

Deltek PM Compass 8.5

Pre- and Post-Installation Checklists

May 16, 2025



While Deltek has attempted to verify that the information in this document is accurate and complete, some typographical or technical errors may exist. The recipient of this document is solely responsible for all decisions relating to or use of the information provided herein.

The information contained in this publication is effective as of the publication date below and is subject to change without notice.

This publication contains proprietary information that is protected by copyright. All rights are reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, or translated into another language, without the prior written consent of Deltek, Inc.

This edition published May 2025.

© Deltek, Inc.

Deltek's software is also protected by copyright law and constitutes valuable confidential and proprietary information of Deltek, Inc. and its licensors. The Deltek software, and all related documentation, is provided for use only in accordance with the terms of the license agreement. Unauthorized reproduction or distribution of the program or any portion thereof could result in severe civil or criminal penalties.

All trademarks are the property of their respective owners.



Contents

Overview	1
Installation Order High-Level Overview	2
Pre-Installation Checklists	3
Post Installation Checklist	9

Overview

This guide contains the post installation and preinstallation summary checklists for the PM Compass installation. The information in the related topics column refers to topics in the PM Compass Installation Guide.

You can also find these checklists in the PM Compass Installation Guide with hyperlinks to the related topics.

Cobra and Open Plan Integration

- PM Compass integrates with existing Cobra and Open Plan databases. The installation applies schema changes (tables, views, stored procedures, and so on) to your existing database in order to support the PM Compass integration. Prior to installation, Deltek highly recommends reviewing the Cobra and Open Plan integration appendices in this guide.
- For each version of PM Compass, the Compatibility Matrix lists the Deltek Cobra and Open Plan versions that are supported.
- The Cobra and Open Plan database and workstation deployments must be at the supported version BEFORE you start to install PM Compass.
- Deltek ships a separate integration installer for each version of Cobra and Open Plan. For example, OpenPlan81IntegrationForPMCompass81.exe.
 - Before you install PM Compass, make sure that you have the correct integration installer version for the Deltek Cobra and Open Plan products.
 - If you upgrade Cobra or Open Plan after the PM Compass installation, make sure that you download and apply the upgraded integration installer as well

Microsoft Project and Primavera P6 Integration

- PM Compass supports integration with Microsoft Project and Oracle Primavera P6. Prior to installation, Deltek highly recommends reviewing the Microsoft Project and Primavera P6 integration appendices in this guide.
- For each version of PM Compass, the Compatibility Matrix lists the Microsoft Project and Primavera P6 versions that are supported.
- The Microsoft Project and Primavera P6 deployment must be at the supported version BEFORE you start to install PM Compass.
- Deltek ships separate integration installers for Microsoft Project and Primavera P6. For example, MSP81IntegrationForPMCompass81.exe. If you are integrating with Microsoft Project and you own Open Plan, you must not apply the Microsoft Project integration installer because the Open Plan initialization already takes care of the integration.

Installation Order High-Level Overview

To install PM Compass correctly, the installation of the server roles must be performed in a specific order:

1. **Database Server tier** (SQL Server only or if you plan to use the sample database).
2. **Report Server tier.** Configures the Report Server with security settings required for PM Compass reporting.
3. **Web/Application Server tier.** Installs PM Compass; scripts get applied to the database to make PM Compass usable.
4. **Process Server tier.**

Pre-Installation Checklists

This topic includes a separate checklist for each of the following tiers:

- Database Tier
- Report Tier
- Web/Application Tier
- Process Server Tier

Attention: For an overview of the logical tiers and deployment models, see the following topics in the *PM Compass Installation Guide*:

- Logical Tiers
- Installation/Deployment Models

Cobra and Open Plan Integration

- PM Compass integrates with existing Cobra and Open Plan databases. The installation applies schema changes (tables, views, stored procedures, and so on) to your existing database in order to support the PM Compass integration. Prior to installation, Deltek highly recommends reviewing the Cobra and Open Plan integration appendices in this guide.
- For each version of PM Compass, the Compatibility Matrix lists the Deltek Cobra and Open Plan versions that are supported.
- The Cobra and Open Plan database and workstation deployments must be at the supported version BEFORE you start to install PM Compass.
- Deltek ships a separate integration installer for each version of Cobra and Open Plan. For example, `OpenPlan85IntegrationForPMCompass82.exe`.
 - Before you install PM Compass, make sure that you have the correct integration installer version for the Deltek Cobra and Open Plan products.
 - If you upgrade Cobra or Open Plan after the PM Compass installation, make sure that you download and apply the upgraded integration installer as well

Microsoft Project and Primavera P6 Integration

- PM Compass supports integration with Microsoft Project and Oracle Primavera P6. Prior to installation, Deltek highly recommends reviewing the Microsoft Project and Primavera P6 integration appendices in this guide.
- For each version of PM Compass, the Compatibility Matrix lists the Microsoft Project and Primavera P6 versions that are supported.
- The Microsoft Project and Primavera P6 deployment must be at the supported version BEFORE you start to install PM Compass.
- Deltek ships separate integration installers for Microsoft Project and Primavera P6. For example, `MSP81IntegrationForPMCompass82.exe`. If you are integrating with Microsoft Project and you own Open Plan, you must not apply the Microsoft Project integration installer because the Open Plan initialization already takes care of the integration.

Database Tier

PM Compass does not require any installation to be performed on the Oracle Database Server. Any connections that are needed are made to the database when you run the installer on your Web/Application Server.

Deltek provides several deployment models. For all models, Deltek assumes that your Oracle Database Server is a separate machine. No installations are performed on this machine. All connections to your Database Server are made from the Web/Application or Report Server machines.

Step		Related Topics
1.	A new PM Compass database is Unicode only and uses case-insensitive indexes. Review Appendix G for any specific checks and possible changes that must be performed to ensure your existing Cobra and Open Plan databases are compatible for integration with PM Compass.	Appendix G: Unicode and Case-Insensitive Prerequisites for Cobra and Open Plan Databases

Report Tier

Deltek recommends installing the Database Server first. This step must be performed before installing PM Compass on your PM Compass Web Server.

Step		Related Topics
1.	Verify that the server operating system and all other platform prerequisites (Database Server, Report Server, and so on) are supported.	System Requirements
2.	Before installing PM Compass, confirm that the supported Deltek integrated product versions are installed and any upgrade database scripts have been applied.	System Requirements
3.	Verify that your SQL Server Database Engine and Reporting Services installations meet the system requirements.	System Requirements
4.	Verify that you have at least 2 GB of disk space available for this installation.	
5.	Configure Reporting Services with native mode. PM Compass only supports native mode.	How to Configure Microsoft SQL Server Reporting Services
	If Reporting Services is already configured, you will need to know the Web Service URL and the name of the Report Server databases. See <i>How to Connect to the Report Service Web Service</i> in Related Topics for details on how to get this information.	How to Connect to the Report Service

Step		Related Topics
6.	Verify that the user account has the proper rights and privileges in Reporting Services.	How to Give Your Account Proper Rights and Privileges in Reporting Services
7.	If you experience connection errors to your report server and have verified the previous steps, check that access is not being blocked by Windows or your firewall.	

Web/Application Tier

Note: After installation, review the [Web Server Post-Installation checklist](#).

Step		Related Topics
1.	Verify that the server operating system and all other platform prerequisites (Database Server, Report Server, and so on) are supported.	System Requirements
2.	Before installing PM Compass, confirm that the supported Deltek integrated product versions are installed and any upgrade database scripts have been applied.	System Requirements
3.	Verify that the user account performing the installation is a member of the local Windows System Administrators group. This account is used to run the PM Compass application in IIS on the server, Windows Services, and integrating PM Compass with other products. You will need to use this account when you perform PM Compass upgrades.	Account Performing the Installation
4.	Verify that you have at least 2 GB of disk space available for this installation.	
5.	Enable Microsoft .NET Framework and apply the supported version.	System Requirements
6.	If you have implemented Transport Layer Security (TLS), you will need to perform additional steps.	Secure Transport Layer Security (TLS)
7.	Install Microsoft Internet Information Services (IIS) with ASP .NET enabled.	Microsoft Internet Information Server (IIS) Installation on Windows Server
8.	Verify that you can connect to the SQL Server from your PM Compass server.	Connecting to the SQL Server

Step	Related Topics
9. Verify that the user account performing the installation has the proper access to the Report Tier.	Required Rights for Report Server
10. Ensure that you have one of the following: ▪ If using Windows Authentication, verify that the user account performing the installation has proper access to the Database. ▪ If you use a SQL Server username and password to access the databases, ensure that it is already created and correctly configured.	Prerequisite Report Server and SQL Server Database Credentials
11. Note the PM Compass installation location on your web server. You will need this information for the Process Server tier.	
12. Oracle Users only: ▪ The Oracle client on the Web/Application and Process servers must be 64-bit; however, you also need to install a 32-bit Oracle client for the Cobra Web Service. ▪ Verify that the Oracle Server name/SID defined in tnsnames.ora is the same on your PM Compass Application Server, Report Server, and Process Server tiers.	Storing PM Compass in an Oracle Database
13. Ensure that you have the following information prior to starting your installation: ▪ Reporting Database Server\SQL instance name ▪ Report Server database name ▪ Report Server Web Service URL You can see this information in Reporting Services Configuration Manager when you select Database in the left pane.	Database Requirements How to Connect to the Report Server
14. If you are integrating with Deltek Cobra, Deltek Open Plan, Microsoft Project, or Oracle Primavera P6, make sure that you review all of the integration and configuration requirements.	Appendix K: Integrating with Cobra Appendix L: Integrating with Open Plan Appendix M: Integrating with Microsoft Project Appendix N: Integrating with Primavera P6

Process Server Tier

Note: After installation, review the [Dedicated Process Server Post-Installation checklist](#).

Step	Related Topics
1. Verify that the server operating system and all other platform prerequisites (Database Server, Report Server, and so on) are supported.	System Requirements
2. Before installing PM Compass, confirm that the supported Deltek integrated product versions are installed and any upgrade database scripts have been applied.	System Requirements
3. Verify that the user account performing the installation is a member of the local Windows System Administrators group. This account is used to run the PM Compass Windows Services and integrating PM Compass with other products. You will need to use this account when you perform PM Compass upgrades.	Account Performing the Installation
4. Verify that you have at least 2 GB of disk space available for this installation.	
5. If you have implemented Transport Layer Security (TLS), you will need to perform additional steps.	Secure Transport Layer Security (TLS)
6. Verify that you can connect to the SQL Server from your PM Compass server.	Connecting to the SQL Server
7. Enable Microsoft .NET Framework and apply the supported version.	System Requirements
8. Verify the location (path) of the existing databases.enc file on your web server. During the installation, you will need to provide this information. The default location of this file is: C:\Program Files\Deltek\PM Compass\.	<i>Configure a Shared Location for Databases.enc</i> in the PM Compass Advanced Administration Guide.
9. If you are integrating with Deltek Cobra, Deltek Open Plan, Microsoft Project, or Oracle Primavera P6, make sure that you review all of the integration and configuration requirements.	Appendix K: Integrating with Cobra Appendix L: Integrating with Open Plan Appendix M: Integrating with Microsoft Project Appendix N: Integrating with Primavera P6

Step	Related Topics
10. Oracle Users only: ▪ The Oracle client on the Web/Application and Process servers must be 64-bit; however, you also need to install a 32-bit Oracle client for the Cobra Web Service. ▪ Verify that the Oracle Server name/SID defined in tnsnames.ora is the same on your PM Compass Application Server, Report Server, and Process Server tiers.	

Post Installation Checklist

Recommended Secure Deployment of PM Compass

Steps	Related Topics
1. Security is a critical part of any application. Applications must be secured against disclosure of confidential information, modification, destruction of data, misappropriation of resources, and compromise of accountability. Deltek recommends securing your PM Compass deployment.	<i>Secure Your PM Compass Deployment</i> in the Deltek PM Compass Advanced Administration Guide.

Web/Application Server

Steps	Related Topics
1. Set the Weblink password on the Web Server using EPM SA Weblink.	
2. In Weblink, click on the System Settings tab and review the Polling Interval and Max Concurrent Jobs field settings to confirm that they meet your needs. Deltek recommends that the total of all of the process queues (per server) does not exceed the number in the Max Concurrent Jobs field. If the total of all of your process queues (per server) <u>does</u> exceed the number in the Max Concurrent Jobs field, only the number of jobs as specified in the Max Concurrent Jobs field will run concurrently. If you run too many concurrent jobs, you will add additional load to your Database Server and/or Report Server. Note: If you make changes to the databases.enc file and you are <u>not</u> using a shared databases.enc file, you must copy the changed databases.enc file to all other Web/Application Server and Process Server machines and then restart the Deltek PM Compass Process Server service on each machine. This ensures that each server uses the same configuration. If you have multiple servers and you want to automate the process, Deltek has a script that you can use. See KB article #85452. Deltek recommends that you test the script before using it on your production servers.	▪ <i>Configure a Shared Location for Databases.enc</i> in the PM Compass Advanced Administration Guide. ▪ For more information about how the Max Concurrent Jobs field affects the Process Queues, see the Deltek Weblink online help and the <i>Maximum vs. Max Concurrent Jobs Fields</i> topic in the EPM SA online help.
3. If you have a dedicated Process Server machine and you do not want your Web Server to pick up the Process Server jobs, you should disable the Deltek PM Compass Process Server service	

Steps	Related Topics
on the Web Server. Navigate to Control Panel » Administrative Tools » Services to do so.	
4. Confirm that any upgrade database scripts for Cobra and Open Plan have been applied.	Refer to the Cobra and Open Plan Installation documentation.
5. Confirm that the supported Cobra and Open Plan integration files have been applied.	Appendix K: Integrating with Cobra Appendix L: Integrating with Open Plan
6. In the Administrative Tools » Windows Services applet, verify the Domain account used as the identity for: ▪ The Deltek PM Compass Process Server ▪ Cobra Web Services	
7. Review the new or upgrade (whichever is relevant to you) installation topic in this guide.	Post Installation (PM Compass New Installs) Installation Steps (PM Compass Upgrades)
8. Configure your antivirus, intrusion detection, or malware prevention software to exclude the following folders and files: ▪ <PM Compass Installation Directory>\EPMSA\databases.enc file ▪ <PM Compass Installation Directory>\EPMSA\Web\Bin\ folder ▪ <PM Compass Installation Directory>\PMCompass\Web\web.config file ▪ <PM Compass Installation Directory>\PMCompass\Web\Bin\ folder	
9. If this is a new PM Compass installation, you must complete the following tasks: ▪ Perform on the Server Tier: ▪ Set the IIS/.NET Globalization setting ▪ Set up recovery actions for the PM Compass Process Server ▪ Share the ItemTypeExport folder on the Web Server ▪ Perform on the Client or Server Tier: ▪ Confirm the Polling Interval and Max Concurrent Job Settings ▪ EPM Security Administrator configuration tasks	Post Installation (PM Compass New Installs).

Steps	Related Topics
Specify and apply the default application URL	
10. Configure PM Compass Servers to print to network printers.	Printing in PM Compass

Dedicated Process Server

Steps	Related Topics
1. Refer to Steps 2 and 3 of the Web Server post installation checklist above to view settings that affect the Process Server.	
2. Confirm that any upgrade database scripts for Cobra and Open Plan have been applied.	Refer to the Cobra and Open Plan Installation documentation.
3. Confirm that the supported Cobra and Open Plan integration files have been applied.	Appendix K: Integrating with Cobra Appendix L: Integrating with Open Plan
4. In the Administrative Tools » Windows Services applet, verify the Domain account used as the identity for: - The Deltek PM Compass Process Server - Cobra Web Services	
5. Configure your antivirus, intrusion detection, or malware prevention software to exclude the following folders and files: <PM Compass Installation Directory>\EPMSA\databases.enc file <PM Compass Installation Directory>\EPMSA\Web\Bin\ folder <PM Compass Installation Directory>\PMCompass\Web\web.config file <PM Compass Installation Directory>\PMCompass\Web\Bin\ folder	
6. Apply the Cobra integration on your Process Server. Note: Because PM Compass supports multiple versions of Cobra, if you are using a dedicated Process Server, you need to tell it which DLL version to register on the server after the installation is complete.	Cobra Web Services Integration (Cobra Engine)

Steps	Related Topics
7. Apply the Open Plan Engine files on your server(s). Note: Because PM Compass supports multiple versions of Open Plan, if you are using a dedicated Process Server, you need to tell it which DLL version to register on the server after the installation is complete.	Install the Open Plan Integration Files (Open Plan Engine)
8. If this is a new PM Compass installation, you must complete the following tasks: ▪ Perform on the Server Tier: ▪ Set the IIS/.NET Globalization setting ▪ Set up recovery actions for the PM Compass Process Server ▪ Share the ItemTypeExport folder on the Web Server ▪ Perform on the Client or Server Tier: ▪ Confirm the Polling Interval and Max Concurrent Job Settings ▪ EPM Security Administrator configuration tasks ▪ Specify and apply the default application URL	Post Installation (PM Compass New Installs)
9. In order for scheduled jobs to be processed, you need at least one server running the Deltek PM Compass Process Server Windows Service. If you turn this service off on the Web/Application server, you should add the name of at least one process server and assign queues to the server. In EPM SA, add the name of the process server then assign queues to the server you added: i. Click Configuration » System Settings. ii. On the Servers tab, add the name of your Process Server. iii. Assign the process queues to that Process Server.	For more information, see the EPM SA online help.
10. Configure a dedicated Process server to pick and process jobs only from a specific queue.	Appendix O: Configure a Dedicated Process Server

Client Tier (Workstation)

Steps	Related Topics
1. Supply end-users with PM Compass and EPM SA URLs.	

Steps	Related Topics
▪ PM Compass: Replace servername in the URL with your server name (http://servername/pmcompassclient) ▪ EPM SA: Replace servername in the URL with your server name (http://servername/epmsaclient)	
2. When you launch PM Compass or EPM SA, the credentials for new / sample databases are: Username: SYSADMIN Password: password	How to Run the Deltek PM Compass Sample Database Restore Wizard
3. Open Plan users only: ▪ Verify that the version of Open Plan installed is supported by PM Compass. ▪ Verify that the Open Plan data source entries match those used by PM Compass for the database. Contact your system administrator for the connection details if Open Plan is not already configured.	System Requirements
4. Cobra users only: ▪ Identify the codes that were rotated. ▪ Specify the location of the process logs.	Configure Cobra to Write Process Logs to a File Unicode and Case-Insensitive Prerequisites

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