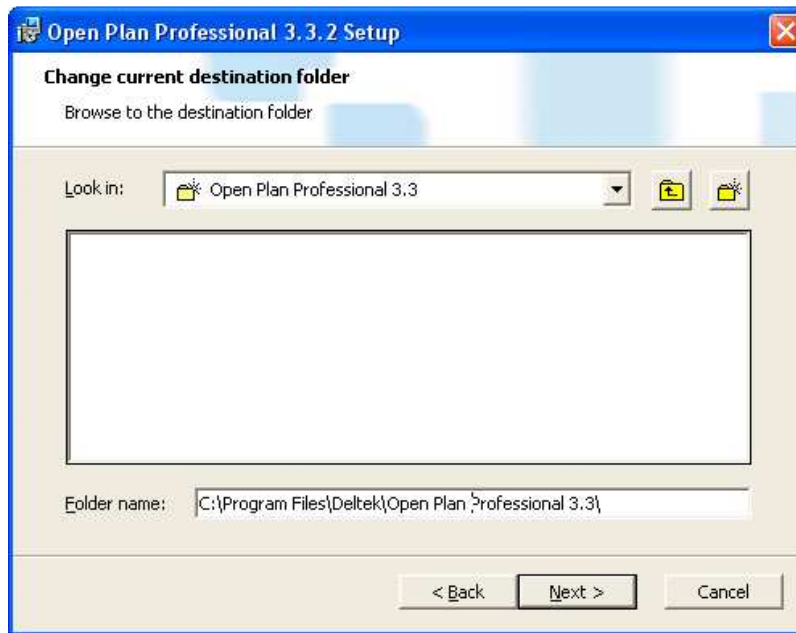
- Click **Next**.
- On the **Customer Information** page, enter your user information.

The screenshot shows a Windows-style dialog box titled "Open Plan Professional 3.3.2 Setup". The "Customer Information" section is active, with the instruction "Please enter your customer information". There are four input fields: "User Name:" containing "Delttek Systems Philippines, Ltd.", "Organization:" containing "Delttek Systems Philippines, Ltd.", "Serial Number:" which is empty, and "Password:" which is empty. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

You can find your Open Plan serial number and password on the back of the Open Plan CD case.

- Click **Next**.

8. The **Change current destination folder** page displays the destination drive and folder for the installation:

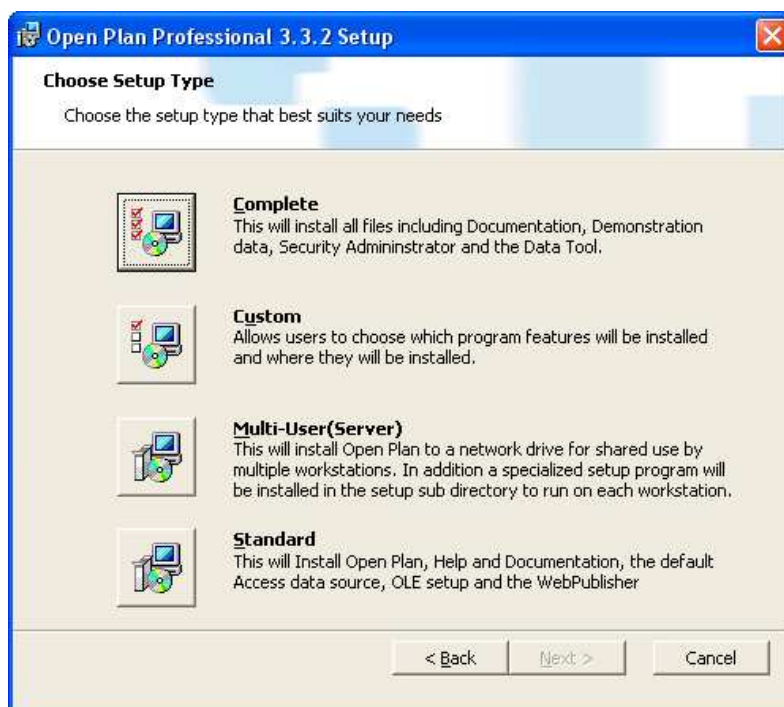


If necessary, select a destination for Open Plan by clicking the browse button.

If you are installing the Desktop version of Open Plan, you are asked if you want to share data with Open Plan Professional. If you click **Yes**, the installation wizard prompts you to locate the Open Plan Professional destination.

Click **Next**.

9. The **Choose Setup Type** page displays different setup types.



Select one of the following installation options:

- **Complete** – Installs all Open Plan's features.
- **Custom** – Allows you to select or clear the individual Open Plan features. SAP (where applicable).
- **Multi-User (Server)** – Installs Open Plan to a network drive for shared use by multiple workstations.



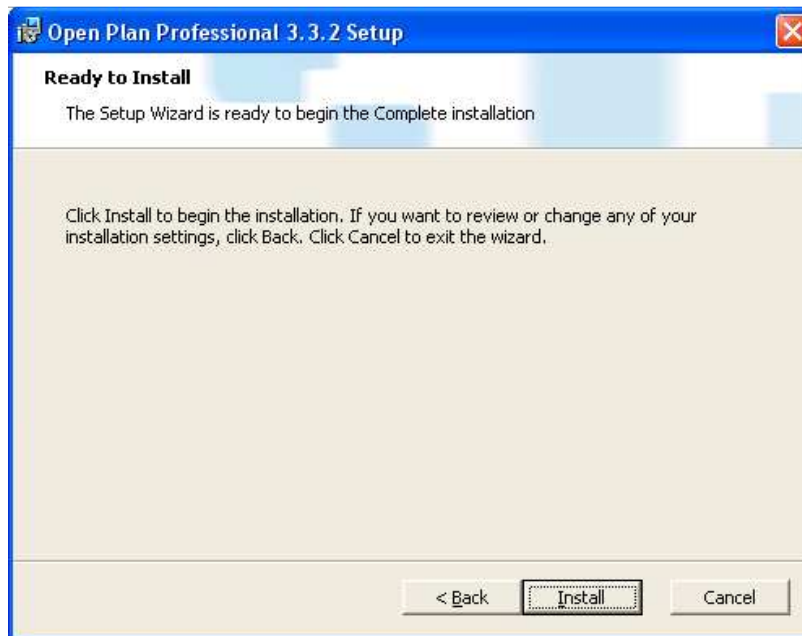
Multi-User (Server) installation is covered in detail in the section entitled Performing a Multi-User Installation of Open Plan.

- **Standard** – Allows you to create a minimal installation of Open Plan by installing only the files needed to run the program.

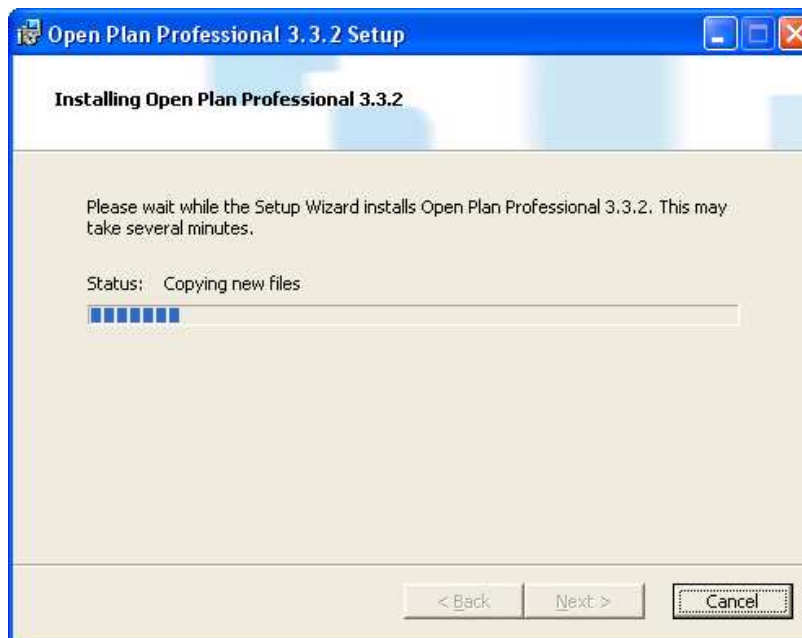


If you do not choose to install a particular feature at this time, you can return to the installation wizard and add the feature later.

10. On the **Ready to Install** page, click **Install**.

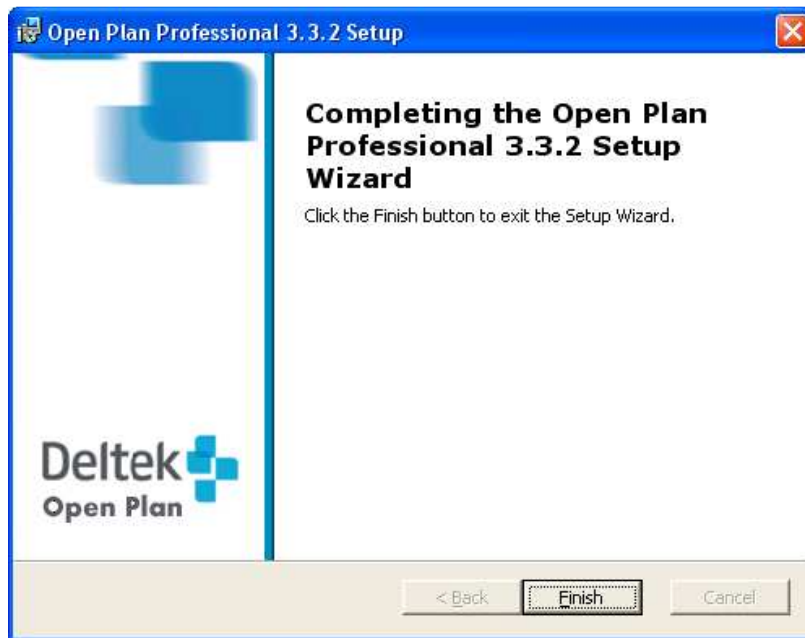


The **Installing Open Plan Professional 3.3.x** page shows the installation's progress.



11. When the installation process is completed, the **Completing the Open Plan 3.3.x Setup Wizard** page is displayed.

12. Click **Finish** to exit the **Setup Wizard**.



## Performing a Multi-User Installation of Open Plan

Creating a multi-user installation of Open Plan is a two-step procedure:

- Performing a server installation
- Performing a workstation installation for each licensed user

### Performing a Server Installation

The purpose of the Multi-User (Server) installation is to allow multiple users to run the application from a shared network location. After performing the Server installation, each user must perform a Workstation installation in order to run the application from the shared network location.

During the Multi-User (Server) installation, the destination folder path is written into the file Setup.ini located in the Workstation Setup folder.

The destination folder path can be specified as either a UNC based \\server\folder path or a mapped drive:\folder path. If a mapped drive:\folder path is used, you must ensure that all the user workstations use the same drive:\folder mapping.

Before you perform a Workstation installation, verify that the path in the Setup.ini file points to the correct network share location because the Workstation installation will use this path to create shortcuts and perform application registration on the workstation.

The line in Setup.ini will look like this:

UNC \\Server\Folder path: PROPERTIES=INSTALLDIR="\\<Server>\<Destination Folder> \"

Drive:\Folder path: PROPERTIES=INSTALLDIR="<Drive>:\<Destination Folder> \"

#### To perform a server installation:

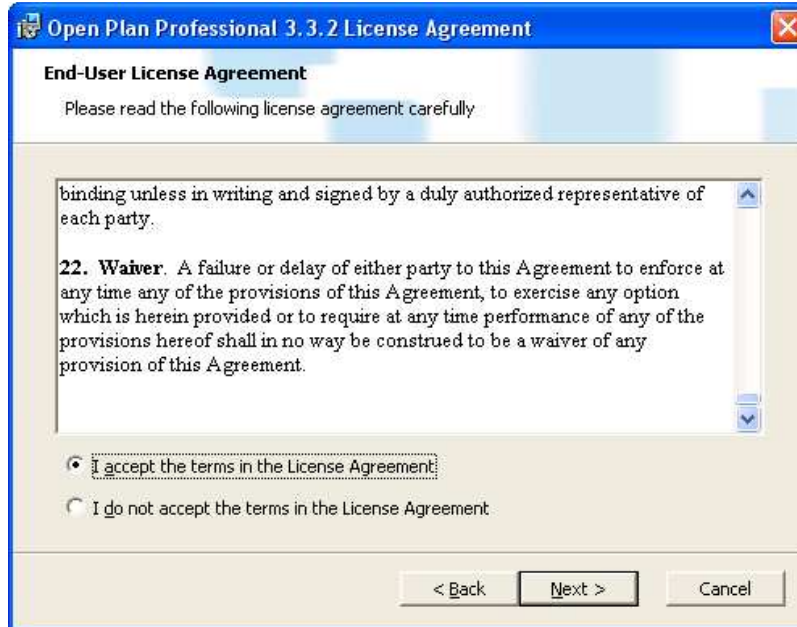
1. Insert the Open Plan CD into the CD-ROM drive.



2. Click **Install Open Plan** on the Open Plan Launch screen. Open Plan displays the **Welcome to the Open Plan Professional 3.3.x Setup Wizard** page.

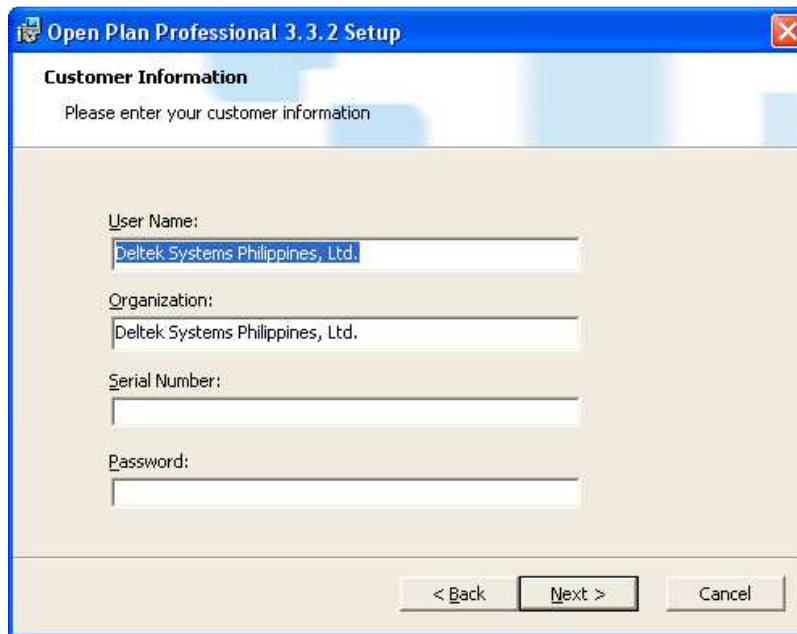


3. Click **Next**.
4. On the **End-User License Agreement** page, select **I accept the terms in the License Agreement**.



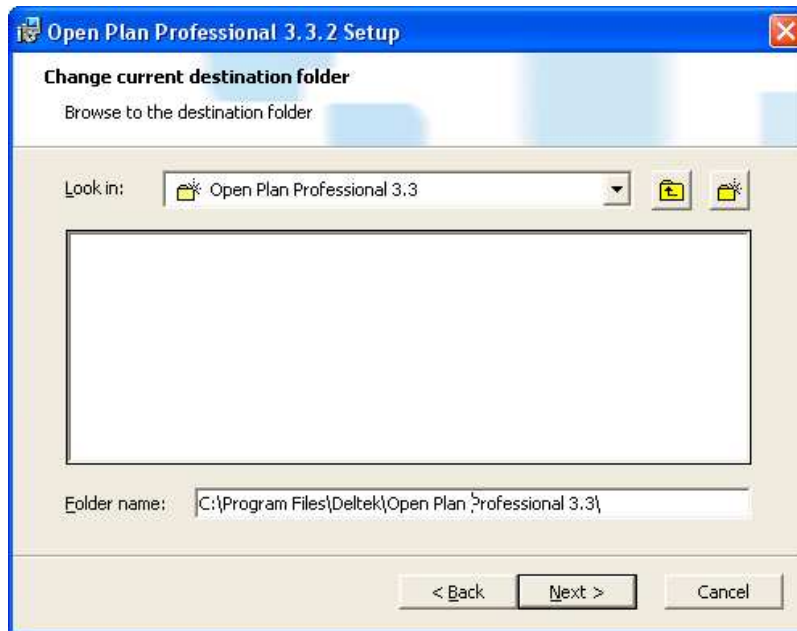
5. Click **Next**.

6. On the **Customer Information** page, enter your user information.



The screenshot shows the 'Open Plan Professional 3.3.2 Setup' window with the 'Customer Information' tab selected. The window has a blue title bar and a standard Windows XP-style border. The main area is light beige. At the top, it says 'Customer Information' and 'Please enter your customer information'. Below this are four input fields: 'User Name:' with 'Delttek Systems Philippines, Ltd.' entered, 'Organization:' with 'Delttek Systems Philippines, Ltd.' entered, 'Serial Number:' which is empty, and 'Password:' which is empty. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

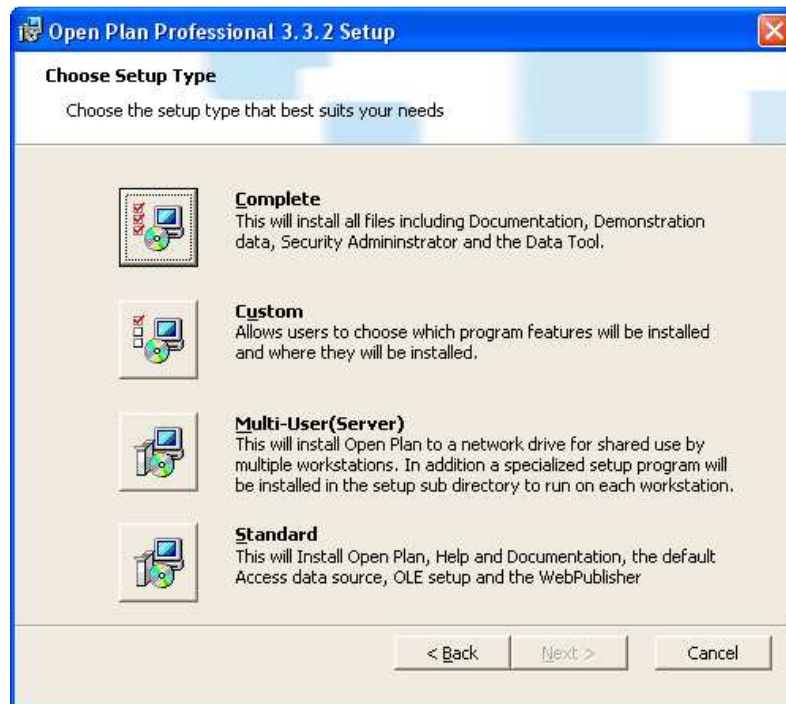
7. Click **Next**.
8. On the **Change current destination folder** page, select a destination drive and folder for the installation.



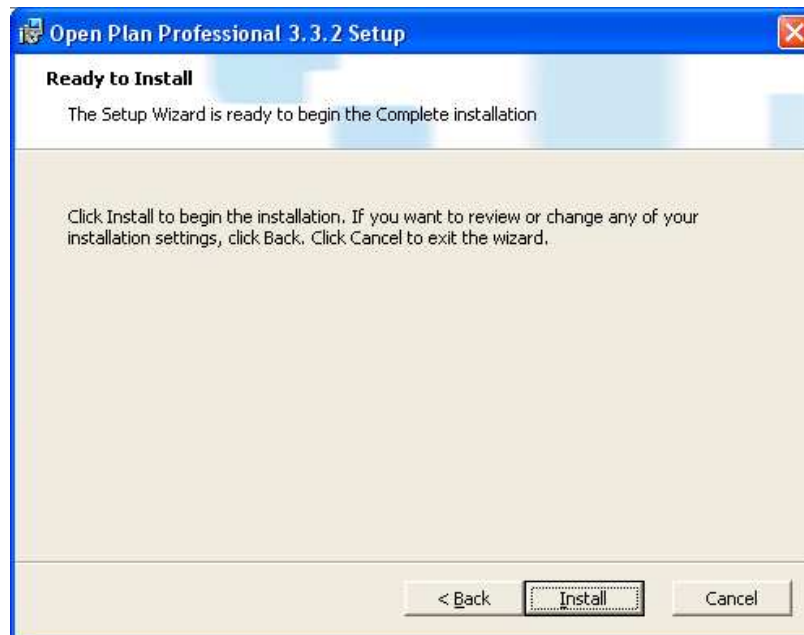
The screenshot shows the 'Open Plan Professional 3.3.2 Setup' window with the 'Change current destination folder' tab selected. The window has a blue title bar and a standard Windows XP-style border. The main area is light beige. At the top, it says 'Change current destination folder' and 'Browse to the destination folder'. Below this is a 'Look in:' section with a dropdown menu showing 'Open Plan Professional 3.3' and two folder icons. Below the dropdown is a large empty rectangular box for file listing. At the bottom, there is a 'Folder name:' label followed by a text box containing 'C:\Program Files\Deltek\Open Plan Professional 3.3\'. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

9. Click **Next**.

10. Select **Multi-User (Server)** on the **Choose Setup Type** page.



11. On the **Ready to Install** page, click **Install**.



12. On the **Completing the Open Plan 3.3.x Setup Wizard** page, click **Finish**.



## Performing a Workstation Installation

After the server version of Open Plan has been installed on a network drive, use this procedure to create multiple workstation installations.



You can create workstation installations only from a server installation of Open Plan.

Although similar to the single-user installation, the workstation installation does not prompt you to enter a serial number and password.

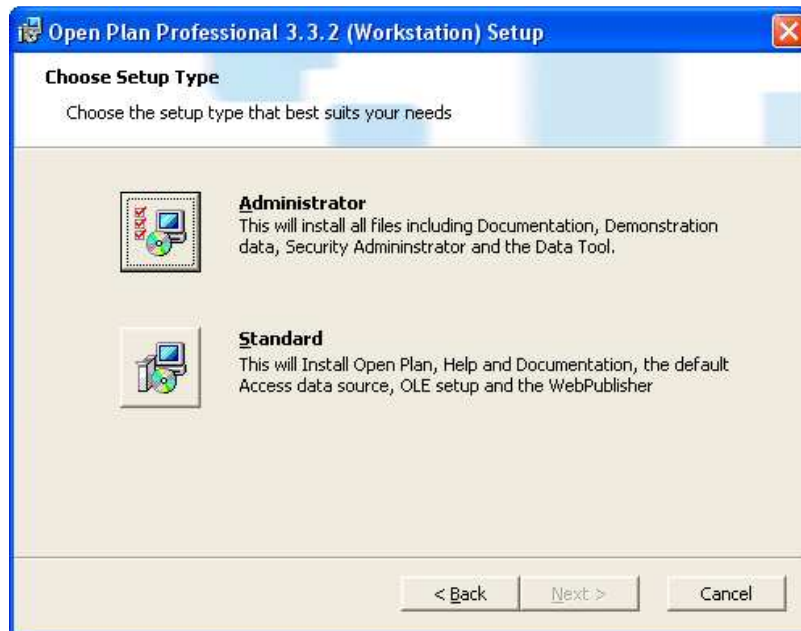
### To install a workstation installation of Open Plan

1. Verify that a server installation of Open Plan has already been placed on the network.
2. Using Windows Explorer, locate the Open Plan server installation. On the server installation, navigate to the root folder for the workstation. For example, **C:\Program Files\Deltek\Open Plan Professional 3.3.x\Workstation Setup**.

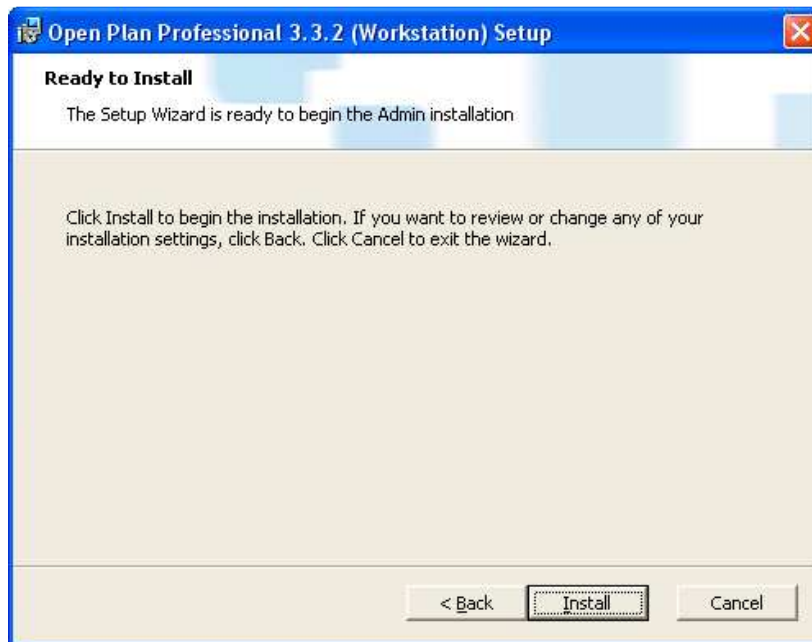
3. Double-click **Setup.exe**. Open Plan displays the **Welcome** page of the installation wizard.



4. Click **Next**.
5. On the **Choose Setup Type** page, select one of the following:
  - **Administrator** – the procedure installs all of the features of the Standard setup are together with the Security Administrator and the Data Tool.
  - **Standard** – the procedure installs the Open Plan Help system, documents, default access, data source, OLE setup, and Web Publisher.



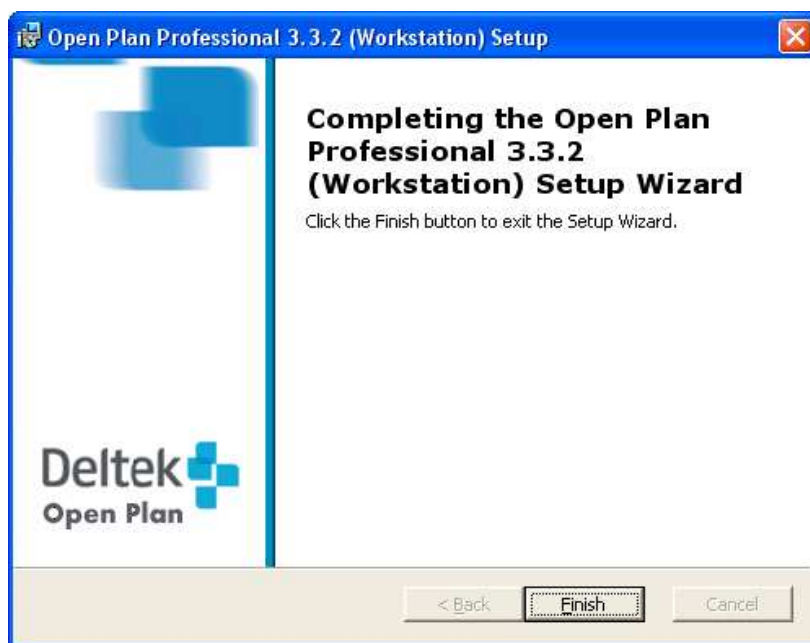
6. On the **Ready to Install** page, click **Install**.



The **Installing Open Plan Professional 3.3.x (Workstation)** page shows the installation's progress.



7. Click **Finish**.



If you try to launch Open Plan after performing a workstation installation and receive an error saying the DataSources could not be located, you will need to check that the paths to these files are mapped to the correct server. This is done by opening the **Config.dat** file located in the Open Plan root folder.

## The Deltek Folder

### Start Menu

In addition to a shortcut to the Open Plan application, the installation creates several folders with shortcuts under the **Deltek >> Open Plan Professional 3.3** folder.

### Documentation

The following reference materials are available in the **Documentation** folder:

- **Open Plan User's Guide** – An Open Plan user reference manual.
- **Open Plan Developer's Guide** – A reference manual for more technical topics in Open Plan.
- **Open Plan Release Notes** – A document that discusses the new features and enhancements of this release, changes to the documentation, and the Software Issues Resolved.
- **Open Plan Guided Tour** – An introduction to Open Plan.
- **Open Plan Help System** – The Open Plan context-sensitive help system.

### Help

- **Open Plan Help System** – The Open Plan context-sensitive help system.
- **Open Plan Log Viewer Help System** – The help system for the Open Plan Log Viewer.
- **EPM Security Administrator Help System** – The help system for the EPM Security Administrator.

### Security

The following applications are represented in the **Security** folder:

- **EPM Security Administrator** – The Deltek security management application. (Open Plan Professional installations only)

### Tools

The following applications are represented in this folder:

- **OLE Setup** – An Open Plan 3.3 application that allows you to ensure that the correct version of OLE automation is invoked when you switch between different versions of Open Plan.
- **Open Plan Web Publisher** – The stand-alone version of the Open Plan Web Publisher application.
- **Data Tool** – A utility to set up the default system data, security data, and optionally, the demonstration data.



## Starting Open Plan for the First Time

If you used the setup utility to install Open Plan, you can start the application on the **Start** menu.

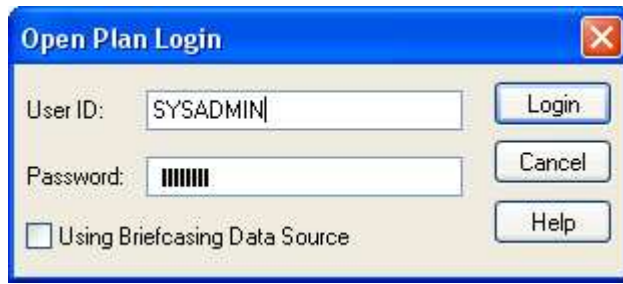


To start Open Plan automatically each time you enter Windows, drag the Open Plan application into the Windows Startup folder. For more information about the Startup program group, refer to your Windows documentation.

You must log in each time you launch Open Plan. You may log into Open Plan for the first time as an administrator or a guest.

### To start Open Plan

1. Click **Start » Programs » Delttek » Open Plan Professional 3.3.x**, and click the icon representing your installation of Open Plan.
2. In the Open Plan Login dialog box, log in as SYSADMIN or GUEST with the corresponding password.



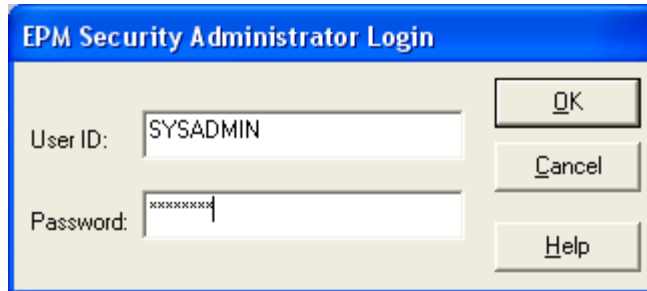
- Administrator:  
User ID: SYSADMIN  
Password: PASSWORD
  - Guest:  
User ID: GUEST  
Password: <blank>
3. Click **Login**.

## Launching the EPM Security Administrator

Use this procedure to launch the EPM Security Administrator, where you can set up security for Open Plan.

### To launch the EPM Security Administrator

1. Click **Start » Programs » Deltek » Open Plan Professional 3.3.x » Security » EPM Security Administrator**.
2. In the EPM Security Administrator dialog box, log on as SYSADMIN in the **User ID** field and enter PASSWORD in the **Password** field.



3. Click **OK**.



For security purposes, we recommend that you change the password for this account.

Because the Deltek EPM Security Administrator does not allow you to delete either the SYSADMIN user or the SYSADMIN group, there will always be at least one user with rights to the security utility.

4. In the Data Sources dialog box, select the OP33 data source, and click **OK**.



## Setting up Security

In the Delttek EPM Security Administrator, there are currently two groups defined: SYSADMIN and GUEST. The administrator lets you add new groups and users as well as define their properties. For each user you add, the **User Details** form lets you define the user ID and password.



To launch Open Plan, each user needs an ID and password and must belong to at least one group.

You may find that you need to create a number of user profiles very quickly. Frequently, these users already exist as entries in another application such as Microsoft Outlook™ or Windows Active Directory. The Delttek EPM Security Administrator provides an import facility that allows you to import data directly from these applications. In addition, you can also import data from a comma-delimited ASCII file.



For more information about importing users into the Delttek EPM Security Administrator, refer to the *EPM Security Administrator Guide*.

After you have set up users and groups, you can add users to groups.

### To create a new user

1. Log on to the EPM Security Administrator.
2. Select **Open Plan** as the product.
3. To create a new user, select the **Users** folder, and click **Edit » Add** on the toolbar.



You can also right-click the **Users** folder and click **Add** on the shortcut menu.

The screenshot shows the Delttek EPM Security Administrator window. On the left is a tree view with folders: DSN, Products, Users, Groups, Roles, and Objects. The 'Users' folder is expanded, showing three users: GUEST, ROMMEL, and SYSADMIN. The 'User Details: ROMMEL' form is open on the right. It has tabs for General, Groups, Address, Data, Notes, and Products. The 'General' tab is active, showing fields for First Name (Rommel), Last Name (Fajardo), Primary Role (DEFAULT (Default Role)), Password, Manager (SYSADMIN (System Administrator)), Alternate Manager (Not defined), Department (Documentation), Location, and Email.

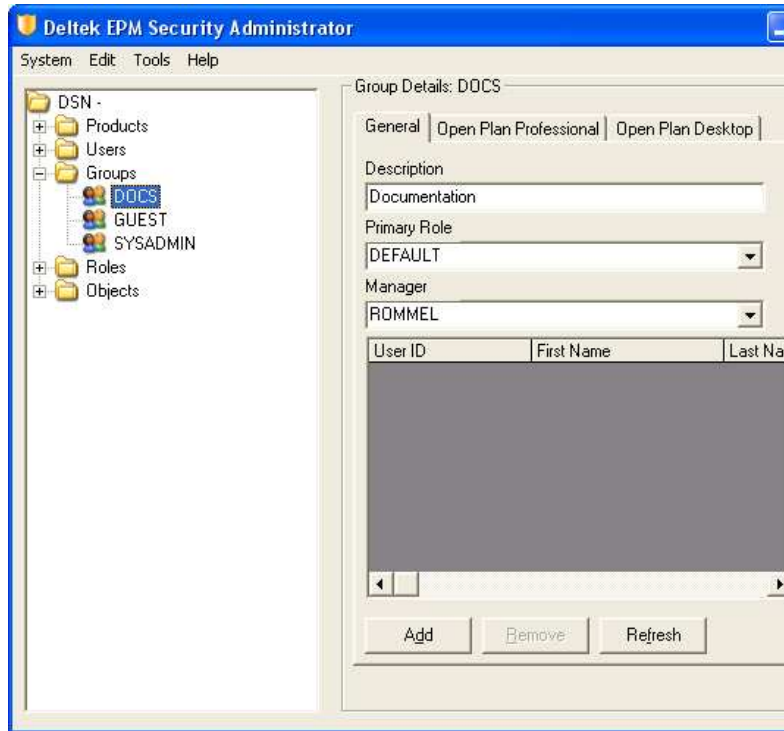
4. To define the user's properties, click the **General** tab.

### To create a new group

1. To create a new group, click the **Groups** folder, and click **Edit » Add** on the toolbar.



You can also right-click the **Groups** folder and click **Add** on the shortcut menu.



2. Enter a name for the new group. To define the group's properties, click the General tab.

### To add a new user to a group

1. After you have created a new user, click the **Groups** tab to add this user to one or more groups.
2. Click **Add**.

3. In the Add Group dialog box, select the group you want to add the user to, and then click **OK**.



4. When you have finished adding groups and users, click **Exit** on the **System** menu. Open Plan Databases

## Supported Databases

Open Plan can use most databases that support access through an OLE DB 2.1-compliant provider. Microsoft Data Access Components (MDAC) 2.6 or later should be used.

The following databases and versions have been tested for compatibility and are fully supported by Open Plan:

- Microsoft Access 2000 and later with the Microsoft Jet 3.51 or 4.0 OLE DB Provider
- ORACLE 9i, 10g, and 11g
- Microsoft SQL Server 2000, 2005, and 2008



SQL Server case-sensitive installations are not supported with Open Plan.

## Setting up the Database

### Access

During the installation, Open Plan automatically sets up an Access database and Open Plan data source for immediate use.

### Oracle and SQL Server

If you prefer to have Open Plan use an Oracle or SQL Server database, you first need to create tables and define a data source.

When you configure an SQL database, you must consider several aspects regarding the database itself:

- Database size
- Transaction log size
- Database permissions

### Database Size

When creating the Open Plan database, you must consider the number of anticipated project elements that will be created in Open Plan and the number of records the project elements will contain. Generally, each project activity uses 3000-4000 bytes. Each project baseline adds an additional 2000-3000 bytes per project activity. Note records contain variable length free-form text and can add up to an additional 32,000 bytes for each note category in use.

Following these rules, a typical 1000-activity project with two baselines and notes containing 200 bytes of text on 20% of the activities would require approximately 10 MB of disk space, not including database-specific overhead. You can use the Excel spreadsheet (sizing30.xls) located in the Open Plan destination folder to help estimate disk requirements.

### Transaction Log Size

Open Plan performs updates on large numbers of database table rows when saving changes to project data. Transaction logs must be sized appropriately to allow for these types of operations.

## Database Permissions

To create and modify project elements in the database, you must have the following permissions on the Open Plan tables: **SELECT**, **INSERT**, **UPDATE**, **DELETE**, and **EXECUTE**.

It is not necessary to create a separate user account for each Open Plan user on the database, nor is it necessary for users to see the database login prompts.

## Creating the Tables

During the installation, the subfolder \SQL is created. This subfolder contains folders for Oracle and SQL Server scripts.

To begin, you or your database administrator must create a database to hold the Open Plan tables. After this has been completed, return to this page of the Installation Guide to proceed.

## Oracle Scripts

If you are using Oracle, run the following scripts located in the Oracle subfolder:

- Opp\_Tables\_Oracle.sql
- WST\_Tables\_Oracle.sql

## SQL Server Script

If using SQL Server, run the following scripts located in the SQL Server subfolder:

- Opp\_Tables\_SqlServer.sql
- WST\_Tables\_SqlServer.sql

### To set up a database using Oracle or SQL Server

1. Navigate to your Open Plan installation folder.
2. Expand the contents of your Open Plan installation folder, and click the **SQL** folder.
3. Open the subfolder that matches the type of database you want to set up: **Oracle** or **SqlServer**.
4. Select the scripts to run based on whether you are using Oracle or SQL Server.

If you selected **Oracle**, run the following scripts:

- Opp\_Tables\_Oracle.sql
- WST\_Tables\_Oracle.sql

If you selected **SQL Server**, run the following scripts:

- Opp\_Tables\_SqlServer.sql
- WST\_Tables\_SqlServer.sql

## Using the Open Plan Data Tool

Once you have created a database and the Open Plan tables, the database must be initialized before it can be used. The Open Plan Data Tool is provided for this purpose. The Open Plan Data Administrator sets up the default system data, security data, and optionally, the demonstration data.

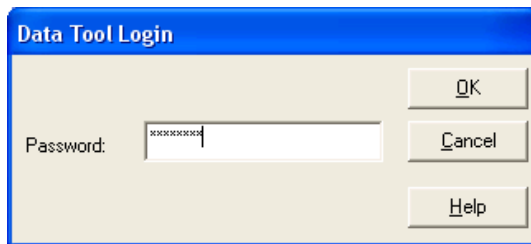


This procedure is not required for the supplied Microsoft Access databases.

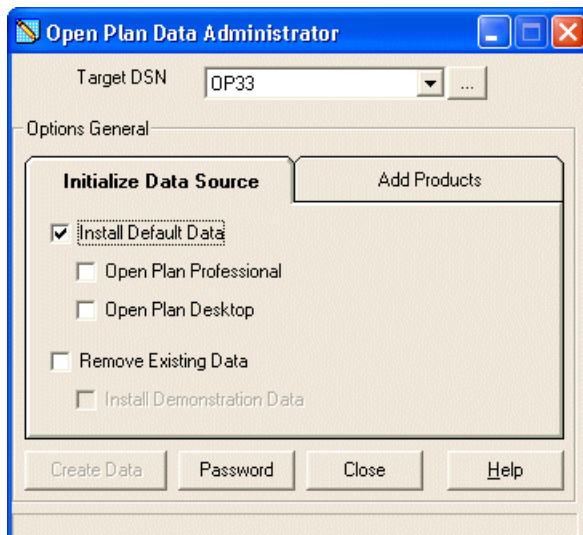
## Logging into the Open Plan Data Tool

### To log in to the Data Tool

1. Click **Start » All Programs » Deltek » Open plan Professional 3.3.x » Tools » Data Tool**. The Data Tool Login dialog box displays.



2. Enter **password**. (The default password as shipped from Deltek is **password**.)
3. Click **OK**. The Open Plan Data Administrator dialog box displays.



Deltek recommends that you change the password you used for login to prevent its unauthorized use. To change the password, click the **Password** button on the Open Plan Data Administrator dialog box, and enter a new password when prompted.



## Choosing a Data Source

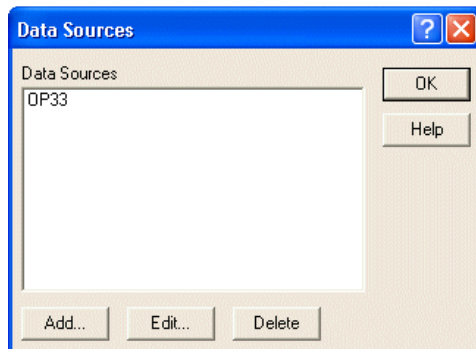


If you already have another edition of Open Plan installed and you want to update the data source, refer to the “Loading Data for an Additional Product” section of this document.

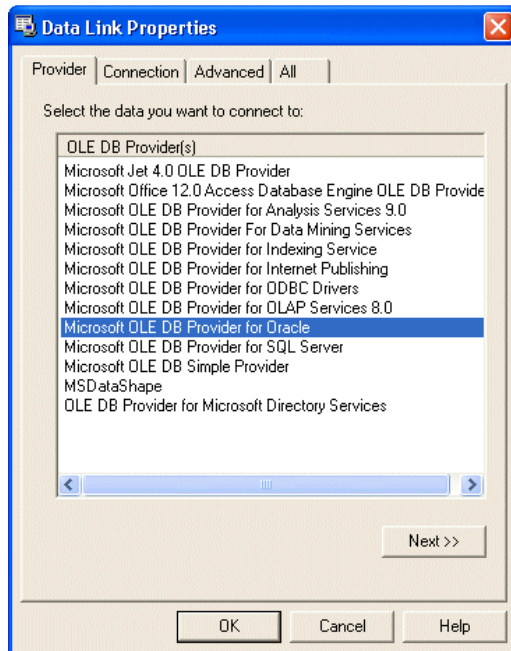
To connect to a newly created database, you must add an Open Plan data source. An Open Plan data source has all the connection information that Open Plan needs in order to work with a database.

## Defining a New Data Source

To add a new data source, click the ellipsis button at the right edge of the **Target DSN** field of the Open Plan Data Administrator dialog box. This will display the Data Sources dialog box.



Click **Add**. The Data Link Properties dialog box displays. (This is a standard Windows dialog box.)



The Data Link Properties dialog box displays the Provider tab with a list of database providers on your system. The database provider you select depends on whether you are using Access,

Oracle, or SQL Server as your provider. After you select a provider, click **Next**, and the **Connection** tab displays.

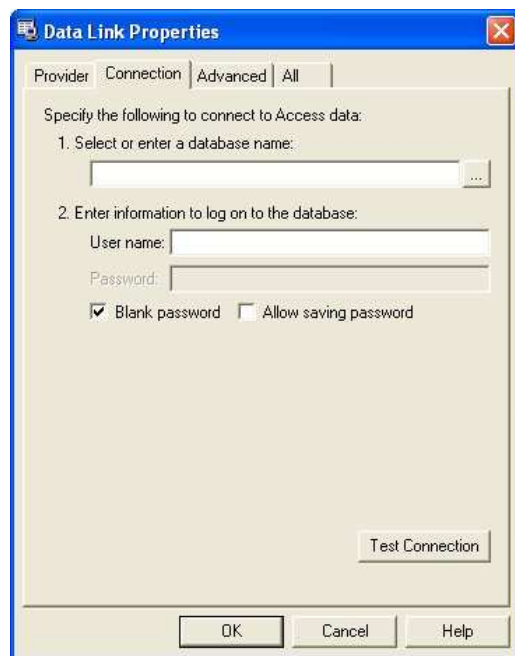
## Data Source Providers and Database Types

The following table lists the data source providers to use for each database type:

Data Source Provider	Database Type
SQL Server	Microsoft OLE DB Provider for SQL Server; SQL Native Client
Oracle	Microsoft OLE DB Provider for Oracle; Oracle Provider for OLE DB
Microsoft Access	Microsoft Jet 4.0 OLE DB Provider

## Access Users

If you are going to use an Access database and selected a Microsoft Jet 4.0 OLE database provider, the Connection tab appears as follows:



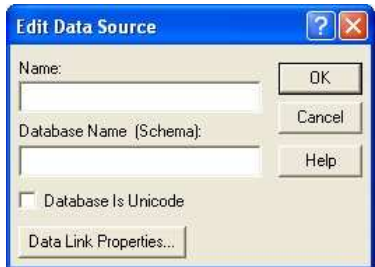
This dialog box allows you to enter the following information:

- **Database name** – Type the Microsoft Access database file name that you want to access or click the ellipsis button to browse for the file.
- **User name** – Enter a valid user name for your database.
- **Password** – Enter the password associated with your user name.
- **Blank password** – Select this option only if your user name does not have an associated password.

- **Allow Saving Password** – Always select this option. Both the **User name** and **Password** are encrypted and the information is stored in the **Datasources.dat** file along with the connection properties. If this option is not selected, the users are prompted to log into the database each time they launch Open Plan and they may encounter database errors.

Once you have defined the properties of the database provider, you can test the connection by clicking **Test Connection**. A message indicates if the connection was successfully tested. If the test was successful, click **OK** twice to close the Data Link Properties dialog box. Otherwise, correct the properties and test the connection again.

The Edit Data Source dialog box displays after a successful connection.



You are prompted to name the Open Plan data source and the **Database Name (Schema)**. Leave the **Database Name (Schema)** field blank. Select the **Database is Unicode** option if the database is in Unicode. Click **OK**. Your new data source is now added to the list of sources in the Data Sources dialog box.

#### To set up an Open Plan data source for a new Access database

1. Click **Start » All Programs » Delttek » Open Plan Professional 3.3.x » Tools » Data Tool**.
2. In the Data Tool Login dialog box, enter **PASSWORD** as the password, and click **OK**.  
For security purposes, you should change this password as soon as possible.



You can change the password by clicking the **Password** button in the Open Plan Data Administrator dialog box, which is displayed after you log in.

3. On the Open Plan Data Administrator dialog box, click the ellipsis button at the right edge of the **Target DSN** field.
4. On the Data Sources dialog box, click **Add**.
5. On the Provider tab of the Data Link Properties dialog box, select the appropriate database provider from the list.
6. Click **Next**.
7. On the Connection tab, enter the following information:
  - Database name
  - Valid user name and password for the database



If you want to save your name and password, select the **Allow saving password** option.

8. Click **Test Connection**.

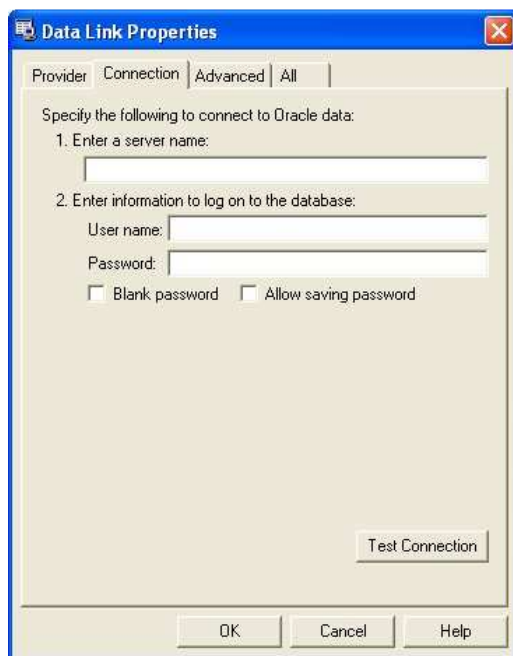
9. When a message displays indicating that the connection tested successfully, click **OK**.
10. Click **OK**.
11. In the Edit Data Source dialog box, enter a name for the Open Plan data source. Leave the **Database Name (Schema)** field blank.
12. Select the **Database is Unicode** option if the database is in Unicode.
13. Click **OK**.

The new data source is now added to the list in the Data Sources dialog box.

14. Click **OK** to return to the **Open Plan Data Administrator** dialog box.

## Oracle Users

If you selected an Oracle provider on the Provider tab of the Data Link Properties dialog box, the Connection tab appears as follows:



This dialog box allows you to enter the following information:

- **Server Name** – Enter the appropriate server name.
- **User Name** – Enter a valid user name for your database.
- **Password** – Enter the password associated with your user name.
- **Blank password** – Select this option only if your user name does not have an associated password.
- **Allow saving password** – Always select this option. Both the **User Name** and the **Password** are encrypted and the information is stored in the **Datasources.dat** file along with the connection properties. If this option is not selected, the users are prompted to log into the database each time they launch Open Plan and they may encounter database errors.



For Oracle, you can either set up an account (user name and password) that automatically restricts access to a specific schema, or use a general account and specify the schema name in the Edit Data Source dialog box.

After you have defined the properties of the database provider, you can test the connection by clicking **Test Connection**. A message indicates if the connection was successfully tested. If the test was successful, click **OK** twice to close the Data Link Properties dialog box. Otherwise, correct the properties and test the connection again.

The Edit Data Source dialog box displays after a successful connection.



You are prompted to name the Open Plan data source and the **Database Name (Schema)**. The **Database Name (Schema)** field is required if the Oracle Account used has access to more than one schema in the Oracle database. Select the **Database is Unicode** option for Unicode support.

When you click **OK**, your new data source is added to the list of sources in the Data Sources dialog box.

#### To set up an Open Plan data source for a new Oracle database

1. Click **Start » All Programs » Delttek » Open Plan Professional 3.3.x » Tools » Data Tool**.
2. In the Data Tool Login dialog box, enter **PASSWORD** as the password, and click **OK**.  
For security purposes, you should change this password as soon as possible.



You can change the password by clicking the **Password** button in the Open Plan Data Administrator dialog box, which is displayed after you log in.

3. On the Open Plan Data Administrator dialog box, click the ellipsis button at the right edge of the **Target DSN** field.
4. On the Data Sources dialog box, click **Add**.
5. On the Provider tab of the Data Link Properties dialog box, select the appropriate database provider from the list.
6. Click **Next**.
7. On the Connection tab, enter the following information:
  - Server name
  - Valid user name and password for the database



If you want to save your user name and password, select the **Allow saving Password** option.

8. Click **Test Connection**.
  9. When a message displays indicating that the connection tested successfully, click **OK**.
  10. Click **OK**.
  11. In the Edit Data Source dialog box, enter a name for the Open Plan data source and the **Database Name (Schema)**. This field is used to identify the source.
  12. Select the **Database is Unicode** option for Unicode support.
  13. Click **OK**.
- The new data source is added to the list in the Data Sources dialog box.
14. Click **OK** to return to the Open Plan Data Administrator dialog box.



After you have added an Open Plan data source for a new Oracle database, refer to the “Loading Default Data” section of this document to set up your data and continue with the installation process.

## SQL Server Users

If you selected a SQL Server provider on the Provider tab of the Data Link Properties dialog box, the Connection tab displays.

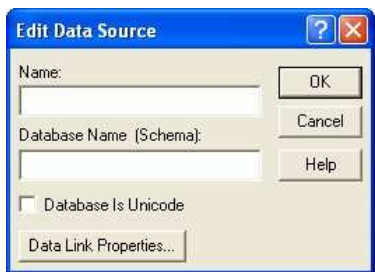
This dialog box allows you to enter the following information:

- **Server Name** – Select or enter the appropriate server name.
- **Information to log on to the server** – Select whether to use Windows NT Integrated Security or to use a specific user name and password. If you elect to use a specific **User name** and **Password**, enter a valid user name and password for your database.
- **Blank password** – Select this option only if your user name does not have an associated password.

- **Allow saving password** – Always select this option. Both the **User name** and **Password** are encrypted and the information is stored in the **Datasources.dat** file along with the connection properties. If this option is not selected, the users are prompted to log into the database each time they launch Open Plan and they may encounter database errors.
- **Select the database on the server** – Select the appropriate database to use on the server by default. This name is used to identify the data source in the Data Sources dialog box.
- **Attach a database file as a database name** – Select this option if you want to attach a database file directly.

Once you have defined the properties of the database provider, you can test the connection by clicking **Test Connection**. A message indicates if the connection was successfully tested. If the test was successful, click **OK** twice to close the Data Link Properties dialog box. Otherwise, correct the properties and test the connection again.

The Edit Data Source dialog box displays after a successful connection.



You are prompted to name the Open Plan data source and the **Database Name (Schema)**. If you selected a database name on the Connection tab of the Data Link Properties dialog box, leave the **Database Name (Schema)** field blank. Select the **Database is Unicode** option for Unicode support. When you click **OK**, your new data source is added to the list of sources in the **Data Sources** dialog box.

#### To set up an Open Plan data source for a new SQL Server database

1. Click **Start » All Programs » Delttek » Open Plan Professional 3.3.x » Tools » Data Tool**.
2. In the Data Tool Login dialog box, enter **PASSWORD** as the password, and click **OK**.  
For security purposes, you should change this password as soon as possible.



You can change the password by clicking the **Password** button in the Open Plan Data Administrator dialog box, which is displayed after you log in.

3. On the Open Plan Data Administrator dialog box, click the ellipsis button at the right edge of the **Target DSN** field.
4. On the Data Sources dialog box, click **Add**.
5. On the Provider tab of the Data Link Properties dialog box, select the appropriate database provider from the list.
6. Click **Next**.
7. On the Connection tab, enter the following information:
  - Server name
  - Valid user name and password for the database

- The database you want to access or select one from the list



If you want to save your user name and password, select the **Allow saving Password** option.

8. Click **Test Connection**.
9. When a message displays indicating that the connection tested successfully, click **OK**.
10. Click **OK**.
11. In the Edit Data Source dialog box, enter a name for the Open Plan data source.  
If you selected a database name on the Connection tab of the Data Link Properties dialog box, leave the **Database Name (Schema)** field blank.
12. Select the **Database is Unicode** option for Unicode support.
13. Click **OK**.  
The new data source is added to the list in the **Data Sources** dialog box.
14. Click **OK** to return to the Open Plan Data Administrator dialog box.



## Loading Default Data

After you have added a data source, the Open Plan Data Administrator dialog box displays, allowing you to set up the default data.



Running the data tool erases all data of the specified type in the data source that you use it against. If you already have another edition of Open Plan installed and you want to update the data, refer to the “Loading Data for an Additional Product” section of this document.

Using this dialog box, select the data source you created in the Edit Data Sources dialog box from the **Target DSN** field.

Select the appropriate fields on the **Initialize Data Source** tab:

- The **Install default data** option needs to be run only once for a data source. It will refresh the data dictionary, security data, system library, explorer folders, spread curves, views, title blocks, bar sets, and symbols. You must indicate the product or products (**Open Plan Professional** or **Open Plan Desktop**) for which you would like the data to be created.
- If you select the **Remove existing data** option, all data in the data source will be removed before the default data is installed.
- The **Install demonstration data** option installs the demonstration projects Clean, Constr, Develop, Movie, Movie15, Pharmacy, STS-65, Ship, and Tour. In order to install the demonstration data, you must select the **Remove Existing Data** option.

### To load default data

1. On the Open Plan Data Administrator dialog box, select a **Target DSN** from the list. This is the data source you created when initializing the data source.
2. Select **Install Default Data**.
3. Select **Open Plan Professional** or **Open Plan Desktop**, depending on the version of Open Plan you installed.
4. To install the demonstration data, select **Remove Existing Data**, and then select **Install Demonstration Data**.
5. Click **Create Data**.
6. After the data has been created, click **Close**.

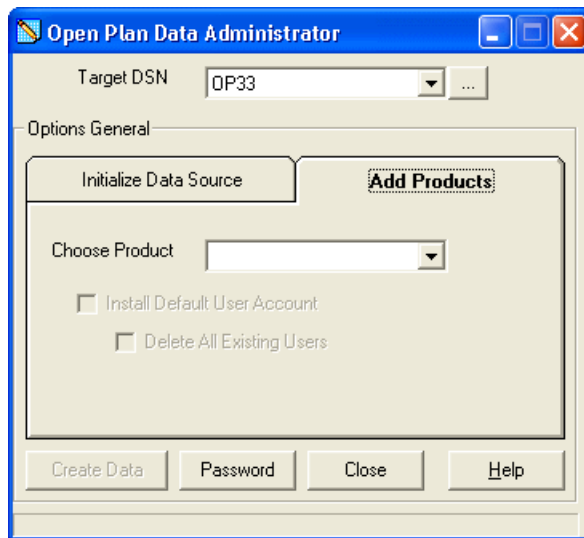
## Loading Data for an Additional Product

You can choose to update data if you currently have data sources set up from another edition of Open Plan (Desktop or Professional).



If you choose to install the default data on the Initialize Data Source tab, the data tool will refresh all data of the specified type in the data source that you use it against. You may lose saved information within your data dictionary, security data, system library, explorer folders, spread curves, views, title blocks, bar sets, and symbols.

To update the data, click the Add Products tab on the Open Plan Data Administrator dialog box.



The Add Products tab allows you to add products to data sources. This allows Open Plan Professional and Desktop editions to use the same data sources. The tab offers the following options:

- **Choose Product** – A list containing Open Plan products not already set up on your system.
- **Install Default User Account** – Allows you to reset default user accounts and passwords for SYSADMIN and GUEST.
- **Delete All Existing Users** – Removes all current users from the data source.

Click **Create Data** to add the new product to the data source. A dialog box will indicate when the transfer is complete.

### To update data for an additional product

1. On the Open Plan Data Administrator dialog box, click the Add Products tab.
2. From the **Choose Products** field, select the product you want to add.
3. If you want to reset default user accounts and passwords for SYSADMIN and GUEST, select the **Install Default User Account** option.
4. If you want to remove all current users from the data source, select the **Delete All Existing Users** option.

5. Click **Create Data**.
6. When the transfer is complete, click **OK**.
7. On the Open Plan Data Administrator dialog box, click **Close** to exit.

## Open Plan Folder Permissions

When installing Open Plan Professional and Desktop systems on a network, the following network access rights must be provided to users:

OPP Folder	OPD Folder	Required Access Rights
Opp	Opd	Read
\Documentation	\Documentation	Read
\Help	\Help	Read
\Sample Data	\Sample Data	Read
\Sample Tools	\Sample Tools	Read (or write if the users want to modify the sample source code)
\Spell	\Spell	Write (to add words to dictionary)
\SQL	\Sql	Read (Write to use the default Access database)
\Symbols	\Symbols	Read
\User	\User	Read
\Workstation Setup	\Workstation Setup	Read



The \Workstation Setup folder is added only for server installations.

## Uninstalling Open Plan

You can remove an Open Plan installation at any time using the **Add/Remove Programs** utility in the Windows Control Panel.

### To uninstall Open Plan

1. Click **Start » Settings » Control Panel » Add or Remove Programs**.  
Windows displays a list of applications that you can remove.
2. Select **Open Plan** on the list, and click the **Remove** button.
3. When Windows asks you to confirm that you want to remove the installed copy of Open Plan, click **Yes**.

## Where to Go from Here

Open Plan includes a number of tools to help you learn about the features and operations of the product.

The *Open Plan Guided Tour* lets you take a hands-on tour of many of the Open Plan features. Use this documentation if you're interested in getting a closer look at some of the tools Open Plan can offer project planners.

For more comprehensive information about Open Plan, examine the *Deltek Open Plan User's Guide*. This PDF file contains complete descriptions of the various features found in Open Plan, and includes procedures for carrying out many common tasks. Chapter 2, "Basic Skills," and Chapter 3, "Getting Started," will help you master the basics of project planning in Open Plan. The remaining chapters are organized on the basis of topics such as entering activity information and project analysis, and do not have to be read in any particular order.

The Open Plan help system contains a wealth of information about using Open Plan and is available whenever you need it. For more complicated features, look for an **Examples** button in the help window for an extended explanation of the feature. To print a help topic, click the **Print** button within the help system.

For in-depth information about advanced topics, check the *Deltek Open Plan Developer's Guide*. This PDF file includes information on topics such as customizing project views, data file structures, compatibility issues, and OLE automation techniques.

For information on training courses offered on Open Plan, visit our Web site at [www.deltek.com](http://www.deltek.com). Click **Services » Deltek University**. On the left under **Deltek University**, click **Browse Catalog**. Finally, select **Deltek Open Plan** to see a listing of Open Plan courses.

## Appendix: Delttek Open Plan 3.3.x Terminal Services / Citrix Installation

### Overview

This appendix is an addendum to the Open Plan 3.3 Installation Guide. It is designed to explain the additional steps required to install Open Plan 3.3 in a shared application server (MS Terminal Server or Citrix Metaframe/Presentation Server) environment.

### Version Information

The appendix applies to Open Plan 3.3. Open Plan has been tested by Delttek on MS Windows Server 2003 and 2008 Terminal Server.

Many customers use Open Plan on Citrix Metaframe/ Presentation Server. Citrix offers more sophisticated load balancing capabilities and provides solutions for cross platform remote access.

### Important Information

For improved application performance, Delttek strongly recommends that all application software to be accessed in a Terminal Server environment be installed locally on the Terminal Server.

If both Open Plan Professional and Open Plan Desktop are installed on the same application server and some users will have less than Power User rights, then an additional manual step is required to avoid unexpected errors. Please see the section on Open Plan Desktop toward the end of this document.

### Database Connections

The two most important factors affecting Open Plan performance are memory available to the application and database performance. Delttek recommends that Open Plan is used with either SQL Server or Oracle in a multi-user environment and that the database server is close to the Terminal Server application server. Smaller implementations can install the database software on the Terminal Server itself but for larger implementations (more than 10 users) we recommend a separate database server. We suggest that the Terminal Server and database server are connected to the same network switch and that if the solution will be supporting many users then serious consideration should be given to a Gigabit link.

### Server Sizing

We recommend that you follow the application server supplier guidelines for server sizing. Open Plan falls into the knowledge worker category for sizing purposes. In the absence of other advice Delttek suggests 200MB for the system and 50MB per concurrent user. Accepted wisdom is that one fast processor is more advantageous than 2 slow processors so we would suggest considering a dual 3 GHz solution over a quad 1.5 GHz solution (a quad 3 GHz is better).

## Installation Screenshots

For the purposes of creating this appendix, a MS Windows 2003 SP1 Terminal Server environment was used.

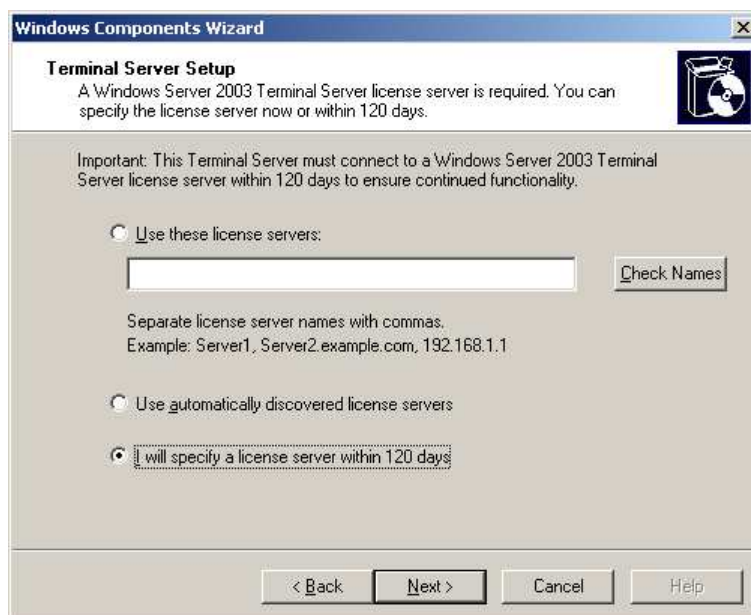


The Open Plan 3.3 standard install CD was used.

## Terminal Server Configuration

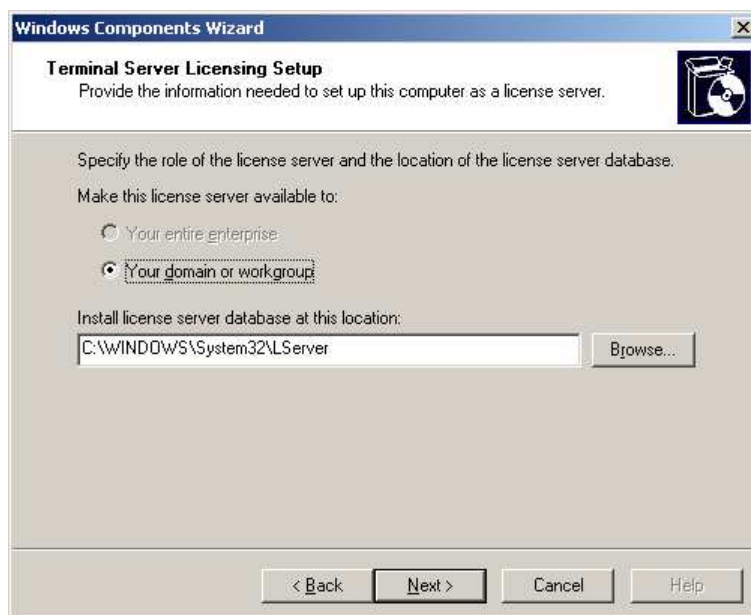






## Per Device Licensing Mode

### Terminal Server Licensing

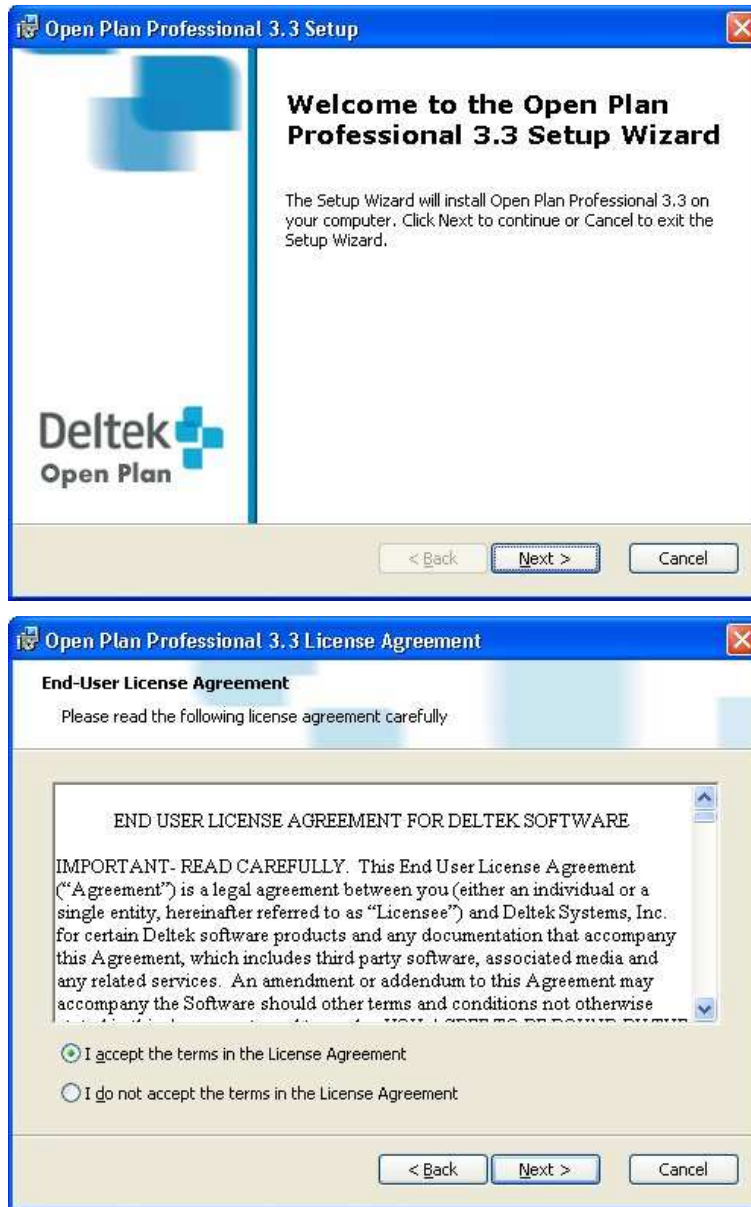


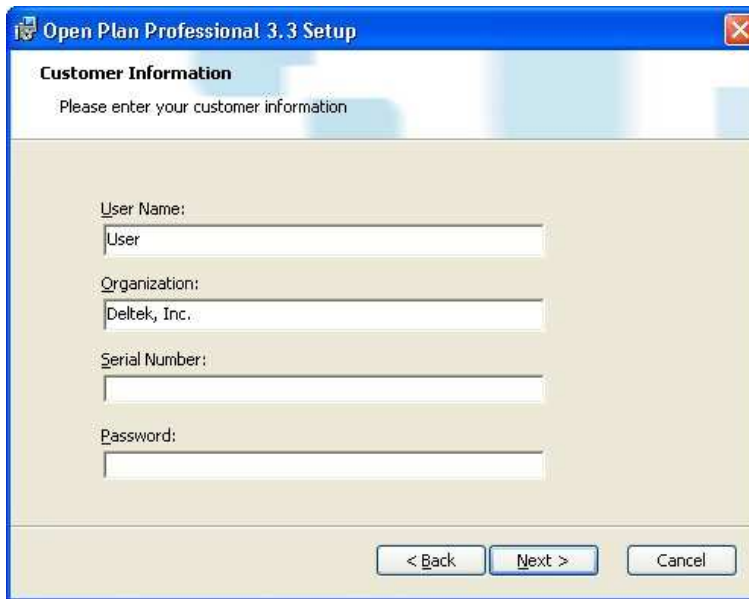
## Open Plan Installation

The recommended approach for Terminal Server/Citrix installation is to install the application locally on the server using the **Complete** installation option. The appropriate menu options will be added for all users. Terminal Server/Citrix will automatically create appropriate registry entries for each user. Open Plan will automatically create the required user files when first launched in the users My Documents folder (see **Modifying the User Directory** for details of how to change this behavior)

When a Terminal Server is in Application Server mode (required to support remote access by more than 2 users) the Server must be placed into Installation Mode so that it will correctly copy application registry keys for new users. The correct way to enter Installation Mode is to use the Add-Remove Programs option in the Control Panel.

In the Add-remove program wizard navigate to the Open Plan installation CD and choose the Setup program (SETUP.EXE).





**Open Plan Professional 3.3 Setup**

**Customer Information**  
Please enter your customer information

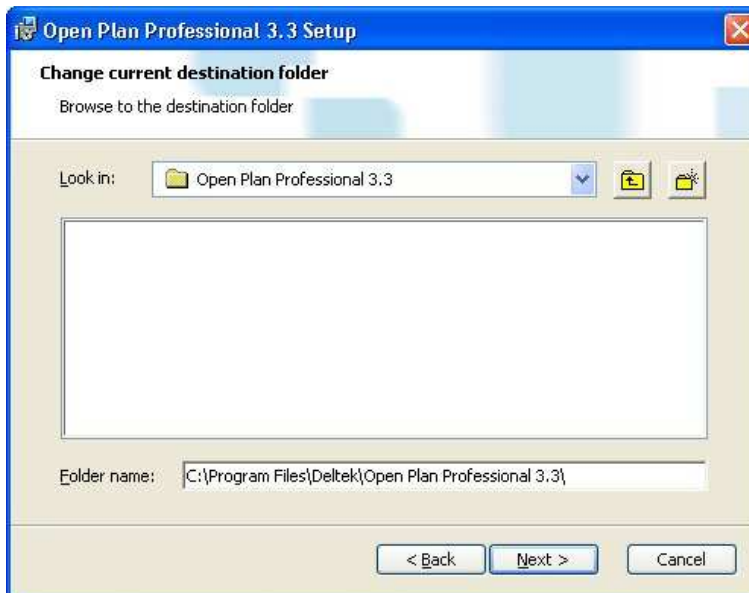
User Name:

Organization:

Serial Number:



Password:

< Back   Next >   Cancel



**Open Plan Professional 3.3 Setup**

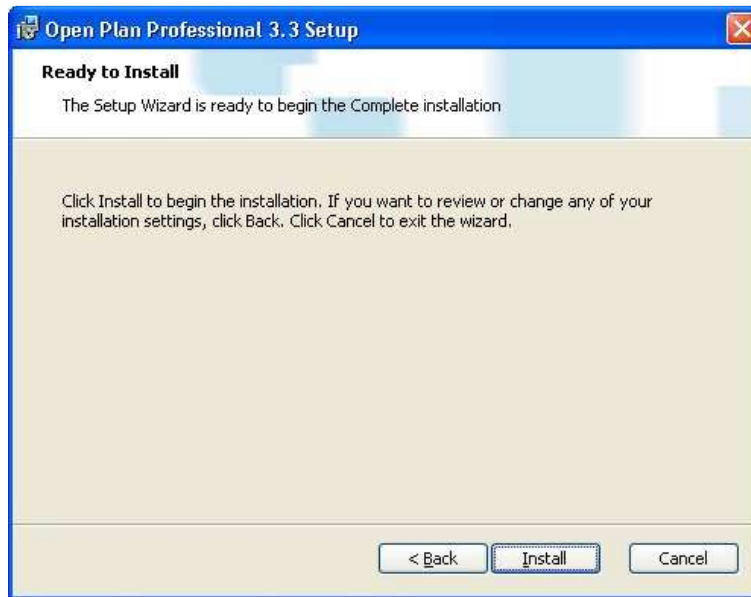
**Change current destination folder**  
Browse to the destination folder

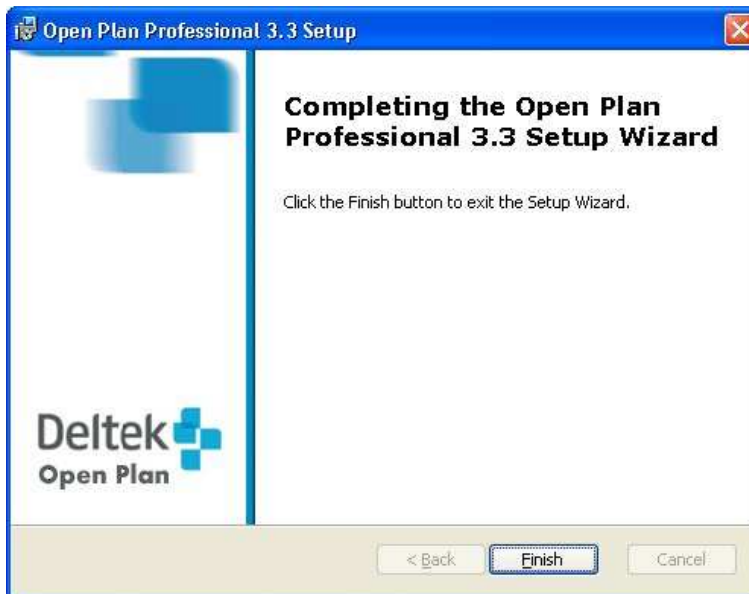
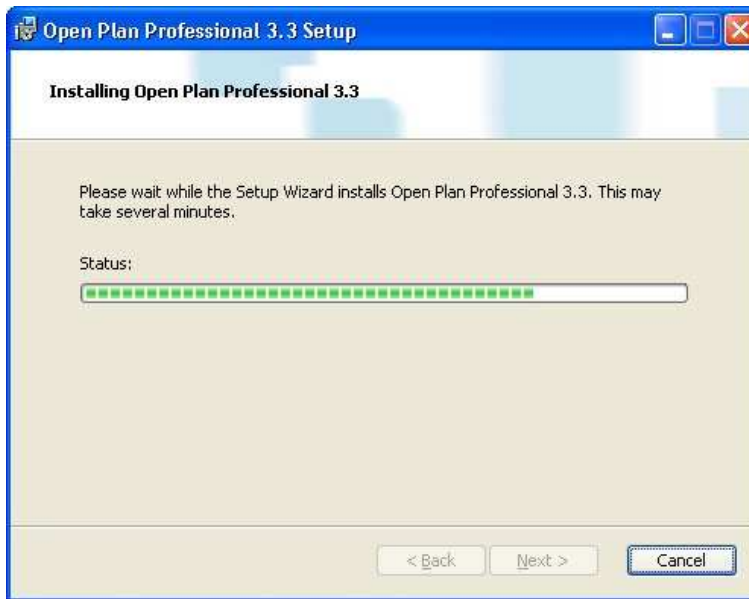
Look in:   

Folder name:

< Back   Next >   Cancel

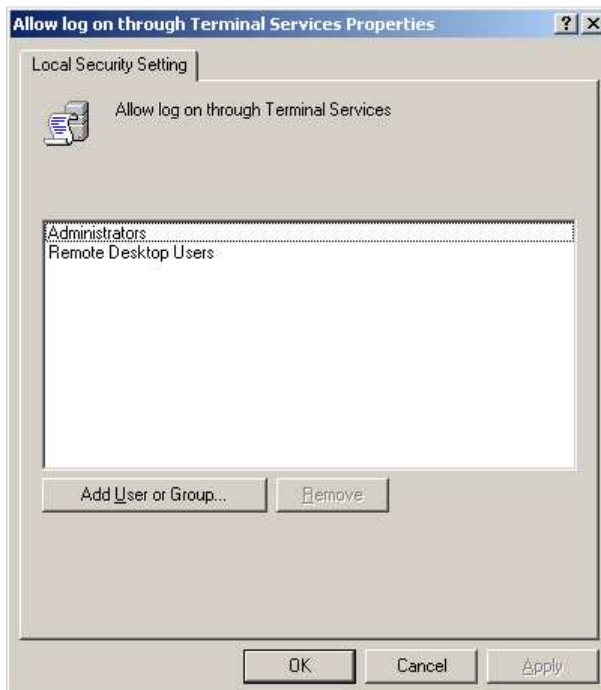
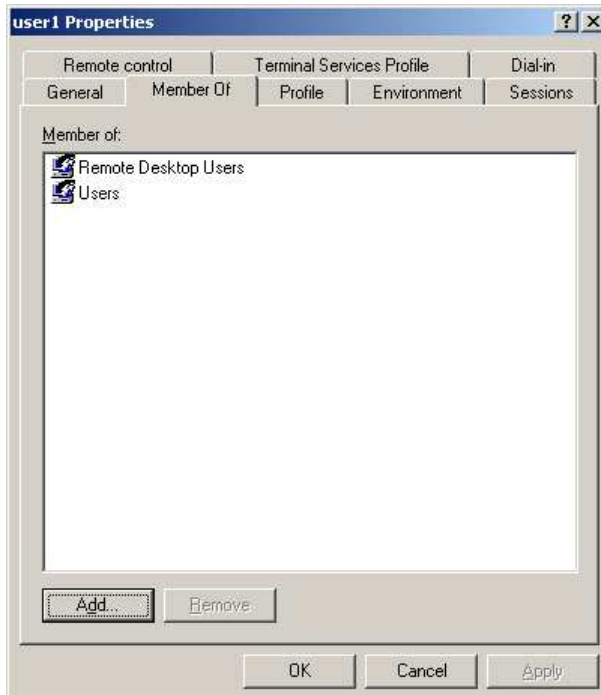
Select the Complete Installation.



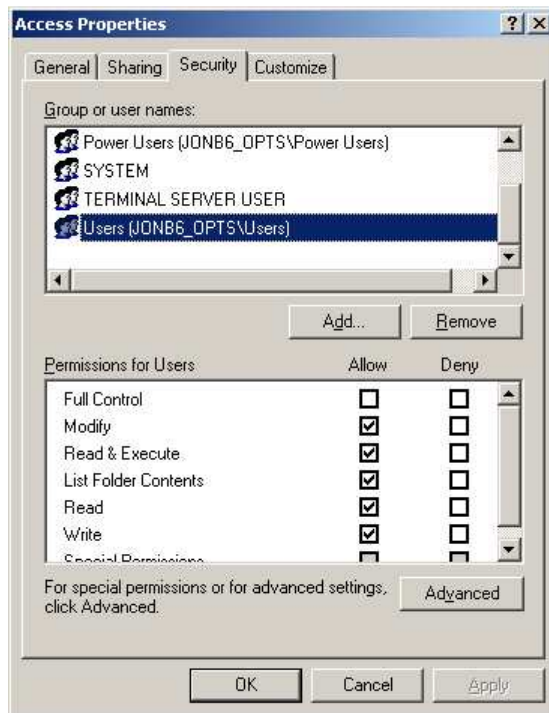


## Security Considerations

Make sure the users requiring Remote Desktop access are members of the Remote Desktop Users group or that the users have been granted Terminal Server logon rights through the local security policy (Administrative Tools; Local Security Policy).



The limited user group must be granted MODIFY access to the default MS Access database if this will be used.

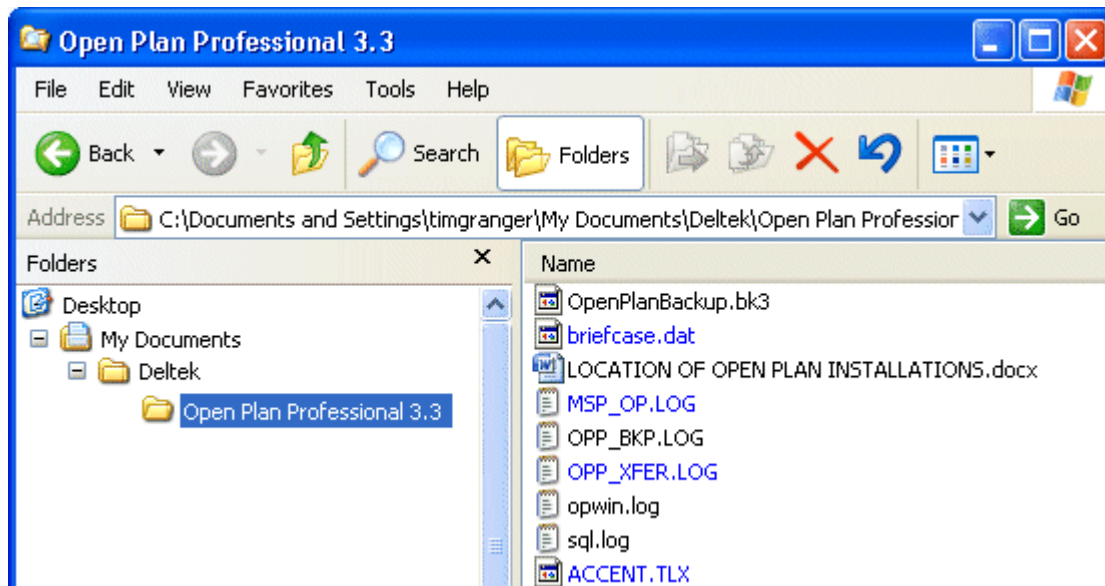


If this data source will not be used then the Administrator must update the Open Plan DATASOURCES.DAT file with the appropriate connection settings for the required database.

Logon as the limited user

Run Open Plan (menu and desktop items should automatically appear)

The user's My Document folder will be updated to include a Delttek folder containing the Open Plan working files (BRIEFCASE database, SPELLING DICTIONARIES etc.).



## Modifying the User Directory

Open Plan 3.3 defaults to creating the user working directory as a sub-folder of the current users My Documents\Deltek folder. It is possible to globally modify this behavior by adding the following line to CONFIG.DAT in the root of the Open Plan installation.

```
[SYSTEM]
UserDir=N:\OPP
```

This would cause Open Plan to create the Open Plan files in the folder N:\OPP. It is the System Administrator's responsibility to ensure that this represents a unique location for each user. This means that typically Drive N: must be mapped as part of the login process, taking care to map to a different physical folder for each user.

## Open Plan Desktop

If both Open Plan Professional and Open Plan Desktop are to be installed on the same application server and some users will not have Administrator or Power User rights then some additional steps are required to avoid users receiving a message that Open Plan is not correctly installed.

When Open Plan (any version/edition) starts, it checks to see if the version number or installation location of the OLE Server components of the product has changed. Since both Professional and Desktop editions include the same OLE Server components changing between editions will be detected as a re-install which will cause Open Plan to attempt to re-register the OLE Server component. This requires write access to the HKEY Local machine registry hive. Regular users do not have this access right.

The current workaround to this issue is as follows:

### As an Administrator

1. Install Open Plan Professional (as above).
2. Install Open Plan Desktop.
3. Execute (start and exit) Open Plan Professional.
4. Manually copy the Open Plan Desktop executable (OPD30.EXE) into the Open Plan Professional installation folder (C:\Program Files\Deltek\Open Plan Professional 3.3.x).
5. Modify the Open Plan Desktop menu shortcut to the new location.



## Deltek Software Support

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

In addition to the information and contacts contained in these Release Notes, as well as the online help available in the product itself, the following sources of information are available.



Deltek Customer Care telephone numbers:

- US Domestic and Canada: 1.877.HLP.PROJ (1.877.457.7765)
- Europe (International): +0800.077.8960
- Australia (International): +61 (8) 8150 550

### Customer Services

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

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



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

### Customer Care Connect Site

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

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

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

- Receive alerts of new Deltek releases and hot fixes

**To access the Customer Care Connect site:**

1. Go to <https://support.deltek.com>.
2. Enter your Customer Care Connect Username and Password.



If you do not have a username and password for the Customer Care Connect site, contact your administrator.

If you forget your username and password, click the **Account Assistance** button on the Login page to get help.

3. Click **Log In**.