

Deltek Open Plan® 3.5

Installation Guide

May 4, 2015

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Overview

Welcome to Deltek® Open Plan™ 3.5, 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.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it [here](#) free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at far right.
2. In the **Annotations** pane that displays, click  **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.



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.

If You Need Assistance

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

Customer Services

For over 30 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
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes



If you need assistance using the [Customer Care Connect site](#), the online help available on the site provides answers for most questions

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In**.



If you do not have a username and password for the Customer Care Connect site, contact your firm's Open Plan Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

Release notes and other guides are available for this release. You can download these documents in two ways.

Deltek Software Manager

The Documents tab in Deltek Software Manager lists all of the documents associated with a release and lets you download the ones that you want.

To download documents, complete the following steps:

1. On the [Deltek Customer Care](#) site, click the Product Downloads tab, then select **Launch Deltek Software Manager**.
2. When the Deltek Software Manager opens, highlight a release in the left pane.



Do **not** enter a check next to the release name or click **Add to Download Queue**. If you do so, you will download the software as well as any documentation that you want.

3. Click the Documents tab to display a list of available documents for the release.
4. Select the documents that you want.
5. Click **View Download Queue** to see a list of documents that you selected.
6. Click **Download**.

Customer Care Site Enterprise Search

Use the search feature to find specific documents or to see a list of all documents associated with a release. Then open or download the ones that you want.

To download documents, complete the following steps:

1. On the [Deltek Customer Care](#) site, click **Enterprise Search**.
2. Select **Release Documentation** as the **Source**.
3. Perform one of the following actions:
 - To see a list of all available documentation for a release, enter the product and release number (for example, **Vision 7.4**) in the search field.

- To find a specific document, enter a description of the document (for example, **Vision 7.4 release notes**) in the search field.
4. Click on the document, then choose to open or save it.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, and sub-releases. You can access DSM directly or through the Deltek Customer Care Connect site.

When you access DSM directly, you will be prompted to log on before you can access the application. If you access DSM from within the Deltek Customer Care site, you do not have to log on since you are already logged into the Customer Care site.

Accessing DSM Directly

To access Deltek Software Manager directly, complete the following steps:

1. Launch Deltek Software Manager by taking one of the following actions:
 - Click [here](#).
 - On your desktop, click **Start » All Programs » Deltek Software Manager**.
2. In the Deltek Software Manager logon dialog box, enter your Deltek Customer Care **User ID** and **Password**, and click **Logon**.
3. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.



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

4. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.



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

5. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.



If you clicked the link in step 1 to access DSM, the application automatically selects Open Plan for you.

6. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
7. 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.



To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

8. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

Accessing DSM from within the Customer Care Connect Site

To access Deltek Software Manager from within the Customer Care Connect site, complete the following steps:

1. In your Web browser, go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and **Password**, and click **Log In**.
3. When the Customer Care Connect site displays, click the Product Downloads tab.
You are automatically logged into Deltek Software Manager.
4. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.



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

5. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.



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

6. In the left pane of Deltek Software Manager, 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. Your options are **Complete**, **HotFix**, and **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.



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. Deltek Software Manager downloads the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite, complete the following steps:

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



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](#).
-



The above troubleshooting link will only work if you are logged into Deltek Customer Care Connect.

Prerequisites

To run Open Plan version 3.5 successfully, your system must meet the requirements listed in this section.

Deltek Integrated Products

- Open Plan is compatible with the following IPM products:
 - Deltek Cobra™ 5.1.2, 5.1.3
 - Deltek PM Compass 2.2 (PMC 2.2 is planned for release later this year. Check the compatibility when it is released.)
 - Deltek Acumen Suite 5.1, 6.0 (Fuse, Risk and 360)



Open Plan users who are integrating data with these products must ensure that the products are upgraded to the compatible versions.

Database Tier

The following database platforms have been tested for compatibility and are fully supported by Open Plan:

Operating System

- Windows Server 2012 R2
- Windows Server 2012
- Windows Server 2008 R2
- Windows Server 2008

Database Platform

- Oracle 12c R1, 11g R2
- Microsoft SQL Server 2014, 2012, 2008 R2
- Microsoft Access

Client Tier

The following client platforms have been tested for compatibility and are fully supported by Open Plan:

Operating System

- Windows 8.1
- Windows 8
- Windows 7

Windows Terminal Services/Citrix

- Windows Server 2012 R2
- Windows Server 2012
- Windows Server 2008 R2
- Windows Server 2008

Integration Products (Optional)

- Microsoft Project® 2013, 2010, 2007

Upgrading from Earlier Versions of Open Plan

When upgrading from an earlier version of Open Plan, Open Plan 3.5 must be installed in a new folder rather than attempting to overwrite/upgrade an existing Open Plan installation. Open Plan 3.5 supports concurrent installation with previous versions of Open Plan, provided that:

- The user has Power User/Administrator rights (This is necessary to enable Open Plan to update OLE Automation Server registration when different versions are used)
- The two versions do not share the same database
- The two versions are installed to different folders

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.

Upgrade the Database

Upgrading from an earlier version of Open Plan requires upgrading the database. Prior to upgrading, however, Deltek recommends backing up of the Open Plan database. Once upgraded, you can no longer use the database with a prior version of the application.



- Before running the upgrade scripts, your Database Administrator must verify if the Open Plan database is in Unicode. If so, the appropriate setting in the script to upgrade the database in Unicode must be set. This, however, does not apply to MS Access.
- If you are installing to a database that already contains another Deltek IPM application, you must select the same Unicode option as the existing applications

-
- *If you are upgrading 3.1a to 3.2:*
 - For SQL, run OPP32_Upgrade_SqlServer.sql.
 - For Oracle, run OPP32_Upgrade_Oracle.sql.
 - *If you are upgrading 3.2 to 3.3:*
 - For SQL, run OPP33_Upgrade_SqlServer.sql.
 - For Oracle, run OPP33_Upgrade_Oracle.sql.
 - *If you are upgrading 3.3 to 3.4:*
 - For SQL, run OPP34_Upgrade_SqlServer.sql.
 - For Oracle, run OPP34_Upgrade_Oracle.sql.
 - *If you are upgrading 3.4 to 3.4.1:*
 - For SQL, run OPP341_Upgrade_SqlServer.sql.
 - For Oracle, run OPP341_Upgrade_Oracle.sql.
 - *If you are upgrading 3.4.1 to 3.5:*
 - For SQL, run OPP35_Upgrade_SqlServer.sql.
 - For Oracle, run OPP35_Upgrade_Oracle.sql.



The update scripts used in this procedure can be found in the Open Plan executable folder.

- For MS SQL, you can find the scripts in the C:\Program Files (x86)\Deltek\Open Plan Professional 3.5\SQL\SQL Server folder.
 - For Oracle, you can find the scripts in the C:\Program Files (x86)\Deltek\Open Plan Professional 3.5\SQL\Oracle folder.
 - For MS Access, however, you can upgrade the database by backing up Open Plan data in the prior version of Open Plan and restoring the backup file to the latest version of Open Plan. This is only possible when the source file has the same major version as Open Plan's (for example, **3.x.x.xxx**).
-

Open Plan Installation Wizard

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

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

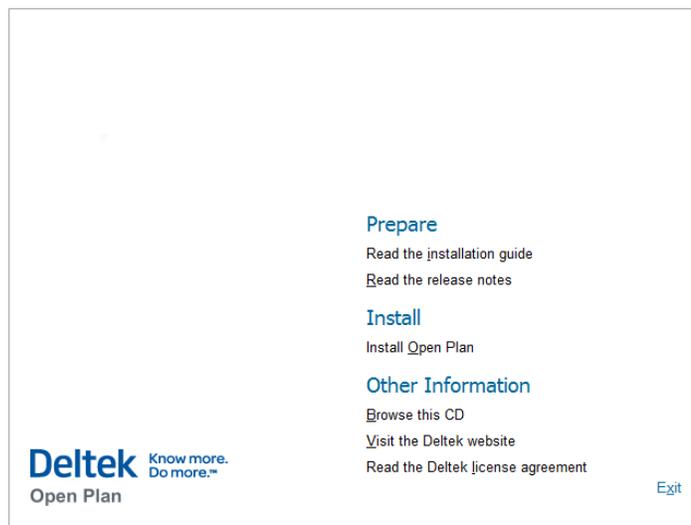
After you have installed Open Plan, you can use the installation wizard to add features to your installation at any time.

Installing a Single-User Version of Open Plan

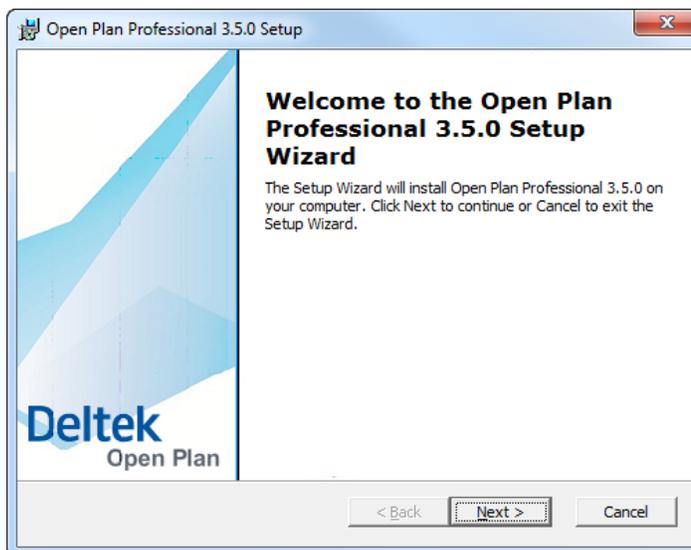
This section describes how to install a single-user version of Open Plan on either a stand-alone PC or on a network drive.

To install a single-user version of Open Plan, complete the following steps:

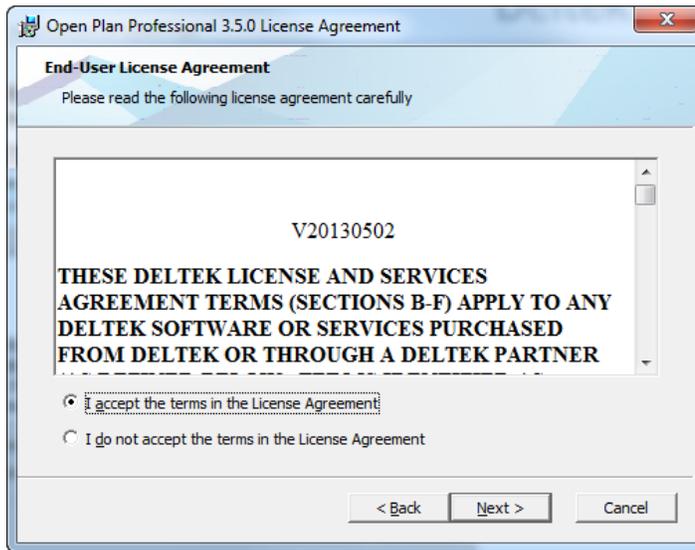
1. Download the Open Plan 3.5 software using the instructions in the [Downloading Deltek Products using Deltek Software Manager](#) section.
2. Go to the location where you saved the Open Plan installer.
3. Double-click DeltekOpenPlanProfessional35.exe to extract the installation files and display the installation launch screen.
4. On the installation launch screen, choose **Install Open Plan** to launch the Open Plan 3.5 Setup Wizard.



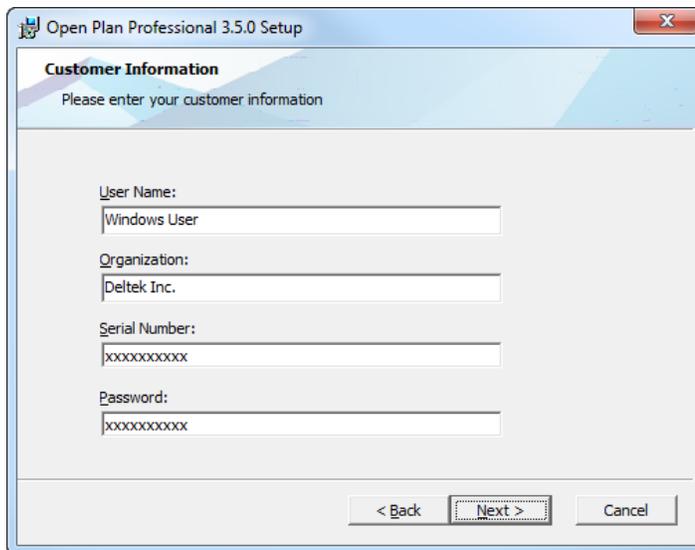
5. On the **Welcome to the Open Plan 3.5.0 Setup Wizard** page, click **Next**.



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

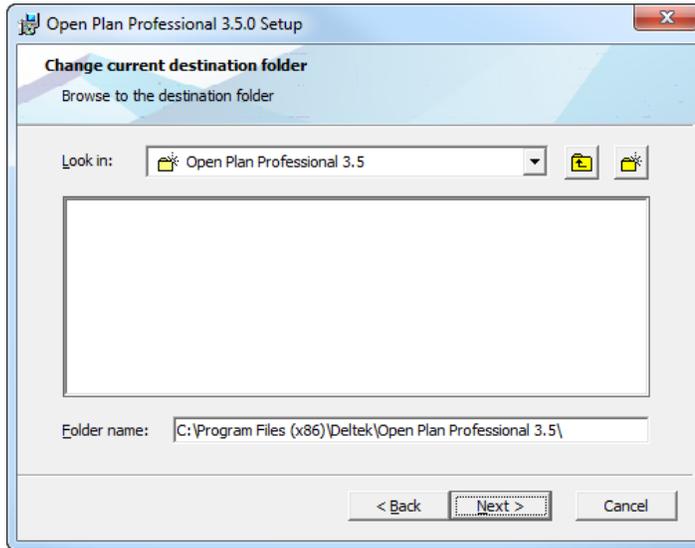


7. On the **Customer Information** page, enter your user information then click **Next**.

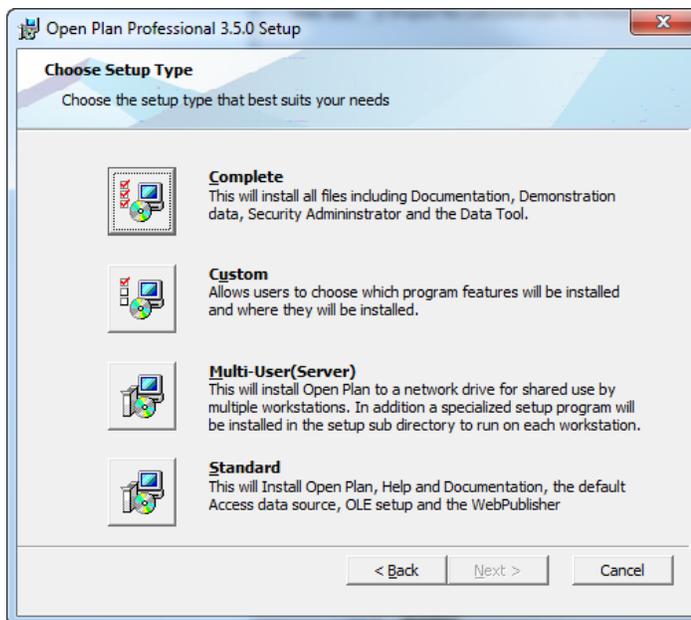


For your Open Plan serial number and password, please contact your Open Plan administrator. The **Password** is also known as the **License Key**.

8. On the **Change current destination folder** page, take one of the following actions then click **Next**:



- 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.
9. On the **Choose Setup Type** page, 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.
- **Multi-User (Server)** – Installs Open Plan to a network drive for shared use by multiple workstations.



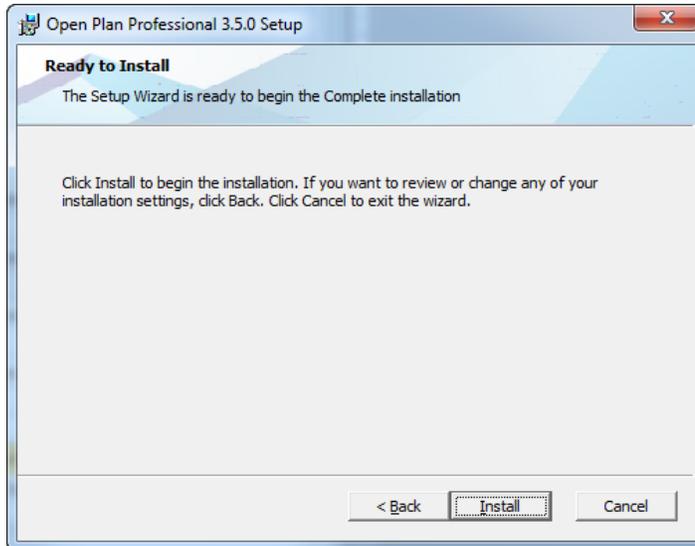
Multi-User (Server) installation is covered in detail in the section entitled [Performing a Multi-User Installation of Open Plan](#).

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

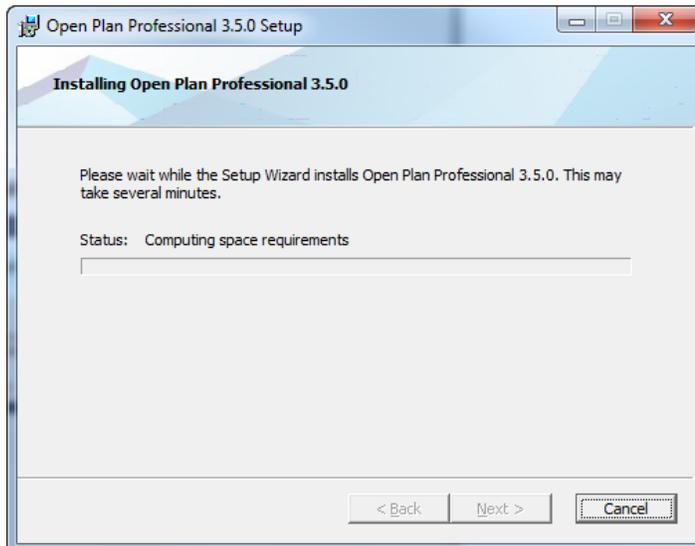


If you do not choose to install a particular feature at this time, you can return to the installation wizard and add the feature later.

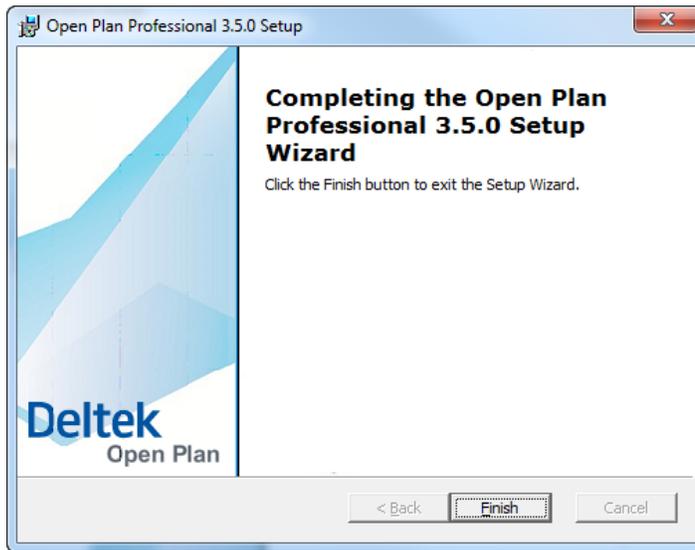
10. On the **Ready to Install** page, click **Install**.



The **Installing Open Plan Professional 3.5.0** page shows the installation's progress.



11. When the installation process is completed, click **Finish** on the **Completing the Open Plan 3.5.0 Setup Wizard** page.



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

Perform 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 looks like this:

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

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

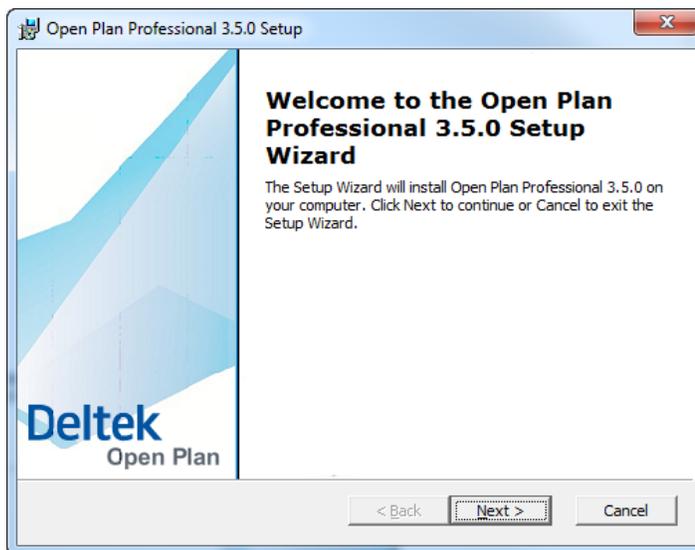
To perform a server installation, complete the following steps:

1. Download the Open Plan 3.5 software, using the instructions in the [Downloading Deltek Products using Deltek Software Manager](#) section.
2. Go to the location where you saved the Open Plan installer.
3. Double-click `DeltekOpenPlanProfessional35.exe` to extract the installation files and display the installation launch screen.

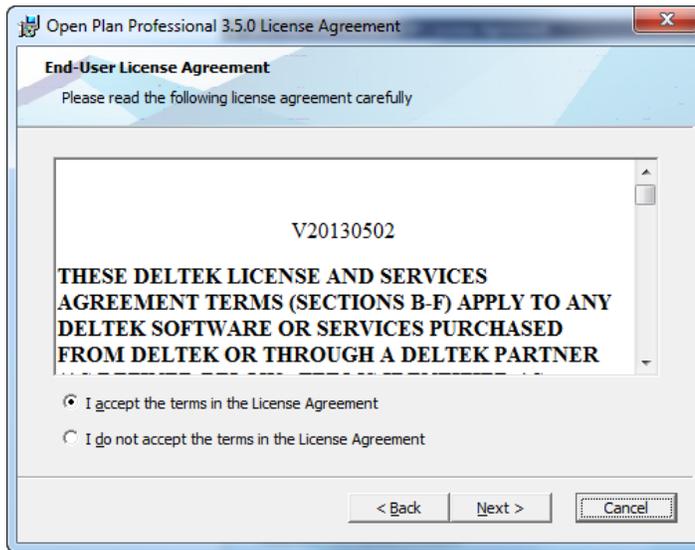
4. On the installation launch screen, choose **Install Open Plan** to launch the Open Plan 3.5 Setup Wizard.



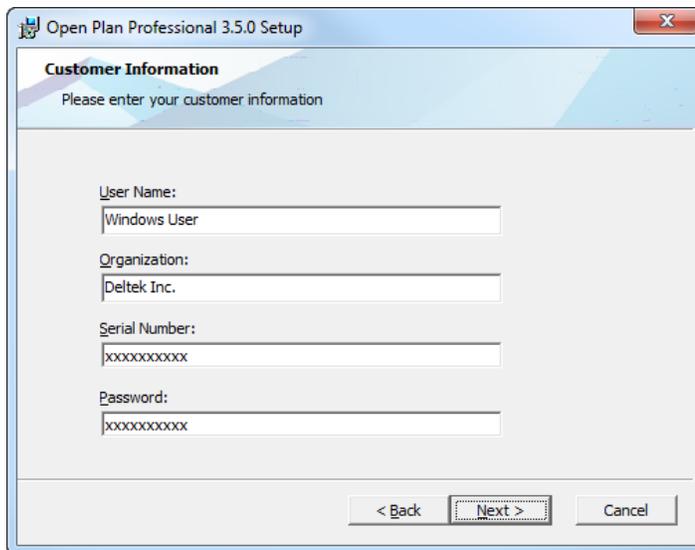
5. On the **Welcome to the Open Plan 3.5.0 Setup Wizard** page, click **Next**.



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

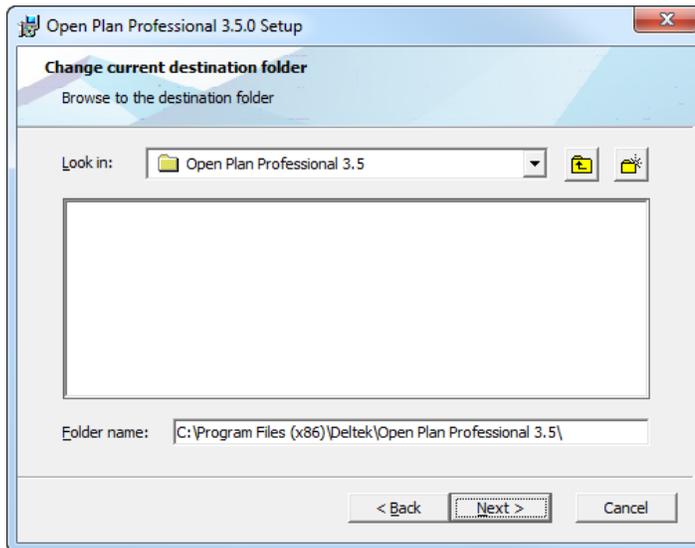


7. On the **Customer Information** page, enter your user information then click **Next**.

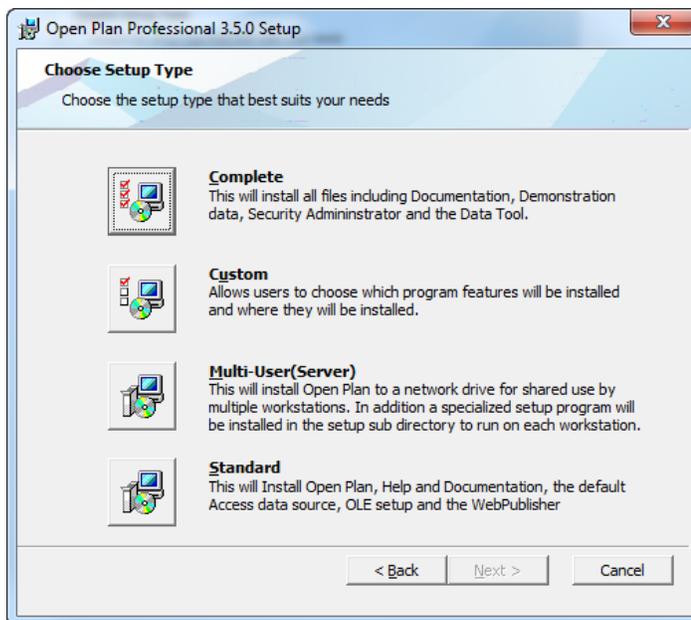


For your Open Plan serial number and password, please contact your Open Plan administrator. The **Password** is also known as the **License Key**.

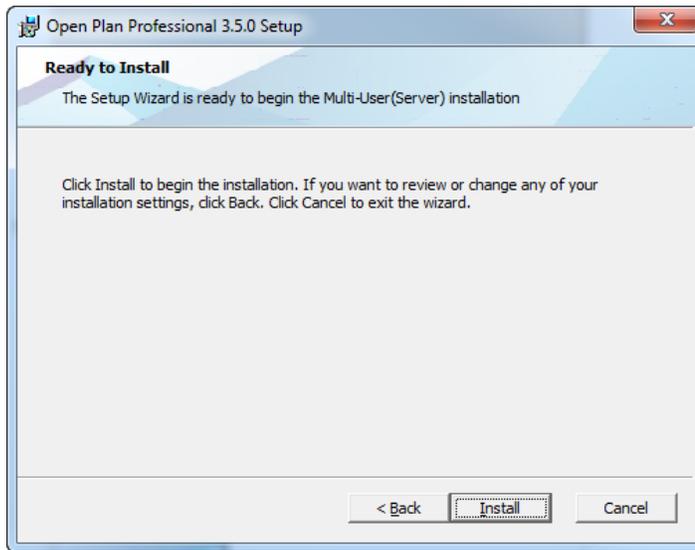
8. On the **Change current destination folder** page, take one of the following actions then click **Next**:



- 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.
9. On the **Choose Setup Type** page, select **Multi-User (Server)**.

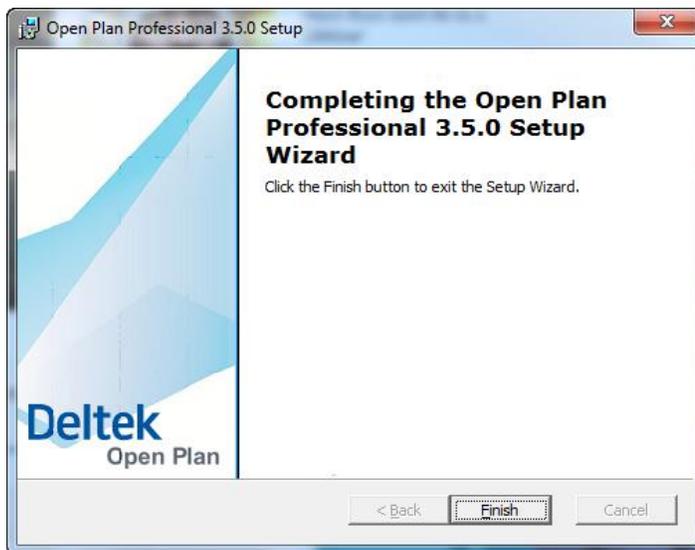


10. On the **Ready to Install** page, click **Install**.



The **Installing Open Plan Professional 3.5.0** page shows the installation's progress.

11. When the installation process is completed, click **Finish** on the **Completing the Open Plan 3.5.0 Setup Wizard** page.



Perform a Workstation Installation

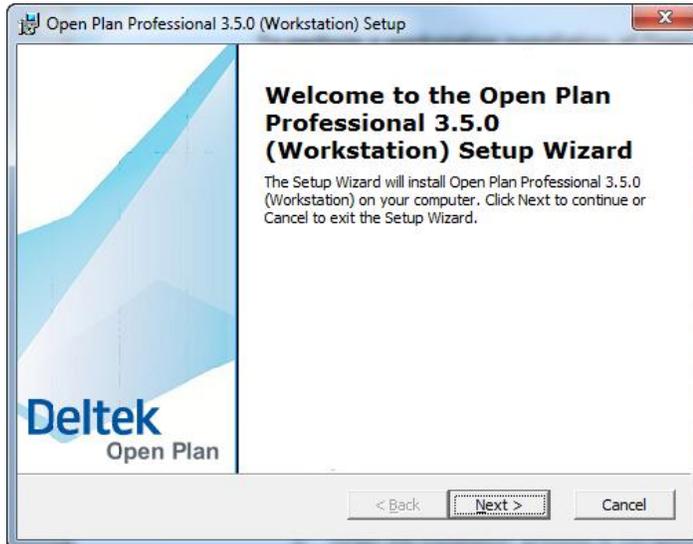
After the server version of Open Plan has been installed on a network drive, use this procedure to create multiple workstation installations.



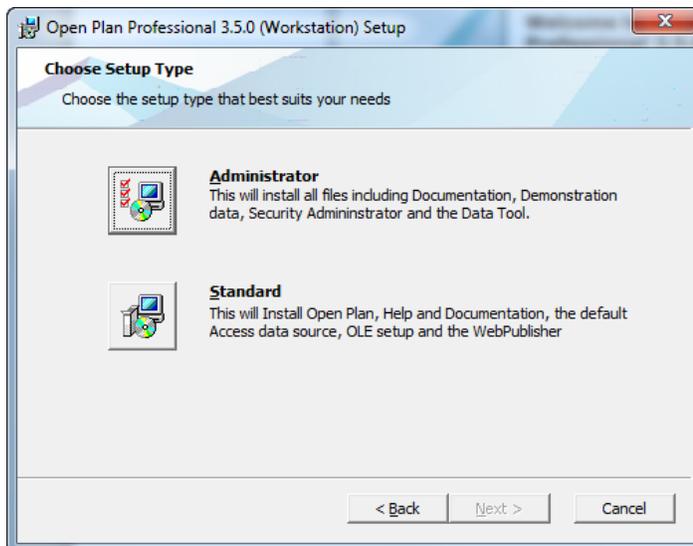
- You can create workstation installations only from a server installation of Open Plan.
- Although similar to the single-user installation, the workstation installation does not prompt you to enter a serial number and password.
- You need to perform the workstation install on every computer on which Open Plan needs to run.

To perform a workstation installation of Open Plan, complete the following steps:

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:\Deltek\Open Plan Professional 3.5\Workstation Setup**.
3. Double-click **setup.exe**. Open Plan displays the **Welcome** page of the installation wizard. Click **Next**.



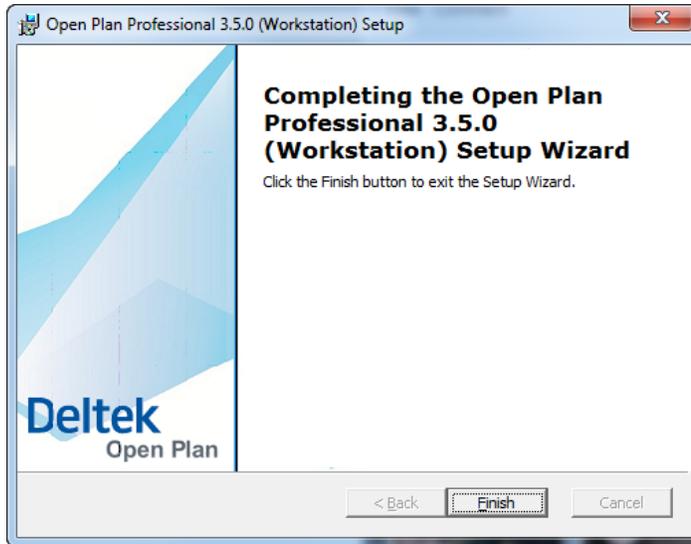
4. On the **Choose Setup Type** page, select one of the following:
 - **Administrator** – the procedure installs all of the features of the Standard setup are together with the Security Administrator and the Data Tool.
 - **Standard** – the procedure installs the Open Plan Help system, documents, default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



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

The **Installing Open Plan Professional 3.5.0 (Workstation)** page shows the installation's progress.

6. When the installation process is completed, click **Finish** on the **Completing the Open Plan 3.5.0 (Workstation) Setup Wizard** page.



If you try to launch Open Plan after performing a workstation installation and receive an error saying the Data Sources 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.

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 3.5** folder.

Documentation

The following reference materials are available in the Documentation folder:

- **Open Plan User Guide** – An Open Plan user reference manual.
- **Open Plan Developer 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.

The following reference materials are also in the Help folder:

- **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. To access this, from within Open Plan, click **View » Log Viewer** and then click **Help » Contents**.
- **EPM Security Administrator Help System** – The help system for the EPM Security Administrator. To access this, click the **Help** button after launching EPM Security Administrator or click **Help » Contents** within the application.

Security

EPM Security Administrator – This is a Deltek security management application. (Open Plan Professional installations only)

Tools

The following applications are represented in this folder:

- **OLE Setup** – An 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, see your Windows documentation.

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

To start Open Plan, complete the following steps:

1. Click **Start » Programs » Deltek » Open Plan Professional 3.5**, and click the icon representing your installation of Open Plan.
 2. On the Open Plan Login dialog box, log on as SYSADMIN or GUEST with the corresponding password.
 - Administrator:
 - User ID: SYSADMIN
 - Password: PASSWORD
 - Guest:
 - User ID: GUEST
 - Password: <blank>
 3. Click **Login**.
-



The first time you launch Open Plan, your default user name is the Windows user name that you use to log on to a computer. Deltek recommends that you replace this user name with your Open Plan user name.

Open Plan Databases

Open Plan supports Access, Oracle, and SQL Server databases through an OLEDB 2.1 compliant provider.



For the list of supported OLEDB providers for each database type, see [Open Plan Data Tool](#).

Access

A default Access database is automatically created when Open Plan is installed and Open Plan is configured to use this database by default.

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
-



Upgrading from an earlier version of Open Plan requires upgrading the database. The update scripts are located in the Open Plan executable folder. For more information, see [Upgrading from Earlier Versions of Open Plan](#).

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.

Open Plan 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.



The scripts for creating tables on SQL Server and Oracle default to a Unicode installation.

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

Set Up a Database

This procedure allows you to set up a database using either Oracle or SQL server.

To set up the database, complete the following steps:

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 (mentioned in the previous subsection) to run based on whether you are using Oracle or SQL Server.

Run Oracle Scripts for PM Compass Integration

You must run the following scripts if you are integrating Open Plan with PM Compass in the same Oracle schema:

Script	Description	Location
Opp_Oracle_CI_Indexes.sql	Run this script to create Case Insensitive indexes in Open Plan tables for integration with PM Compass. For explicit Tablespace support, set the	\SQL\Oracle\Utility

Script	Description	Location
	<p>index_tablespace variable in the DECLARE section.</p> <p>To control the type of indexes that are created, see the indextype variable in the DECLARE section.</p>	
WST_Oracle_CI_Indexes.sql	<p>Run this script to create Case Insensitive indexes on WST tables for integration with PMCompass.</p> <p>For explicit Tablespace support, set the index_tablespace variable in the DECLARE section.</p> <p>To control the type of indexes that are created, see the indextype variable in the DECLARE section.</p>	\SQL\Oracle\Utility



- If your Open Plan installation is in the same schema as your PM Compass installation, you must run Opp_Oracle_CI_Indexes.sql.
- If Open Plan was installed first followed by PM Compass, you must run both Opp_Oracle_CI_Indexes.sql and WST_Oracle_CI_Indexes.sql.
- If PM Compass was installed first followed by Open Plan, you only need to run Opp_Oracle_CI_Indexes.sql.

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.

Log On to the Open Plan Data Tool

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

To log in to the Data Tool, complete the following steps:

1. Click **Start » All Programs » Deltek » Open Plan Professional 3.5 » Tools » Data Tool**. The Data Sources dialog box displays.
2. Click **OK**. The Data Tool Login dialog box displays.
3. Enter the password. (The default password as shipped from Deltek is password.)
4. 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 **Password** on the Open Plan Data Administrator dialog box, and enter a new password when prompted.

Choose a Data Source

If you already have another edition of Open Plan installed and you want to update the data source, see 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.

Define a New Data Source

To add a new data source, complete the following steps:

1. On the Open Plan Data Administrator dialog box, click  at the right edge of the **Target DSN** field. The Data Sources dialog box displays.
2. Click **Add**. The Data Link Properties dialog box displays. This dialog box displays the **Provider** tab with a list of database providers on your system.
3. Select the appropriate database provider.
4. After you select a provider, click **Next**. 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	Oracle Provider for OLE DB Microsoft OLE DB Provider for Oracle
Microsoft Access	Microsoft Jet 3.51 or 4.0 OLE DB Provider

Access Users

If you are going to use an Access database and selected a Microsoft Jet 3.51 or 4.0 OLE database provider, the Connection tab displays. It 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 if you are not using schemas or Access. Select the **Database is Unicode** option if tables were created with the **Unicode** option enabled. Click **OK**. Your new data source is now added to the list of sources in the Data Sources dialog box.



The scripts for creating tables on SQL Server and Oracle default to a Unicode installation. For more information, see [Open Plan Tables](#).

To set up an Open Plan data source for a new Access database, complete the following steps:

1. Click **Start » All Programs » Deltek » Open Plan Professional 3.5 » Tools » Data Tool**.
2. On 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 **Password** in the Open Plan Data Administrator dialog box, which is displayed after you log on.

3. On the Open Plan Data Administrator dialog box, click  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. On the Edit Data Source dialog box, enter a name for the Open Plan data source. Leave the **Database Name (Schema)** field blank.
12. If tables were created with the **Unicode** option enabled, select the **Database is Unicode** option for Unicode support.



The scripts for creating tables on SQL Server and Oracle default to a Unicode installation. For more information, see [Open Plan Tables](#).

13. Click **OK**. The new data source is now added to the list on 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 displays. It 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 if tables were created with the **Unicode** option enabled. When you click **OK**, your new data source is added to the list of sources in the Data Sources dialog box.



The scripts for creating tables on SQL Server and Oracle default to a Unicode installation. For more information, see [Open Plan Tables](#).

To set up an Open Plan data source for a new Oracle database, complete the following steps:

1. Click **Start » All Programs » Deltek » Open Plan Professional 3.5 » Tools » Data Tool**.
2. On 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 on the Open Plan Data Administrator dialog box, which is displayed after you log on.

3. On the Open Plan Data Administrator dialog box, click  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. On 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. If tables were created with the **Unicode** option enabled, select the **Database is Unicode** option for Unicode support.



The scripts for creating tables on SQL Server and Oracle default to a Unicode installation. For more information, see [Open Plan Tables](#).

13. Click **OK**. The new data source is added to the list on 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, see 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. It 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 if you are not using schemas or Access. Select the **Database is Unicode** option if tables were created with the Unicode option enable. When you click **OK**, your new data source is added to the list of sources in the Data Sources dialog box.



The scripts for creating tables on SQL Server and Oracle default to a Unicode installation. For more information, see [Open Plan Tables](#).

To set up an Open Plan data source for a new SQL Server database, complete the following steps:

1. Click **Start » All Programs » Deltek » Open Plan Professional 3.5 » Tools » Data Tool**.
2. On 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 on the Open Plan Data Administrator dialog box, which is displayed after you log on.

3. On the Open Plan Data Administrator dialog box, click  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. On the Edit Data Source dialog box, enter a name for the Open Plan data source.
12. If you selected a database name on the Connection tab of the Data Link Properties dialog box, leave the **Database Name (Schema)** field blank if you are not using schemas or Access.
13. If tables were created with the **Unicode** option enabled, select the **Database is Unicode** option for Unicode support.



The scripts for creating tables on SQL Server and Oracle default to a Unicode installation. For more information, see [Open Plan Tables](#).

14. Click **OK**. The new data source is added to the list on the Data Sources dialog box.
15. Click **OK** to return to the Open Plan Data Administrator dialog box.

Load 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, see 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. To install the demonstration data, you must select the **Remove Existing Data** option.

To load default data, complete the following steps:

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** and/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**.

Load 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, allowing 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, complete the following steps:

1. On the Open Plan Data Administrator dialog box, click the Add Products tab.
2. From the **Choose Products** drop-down list, 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**.

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, complete the following steps:

1. Click **Start » Programs » Deltek » Open Plan Professional 3.5 » Security » EPM Security Administrator**.
2. On 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**.
4. Click **Tools » Programs » Change data source...** to display the Data Sources dialog box.
5. Select the appropriate data source and click **OK**. The default data source is **OP35**.

Set Up Security

In the Deltek 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 Deltek 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 Deltek EPM Security Administrator, see the [EPM Security Administrator Guide](#).

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

Create a User

To create a new user, complete the following steps:

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.

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

Create a Group

To create a new group, complete the following steps:

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.

Add a User to a Group

To add a new user to a group, complete the following steps:

1. After you have created a new user, click a group in the **Groups** tab.
2. Click **Add**.
3. On the Add Users dialog box, select the user that you want to add to the selected group, and then click **OK**.
4. When you have finished adding groups and users, click **Exit** on the **System** menu.



A user must be a member of at least one group to have access to Open Plan.

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.

Modifying, Repairing, or Uninstalling Open Plan

Open Plan provides facilities for changing which features are installed, repairing installation errors, and removing Open Plan. Use the procedure in this section to change your Open Plan installation structure.

To modify, repair, or remove your Open Plan installation, complete the following steps:

1. Launch the MS Windows Control Panel.
2. Click **Programs and Features**.
3. On the **Programs and Features** list, right-click **Deltek Open Plan Professional 3.5** and click **Change** on the context menu. The Open Plan 3.5 Setup Wizard displays.
4. Click **Next**.



5. On the **Modify, Repair, or Remove Installation** page, select one of the following options, depending on the task that you want to do:



- **Modify** — Select this option to change your Open Plan installation structure. Selecting this option displays the **Custom Setup** page.
 - **Repair** — Select this option to repair installation errors by reinstalling the Open Plan components. Selecting this option displays the **Repair Open Plan 3.5 Installation** page. Click **Next** to continue repairing Open Plan.
 - **Remove** — Select this option to uninstall Open Plan from your machine. Selecting this option displays the **Remove Open Plan 3.5 Installation** page. Click **Next** to continue uninstalling Open Plan.
6. When the process is completed, click the **Finish** button to exit the Setup Wizard.

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 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 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. Click **Education » Browse Courses**. On the My Deltek University page, browse for Open Plan courses in the **Browse for Training** pane.

Appendix: Deltek Open Plan 3.5 Terminal Services (Remote Desktop Services)/Citrix Installation

Overview

This appendix is an addendum to the Open Plan 3.5 Installation Guide. It is designed to explain the additional steps required to install Open Plan 3.5 in a shared application server (MS Terminal Server/Remote Desktop Services or Citrix XenApp Server) environment.

Version Information

The appendix applies to Open Plan 3.5. Open Plan has been tested by Deltek on MS Windows Server 2008 Terminal Server and Windows Server 2008 R2, 2012, and 2012 R2 Remote Desktop Services.

Beginning with Windows Server 2008 R2, Terminal Services was renamed Remote Desktop Services. In addition to the name change, the deployment and configuration of Remote Desktop Services have changed significantly. For guidance on deploying the Remote Desktop Services Role and Features, refer to the Microsoft Remote Desktop Services documentation page (<https://technet.microsoft.com/en-us/windowsserver/ee236407>).



In this appendix, the terms “Terminal Services” and “Remote Desktop Services” are used interchangeably.

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

Important Information

For improved application performance, Deltek strongly recommends that all application software be accessed in a Terminal Server/Remote Desktop Services environment installed locally on the Terminal Server/Remote Desktop Session Host application server. For Windows 2008 R2 or higher, when deploying the Remote Desktop Services role, the **session-based desktop deployment** scenario is recommended and is comparable to the deployment of Windows Terminal Services of Windows 2008 and earlier versions.

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. Deltek 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/Remote Desktop Session Host application server. Smaller implementations can install the database software on the Terminal Server/Remote Desktop Session Host 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 Deltek 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).

Terminal Server/Citrix Installation

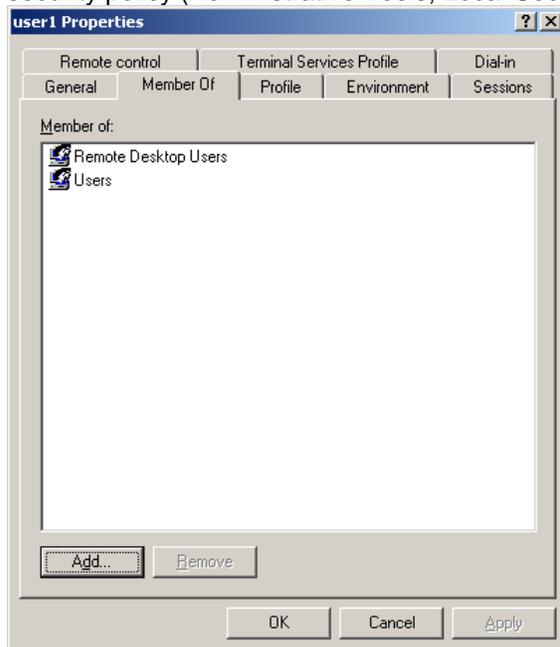
The recommended approach for Terminal Server/Citrix installation is to install the application locally on the server using the **Complete** installation option. The appropriate menu options will be added for all users. Terminal Server/Citrix will automatically create appropriate registry entries for 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)

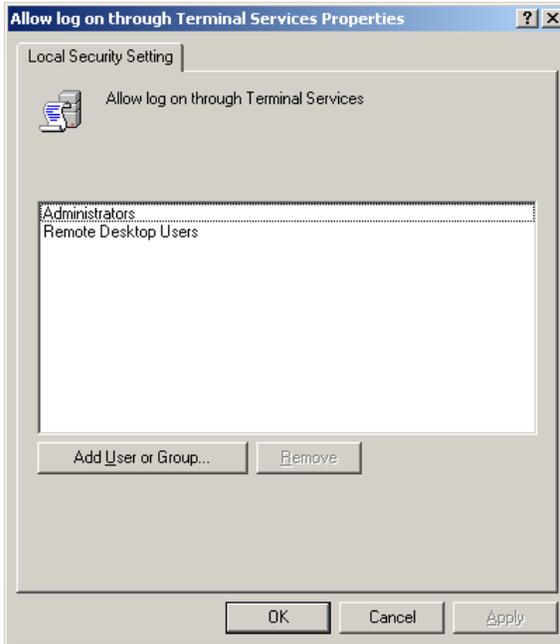
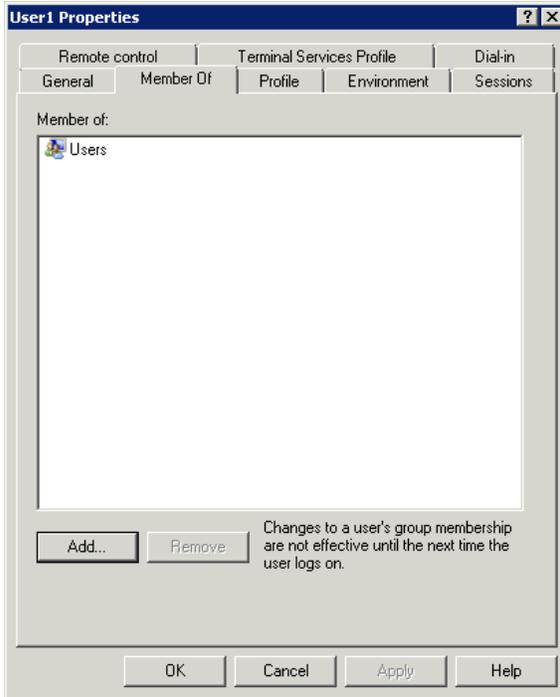
When a Terminal Server is in Application Server mode (required to support remote access by more than 2 users) the Server must be placed into Installation Mode so that it will correctly copy application registry keys for new users. The correct way to enter Installation Mode is to use the **Programs and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

In **Programs and Features**, find and double-click **Deltek Open Plan Professional 3.5.0.exe**. Select the Complete Installation.

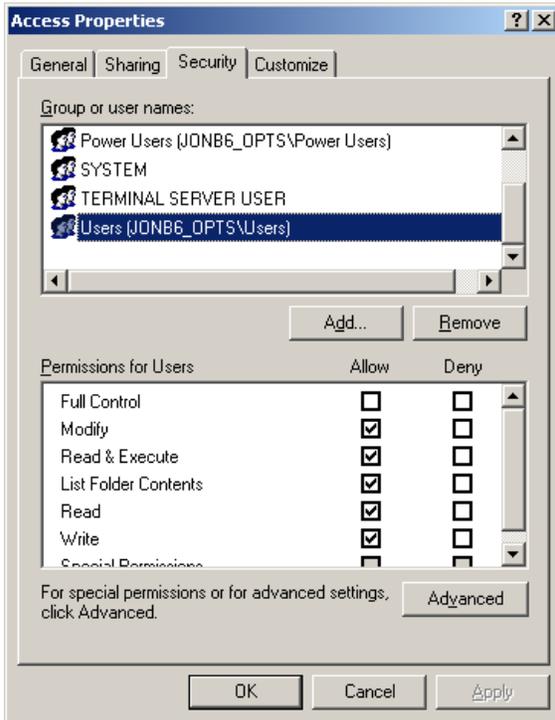
Security Considerations

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.

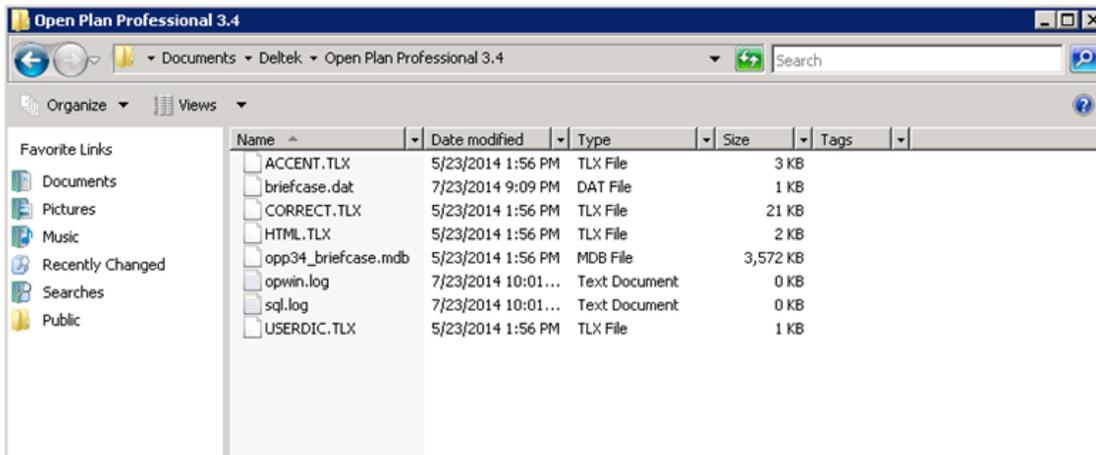


If this data source will not be used then the Administrator must update the Open Plan DATASOURCES.DAT file with the appropriate connection settings for the required database.

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 Deltek folder containing the Open Plan working files, including the BRIEFCASE database and SPELLING DICTIONARIES, among others.



Modifying the User Directory

Open Plan 3.5 defaults to creating the user working directory as a subfolder 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 Administrator, perform the following steps:

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 (OPD35.EXE) into the Open Plan Professional installation folder (C:\Program Files\Deltek\Open Plan Professional 3.5).
5. Modify the Open Plan Desktop menu shortcut to the new location.



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