



Deltek

Deltek PM Compass 8.5

Release Notes

May 16, 2025

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This edition published May 2025.

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Overview

Welcome to the Deltek PM Compass 8.5 Release Notes. These Release Notes contain the following information:

- New Features and Enhancements
- Software Issues Resolved
- Database and Data Changes

Viewing the Online Help

The Deltek PM Compass Help System provides help for all areas of the PM Compass application. To access all documents available for PM Compass 8.5, click <https://help.deltek.com/product/PMCompass/8.5/GA/>.

Note: You can access the online help using Microsoft Edge, Chrome, or Firefox.

Pre-Installation Information

Before you begin the installation and setup of PM Compass, it is important to understand the following information.

Upgrading PM Compass

If you are upgrading from a previous PM Compass version, review the “Installation Steps (PM Compass Upgrades)” section in the *Deltek PM Compass 8.5 Installation Guide* prior to beginning your installation.

PM Compass 8.5 is a 64-bit application. By default, Windows installs 32-bit applications into the C:\Program Files (x86) folder and 64-bit applications into the C:\Program Files folder.

Upgrading from the Default 32-Bit Installation Location

For previous PM Compass installations, if you accepted the default installation path, the application would have been installed in the C:\Program Files (x86)\Deltek\PMCompass and C:\Program Files (x86)\Deltek\EPMSA folders.

Since Windows installs 64-bit applications in the C:\Program Files folder by default, if you are upgrading from the default 32-bit installation location, the upgrade will not overwrite your existing files. It will install to the C:\Program Files folder or an alternate folder that you select during the installation.

The PM Compass upgrade installer detects your previous installation location. If that location is in an x86 folder, the installer copies the configuration files into the new location, updates them to use the new installation path, and renames the old PMCompass and EPMSA folders.

Upgrading from a Non-Default Installation Location

The PM Compass upgrade installer detects your previous installation location. If that location is not the default folder (C:\Program Files (x86)\Deltek\PMCompass), the installer performs an in-place upgrade that overwrites the old files.

Pre- and Post-Installation Checklists

The PM Compass Installation Guide provides pre- and post-installation checklists that include all the necessary steps for successful implementation. Deltek recommends reviewing these topics for both new and upgrade installations to ensure that you have the correct configuration.

Loading Reports onto Load Balanced SSRS Servers

Multiple SSRS servers in a load-balanced environment all have a common URL. After a release, to ensure that all SSRS servers are updated with the latest PM Compass reports, you should run a batch file that updates each individual SSRS server by its NetBIOS or host name.

Attention: For more information, refer to the “Loading Reports onto Load Balanced SSRS Servers” topic in the *Deltek PM Compass Advanced Technical Administration Guide*.

Additional Security Configurations

PM Compass includes a new encryption mechanism. It creates an additional layer of protection beyond the traditional SSL encryption recommended for PM Compass implementations and prevents in-flight data transmission from being compromised.

These settings are included and enabled on new PM Compass 8.2 and later installations. For upgrades, you will need to manually add them.

Attention: For more information about the new security configuration, refer to the [Secure the Web/Application Tier » Additional Security Configurations](#) topic in the *Deltek PM Compass Advanced Administration Guide*.

Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name
PM Compass	Deltek PM Compass 8.5 (8.5.0700.4254)
Deltek Cobra 8.x Integration	Deltek Cobra 8.5 Integration for PM Compass 8.5_8.5.0717.3722
	Deltek Cobra 8.6 Integration for PM Compass 8.5_8.6.0700.3634
Deltek Open Plan 8.x Integration	Deltek Open Plan 8.6 Integration for PM Compass 8.5_8.6.0711.477
	Deltek Open Plan 8.7 Integration for PM Compass 8.5_8.7.0707.379

Client Component

Install these files on all client machines.

Product Module	DSM Release Name
Deltek Open Plan AddIn	Deltek Open Plan Addin for PM Compass 8.5_8.5.0700.4254

Software Requirements (Compatibility Matrix)

Various parts of the PM Compass application are distributed to logical tiers for performance, scalability, and security purposes. These logical tiers are distinct technologies required to run PM Compass, such as Report Server software or Web server software. They may or may not be hosted on the same machine.

The method you use to distribute PM Compass’s logical tiers across physical tiers or actual machines depends on your organization’s needs.

Attention: For a complete list of the recommended minimum software requirements, refer to the following:

- The “System Requirements” topic in the *Deltek PM Compass Installation Guide*
- The *Deltek Product Support Compatibility Matrix* document that you can download from the [Deltek Support Center site](#)

Cobra and Open Plan Integration

PM Compass 8.5 supports multiple versions of Cobra and Open Plan. After the PM Compass installation, you may have to download and install the integration that matches your version of Open Plan and/or Cobra.

Attention: For additional information, refer to the “Appendix K: Integrating with Cobra” and “Appendix L: Integrating with Open Plan” sections of the *Deltek PM Compass 8.5 Installation Guide*.

Open Plan Engine Support

The table below indicates which PM Compass features are supported for each Open Plan engine when Microsoft Project Professional, Microsoft Project Server, or Oracle Primavera P6 is the scheduling tool.

Scheduling Tool	Feature	OPP v8.7
Microsoft Project Professional	Import	Yes
	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes
	Resource % Complete	Yes
Project Server	Import	Yes
	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes

Pre-Installation Information

Scheduling Tool	Feature	OPP v8.7
	Resource % Complete	Yes
Primavera P6	Import	Yes
	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes
	Resource % Complete	Yes

New Features and Enhancements

This section includes summaries of the new features and enhancements for this release.

Important: The PM Compass API feature was originally included in the *Deltek PM Compass 8.5 Release Notes*. Due to several updates made to this feature for PM Compass 8.5 Cumulative Update 01, the feature is now comprehensively documented in the *Deltek PM Compass 8.5 Cumulative Update 01 Release Notes*.

Comprehensive EAC Workflow

To facilitate the need for a scheduled process that generates individual workflows for each control account, PM Compass introduces the Comprehensive EAC workflow type. Use the Comprehensive EAC workflow to review and compare the current EAC (Estimate at Completion) cost set with a prior EAC cost set.

A key feature of this workflow type is a calculated column that displays the difference between the two cost sets, providing clear insights into cost variations. Furthermore, the Comprehensive EAC workflow type includes the calculation of ETC (Estimate to Complete). This can be achieved either by creating a new cost set or by subtracting the actual costs from the EAC cost set, offering flexibility in how ETC is determined.

Attention: For more information on this workflow type, see the “Comprehensive EAC” topic in the PM Compass Help System under **Workflows » Change Management » Change Management Workflow Types» Comprehensive EAC**.

Setting Up the Comprehensive EAC Workflow Type

These are the steps required to import the workflow type and automatically create a Comprehensive EAC workflow type.

Note: To create a Comprehensive EAC workflow type, you must use a Cobra project that contains a Prior EAC cost set with a Frozen Forecast class.

1. Add the necessary custom fields in the Workflow table on the User-Defined Data form.
2. Import the appropriate Comprehensive EAC workflow type based on your database.
3. Update the Cost Details on the Form tab of the Workflow Type Configuration to a Prior EAC cost set.
4. Set up a scheduled alert to automatically create one Comprehensive EAC workflow per control account in a project.

New Features and Enhancements

Attention: For the detailed steps, see the following topics in the PM Compass Help System under **Workflows » Change Management » Change Management Workflow Types» Comprehensive EAC**.

- “Configure the Custom Fields for the Comprehensive EAC Workflow”
- “Custom Fields for the Comprehensive EAC Workflow”
- “Update the Prior EAC Cost Set”
- “Create a Scheduled Alert for the Comprehensive EAC Workflow”

Note: Although user-initiated alerts for the Comprehensive EAC workflow type are automatically saved after configuring the necessary custom fields on the User-Defined Data form and importing the Comprehensive EAC workflow type, you can still manually configure or update the custom fields to meet your company’s needs.

For more information, see the “User-Initiated Alert Setup for the Comprehensive EAC Workflow” topic in the PM Compass Help System under **Workflows » Change Management » Change Management Workflow Types» Comprehensive EAC**.

Viewing the Forecast Details Grid

Element of Cost	Prior EAC DIRECT	Prior EAC HOURS	Prior EAC Total Costs	Difference DIRECT	Difference HOURS	Difference Total Costs	Total DIRECT	Total HOURS	Total Total Costs
Labor	8.04	504.00	11.36	44.30	1,945.90	62.78	52.34	2,449.90	74.16
Material	0.80	0.00	0.80	-0.80	0.00	-0.80	0.00	0.00	0.00
Other Direct Costs	0.30	0.00	0.30	-0.30	0.00	-0.30	0.00	0.00	0.00
SubContractor	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Σ	9.14	504.00	12.46	43.20	1,945.90	61.68	52.34	2,449.90	74.16

ETC	Labor	Material	ODC	Subcontract
Hours	2,442.90			
Direct	52.45	0.10	0.10	0.20
Total Cost	74.36	0.10	0.10	0.23

Comprehensive EAC Workflow General Tab

The upper part of the Forecast Details grid displays details of the Prior EAC cost set (composed of Frozen Forecast classes) and the EAC cost set (composed of Actual and Forecast classes), showing calculated results (such as Hours, Direct, and Total Costs) for each element of cost (such as Labor, Material, Other Direct Costs, and Subcontractor). It also shows the difference between the Prior EAC and EAC cost set calculations.

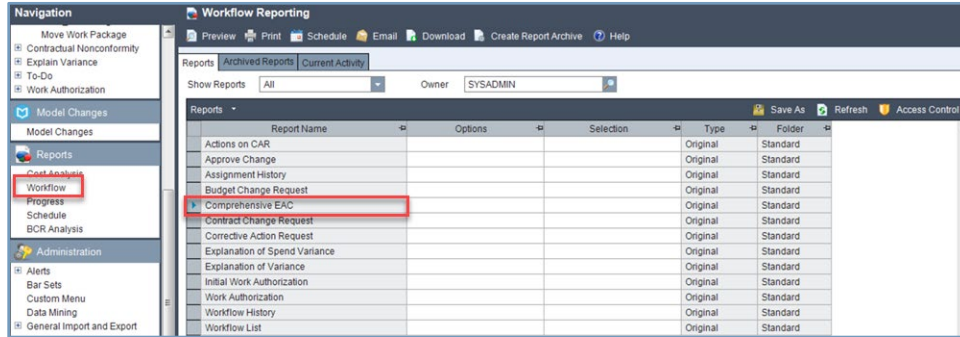
The lower part of the grid displays details of the ETC cost set (composed of Forecast classes), showing calculated results for each element of cost.

New Features and Enhancements

Attention: For more information on these fields on this tab, see the “Workflow Form View: General Tab of the Comprehensive EAC Form” topic in the PM Compass Help System under **Workflows » Change Management » Tabs and Dialog Boxes.**

Generating the Comprehensive EAC Report

You can generate the Comprehensive EAC report to review and compare the current EAC cost set with a configurable Prior EAC cost set, ensuring that any changes to the EAC are recorded.



Workflow Reporting Form

CHG000003331

Comprehensive EAC

Project PIPShuttle_CEAC2 Inter-Planet Space Shuttle
Control Account 1.7.1/1710 Test1
Control Account Manager

Baseline Start 5/30/2023 **Forecast Start** 1/29/2023 **SPI**
Baseline Finish 1/31/2025 **Forecast Finish** 1/31/2025 **CPI** .97

All EAC, ETC and ACWP Values are represented in \$K

Element of Cost	Prior EAC HOURS	Prior EAC DIRECT	Prior EAC Total Costs	Prior HOURS	Prior DIRECT	Prior Total Costs	Total HOURS	Total DIRECT	Total Total Costs
Labor	150.00	272.42	386.49	110.00	335.77	476.40	260.00	608.19	862.89
Material		50.00	50.00		-15.00	-15.00		35.00	35.00
Other Direct Costs		70.00	70.00		52.00	52.00		122.00	122.00
SubContractor		11.00	12.65		4.00	4.60		15.00	17.25
Total	150.00	403.42	519.14	110.00	376.77	518.00	260.00	780.19	1,037.14

ETC	Labor	Material	ODC	Subcontractor
Hours	250.00			
Direct	594.99	35.00	120.00	15.00
Total Cost	844.19	35.00	120.00	17.25

Remaining Scope
sample remaining scropt

Risks, Issues and Opportunities
sample risks, issues and opportunities

Assumptions
sample assimpions

Justification
sample justification

Notes
sample notes

Authorization	Date
Workflow Failure User : System Administrator	1/23/2025
Workflow Failure User : System Administrator	1/23/2025
Workflow Failure User : Astro Bot	1/23/2025

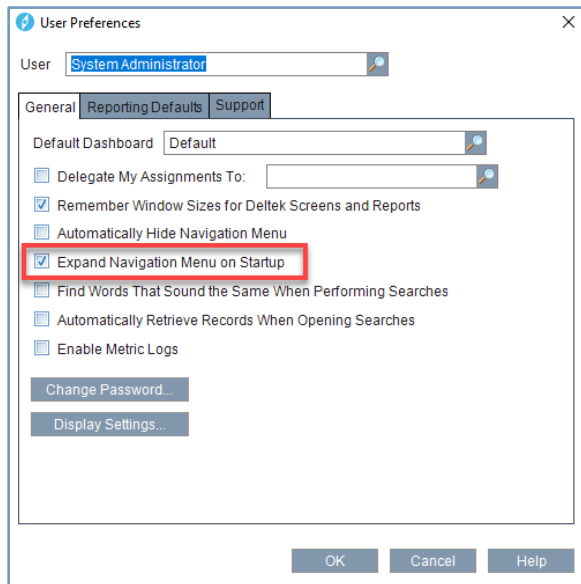
v8.5.000 (ASTRO) - Page 38 of 98

Comprehensive EAC Report

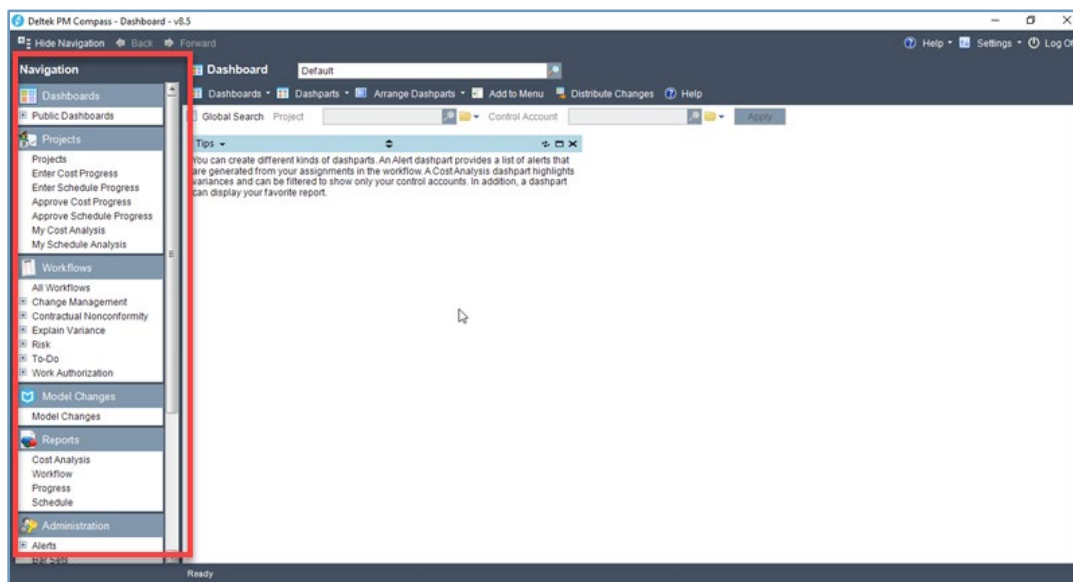
Attention: For more information on the Comprehensive EAC report, see the “Comprehensive EAC Report” topic in the PM Compass Help System under **Reports » Workflow Reports**.

Ability to Display the Navigation Menu in Expanded Form Upon Login

The User Preferences dialog box now includes a new option called **Expand Navigation Menu on Startup**, which allows the **Navigation** menu to be displayed in expanded form when you first open PM Compass.



User Preferences Dialog Box



Navigation Menu in Expanded Form

Attention: For more information, see the “General Tab of the User Preferences Dialog Box” topic in the PM Compass Help System.

Ability to Add Hours Results in the Data Mining Detail Report

The Data Mining Detail report now includes new columns that enable you to perform analysis in hours.

The following columns have been added to the Columns tab of the Data Mining Detail Options dialog box:

- Cumulative Actual Hours
- Cumulative Earned Hours
- Cumulative Budget Hours
- Current Actuals Hours
- Current Earned Hours
- Current Budget Hours
- Estimate at Complete Hours
- Budget at Complete Hours
- CV Hours
- SV Hours
- CPI Hours
- SPI Hours

New Features and Enhancements

Data Mining Detail Options

General | **Sorting/Grouping** | Columns | Graph | Layout

Columns ▾ Move to Top Find Find Next New Calculation Edit Calculation

Select	Column Name	Line 1 Heading	Line 2 Heading	Width	F
<input type="checkbox"/>	CPI	CPI		1.00	123,456.7
<input type="checkbox"/>	SPI	SPI		1.00	123,456.7
<input checked="" type="checkbox"/>	Cumulative Actuals Hours	Cumulative	Actuals Hours	1.00	123,456.7
<input checked="" type="checkbox"/>	Cumulative Earned Hours	Cumulative	Earned Hours	1.00	123,456.7
<input checked="" type="checkbox"/>	Cumulative Budget Hours	Cumulative	Budget Hours	1.00	123,456.7
<input checked="" type="checkbox"/>	Current Actuals Hours	Current	Actuals Hours	1.00	123,456.7
<input checked="" type="checkbox"/>	Current Earned Hours	Current	Earned Hours	1.00	123,456.7
<input checked="" type="checkbox"/>	Current Budget Hours	Current	Budget Hours	1.00	123,456.7
<input checked="" type="checkbox"/>	Estimate at Complete Hours	Estimate at	Complete Hours	1.00	123,456.7
<input checked="" type="checkbox"/>	Budget at Complete Hours	Budget at	Complete Hours	1.00	123,456.7
<input checked="" type="checkbox"/>	CV Hours	CV Hours		1.00	123,456.7
<input checked="" type="checkbox"/>	SV Hours	SV Hours		1.00	123,456.7
<input checked="" type="checkbox"/>	CPI Hours	CPI Hours		1.00	123,456.7
<input checked="" type="checkbox"/>	SPI Hours	SPI Hours		1.00	123,456.7
<input type="checkbox"/>	CV Bad End Range	CV Bad End Range		0.80	123,456.7

Left Margin for First Column

Options Organize Default Apply Cancel Help

Columns Tab of the Data Mining Detail Options Dialog Box

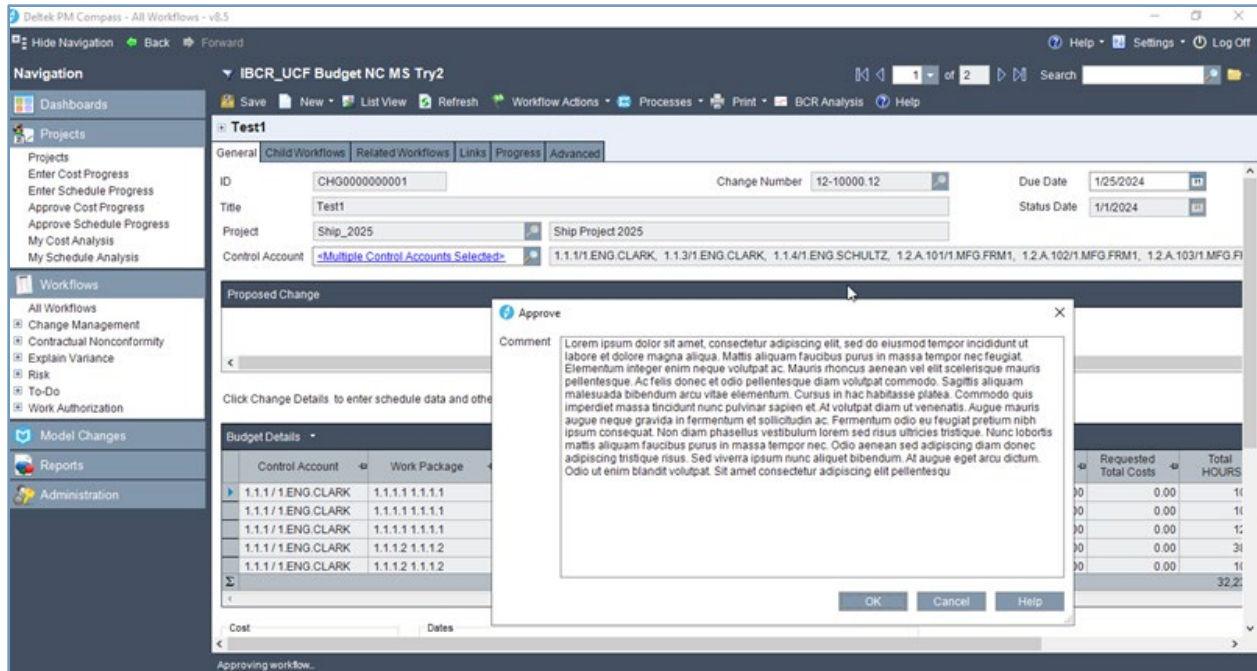
Project	Project Description	Control Account	Cumulative Actuals Hours	Cumulative Earned Hours	Cumulative Budget Hours	Current Actuals Hours	Current Earned Hours	Current Budget Hours	Estimate at Complete Hours	Budget at Complete Hours	CV Hours	SV Hours	CPI Hours	SPI Hours
Rule Description: Cumulative actual costs exceed budget at complete (BAC)														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: Forecasted cost is zero for incomplete control account														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
Rule Description: TCPI is greater than CPI by more than 1.00														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
Rule Description: SPI is less than 1.00														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.2 / 1600	261.00	585.80	1,216.17			481.91	2,449.90	2,072.00	324.80	430.37	2.24	48
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.2 / 1600			76.80			43.84	250.00	235.00		-76.80		
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.1 / 1332			1,219.07			1,048.86	7,498.00	6,544.00		-1,219.07		
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.2 / 1331	135.00	514.00	1,278.42			197.17	2,465.25	2,855.00	379.00	-764.42	3.81	40
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.3.1 / 1220	305.00	1,065.12	2,097.61			722.78	7,714.15	7,796.00	760.12	-1,032.49	3.49	51
Rule Description: Negative earned value in current period														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: Planned value is negative for current period														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: CPI is less than 1.00														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: Percent spent EAC is greater than percent complete by more than 5														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
Rule Description: Percent spent BAC is greater than percent complete by more than 5														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: TCPI is greater than 1.00														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.2 / 1331	135.00	514.00	1,278.42			197.17	2,465.25	2,855.00	379.00	-764.42	3.81	40
Rule Description: Planned value (baseline) has changed for a control account that has actual costs														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.2 / 1600	261.00	585.80	1,216.17			481.91	2,449.90	2,072.00	324.80	430.37	2.24	48
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.2 / 1331	135.00	514.00	1,278.42			197.17	2,465.25	2,855.00	379.00	-764.42	3.81	40
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.3.1 / 1220	305.00	1,065.12	2,097.61			722.78	7,714.15	7,796.00	760.12	-1,032.49	3.49	51
Rule Description: Planned value (baseline) has changed for a control account that has earned value														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.2 / 1600	261.00	585.80	1,216.17			481.91	2,449.90	2,072.00	324.80	430.37	2.24	48
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.2 / 1331	135.00	514.00	1,278.42			197.17	2,465.25	2,855.00	379.00	-764.42	3.81	40
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.3.1 / 1220	305.00	1,065.12	2,097.61			722.78	7,714.15	7,796.00	760.12	-1,032.49	3.49	51

Sample Data Mining Detail Report with New Columns

Attention: For more information on Data Mining Detail report, see the “Data Mining Report Overview” topic in the PM Compass Help System.

Increase the Character Limit of the Comments Dialog Box

The Comments dialog box now allows up to 1,000 characters, giving you more space to explain why you are performing a specific action, such as approving, rejecting, suspending, or canceling a workflow. You can also resize the dialog box and use the scrollbar to view your comments.



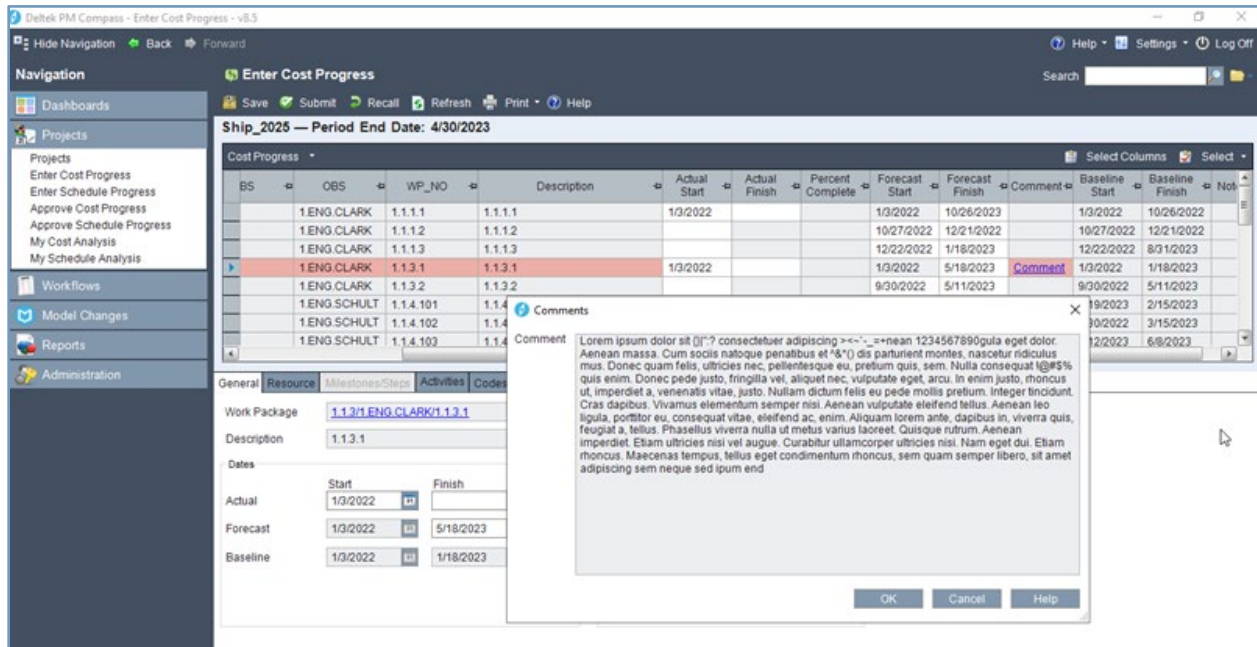
Approving a Workflow

For the following forms, the **Comment** column in the grid displays **Comment** as a hyperlink:

- Enter Cost Progress
- Approve Cost Progress
- Enter Schedule Progress
- Approve Schedule Progress

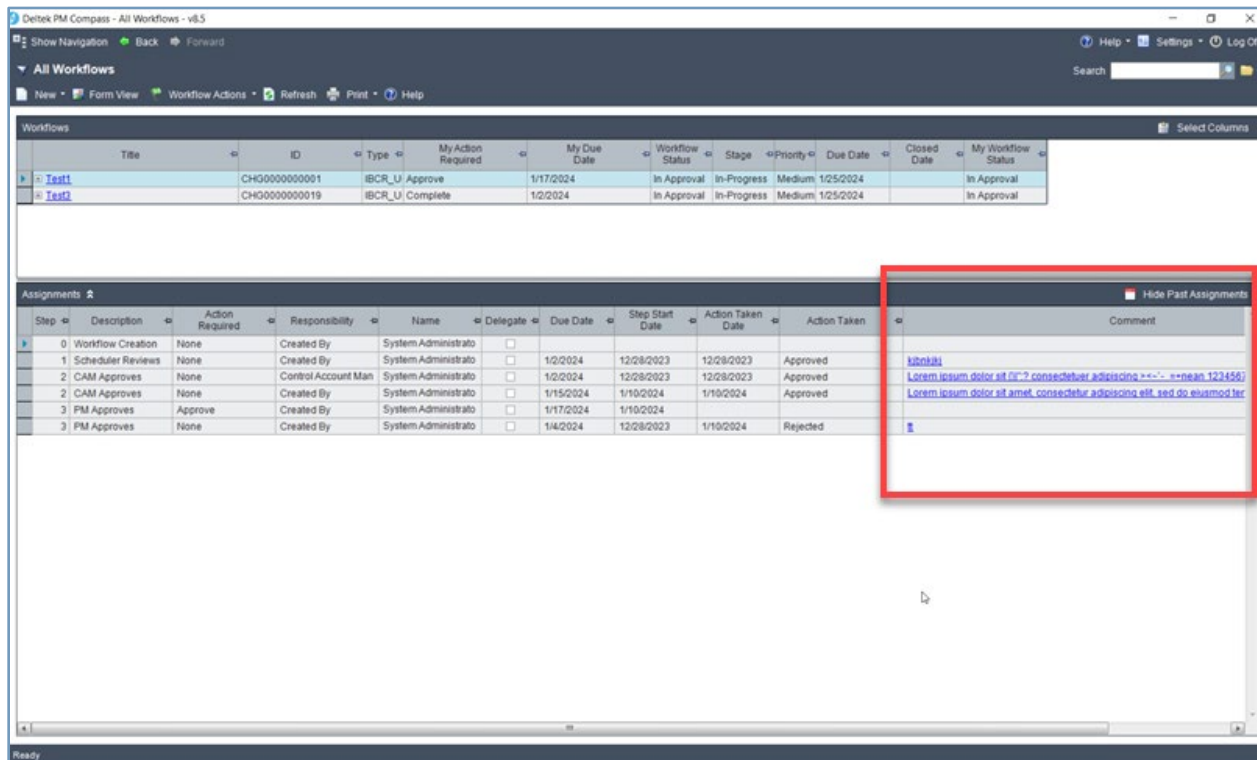
Clicking the **Comment** hyperlink displays the Comments dialog box.

New Features and Enhancements



Enter Cost Progress Form

In the Assignments grid of the Workflows List view or the Progress tab, the **Comment** column displays only the first 100 characters as a hyperlink in the grid.



Assignments Grid of the Workflows List View

Determining Activity Completion in Change Details

PM Compass now uses revised conditions to determine activity completion in Change Details, which ensures that changes made in Change Details are reflected in the live project.

An activity is considered **Complete** and not editable if any of the following are true:

- The **Computed Status** is **Complete**.
- The **Progress Type** is **Complete**.
- The **Expected Finish Date** is earlier than **Time Now**.

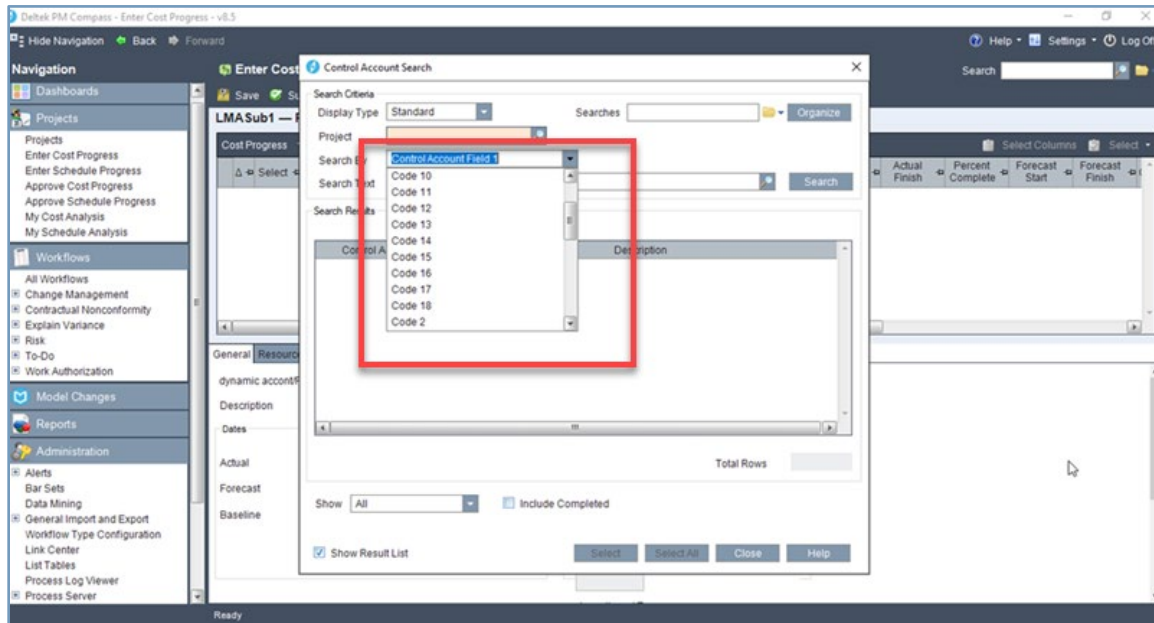
Attention: For more information, see the “Rules for Editing Change Details Data” topic in the PM Compass Help System.

Support for All 20 Cobra Codes

PM Compass now supports Cobra codes 10 to 20. All 20 control account codes and 20 work package codes are now automatically available to be displayed in various areas within PM Compass, including:

- Codes tab of the Change Details view
- Codes tab of the Cost Analysis view
- Codes tab of the Enter Cost Progress form
- Codes tab of the Approve Cost Progress form
- Workflows
- Control Account Search dialog box
- Reports
 - Cost and Schedule Performance Index
 - Cost and Schedule Variance
 - Cost and Schedule Variance Percent
 - Cost vs. Schedule Performance Index
 - Curve
 - Data Mining Detail
 - EAC Analysis
 - Earned Value Histogram
 - Portfolio
 - Price and Usage Analysis
 - Responsibility Assignment Matrix
 - Schedule Traceability Dates
 - Schedule Traceability Progress
 - Time Phased
 - Variance Analysis

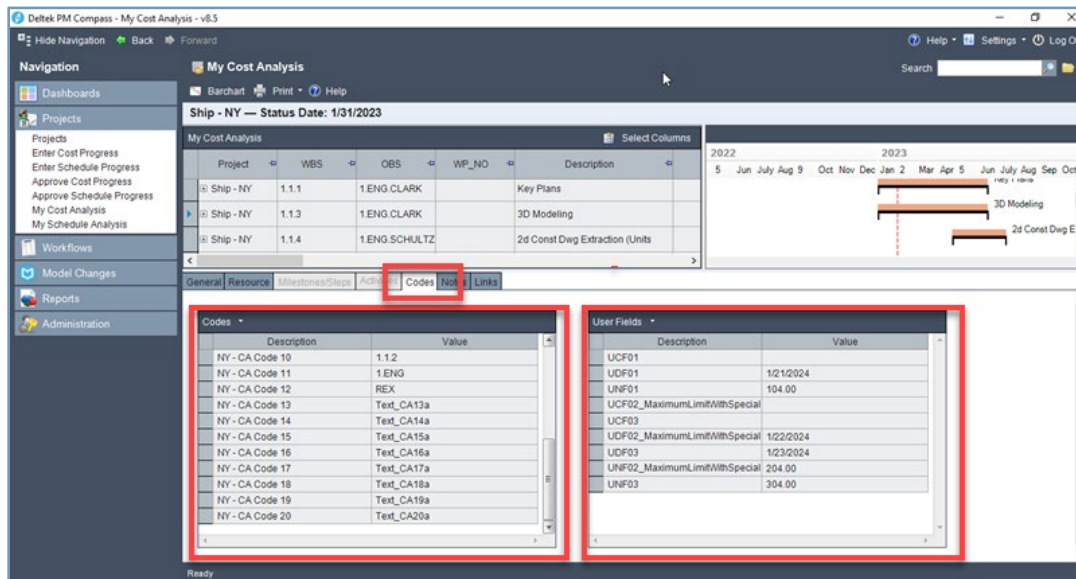
New Features and Enhancements



Enter Cost Progress Form/Control Account Search Dialog Box

Combined Codes and User Fields Tabs

Previously, the Cost Analysis view, Enter Cost Progress form, and Approve Cost Progress form each had distinct Codes and User Fields tabs. However, following the model of the Change Details view, these two tabs are now combined into a single Codes tab. This unified tab features two separate grids—one for codes and another for user fields.



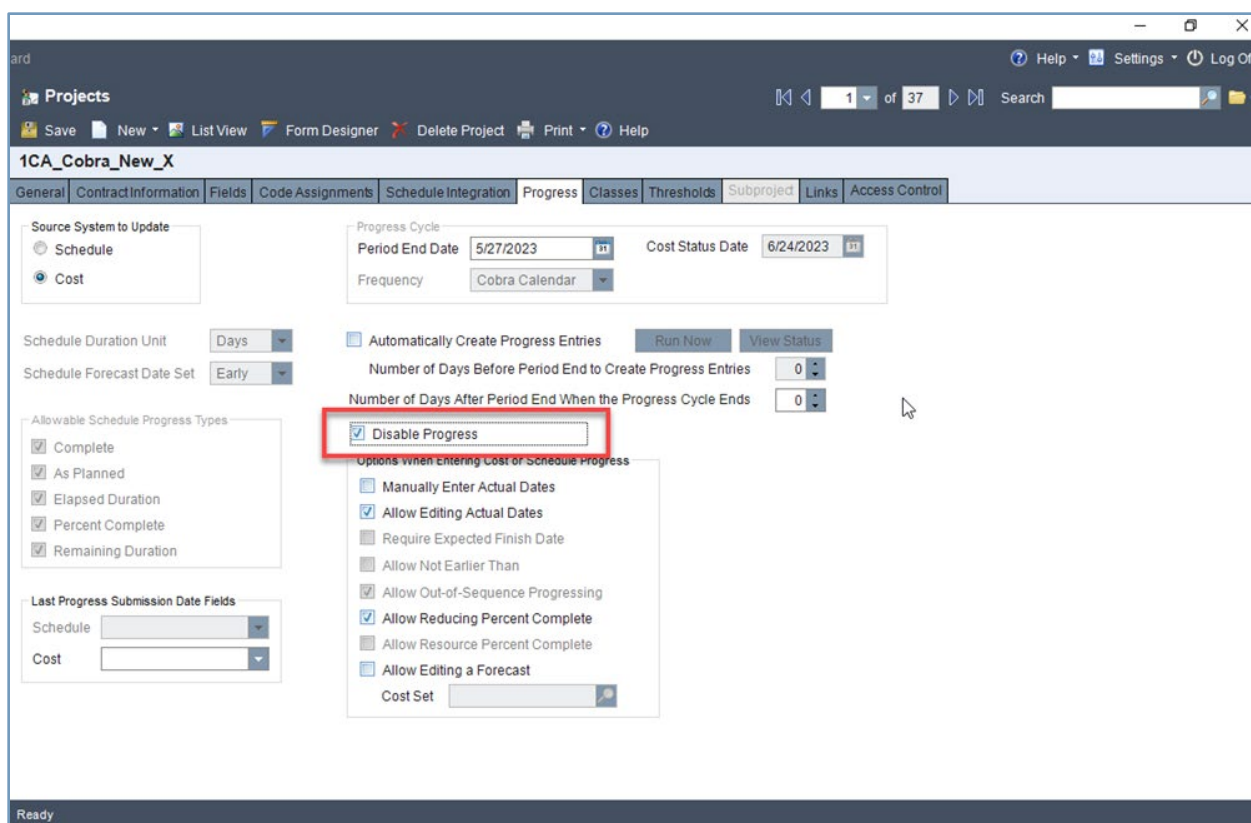
My Cost Analysis View

Attention: For more information, see the following topics in the PM Compass Help System:

- “Accessing the Cobra Codes and User-Defined Fields in PM Compass”
- “Codes Tab of the Change Details View”
- “Codes Tab of the Cost Analysis View”
- “Codes Tab of the Enter Cost Progress Form”

Ability to Disable Progress

You can now disable progress in PM Compass by utilizing the **Disable Progress** option on the Progress tab of the Projects form.



Progress Tab of the Projects Form

Selecting the **Disable Progress** option prevents access to the Enter and Approve Progress views for the selected project. Disabling progress enables you to perform tasks such as time analysis and mitigation, allowing you to finalize the schedules for government reporting without any concerns about changes to the progress entries.

When you select this option:

- The **Enter Progress** and **Approve Progress** buttons in the Projects List view toolbar become disabled.
- The selected project is removed from the Search dialog box in the following views:

- Enter Cost Progress
- Enter Schedule Progress
- Approve Cost Progress
- Approve Schedule Progress

When you select the **Disable Progress** option for a master project, the same option for all the subprojects is automatically selected. However, you can clear the **Disable Progress** option for each of the subprojects. PM Compass evaluates which project progress can be edited at the subproject level.

Attention: For more information, see the following topics in the PM Compass Help System:

- “Progress Tab of the Projects Form”
- “Progress List View Tool Bar”

Support for 20 Schedule User-Defined Fields

You can now configure up to 20 user character fields, 20 user number fields, 20 user date fields, and 20 code fields on the Source Fields tab under the Schedule area on the User Defined Data form.

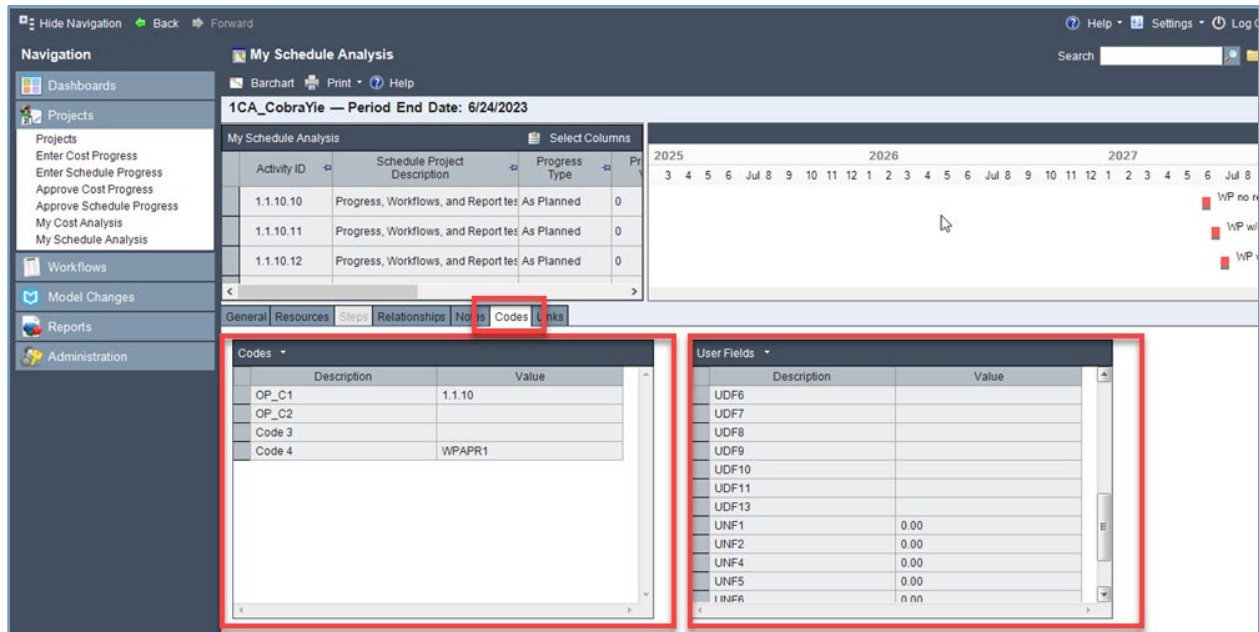
Once the fields are added to the User Defined Data form, you can then view, add, or insert them in various areas within PM Compass, including:

- Codes tab of the Change Details view
- Codes tab of the Schedule Analysis view
- Codes tab of the Enter Schedule Progress form
- Codes tab of the Approve Schedule Progress form

Combined Codes and User Fields Tabs

Previously, the Schedule Analysis view, Enter Schedule Progress form, and Approve Schedule Progress form each had distinct Codes and User Fields tabs. However, following the model of the Change Details view, these two tabs are now combined into a single Codes tab. This unified tab features two separate grids—one for codes and another for user fields.

New Features and Enhancements



Schedule Analysis View

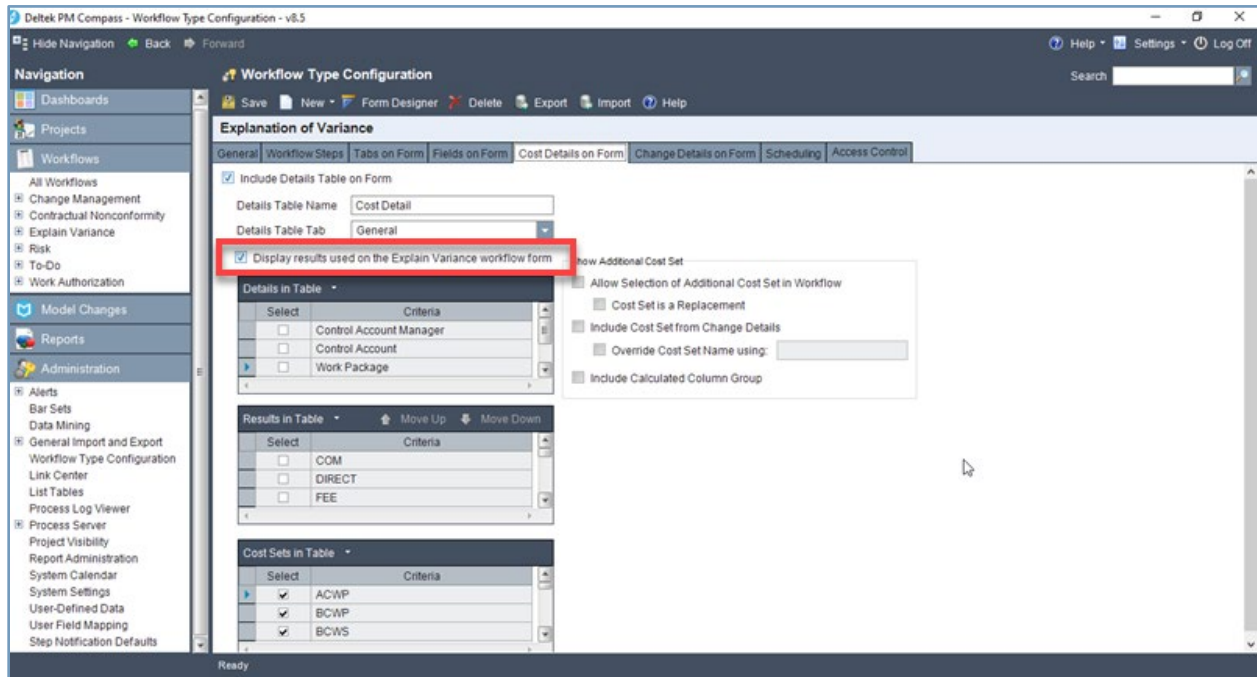
Attention: For more information, see the following topics in the PM Compass Help System:

- “Accessing the Open Plan Fields in PM Compass”
- “Codes Tab of the Change Details View”
- “Codes Tab of the Schedule Analysis View”
- “Codes Tab of the Enter Schedule Progress Form”

Ability to Hide the Values Utilized to Compute Results on the Explanation of Variance Form

The **Display results used on the Explanation Variance workflow form** checkbox has been added to the Cost Details on Form tab of Workflow Type Configuration, allowing you to selectively hide the results that were utilized to compute amounts on the General tab of the Explanation of Variance form. This enhancement is particularly useful because this information can be confusing for individuals outside the business management domain.

New Features and Enhancements



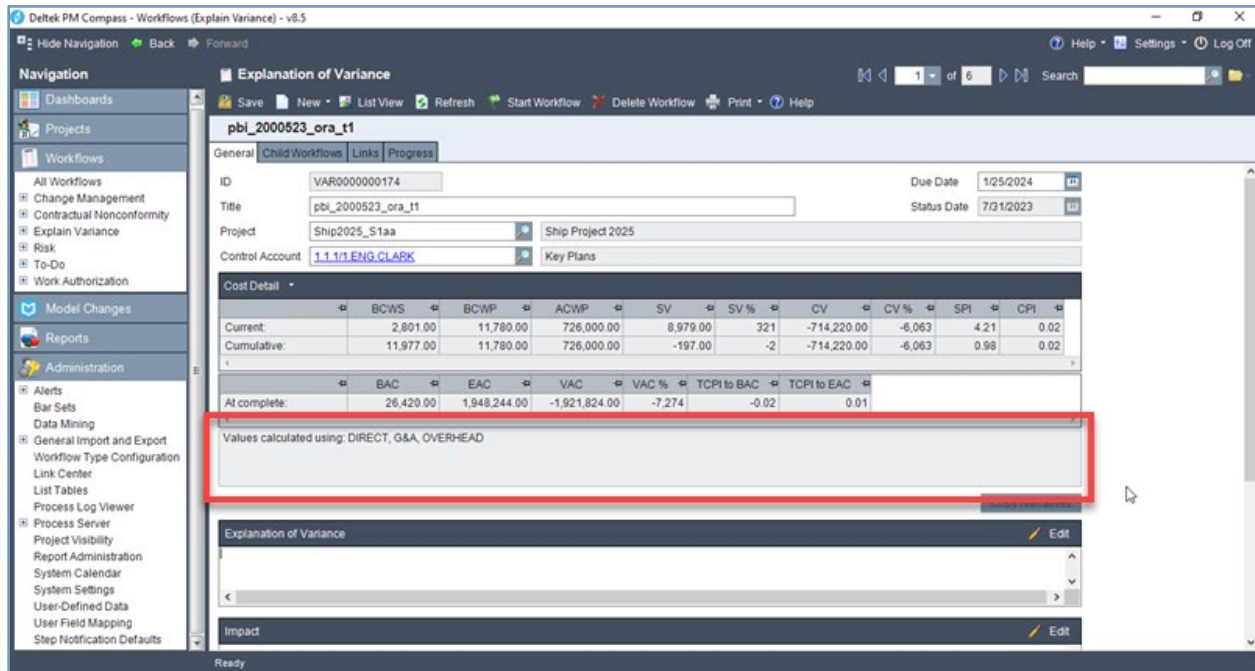
Cost Details on Form Tab of the Workflow Type Configuration

The **Display results used on the Explanation Variance workflow form** checkbox is enabled only if the workflow type meets the following conditions:

- The workflow category is Explain Variance.
- The **Include Details Table on Form** checkbox on the Cost Details on Form tab is selected.
- The BCWP (Earned) cost set is selected in the Cost Sets in Table grid on the Cost Details on Form tab.

If the **Display results used on the Explanation Variance workflow form** checkbox is selected, the **Values calculated using** row is displayed. If the checkbox is not selected, the **Values calculated using** row is hidden.

New Features and Enhancements



Explanation of Variance Form

Attention: For more information, refer to the “Cost Details on Form Tab of Workflow Type Configuration” and “General Tab of the Explanation of Variance Form” topics in the PM Compass Help System.

Copying All Step Actions When Duplicating an Existing Workflow Type

When you copy an existing workflow type, all step actions are also copied.

Enhanced Text Label Display for Long System Labels in WTC

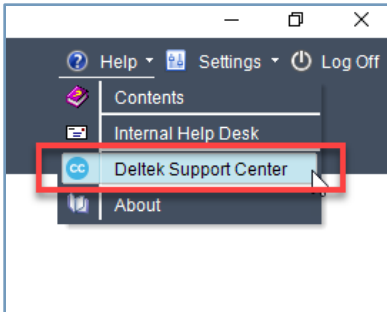
Several enhancements were implemented to enhance the display of long system labels within Workflow Type Configuration (WTC). These enhancements aim to improve usability and readability, making it easier for users to navigate and understand system labels in WTC.

- **Text Clipping:** Previously, long labels could get cut off, making them difficult to read. Now, any text in WTC that exceeds a logical size is displayed on a single line with ellipses at the end, indicating that there is more content. To view the complete label, simply hover over it.
- **General Tab Enhancement:** The General tab in WTC has been enhanced to provide a clearer and more visually appealing layout for users.
- **Default System Labels:** Even when using default system labels, WTC remains clear and readable, ensuring that no text is inadvertently cut off.

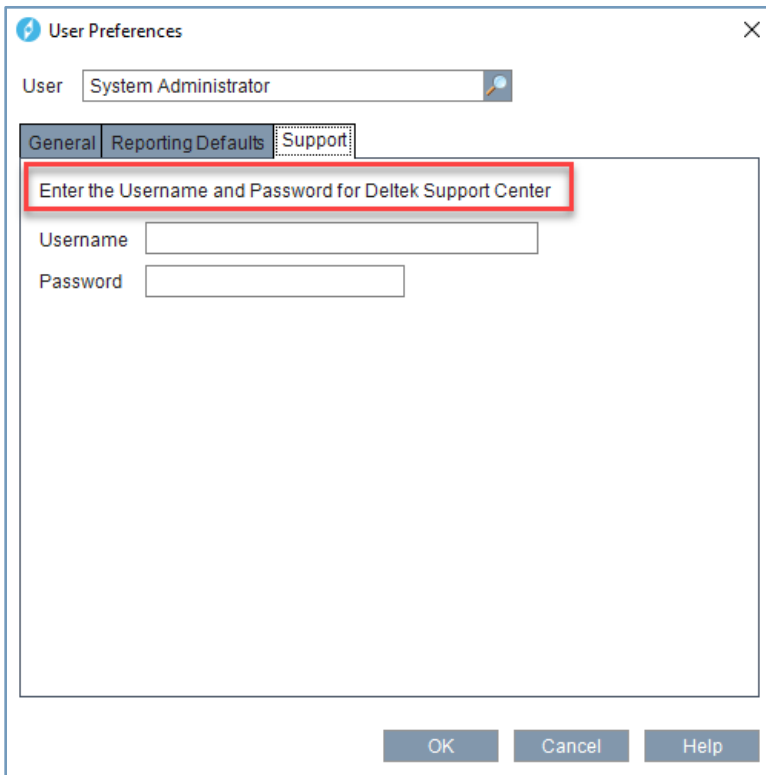
Renamed "Deltek Customer Care" to "Deltek Support Center"

In line with the renaming of **Deltek Customer Care** to **Deltek Support Center**, the following updates have been made within the PM Compass application:

- The **Help** menu on the application toolbar now reflects the new name.



- The label on the Support tab of the User Preferences dialog box has been updated.

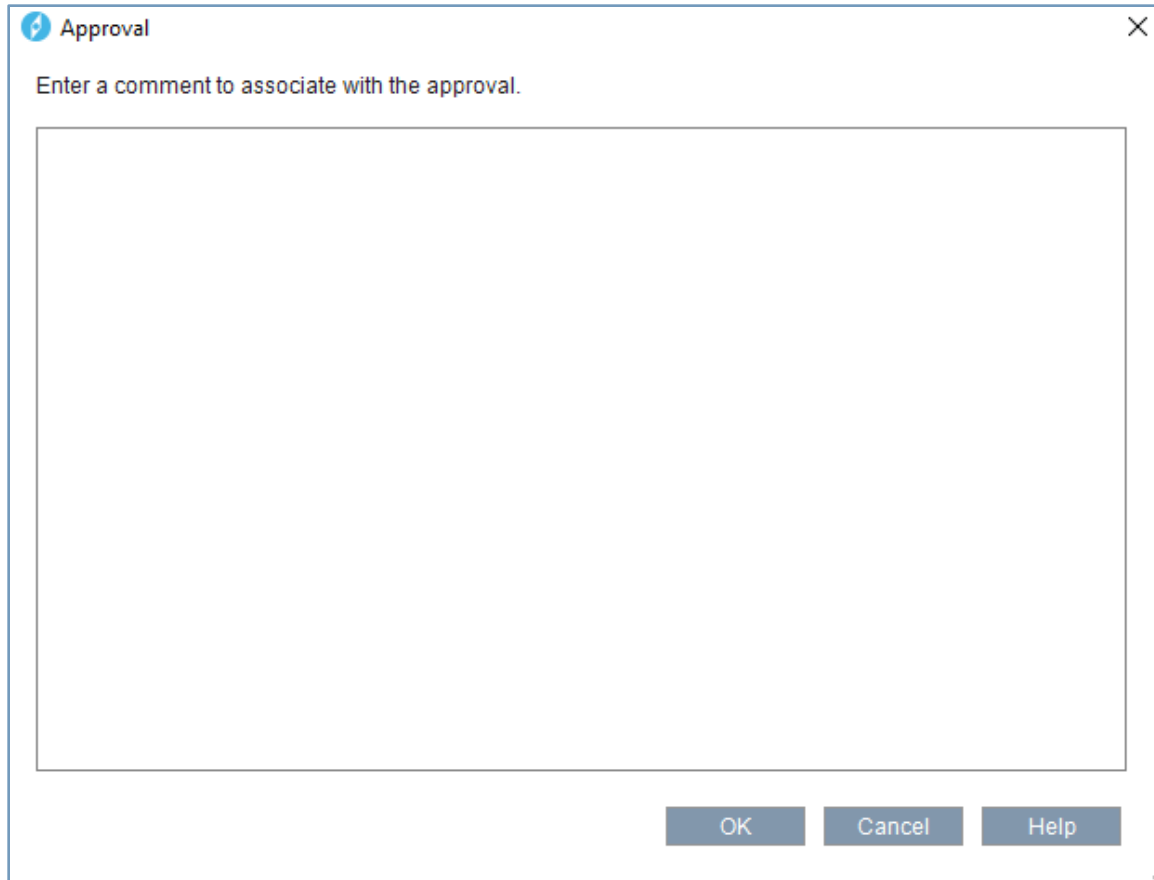


Attention: The following topics in the PM Compass Help System have also been updated to reflect this change:

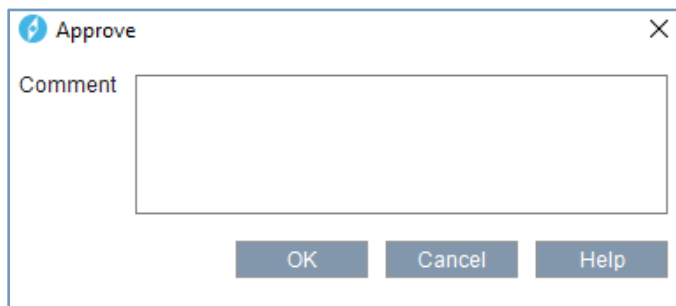
- "Help Menu"
- "Welcome to the Deltek PM Compass Help System Exception Tracing"
- "Exception Tracing"
- "Download Additional PM Compass Documentation"

Comments Dialog Box Update

The Comment dialog box displayed during workflow actions and on the Enter and Approve Progress forms has been updated. The dialog box size has been increased, and its appearance has been standardized to ensure it is centered and uniform.



Comments Dialog Box in PM Compass 8.5



Comments Dialog Box in PM Compass 8.4 or earlier

Support for Azure VM and Azure SQL

PM Compass now fully supports the Azure Virtual Machine (VM) and Azure SQL database.

Software Issues Resolved

This section includes the software issues resolved for this release.

[Administration](#) » [Alerts](#) » [Scheduled Alerts](#)

Defect 2268058

Description: When you added an Insert/Update type of alert in the Alerts grid in the User-Initiated Alert form of a workflow type, the automatic creation of a workflow resulted in the "There is no row at position 1" error.

Customers Impacted: This defect affects customers creating user-initiated alerts.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ApplicationAncestors.Server.dll

[Dashboards](#) » [Dashparts](#) » [Report Dashpart](#)

Defect 2088308

Description: When you created a favorite EAC Analysis report with a master project selected and added it as a report dashpart, PM Compass encountered the following error: "The multi-part identifier 'MasterProgram.Master' could not be bound."

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- EACAnalysis.rdl

Projects

Defect 2096292

Description: After you generated progress, schedule progress entries were displayed in the Cost Progress view.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Projects » Enter Progress

Defect 2095384

Description: When you removed codes or user field columns on the Enter or Approve Schedule Progress form and then reloaded the form or logged in and out of the application, the removed records were retained.

Customers Impacted: This defect affects customers accessing the Enter or Approve Schedule Progress form.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Defect 2247643

Description: When you submitted a progress entry and entered comments with 1,000 characters including spaces, PM Compass encountered an error.

Customers Impacted: This defect affects customers entering progress.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Items.Server.dll

Projects » Enter Cost Progress

Defect 2088820

Description: When you entered more than 100 characters in the User Fields grid on the Codes tab of the Enter Cost Progress form and clicked **Save**, PM Compass encountered the "ORA-12899: value too large for column" error.

Customers Impacted: This defect affects customers accessing the Enter Cost Progress form.

Workaround Before Fix: Enter a user character field value of no more than 100 characters.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Reports » Progress Reporting

Defect 2255095

Description: When you accessed the Progress History Cost report, changes to the forecast dates did not display.

Customers Impacted: This defect affects customers accessing the Progress History Cost report.

Workaround Before Fix: None.

Files Updated:

- Progress History Cost.rdl

Defect 2255271

Description: When you accessed the Progress History Cost report, the progress displayed in reverse order of approval.

Customers Impacted: This defect affects customers accessing the Progress History Cost report.

Workaround Before Fix: None.

Files Updated:

- Progress History Cost.rdl

[Reports](#) » [Progress Reporting](#) » [Progress History-Cost](#)

Defect 2272338

Description: When you accessed the Progress History Cost report, the work package-level data did not update based on the live project data.

Customers Impacted: This defect affects customers accessing the Progress History Cost report.

Workaround Before Fix: None.

Files Updated:

- Progress History Cost.rdl

[Workflows](#)

Defect 2270343

Description: When you clicked the **Reject** button again on the Approve Progress form after the first progress entry on the list had already been approved, PM Compass encountered the "Row number -1 does not exist" error.

Customers Impacted: This defect affects customers accessing workflows.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client

Defect 2270783

Description: When you closed the Comments dialog box, PM Compass encountered an object reference error.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client

Workflows » All Items » Print

Defect 2122570

Description: When you selected either **Print Active Group** or **Print Change Details** from the **Print** menu on the Workflow Form view, a blank Workflow Reporting window displayed.

Customers Impacted: This defect affects customers accessing workflows.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Items.Client

Workflows » Change Management

Defect 2083417

Description: When you manually entered or selected user fields in the Change Details view, they were carried over to the activity level.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Workflows » Change Management » Change Details

Defect 2058570

Description: You could not unlink a schedule without a baseline.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: Before you change the schedule tool to **None** on the Schedule Integration tab of the Project Form view, select **Open Plan** as your scheduling tool first and then select a baseline.

Files Updated:

- Deltek.PMCompass.Projects.Client

Defect 2098808

Description: When you added more than 12 numeric characters to any user numeric fields on the Codes tab of the Change Details view, PM Compass encountered an error while loading the changes.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Defect 2112662

Description: When you edited two activities in the Change Details view and changed the duration of the first activity (where the Requested Finish date was already calculated) and then moved to another activity and changed its duration, the Requested Finish date of the previously changed activity was altered to match its baseline finish date. This made it incorrect as the duration was not in sync with the Requested Finish date.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.Framework.Scheduling.Client.dll

[Workflows » Explain Variance](#)

Defect 2080872

Description: When you cleared and then selected the **Include Details Table on Form** checkbox on the Cost Details on Form tab of Workflow Type Configuration for an Explain Variance workflow type, PM Compass encountered an error.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ItemConfig.Client.dll

Security Enhancements

This release includes security enhancements to address findings from ongoing security monitoring.

Database and Data Changes

This section includes database and data changes for this release.

Database Changes

This section includes the changes made to the database for this release.

Columns

This section includes changes to columns.

New Columns in Existing Tables

Table Name	Column Name	Data Type
CAM_ItemData	NarrativeAnalysisExplanation	nvarchar(max)
CAM_ItemData	NarrativeAnalysisScore	decimal(5,2) NOT NULL
CAM_ItemType	DisplayResultsOnNarratives	varchar(1) NOT NULL
CAM_ItemUpdateStatus	User_Chr11	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr12	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr13	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr14	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr15	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr16	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr17	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr18	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr19	nvarchar(100)
CAM_ItemUpdateStatus	User_Chr20	nvarchar(100)
CAM_ItemUpdateStatus	User_Dte11	datetime
CAM_ItemUpdateStatus	User_Dte12	datetime
CAM_ItemUpdateStatus	User_Dte13	datetime
CAM_ItemUpdateStatus	User_Dte14	datetime
CAM_ItemUpdateStatus	User_Dte15	datetime

Table Name	Column Name	Data Type
CAM_ItemUpdateStatus	User_Dte16	datetime
CAM_ItemUpdateStatus	User_Dte17	datetime
CAM_ItemUpdateStatus	User_Dte18	datetime
CAM_ItemUpdateStatus	User_Dte19	datetime
CAM_ItemUpdateStatus	User_Dte20	datetime
CAM_ItemUpdateStatus	User_Num11	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num12	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num13	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num14	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num15	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num16	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num17	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num18	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num19	decimal(21,6) NOT NULL
CAM_ItemUpdateStatus	User_Num20	decimal(21,6) NOT NULL
CAM_UserPreferences	ExpandNavMenuOnStartup	varchar(1) NOT NULL
PROGRAMCustomTabFields	DisableProgress	varchar(1) NOT NULL

Changes to Existing Columns

Table Name	Column Name	New Data Type
CAM_ItemData	Comments	nvarchar(1000)
CAM_ItemHistory	Comments	nvarchar(1000)
CAM_UserPreferences	SupportPassword	nvarchar(178)

Data Changes

This section includes changes to data applied by scripts.

- Added the ExpandNavMenuOnStartup column to CAM_UserPreferences

Database and Data Changes

- Added new columns to CAM_ItemUpdateStatus
- Added the DisplayResultsOnNarratives column to CAM_ItemType
- Added the DisableProgress column to ProgramCustomTabFields
- Added the NarrativeAnalysisExplanation and NarrativeAnalysisScore columns to CAM_ItemData
- Updated the Comments column length on CAM_ItemData to nvarchar(1000)
- Updated the Comments column length on CAM_ItemHistory to nvarchar(1000)
- Updated the ESupportPassword column length on CAM_UserPreferences to nvarchar(178)

Appendix A: For Additional Information

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Deltek Customer Success analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Deltek Customer Success analyst online

Note: For more information regarding Deltek Support Center, refer to the online help available from the website.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the Need Help? button on the login screen for help.

Available Documentation for this Release

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Support Center.

Document Name	Description
<i>Deltek PM Compass 8.5 Installation Guide</i>	The Installation document provides step-by-step procedures on how to install the application. It also provides information about the software and hardware requirements of the product.
Deltek PM Compass 8.5 Help System	The help system for PM Compass provides administrators and users with screen/field-level documentation for all applications and functions in the current release. You can access the Online Help from the PM Compass application.
Deltek EPM Security Administrator Help System	The help system for the EPM Security Administrator provides administrators with screen/field-level documentation for all the security features of PM Compass. You can access the Help from the EPM Security Administrator application.
<i>Deltek PM Compass 8.5 Technical Overview and System Requirements</i>	The Technical Overview and System Requirements document serves as a guideline for hardware and software requirements and provides your firm's IT department with information about the technical deployment architecture of PM Compass.
<i>Deltek PM Compass 8.5 Advanced Administration Guide</i>	The Advanced Administration document is a supplement to the Deltek PM Compass Technical Installation Guide. It provides additional insight into advanced administration topics for your Deltek application.
<i>Deltek PM Compass 8.5 Custom Reports and Microsoft SQL Server Reporting Services Guide</i>	The Custom Reports and MS SQL Server Reporting Services document provides information for the tasks that are necessary to create, deliver, and generate PM Compass custom reports.
<i>Deltek PM Compass 8.5 Deploying PM Compass in a Hosted Environment</i>	The Deploying PM Compass in a Hosted Environment document provides information to deploy Deltek PM Compass Web Application in a hosted environment or in a shared environment with multiple databases used by different business units or entities.

Document Name	Description
<i>Deltek PM Compass 8.5 Pre- and Post-Installation Checklists</i>	The Pre- and Post-Installation document contains the post installation and preinstallation summary checklists for the PM Compass installation.
<i>Deltek PM Compass 8.5 Standard Reports Guide</i>	The Standard Reports document contains information on the standards reports used in PM Compass.
<i>Deltek PM Compass and Cobra Concurrency Solution Setup and Configuration Guide</i>	The PM Compass and Cobra Concurrency document contains information on how to set up and configure your environment to use the concurrency feature.
<i>Deltek PPM Encryption Conversion Utility Conversion Guide</i>	The PPM Encryption Conversion Utility Conversion document contains information to unitize the PPM Encryption Conversion Utility application.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management, and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com