

Deltek Cloud Server Installation Guide

The Deltek Cloud connector uses an ODBC data source and linked server to retrieve data from the accounting system. Follow the instructions below to install SQL Server Express (if needed), set up a System DSN and a Linked Server on a local server or workstation before proceeding with the installation on the client workstation.



Note

This document provides the steps for installing SQL Server 2017 Express Edition. Screenshots may not match if a different SQL Server version is being installed.

Table of Contents

Install SQL Server Express and SQL Server Management Studio	2
Enable SQL Browser Service and TCP/IP Protocol	7
Add Windows Firewall Exceptions	12
Install and Configure ODBC Driver.....	19
Create Linked Server.....	31

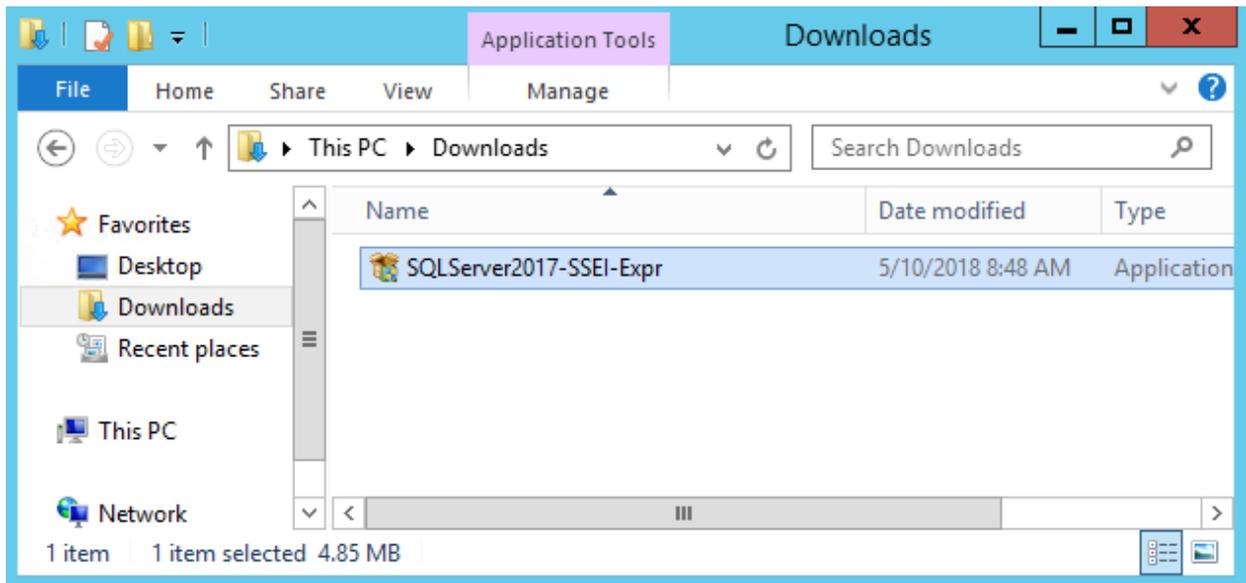
Install SQL Server Express and SQL Server Management Studio

1. Download SQL Server Express and SQL Server Management Studio Express from Microsoft. At the time this article was written, this installer could be downloaded from the following URL:

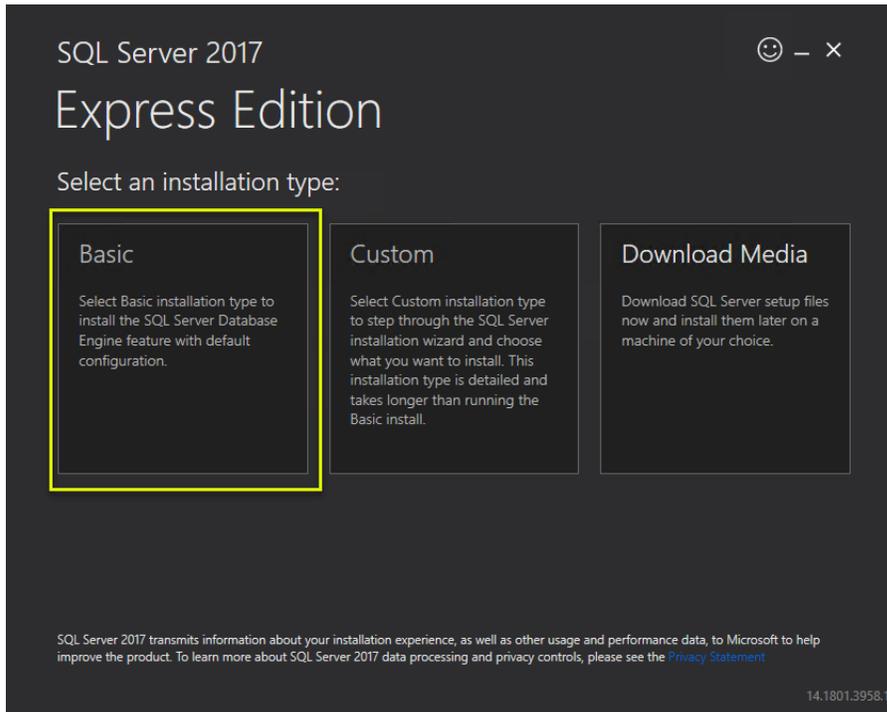
SQL Server 2017 Express

<https://www.microsoft.com/en-us/sql-server/sql-server-editions-express>

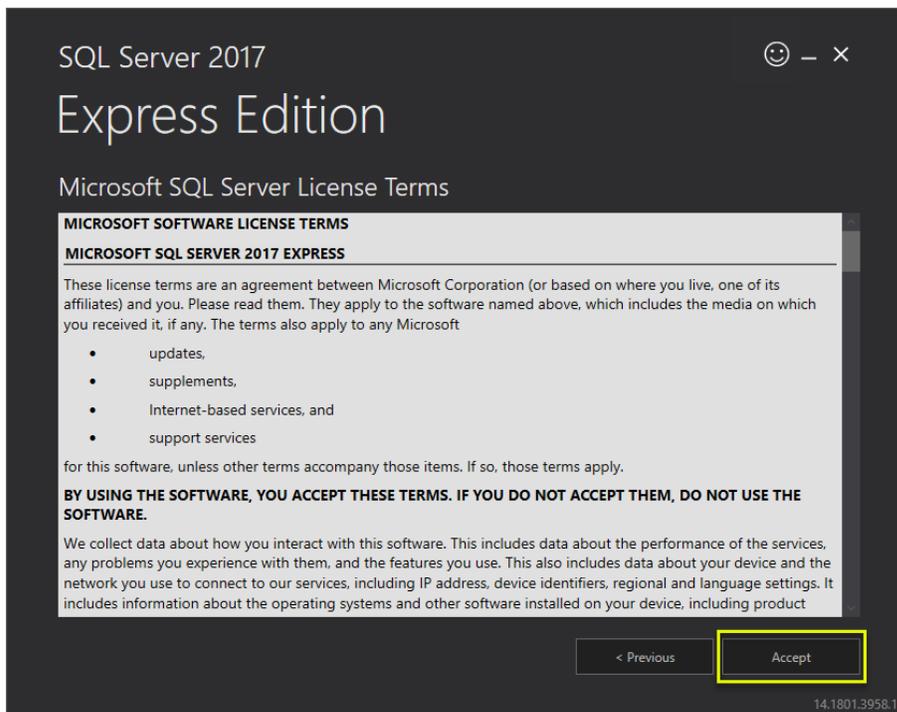
2. Double-click the downloaded SQL Server installation executable.



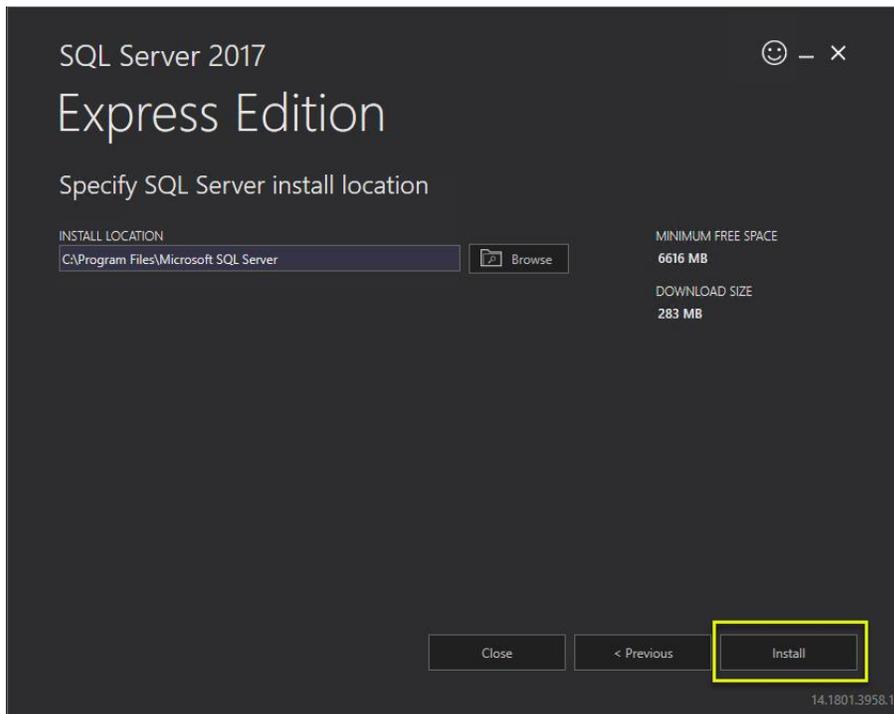
3. Click on the Basic option.



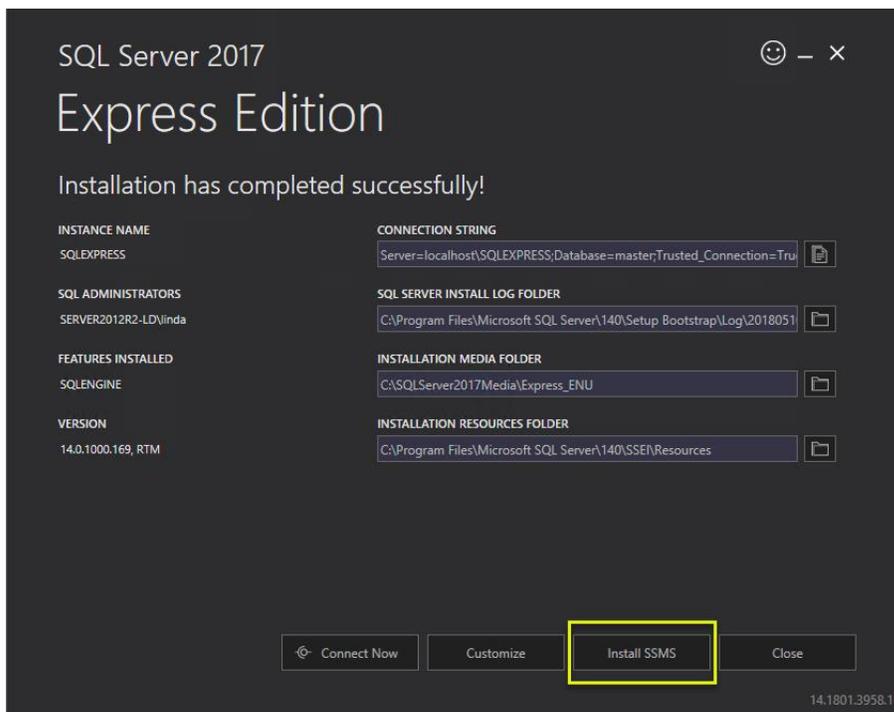
4. Read through the EULA and click Accept.



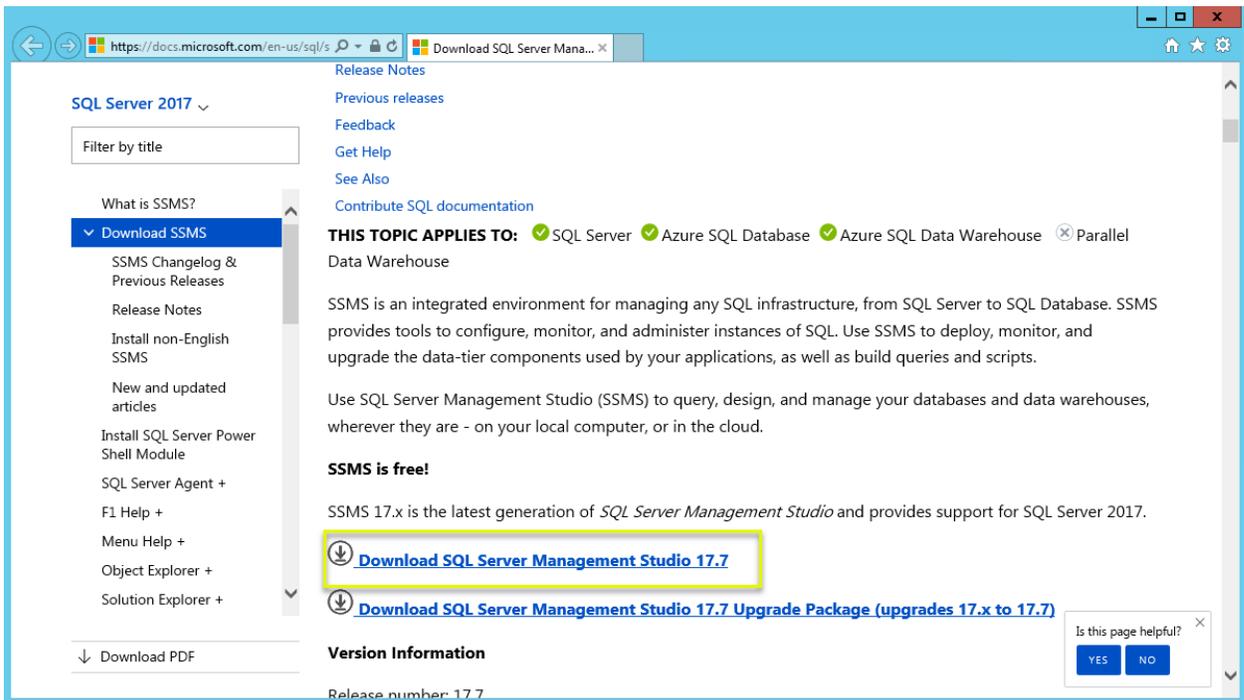
- 5. Click Install.



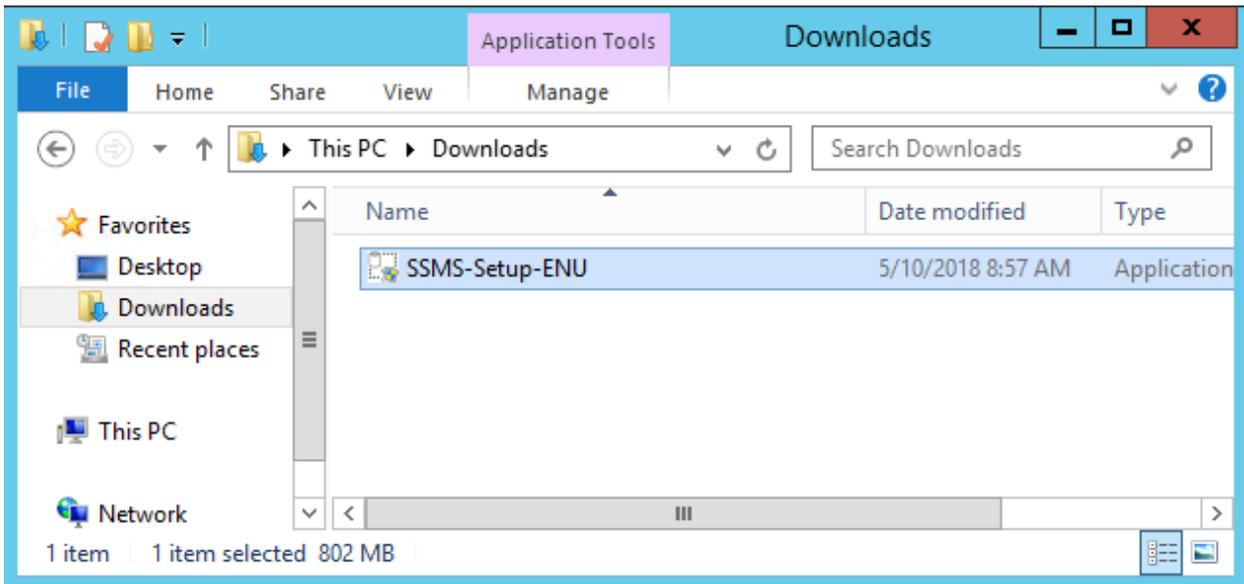
- 6. Click Install SSMS when the installation completes.



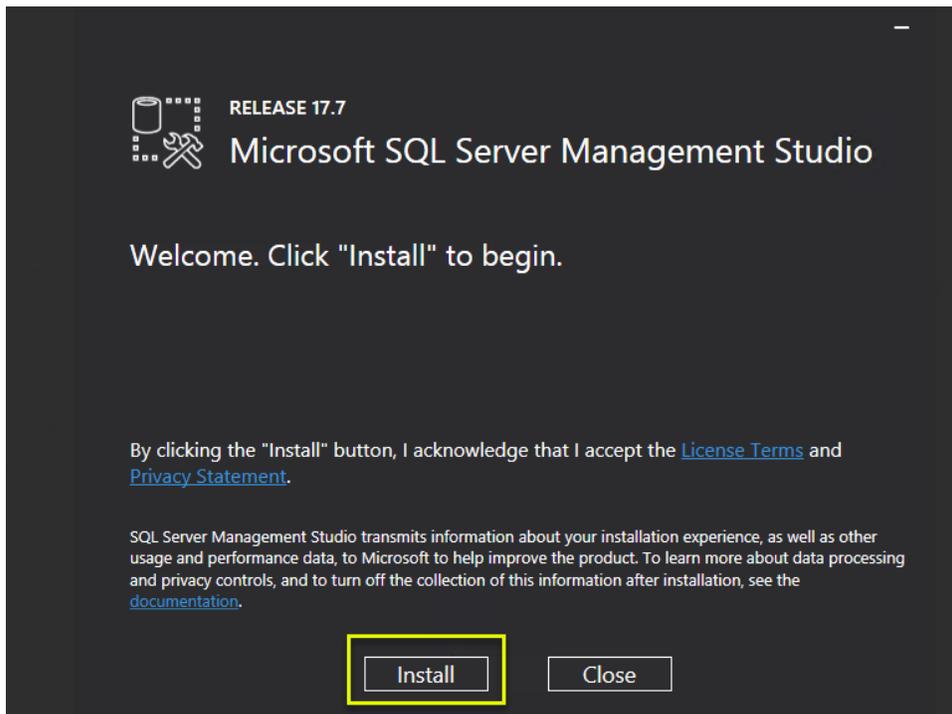
- Internet Explorer will open to the site from which SSMS can be downloaded. Click on the download link.



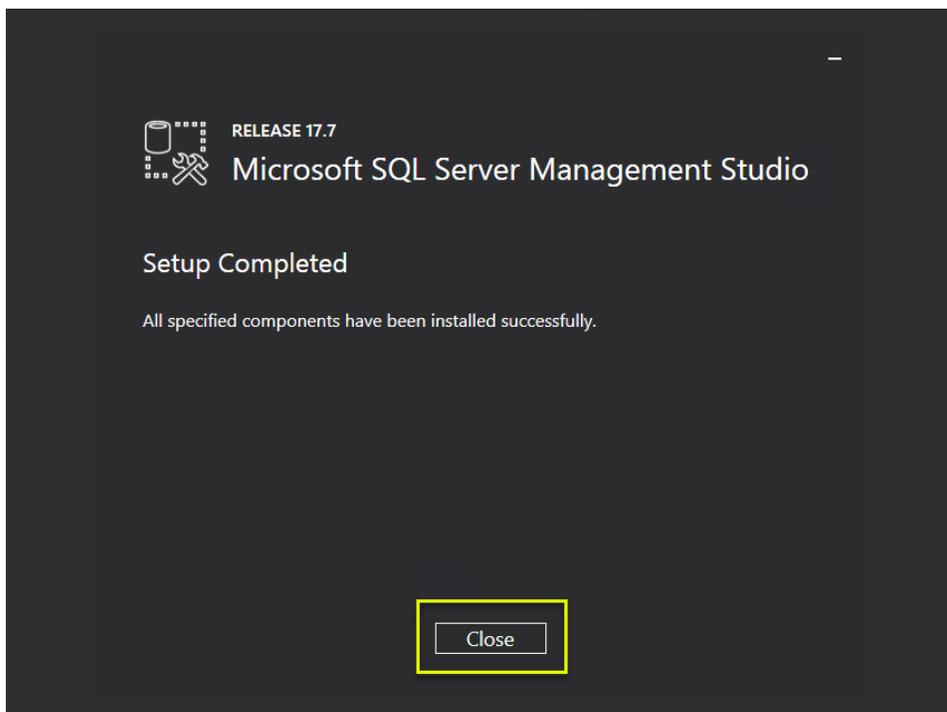
- When the download completes, double-click the install executable.



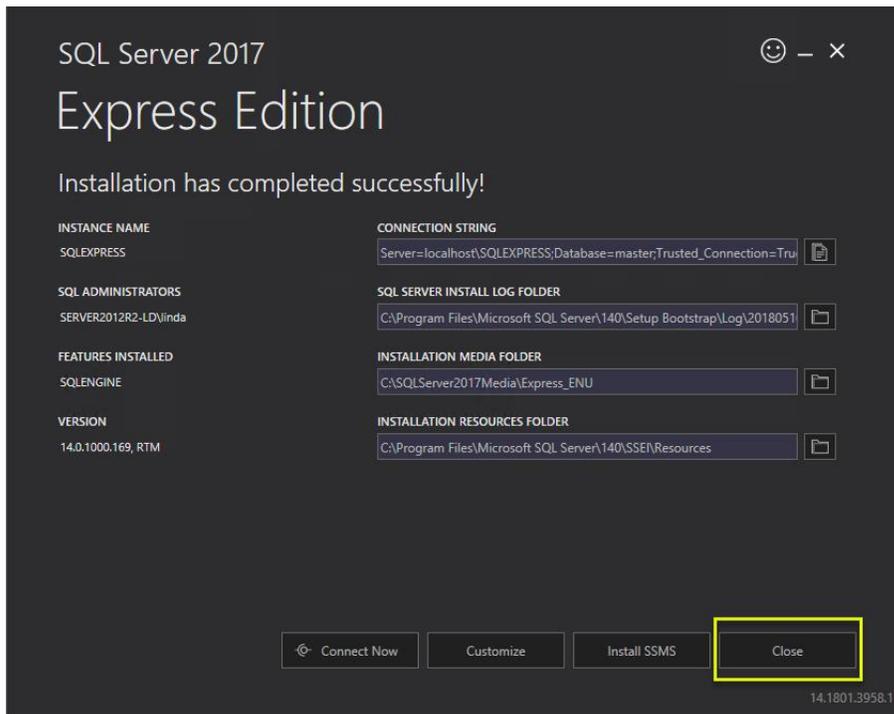
9. Click **Install** to begin the installation.



10. Click Close when the installation completes.



11. Close the SQL Server installation complete dialog.

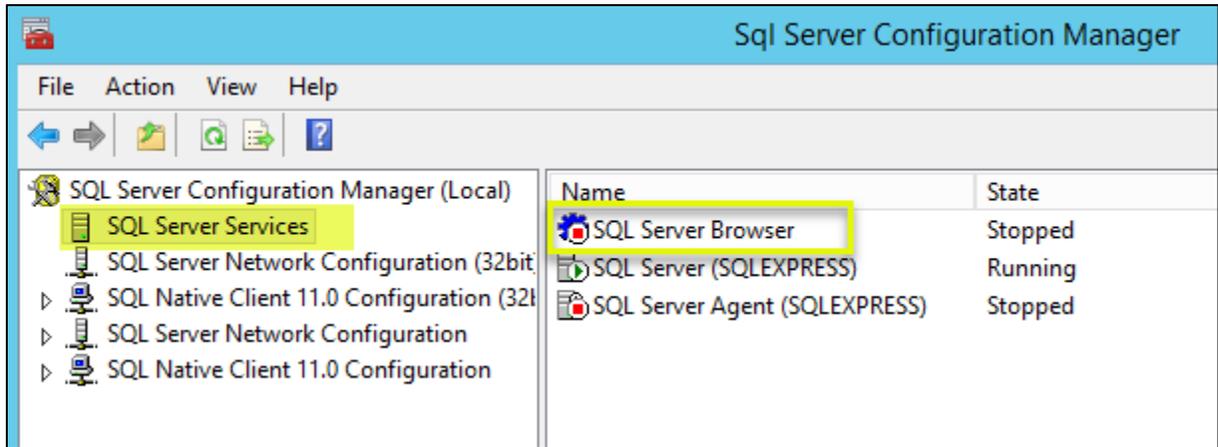


Enable SQL Browser Service and TCP/IP Protocol

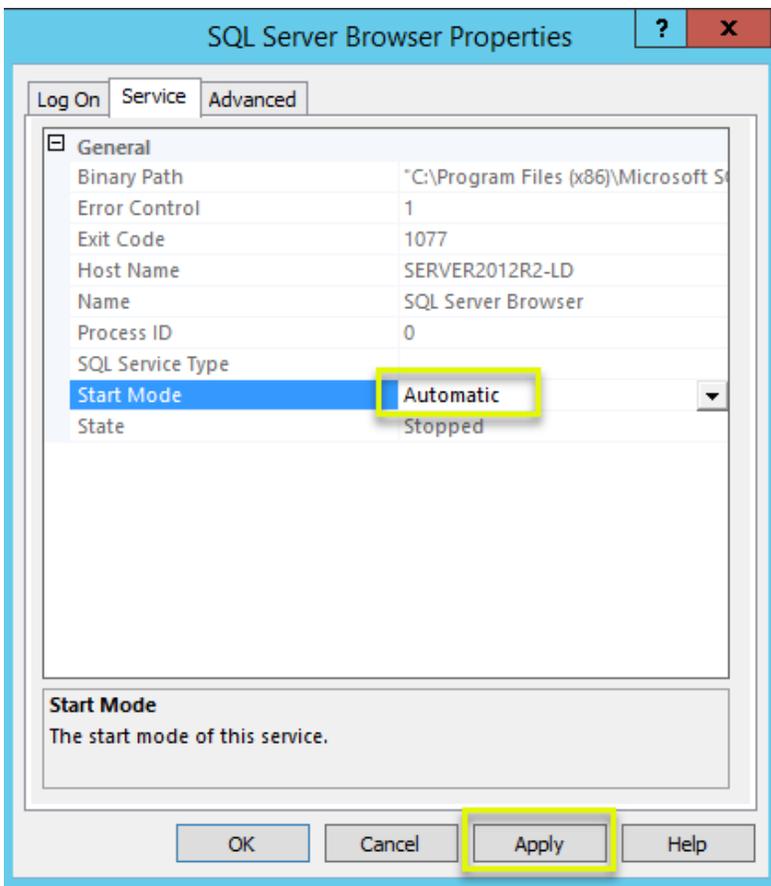
1. Start SQL Server Configuration Manager.



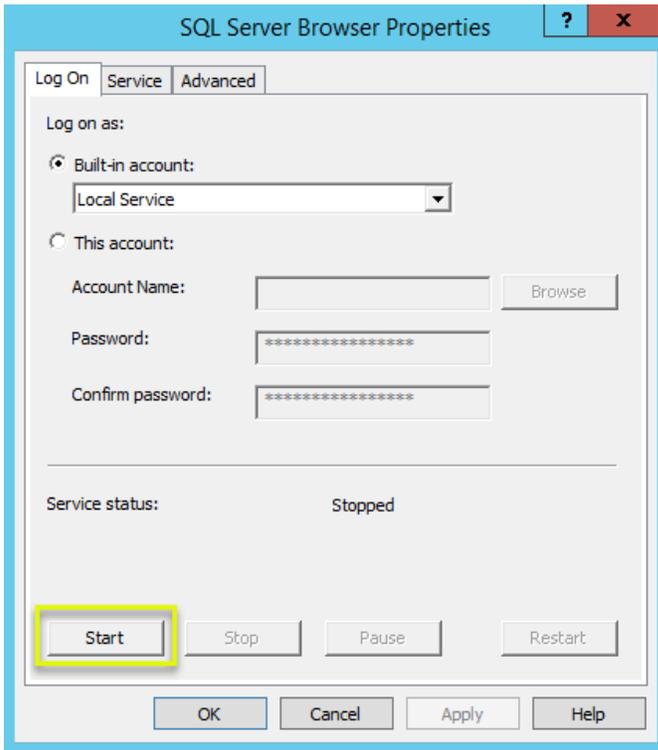
- Click on SQL Server Services in the left pane and double-click the SQL Server Browser service in the right pane.



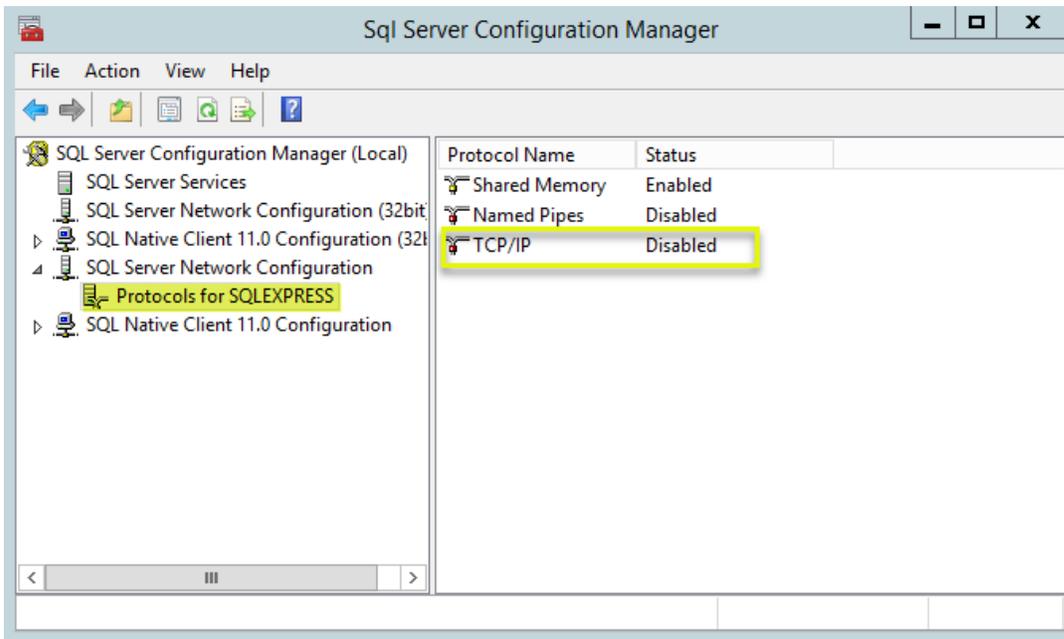
- Click on the Service tab, change the Start Mode to Automatic and click Apply.



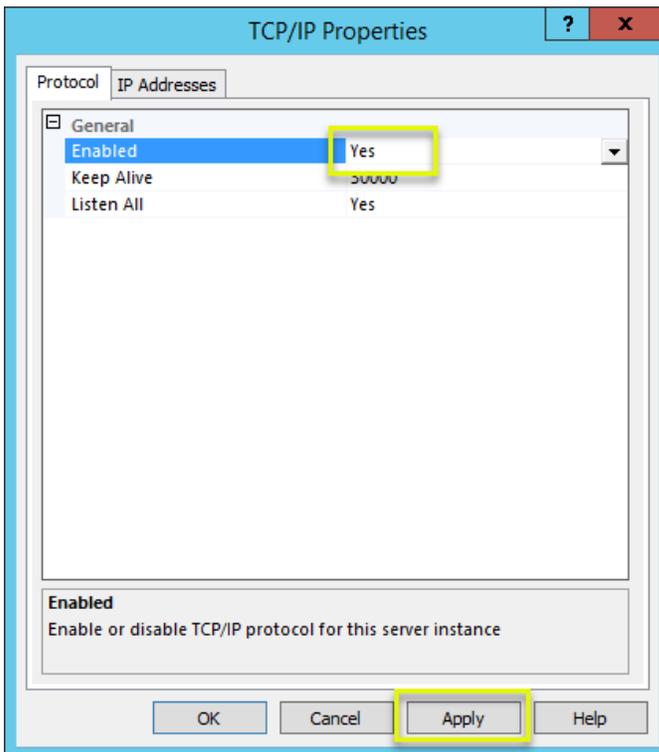
- Click on the Log On tab and click Start. Click OK to close.



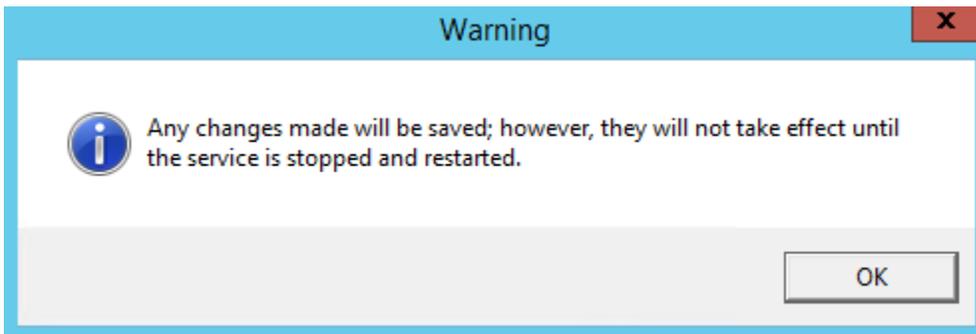
- Expand SQL Server Network Configuration and click on Protocols for SQLEXPRESS in the left pane. Double-click the TCP/IP protocol in the right pane.



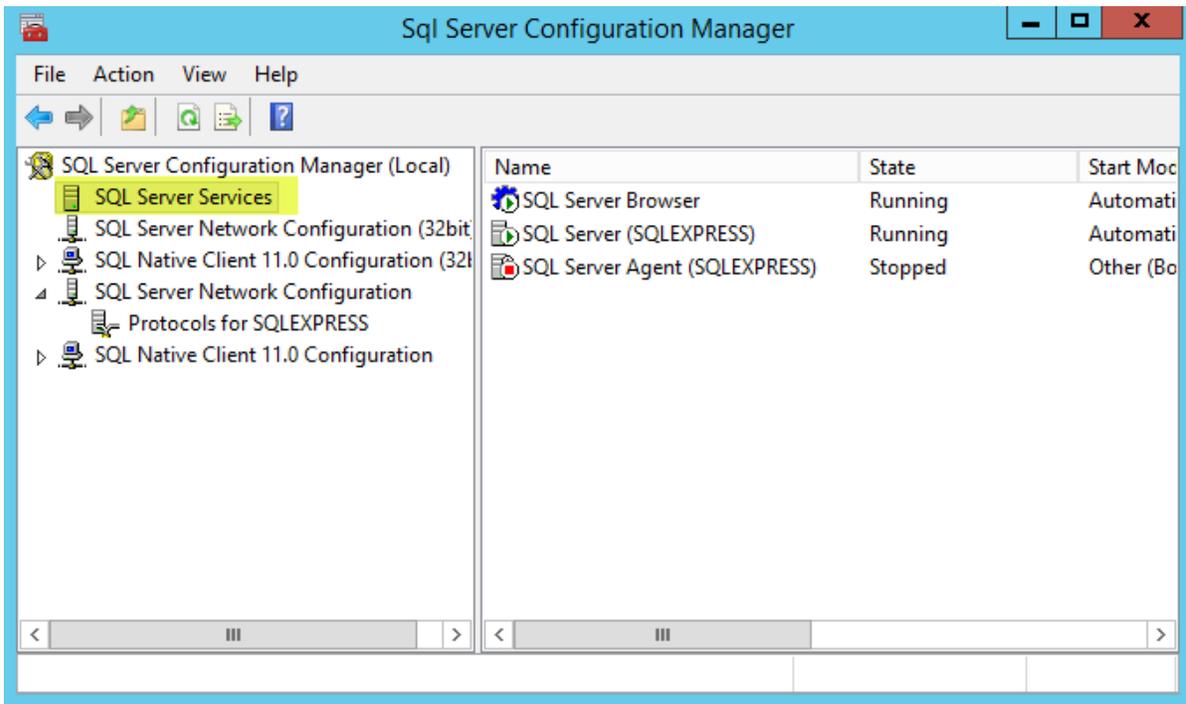
6. Change the Enabled property to Yes. Click Apply.



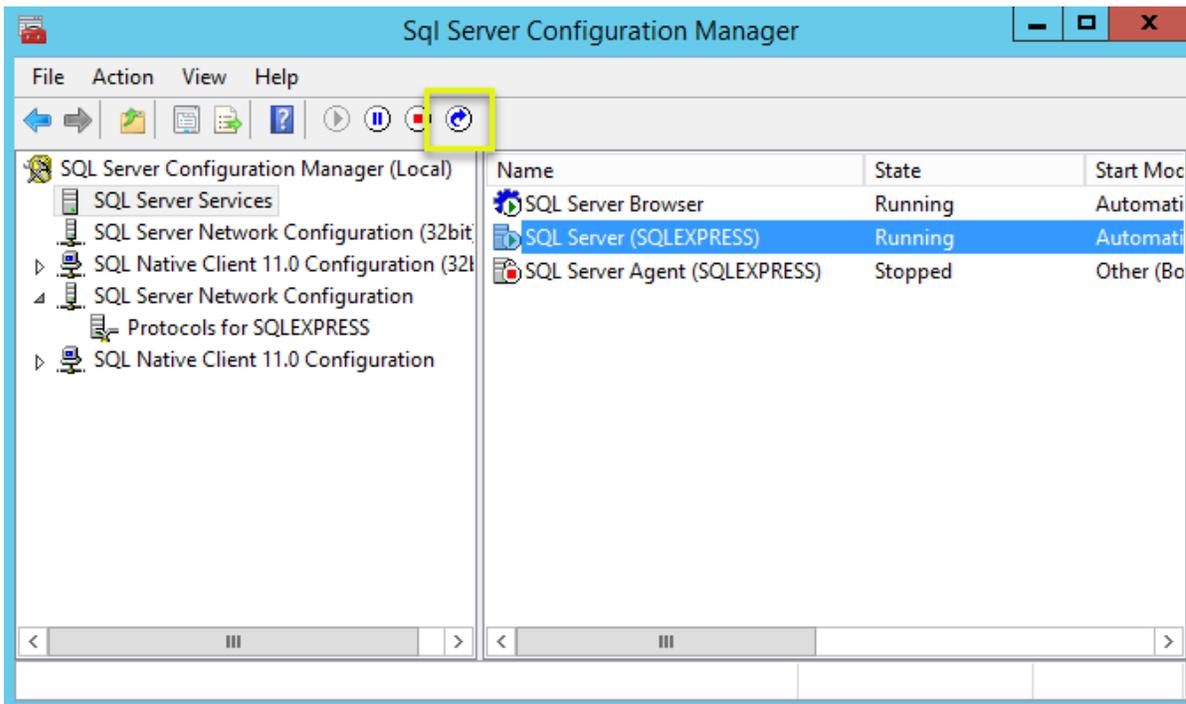
7. Click OK to the message about restarting the SQL Server service.



- Click OK to close the TCP/IP Properties dialog and go back to the SQL Server Services node.

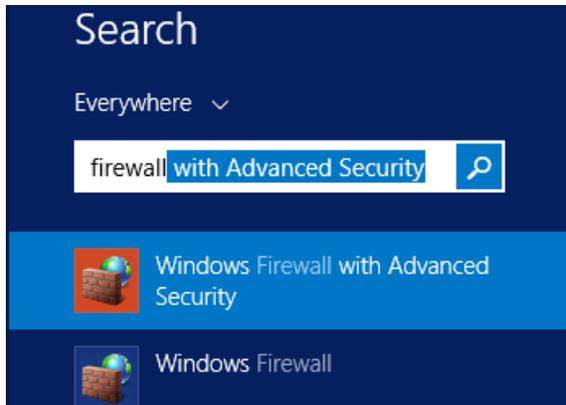


- Select the SQL Server service in the right pane and click the restart button.



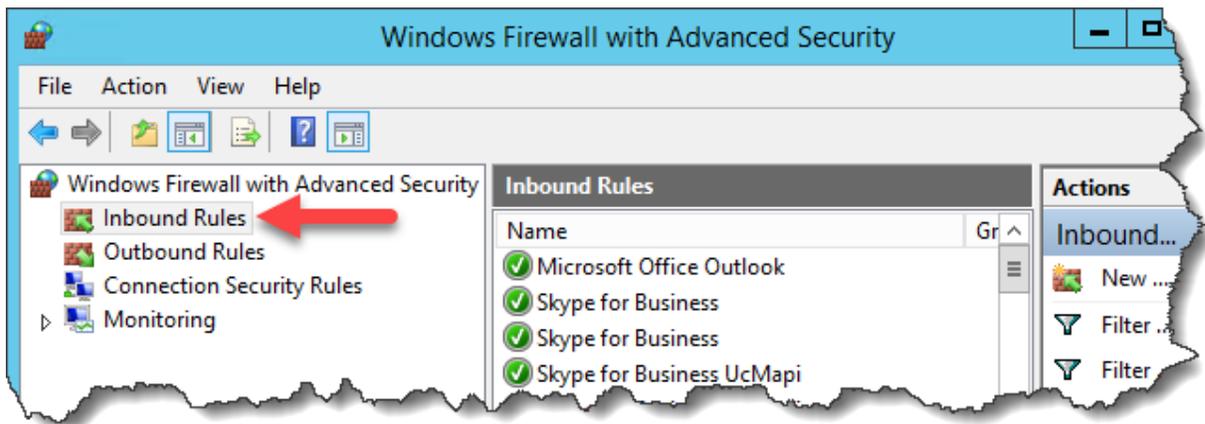
Add Windows Firewall Exceptions

1. Open the Windows Firewall applet on the server.

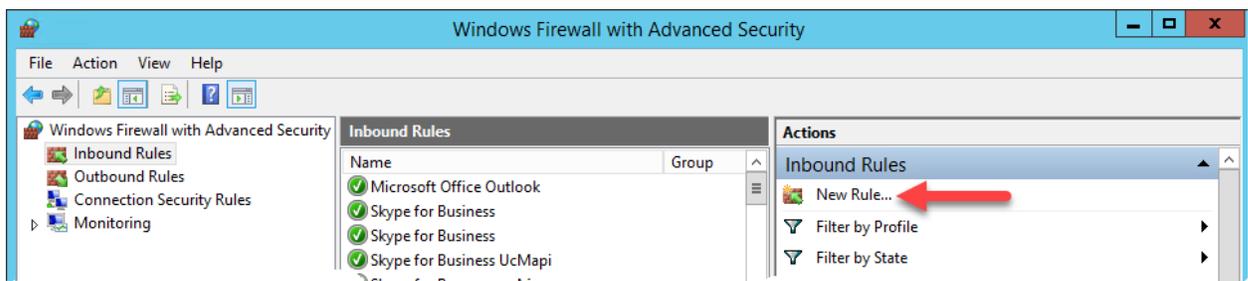


If the Firewall is off for all profiles, there is no need to continue.

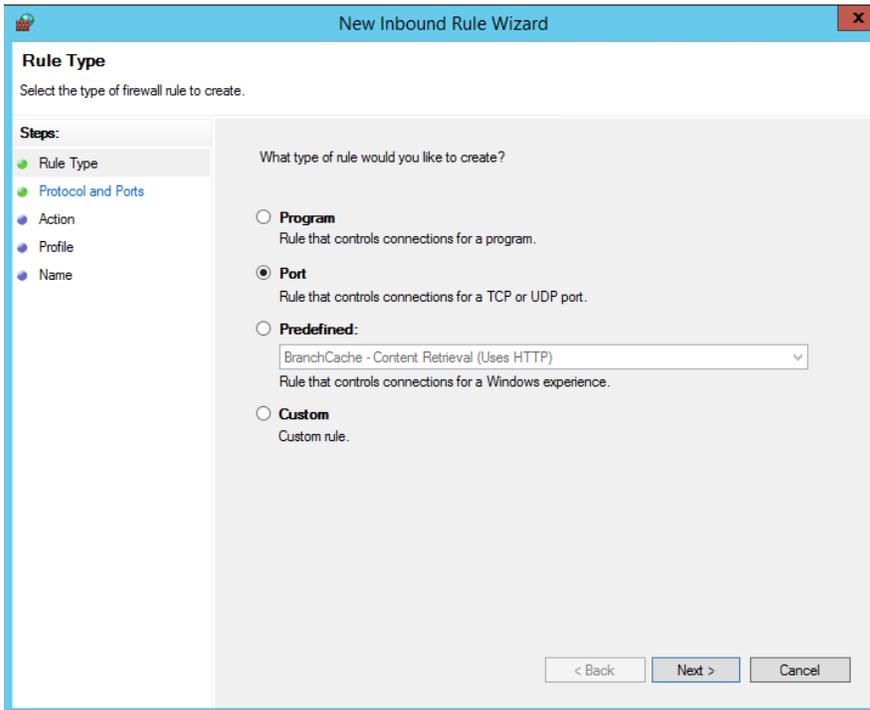
2. Click on **Inbound Rules**.



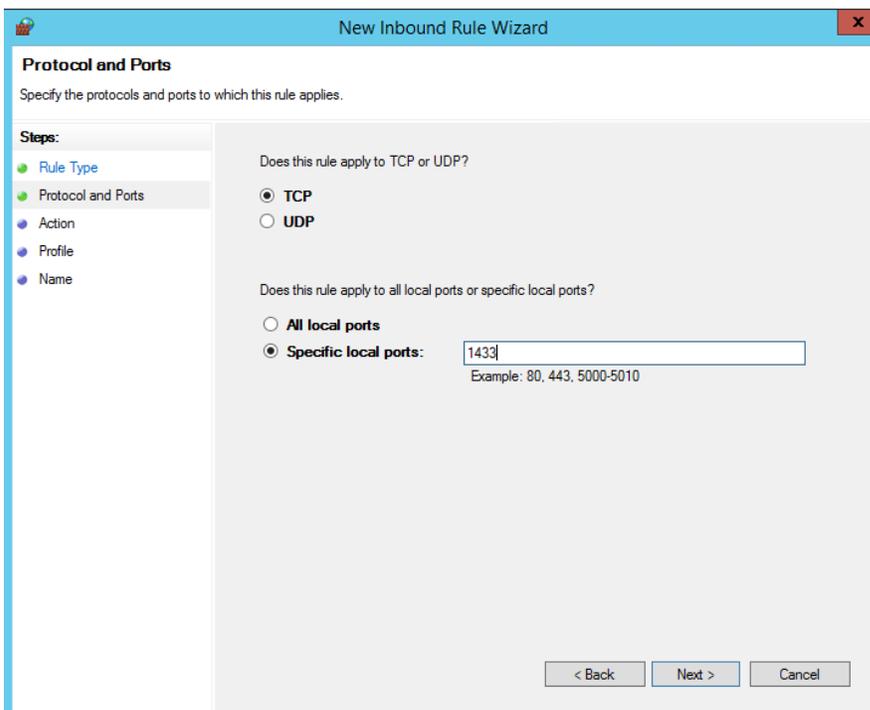
3. Click on **New Rule**.



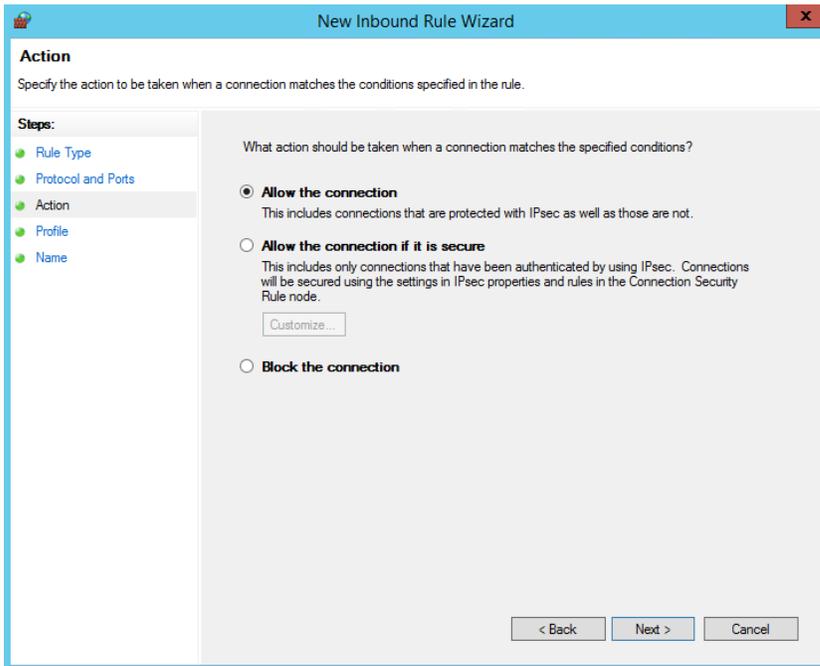
- Choose the **Port** radio button and click **Next**.



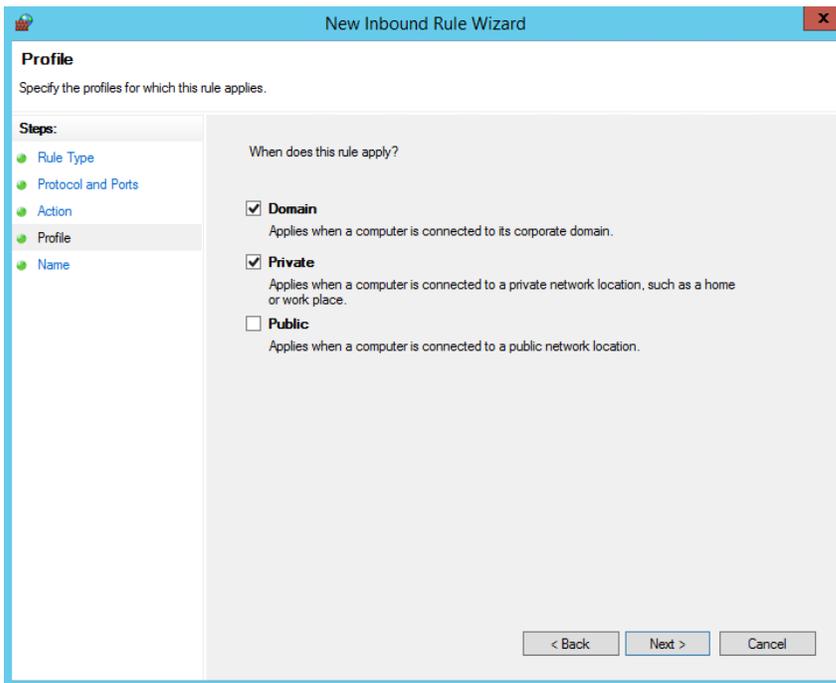
- Leave the **TCP** option selected and type in port **1433**. Click **Next**.



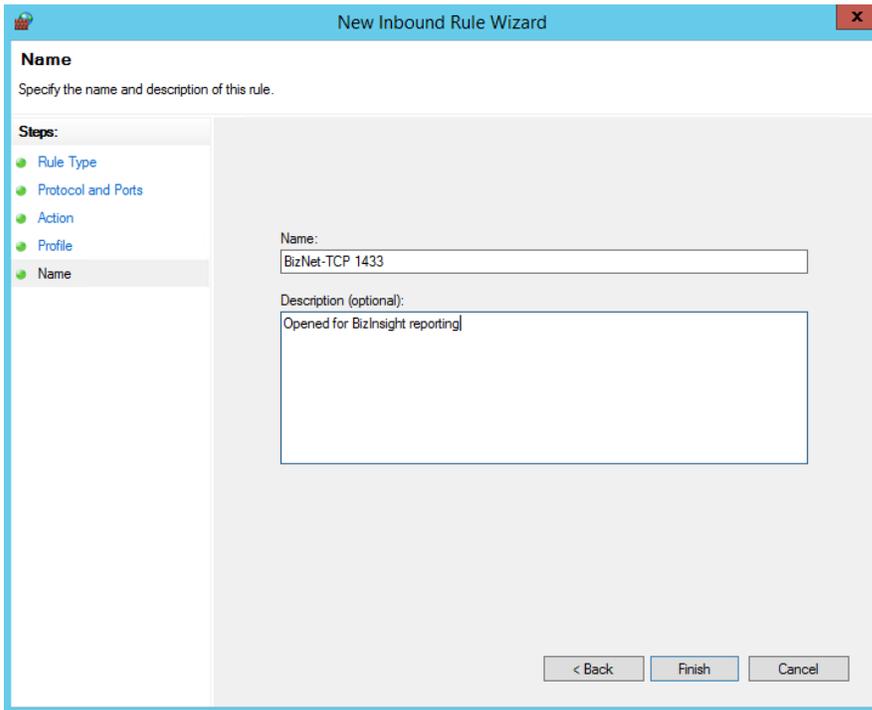
6. Leave the **Allow the connection** radio button selected and click **Next**.



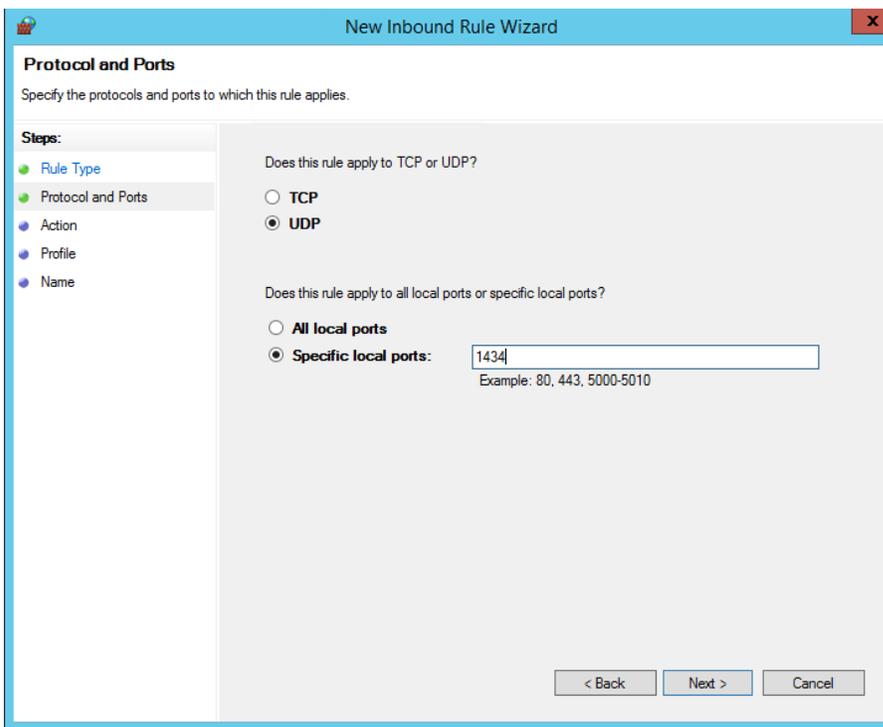
7. Check the appropriate profiles to which the rule should apply. Refer to this Microsoft article for more information about Firewall Profile types: [https://technet.microsoft.com/en-us/library/getting-started-wfas-firewall-profiles-ipsec\(v=ws.10\).aspx](https://technet.microsoft.com/en-us/library/getting-started-wfas-firewall-profiles-ipsec(v=ws.10).aspx).



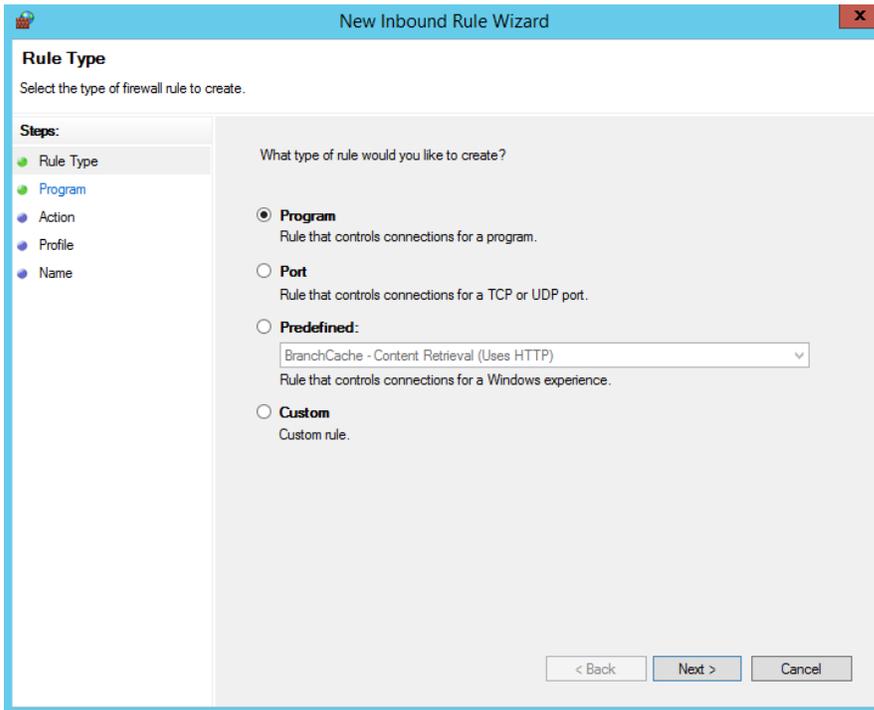
8. Type a name and description for the exception and click **Finish**.



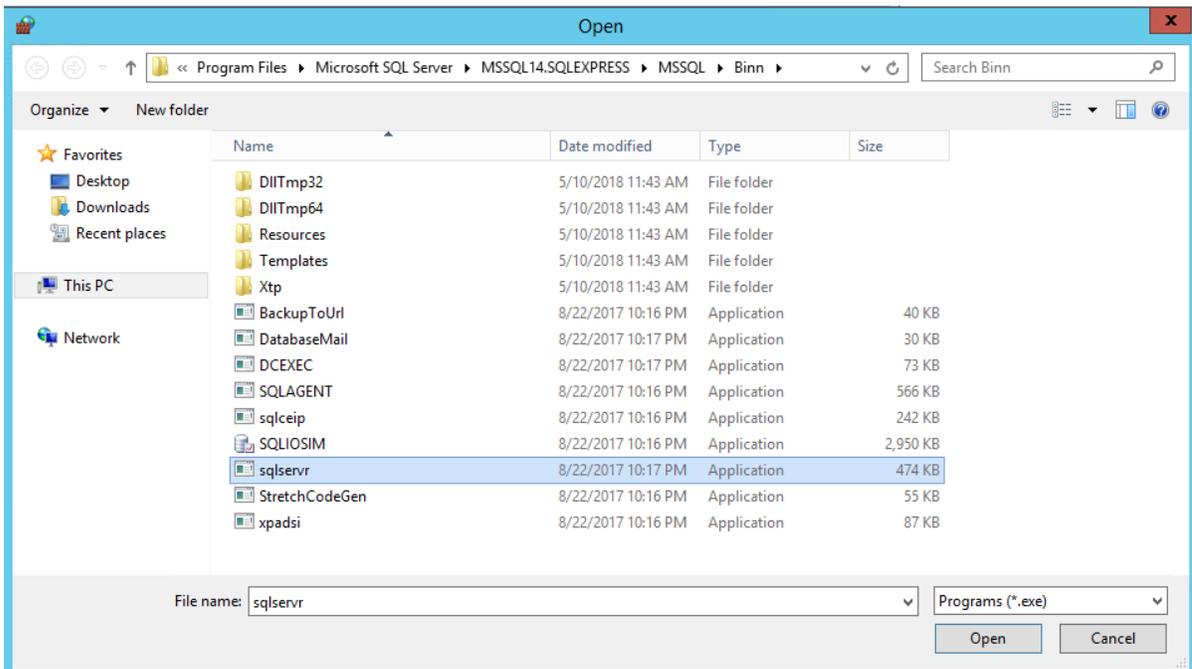
9. Repeat these steps to add a UDP port exception for port 1434.



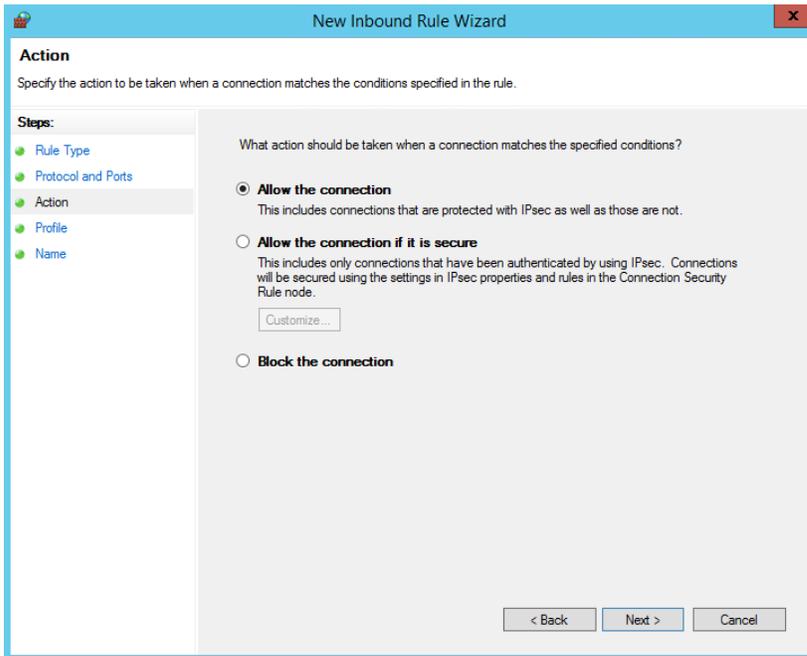
10. Add a third new inbound rule for a program exception.



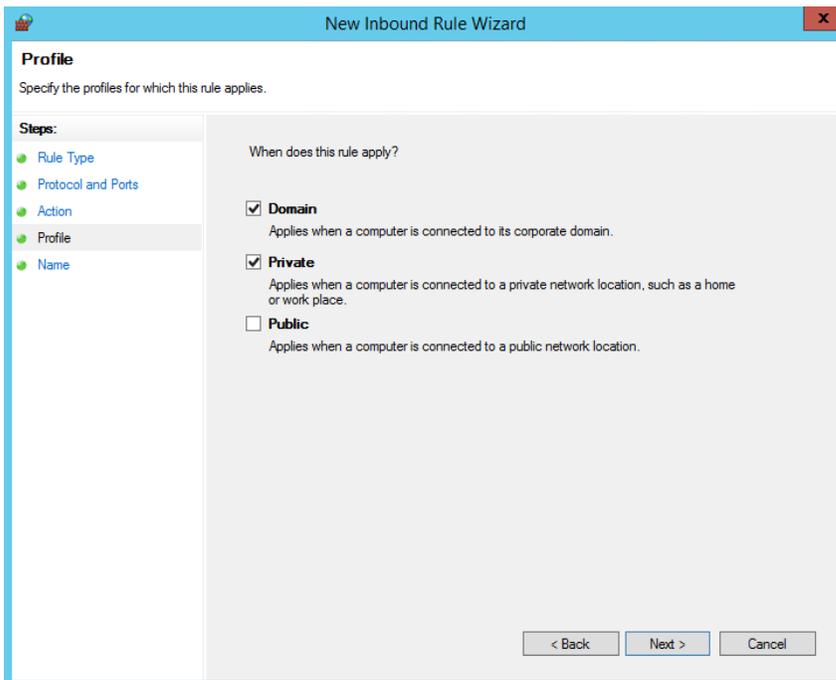
11. Click on the **Browse** button and browse to the SQL Server installation's Binn directory and select the **sqlservr.exe**. Then click **Next**.



12. Leave **Allow the connection** selected and click **Next**.



13. Check the appropriate profiles to which the rule should apply. Refer to this Microsoft article for more information about Firewall Profile types: [https://technet.microsoft.com/en-us/library/getting-started-wfas-firewall-profiles-ipsec\(v=ws.10\).aspx](https://technet.microsoft.com/en-us/library/getting-started-wfas-firewall-profiles-ipsec(v=ws.10).aspx).



14. Type a name and description for the exception and click **Finish**.

The screenshot shows a 'New Inbound Rule Wizard' window. The title bar reads 'New Inbound Rule Wizard'. The main area is titled 'Name' and contains the instruction 'Specify the name and description of this rule.' On the left, a 'Steps' list includes 'Rule Type', 'Program', 'Action', 'Profile', and 'Name', with 'Name' selected. The main content area has a 'Name:' label above a text box containing 'BizNet-sqlservr.exe'. Below that is a 'Description (optional):' label above a text area containing 'Added for BizInsight reporting'. At the bottom right, there are three buttons: '< Back', 'Finish', and 'Cancel'.

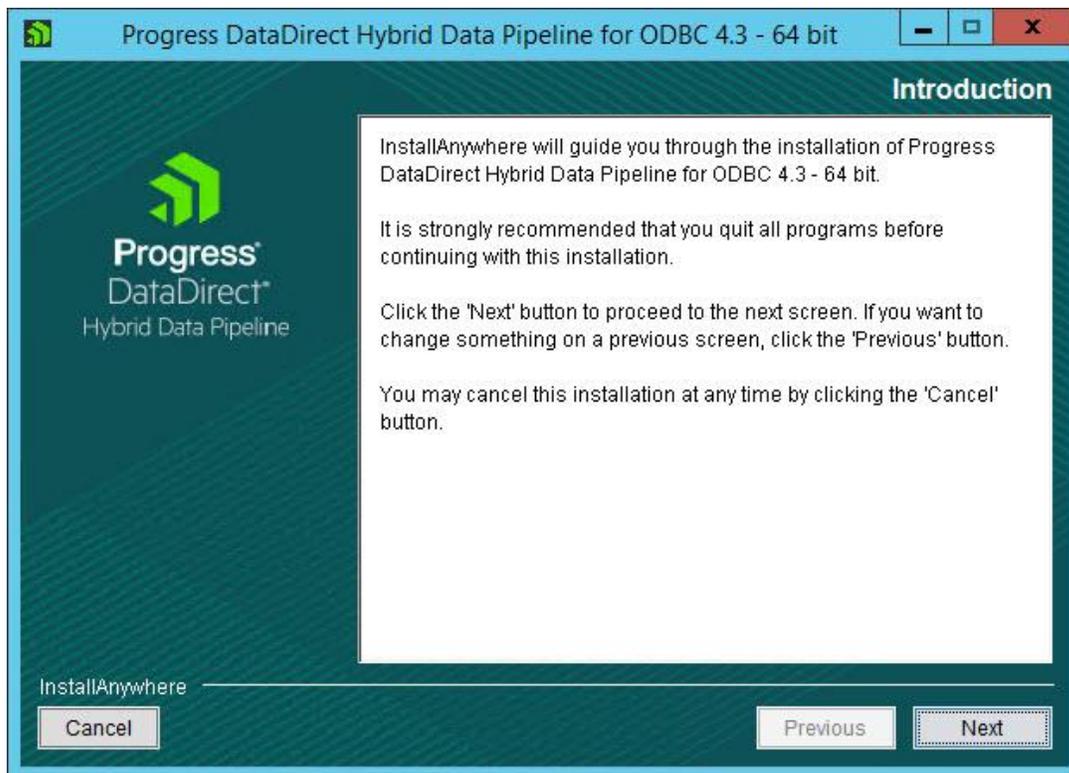
Install and Configure ODBC Driver

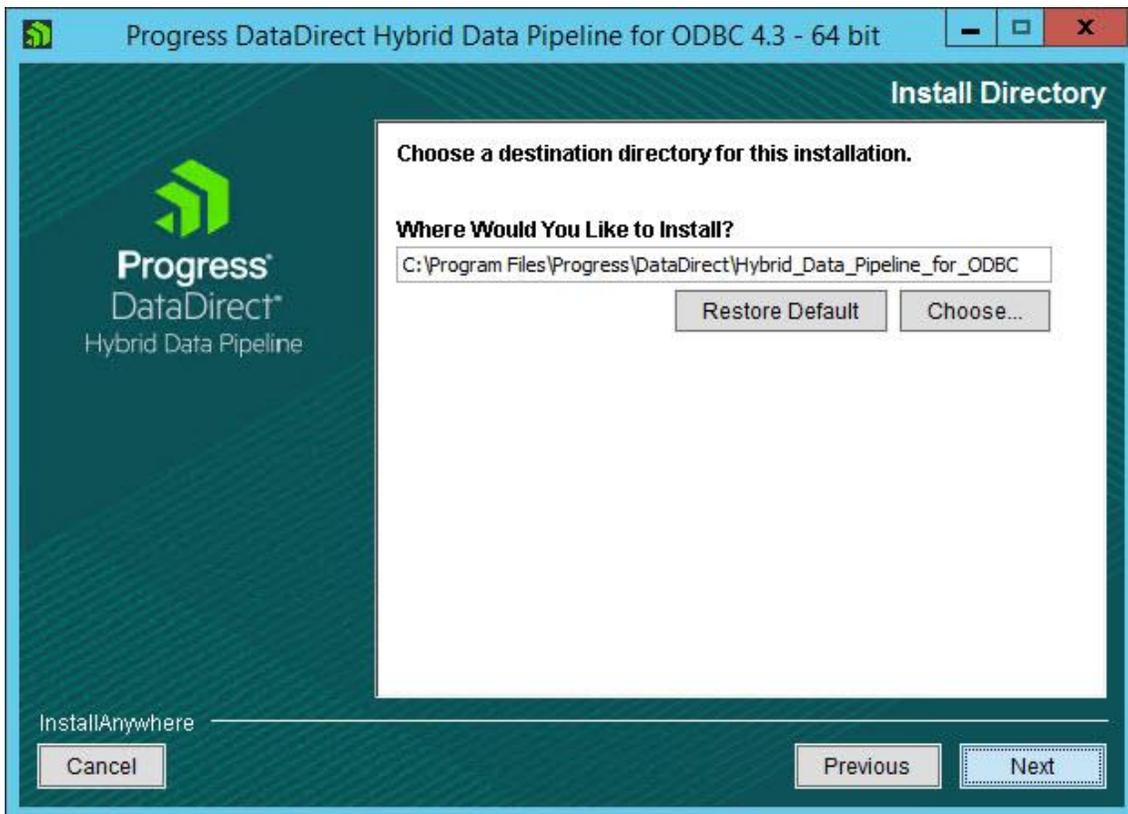
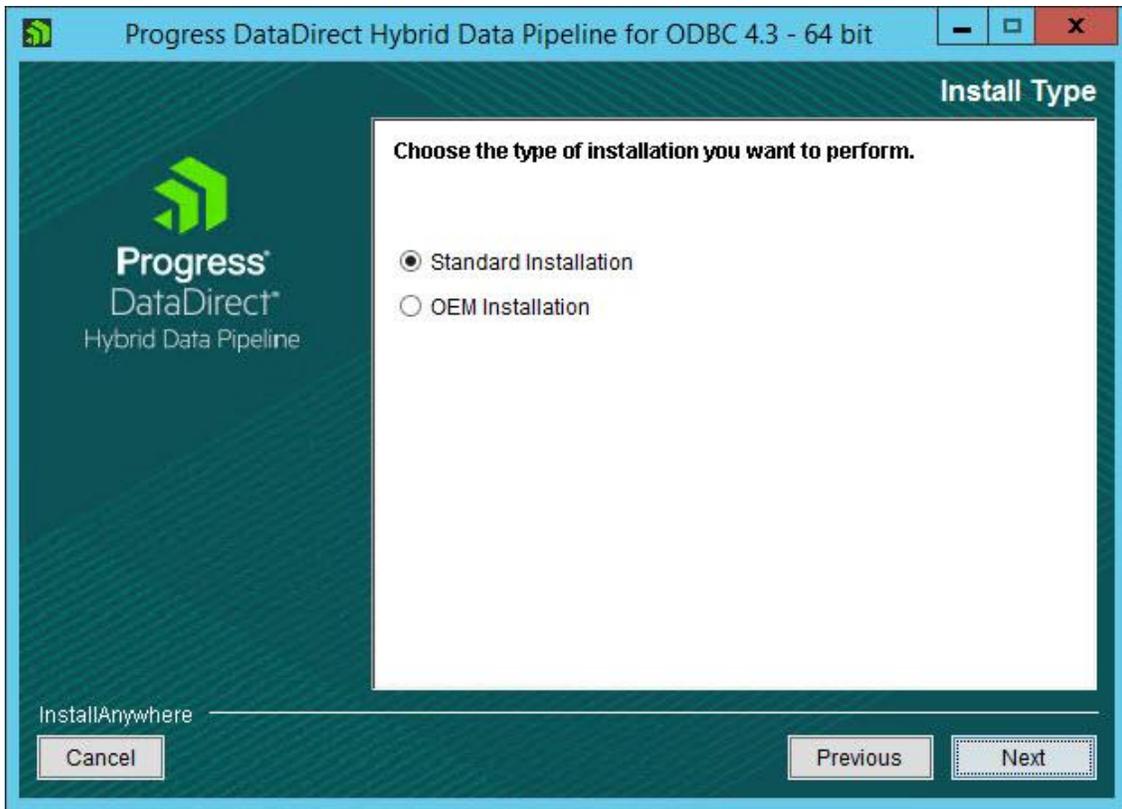
(From Deltek First Vision Essentials Administrator Guide pdf; edited for use by BizNet Software)

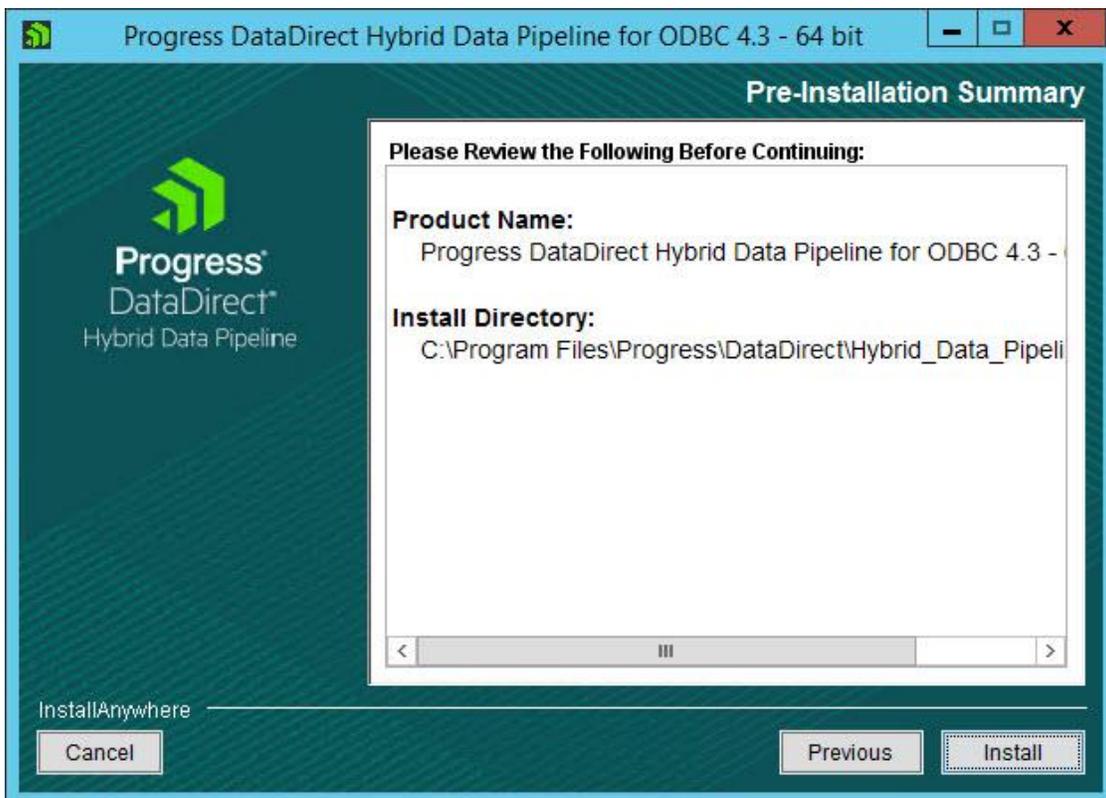
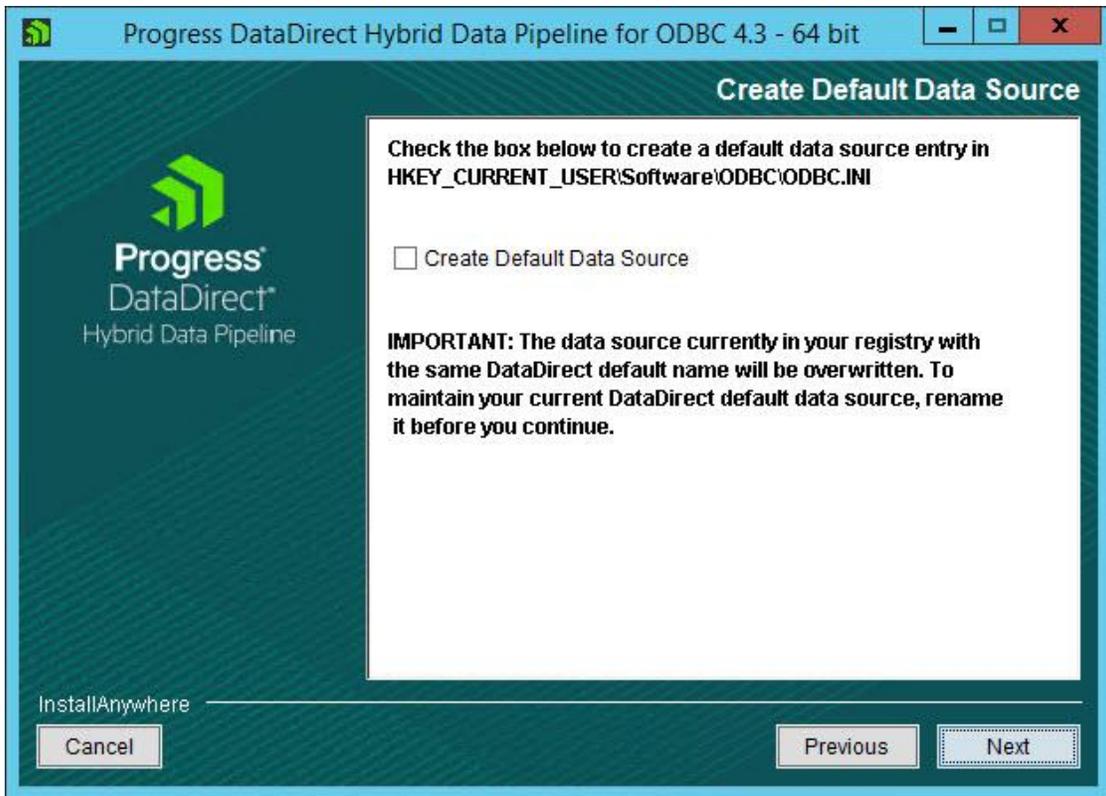
1. Contact Deltek Customer Care to request ODBC accounts and drivers
2. Download the ODBC driver installer from the appropriate link you received from Deltek Customer Care
 - a. ODBC Driver 32-Bit
 - b. ODBC Driver 64-Bit

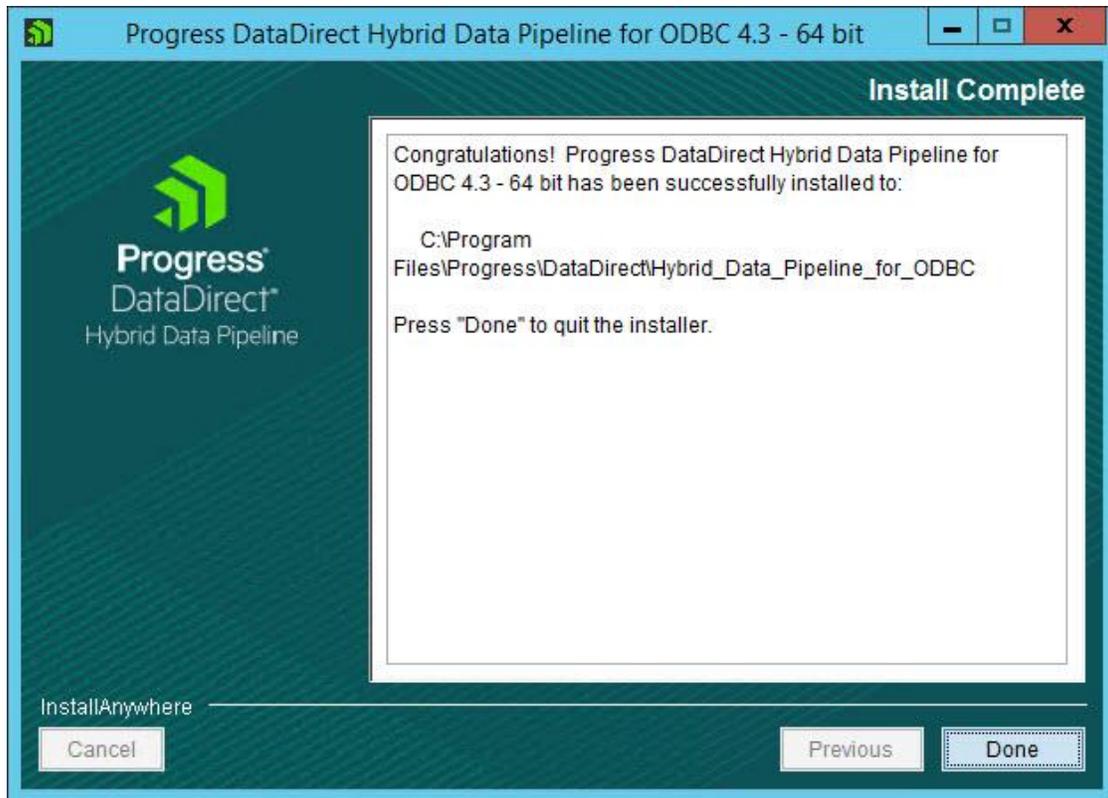
Name	Date modified	Type	Size
config.properties	3/27/2018 6:03 PM	PROPERTIES File	2 KB
ddcloud.pem	3/28/2018 1:09 PM	PEM File	4 KB
ddcloudTrustStore.jks	3/28/2018 1:13 PM	JKS File	2 KB
OnPremise.properties	3/27/2018 6:03 PM	PROPERTIES File	2 KB
PROGRESS_DATADIRECT_HDP_ODBC_WIN_32	3/28/2018 1:36 PM	Application	75,831 KB
PROGRESS_DATADIRECT_HDP_ODBC_WIN_64	3/28/2018 2:05 PM	Application	76,089 KB

3. Run the ODBC driver installer. Follow the prompts, accepting all the defaults. Install.

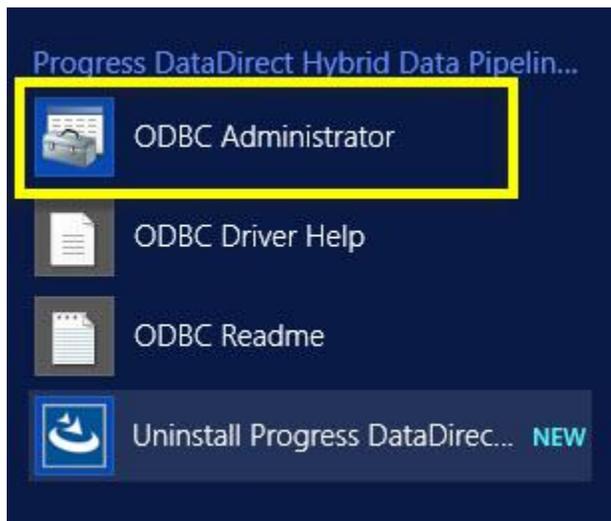




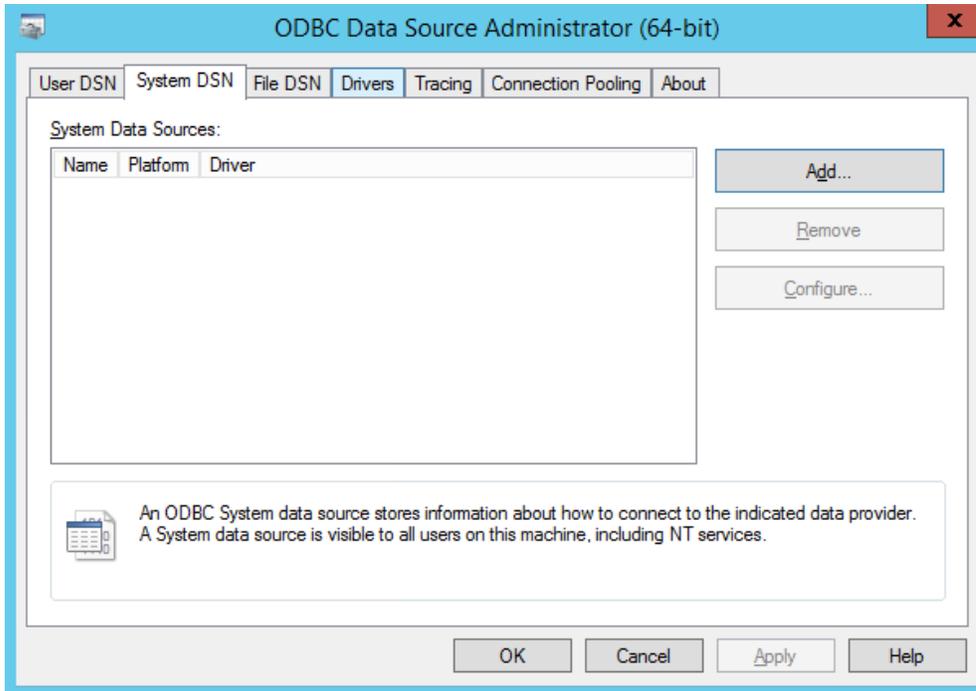




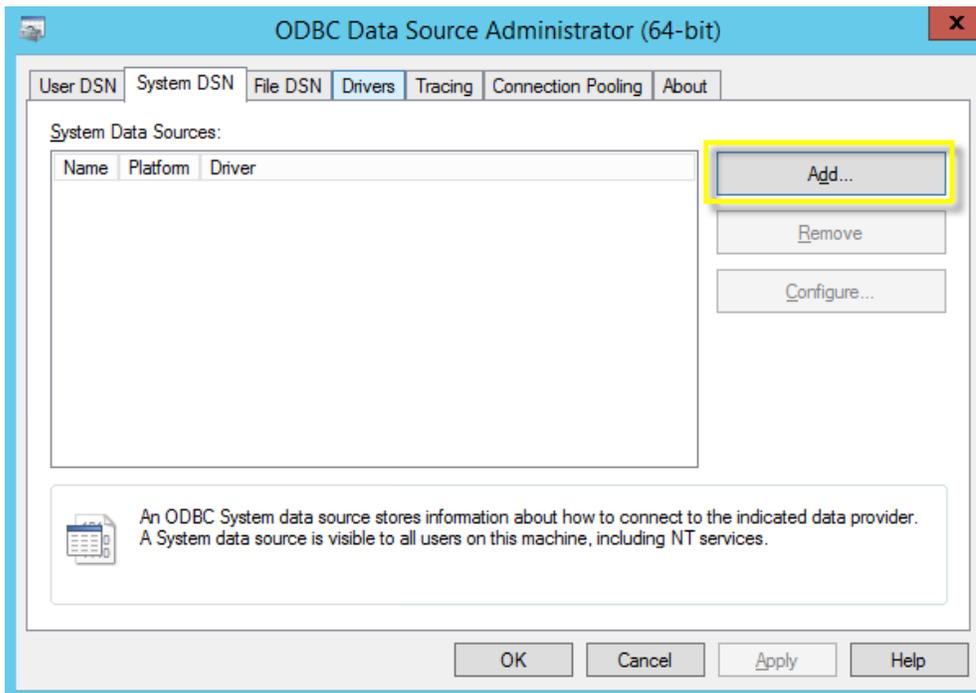
4. Click Start > All Programs > Progress DataDirect Hybrid Pipeline for ODBC 4.3 and select ODBC Administrator.



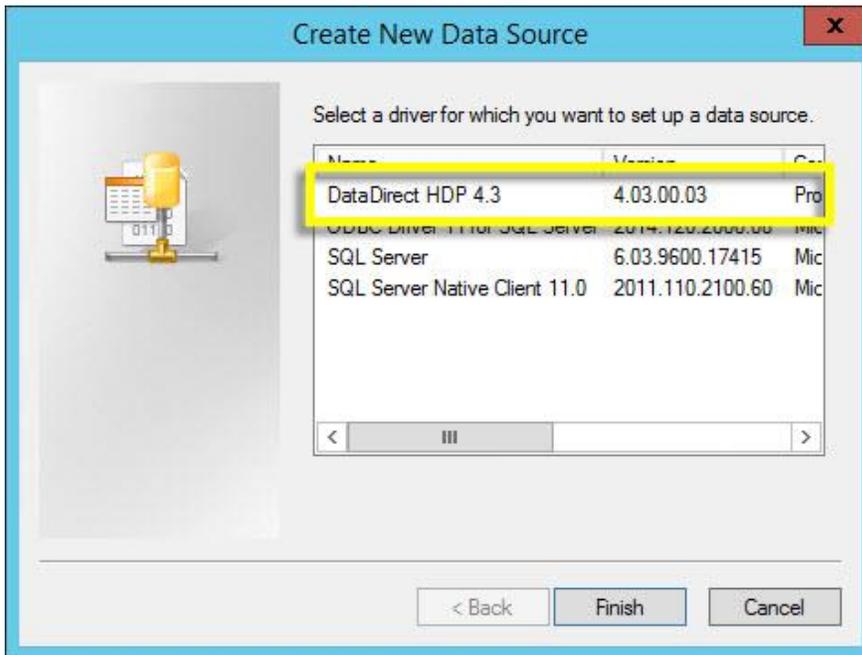
- From the ODBC Data Source Administrator dialog box, you will create a System DSN. User DSNs are for a single user; System DSNs are available to all users of the workstation. Select the System DSN tab.



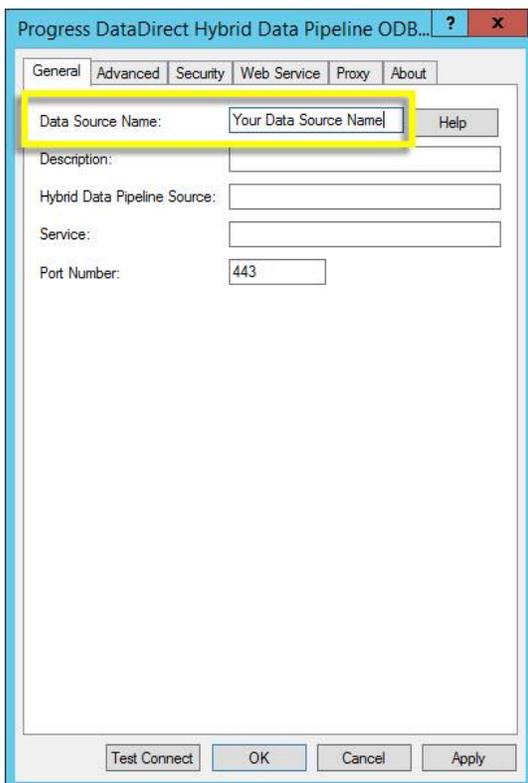
- Click Add.



- In the Create New Data Source dialog box, select “DataDirect HDP 4.3” and click Finish.



- In the ODBC Driver Setup dialog box, enter a name in the Data Source Name field. This can be any name that helps you identify the data source. (Helpful tip: keep this name on hand once created – you will use this name when creating the Linked Server)



9. In the Hybrid Data Pipeline Source field, enter the database name that you received from Deltek Customer Care when you requested the ODBC accounts

The image shows a dialog box titled "Progress DataDirect Hybrid Data Pipeline ODB...". It has a tabbed interface with tabs for "General", "Advanced", "Security", "Web Service", "Proxy", and "About". The "General" tab is selected. The dialog contains several input fields: "Data Source Name" with the value "Your Data Source Name" and a "Help" button; "Description"; "Hybrid Data Pipeline Source" with the value "Database Name" (highlighted in yellow); "Service"; and "Port Number" with the value "443". At the bottom, there are four buttons: "Test Connect", "OK", "Cancel", and "Apply".

10. In the Service field, enter the service URL that you received from Deltek Customer Care when you requested the ODBC accounts.



Note

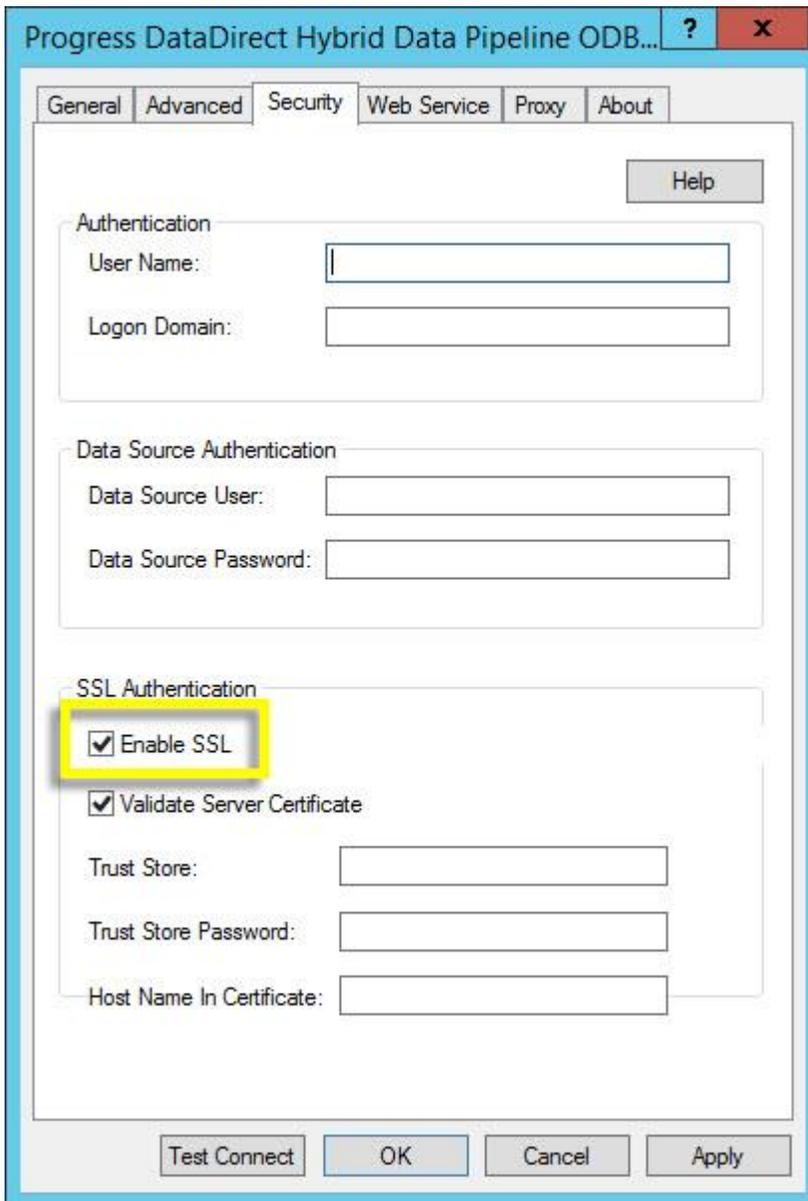
The Port Number field should be left as is.

The screenshot shows a dialog box titled "Progress DataDirect Hybrid Data Pipeline ODB...". It has several tabs: "General", "Advanced", "Security", "Web Service", "Proxy", and "About". The "General" tab is selected. The dialog contains the following fields and controls:

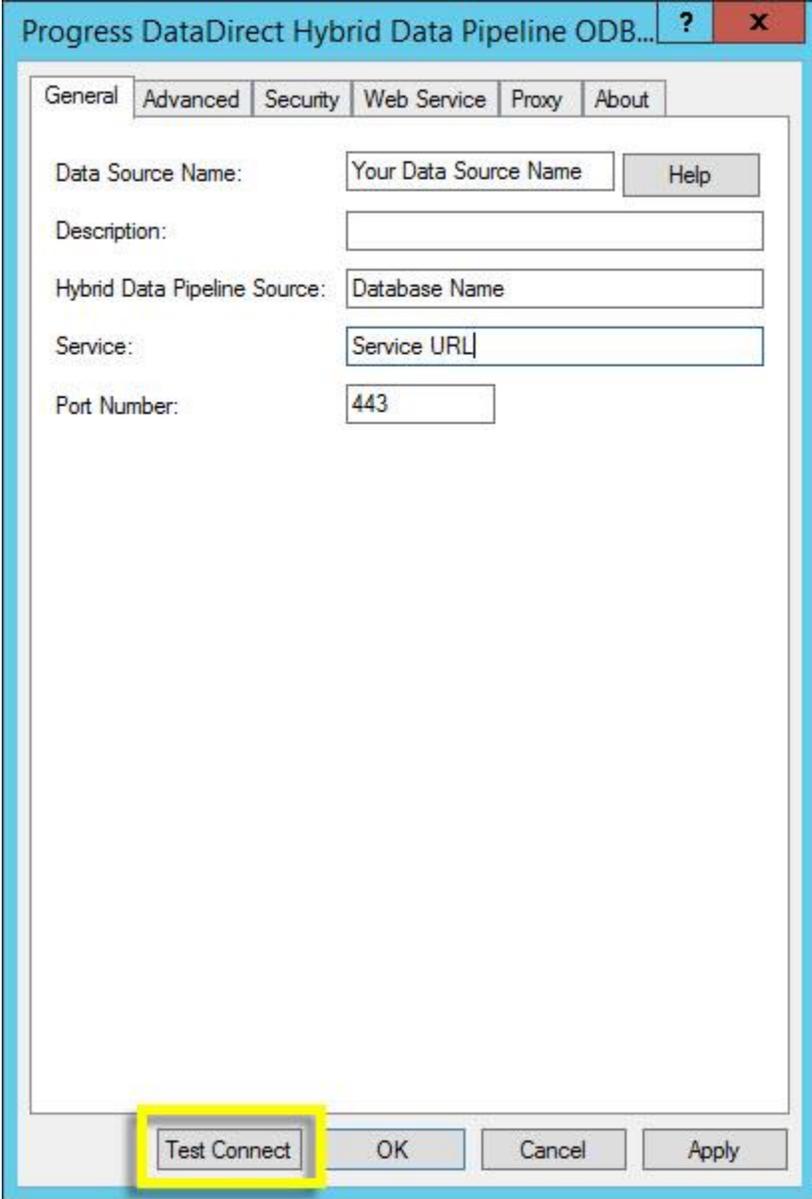
- Data Source Name:** A text box containing "Your Data Source Name" and a "Help" button.
- Description:** An empty text box.
- Hybrid Data Pipeline Source:** A text box containing "Database Name".
- Service:** A text box containing "Service URL", which is highlighted with a yellow border.
- Port Number:** A text box containing "443".

At the bottom of the dialog, there are four buttons: "Test Connect", "OK", "Cancel", and "Apply".

11. On the Security tab, ensure that the Enable SSL checkbox



- Click Test Connect and enter the credentials that you received from Deltek Customer Care when you requested the ODBC accounts. Click OK. A “Connection established!” message displays. Click OK.



The screenshot shows a dialog box titled "Progress DataDirect Hybrid Data Pipeline ODB...". It has a standard Windows-style title bar with a question mark and a close button. The dialog contains several tabs: "General", "Advanced", "Security", "Web Service", "Proxy", and "About". The "General" tab is selected. The form fields are as follows:

- Data Source Name: with a "Help" button to its right.
- Description:
- Hybrid Data Pipeline Source:
- Service:
- Port Number:

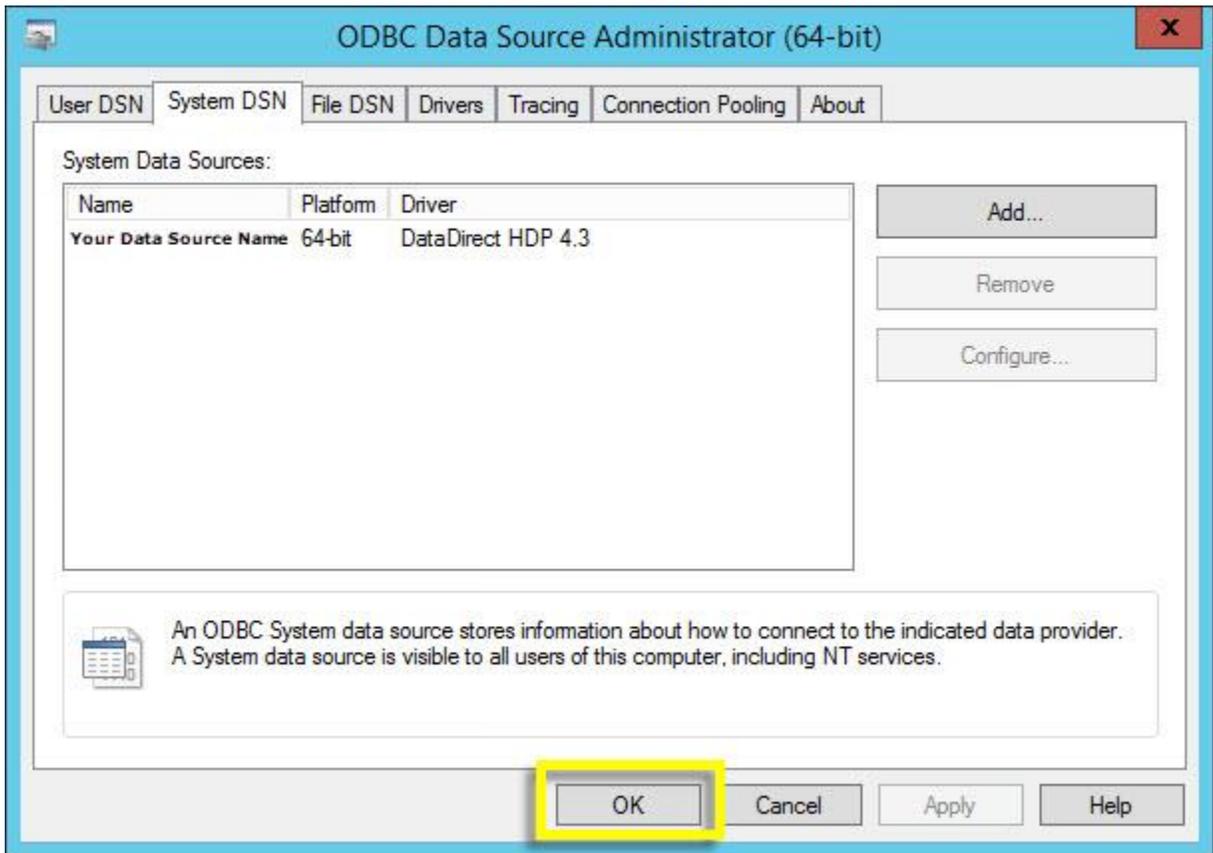
At the bottom of the dialog, there are four buttons: "Test Connect", "OK", "Cancel", and "Apply". The "Test Connect" button is highlighted with a yellow rectangular box.

The image shows a configuration dialog box titled "Progress DataDirect Hybrid Data Pipeline ODB...". It has a standard Windows-style title bar with a question mark and a close button. The dialog features a tabbed interface with the following tabs: "General", "Advanced", "Security", "Web Service", "Proxy", and "About". The "General" tab is currently selected and contains the following fields and controls:

- Data Source Name:** A text input field containing "Your Data Source Name" and a "Help" button to its right.
- Description:** An empty text input field.
- Hybrid Data Pipeline Source:** A text input field containing "Database Name".
- Service:** A text input field containing "Service URL".
- Port Number:** A text input field containing "443".

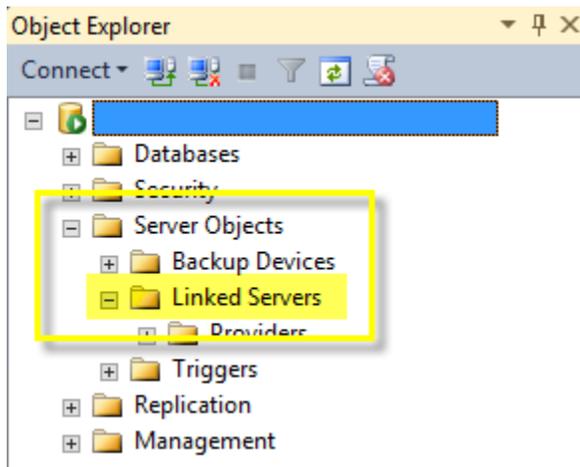
At the bottom of the dialog, there are four buttons: "Test Connect", "OK", "Cancel", and "Apply". The "OK" button is highlighted with a yellow rectangular box.

13. Click OK in the ODBC Data Source Administrator dialog box.

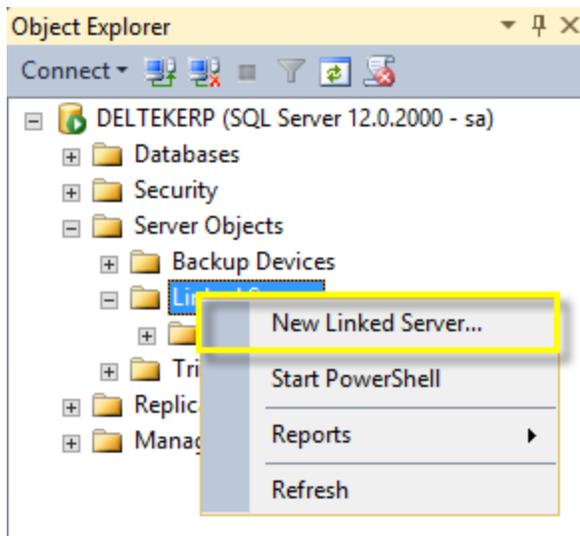


Create Linked Server

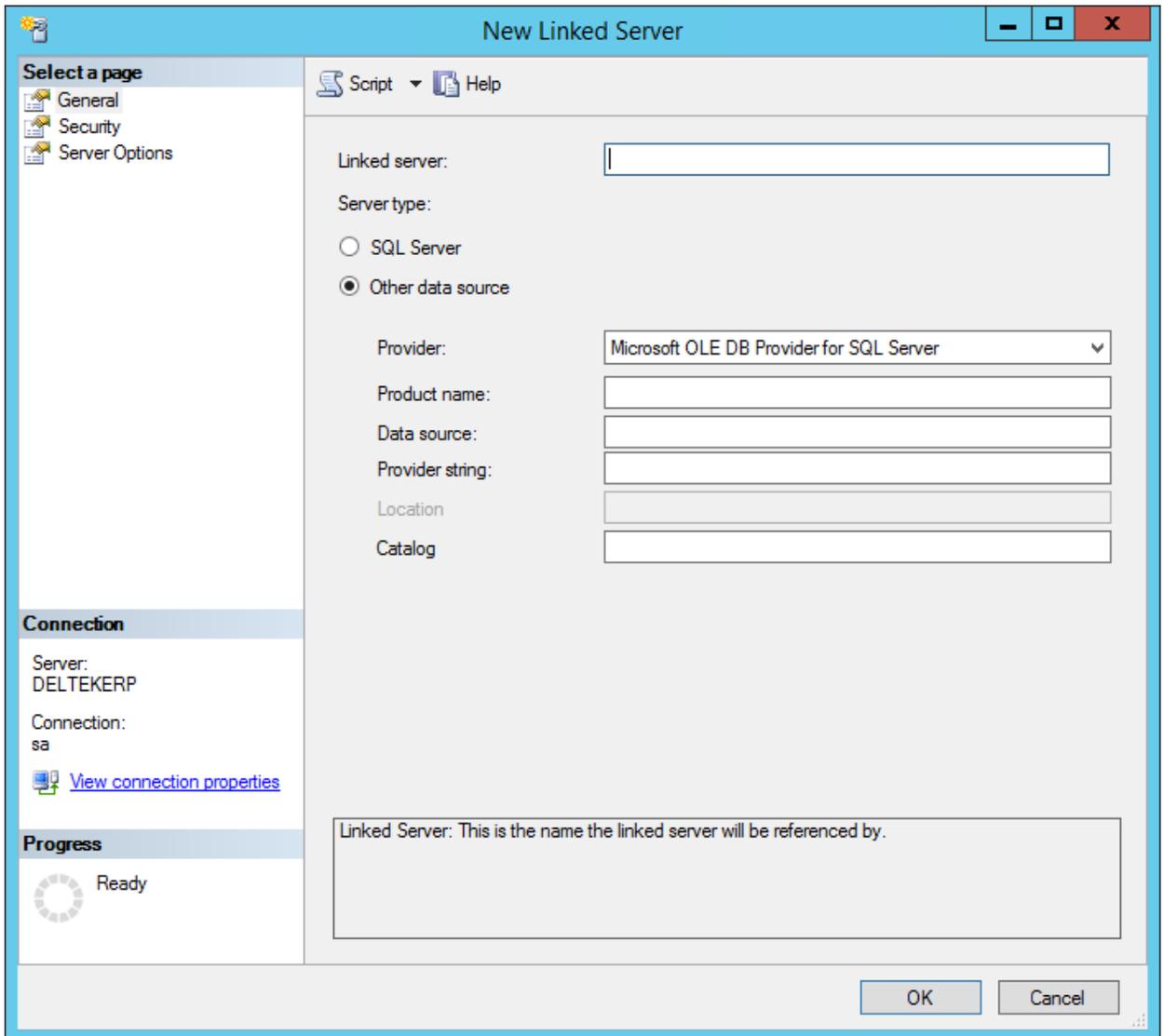
1. In SQL Server Management Studio, Expand Server Objects > Linked Servers > Right click on the Linked Server Folder



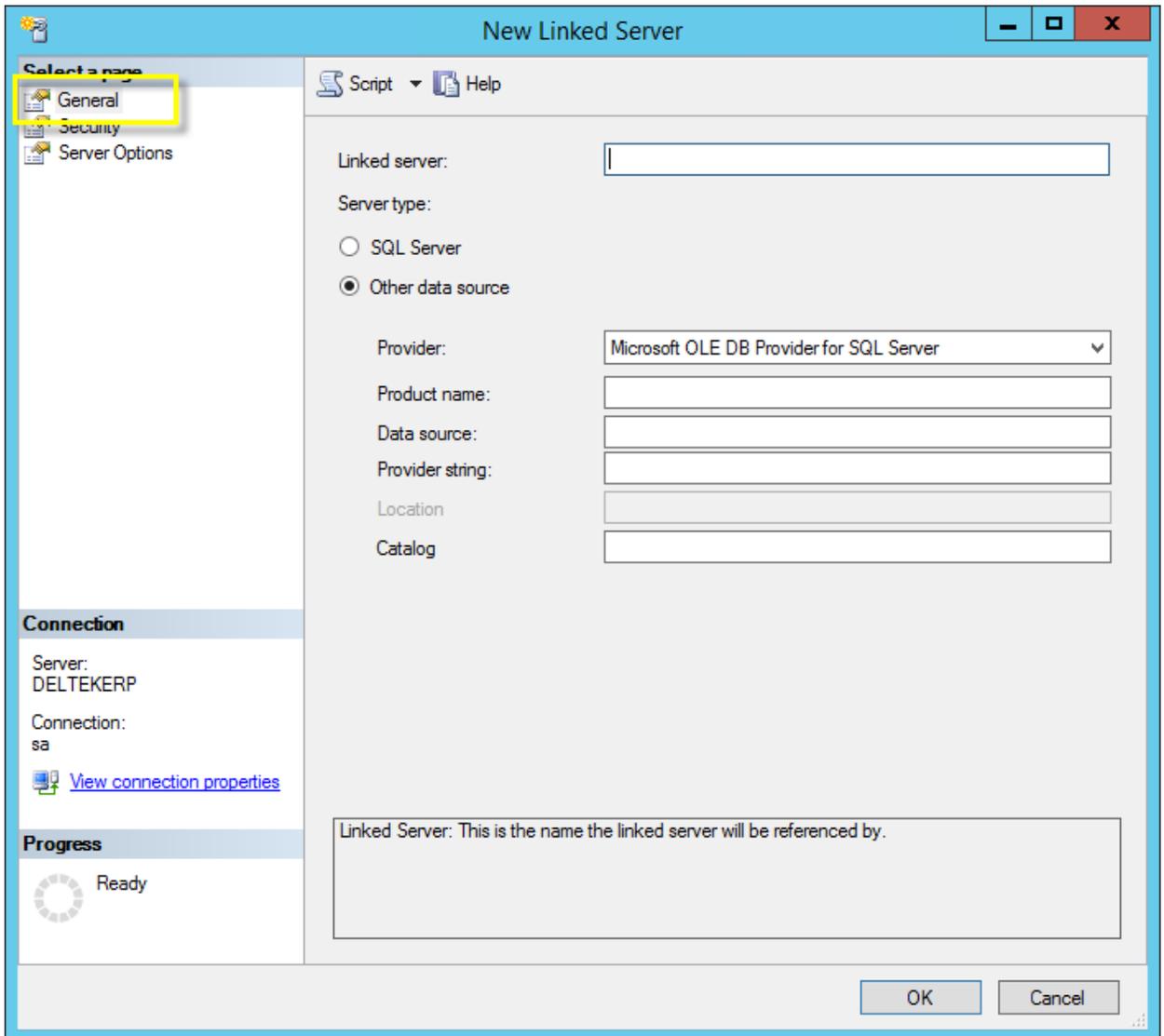
2. Select "New Linked Server" option from right click menu



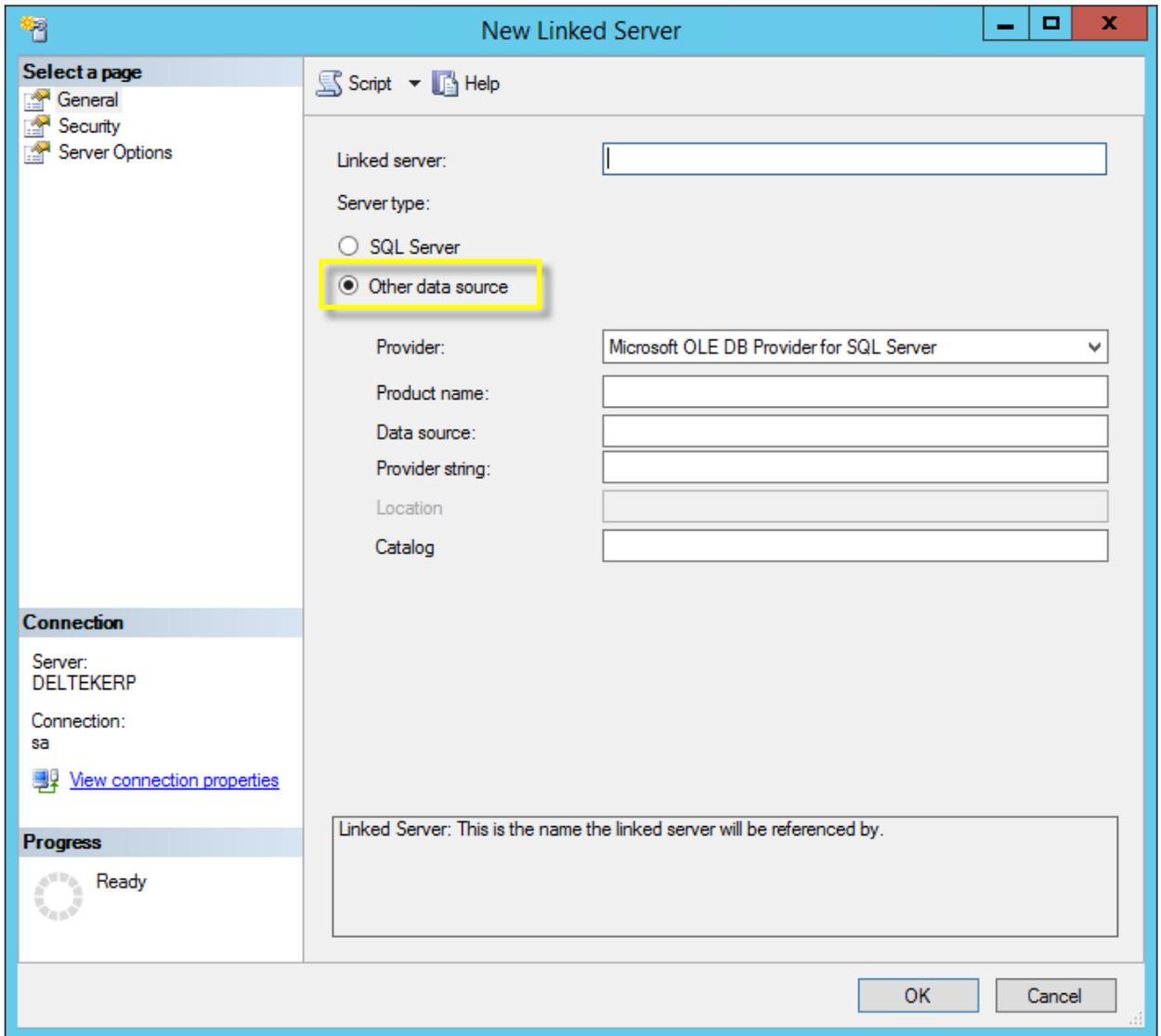
3. The “New Linked Server” Dialog appears



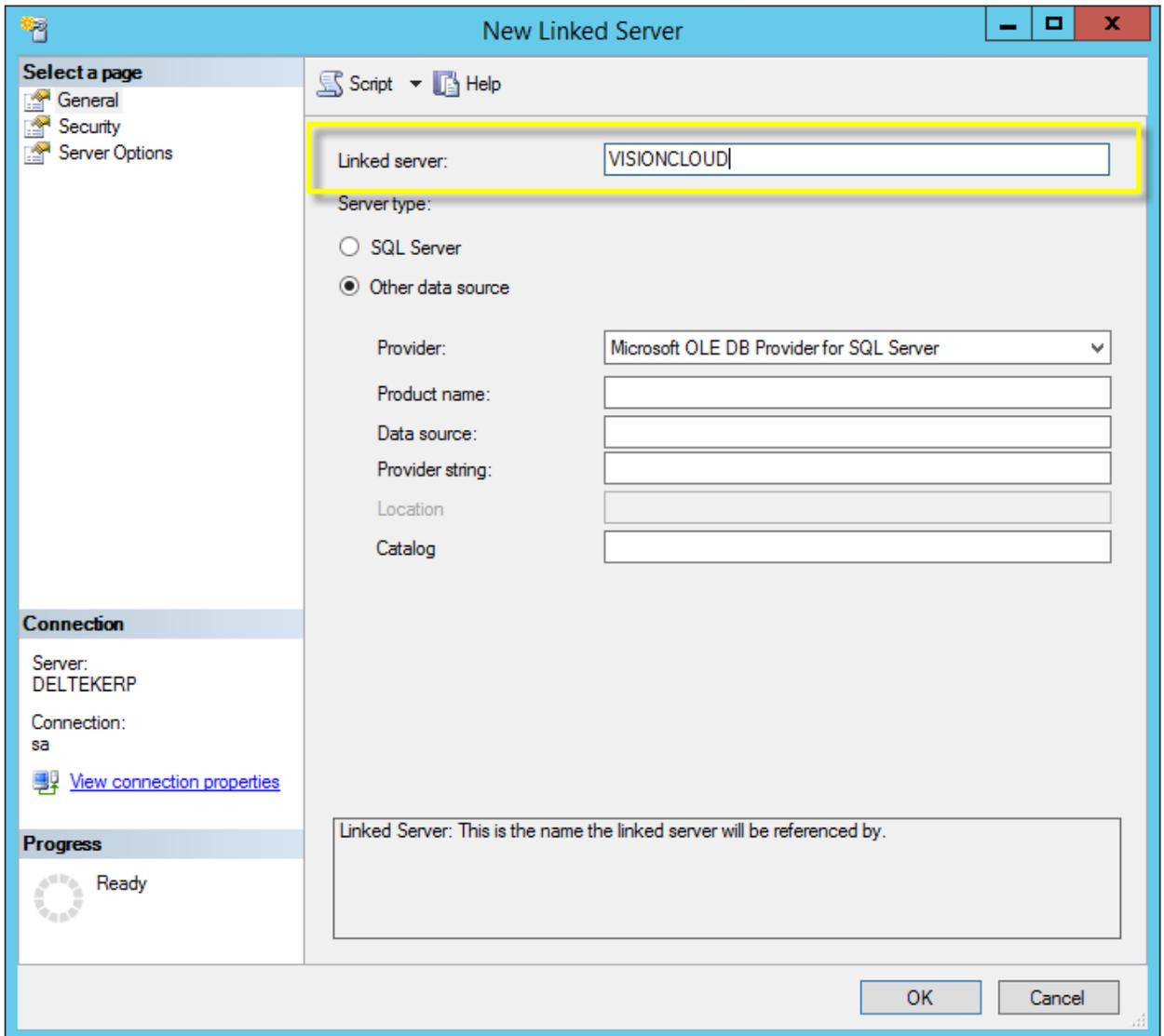
4. Make sure the “General” page has been selected



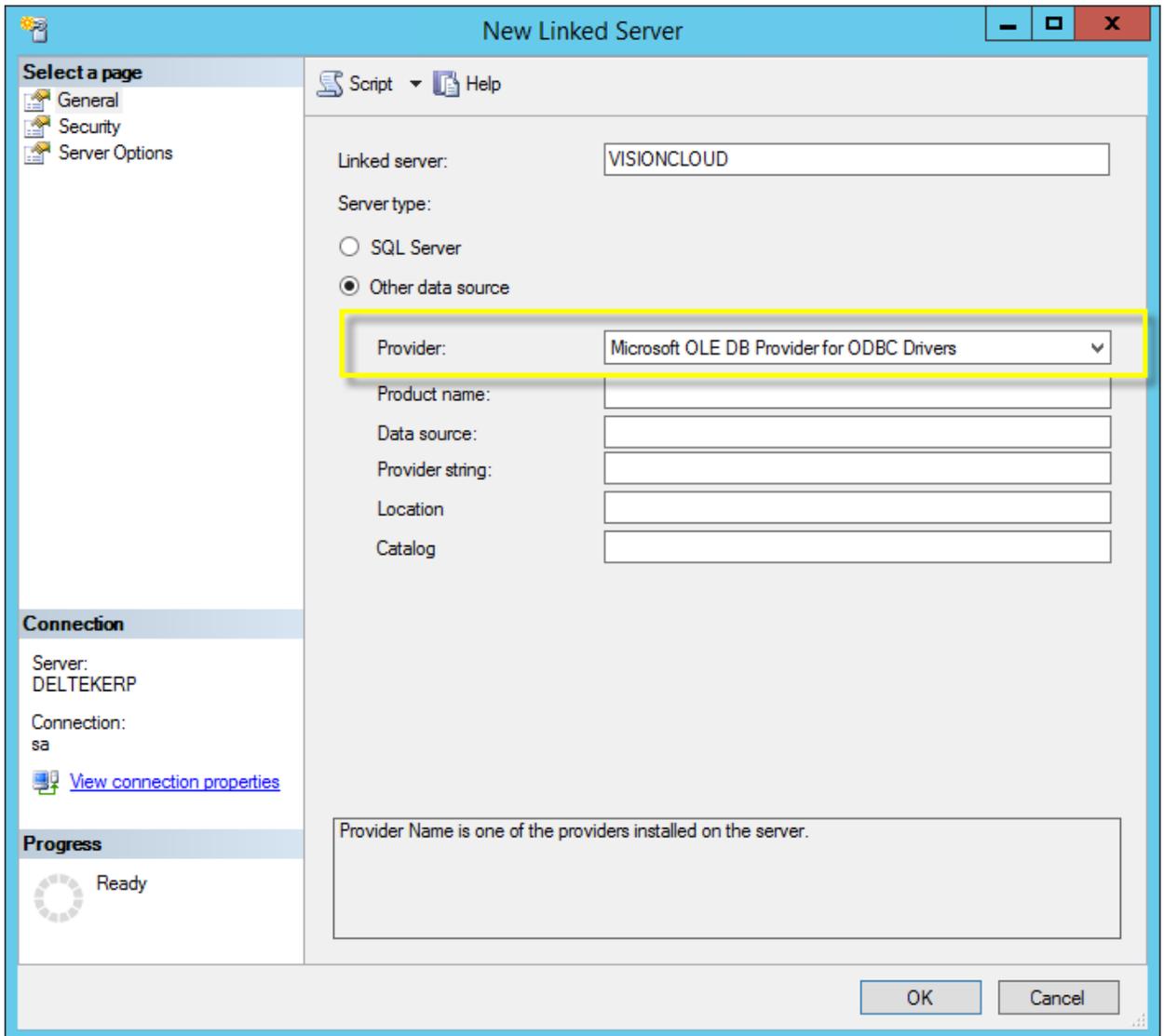
- For “Server Type” make sure “Other Data Source” is selected. (The SQL Server option will force you to specify the literal SQL Server Name)



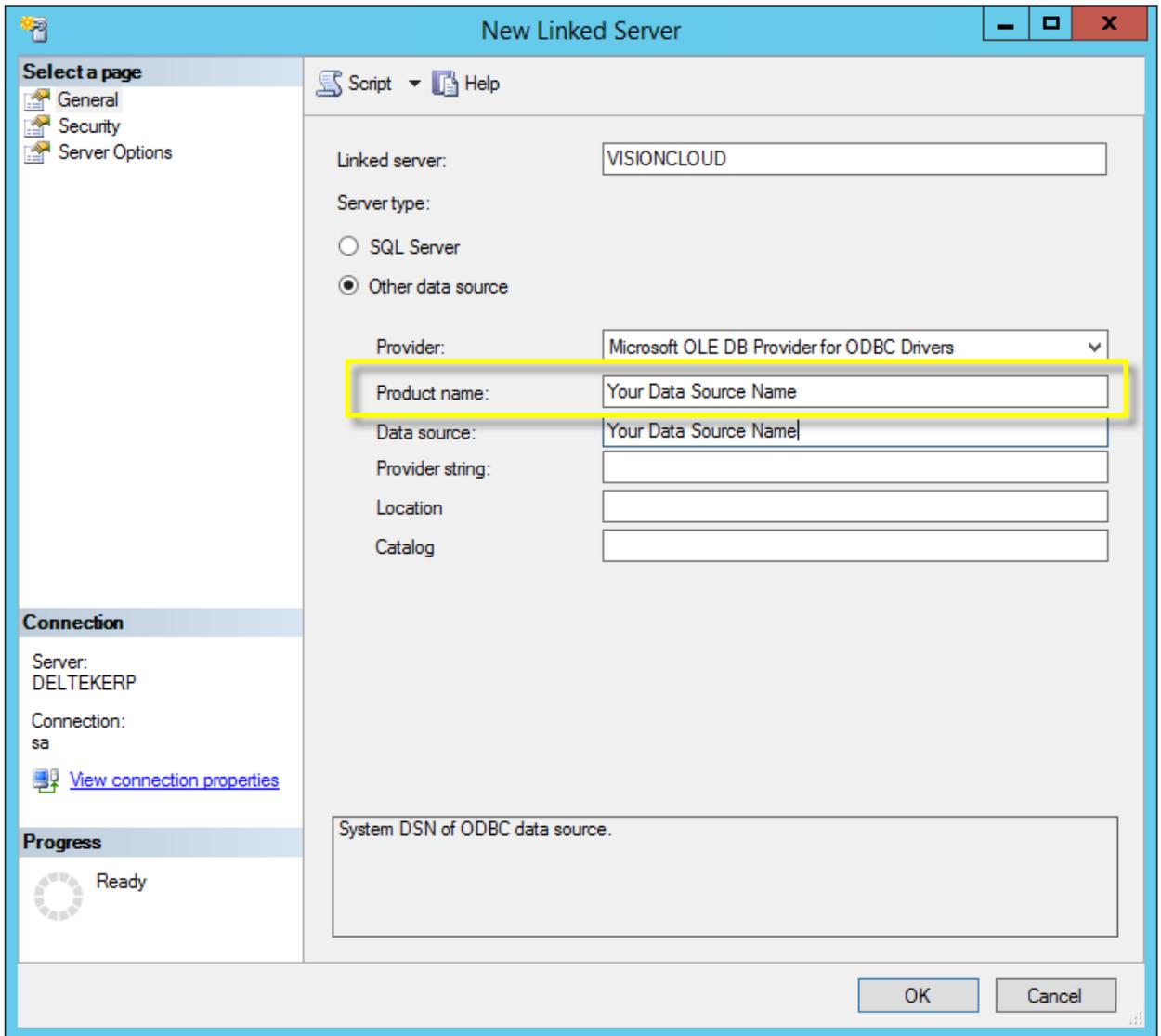
6. Type in "VISIONCLOUD" into Linked Server text box



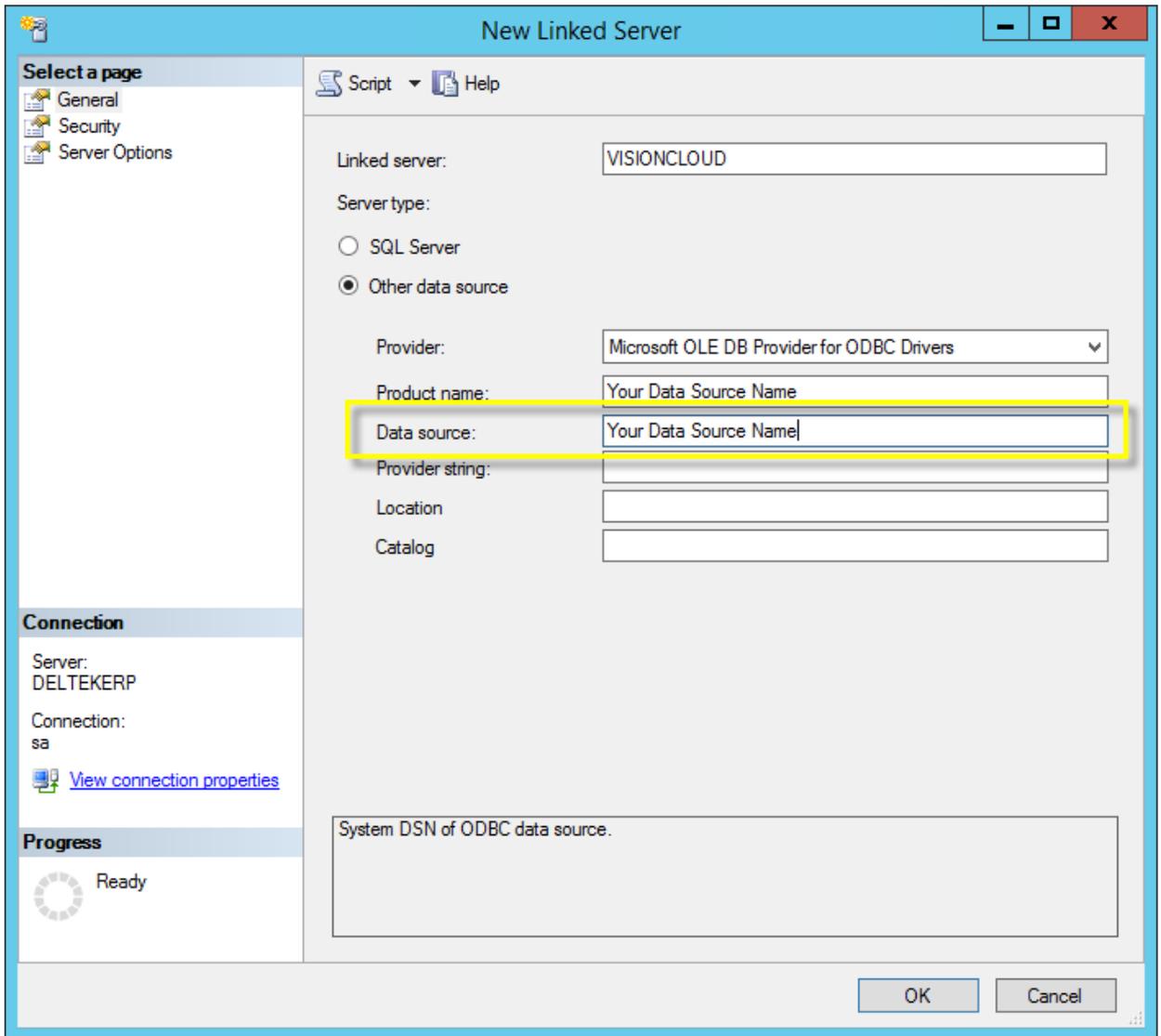
7. Provider – Select “Microsoft OLE DB Provider for ODBC Drivers”



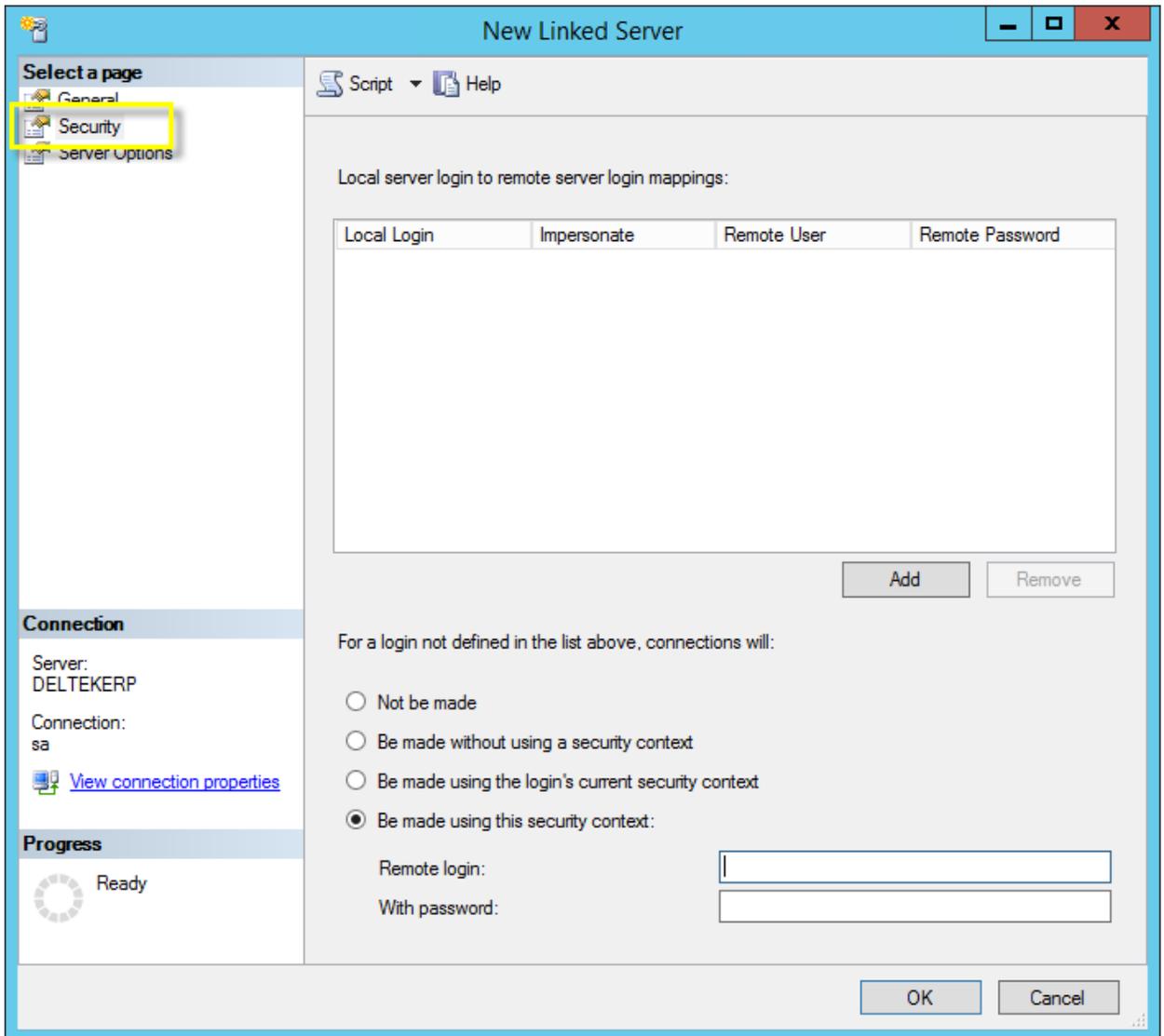
- 8. Product Name – ODBC data source name (Same as *Your Data Source Name* when you created your data source name in step #8 of above “Install and Configure Driver” section)



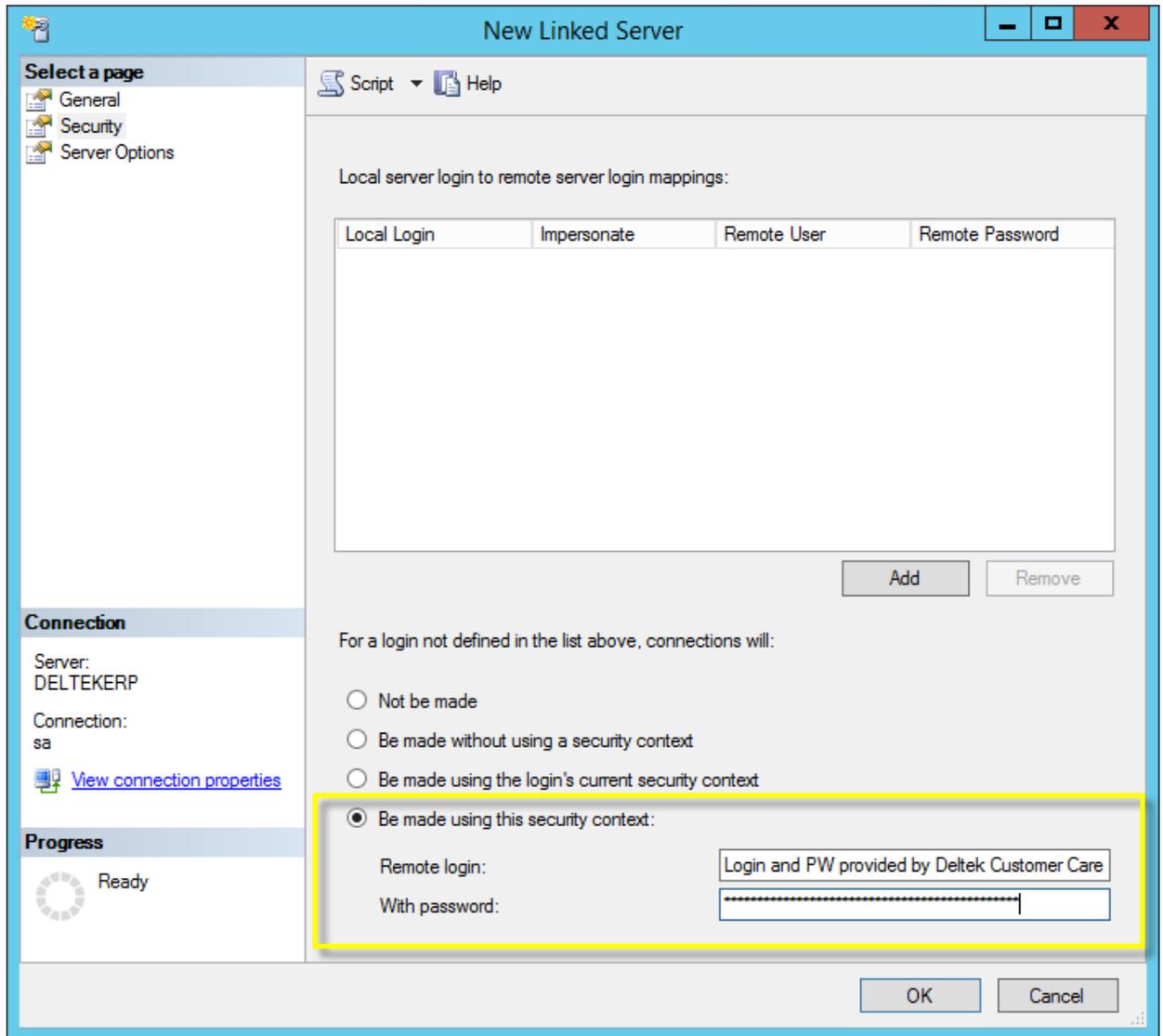
- 9. Datasource – ODBC data source name (Same as *Your Data Source Name* when you created your data source name in step #8 of above “Install and Configure Driver” section)



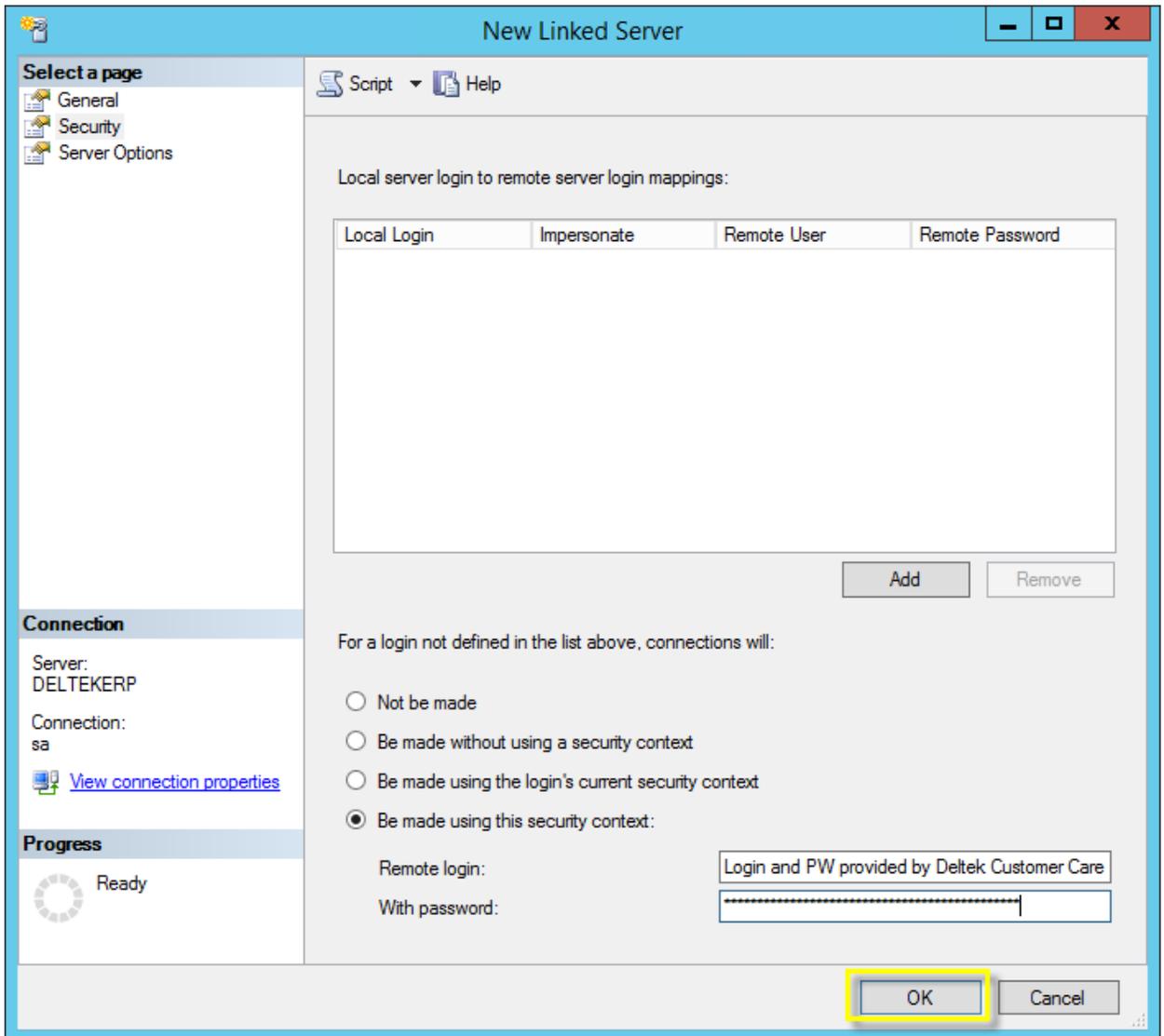
10. Navigate to the “Security” page



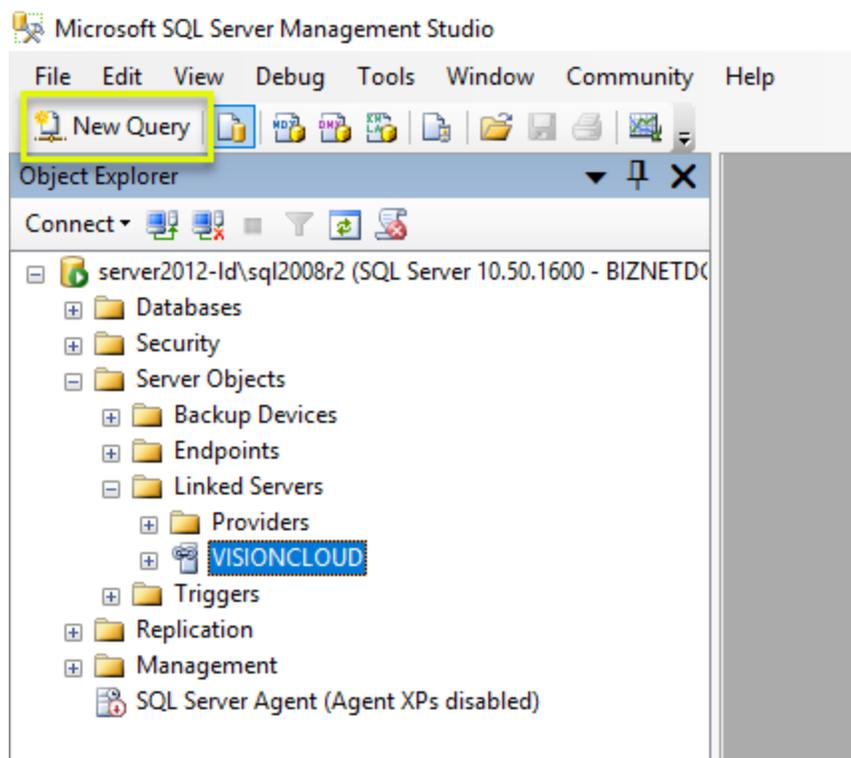
11. Select “Be made using this security context:” and enter Remote login and password provided by Deltek Customer Care



12. Select OK



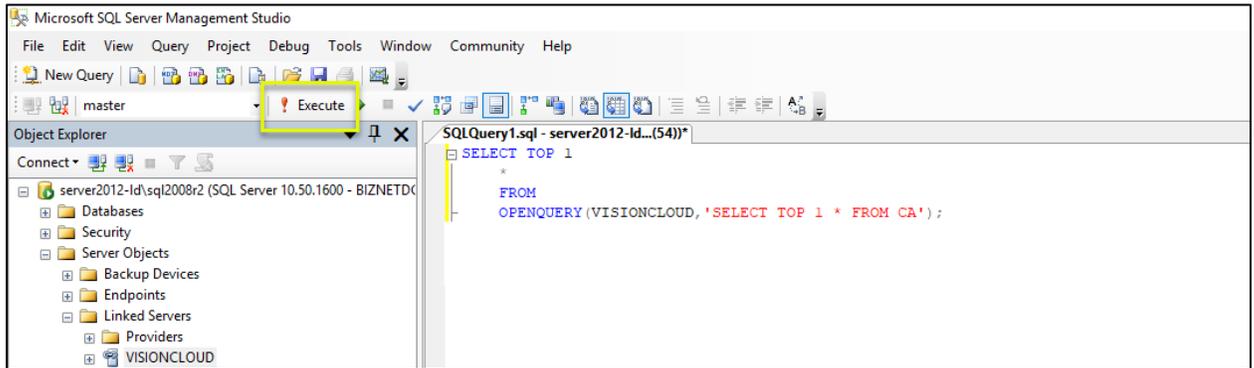
13. To test the Linked Server, click on the New Query button.



14. Paste the following query into the query dialog.

```
SELECT TOP 1
*
FROM
OPENQUERY (VISIONCLOUD, 'SELECT TOP 1 * FROM CA');
```

15. Click Execute to run the query.



The query should return records. If it does not, contact BizNet Software Support for assistance.