

Deltek PM Compass 8.5

Technical Overview and System
Requirements Guide

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Introduction

PM Compass provides all the tools to view and manage complex programs from one central location. Deltek PM Compass is the industry's first project management platform specifically designed and built with program managers and project teams in mind. Complete with role-based dashboards and built-in data mining capabilities, Deltek PM Compass is a "command center" where practitioners can effectively monitor and control complex, interconnected projects from the convenience of a single, centralized view.

PM Compass will:

- Increase visibility and control
- Reduce your surprises that cause delays and cost overruns
- Increase accountability and overall efficiency within your organization
- Provide one version of the truth for all project information
- Maintain consistency and predictability in project processes—therefore reducing program risks
- Foster higher levels of communication and collaboration for key stakeholders throughout the organization

PM Compass delivers the project control and visibility you need to ensure that your business can effectively monitor multiple, complexly inter-connected projects—all while remaining focused on project success.

Deltek has designed several PM Compass deployment models to ensure the best fit with your firm's environment. PM Compass's tiers are all logical tiers, which can be collapsed or allocated to as many physical servers as needed by your firm.

It is important to note that the choices of hardware, database, and operating system in these examples represent guidelines, are subject to change, and do not replace a needs analysis and site survey with a Deltek Technical Consultant. Contact a Deltek Technical Systems Engineer for suitability of legacy equipment.

Consulting

Deltek, Inc. can provide onsite consulting and training services as well as phone support on a contract or time-and-materials basis.

Additional Notes

Legal Disclaimer: The recommendations in this document are intended to convey general information and should not be relied upon as a substitute for a professional consultation with Deltek. All the information in this document is provided "as is" and without warranties of any kind, either expressed or implied.

The evolution of technology dictates the way IT professionals plan their network hardware and software environments. While this document does not account for all possible options in the deployment of Deltek software, it does provide specific recommendations based on testing metrics and years of experience working directly with Deltek customers.

Prior to making assumptions on how specific 3rd party technologies will perform with Deltek applications, Deltek recommends contacting your sales representative to arrange a discussion with a Deltek Technical

Systems Engineer who can help you plan for a cost effective and optimally performing application environment.

Before You Begin Deployment

Before you begin deployment, it is important to understand the following:

- Hardware and Software Requirements
- Logical Tiers
- Database Requirements
- Reporting Services

Hardware and Software Requirements

This section covers the hardware and software requirements for deploying PM Compass.

Attention: Prior to proceeding with the installation, see [“System Requirements”](#) in this guide for a comprehensive overview of the software and hardware requirements.

Deltek Cobra and Open Plan

Before upgrading, you must have Cobra and Open Plan upgraded to a supported version.

Note: Check the latest Cumulative Update Release Notes for information on compatible and tested Cobra and Open Plan products.

Deltek recommends that you make a backup of your production database before installing PM Compass.

To install a test version of PM Compass into a database that is not a production database, you have two options:

- Copy the production database to a new database and confirm that Cobra and Open Plan are working correctly when connected to the new database. Then, install PM Compass into the new database. This method has the advantage of retaining all security, saved reports, projects, and other relevant data.
- Install PM Compass into a new database and then restore the Cobra projects into the database.

If you upgrade Cobra or Open Plan after the PM Compass installation, download the sub-release integration installer for either Cobra or Open Plan, and install the integrations.

Logical Tiers Overview

PM Compass uses a multitier architecture. Various components of the PM Compass application are distributed to logical tiers for performance and scalability. Multiple tiers can exist on the same server.

The logical tiers are as follows:

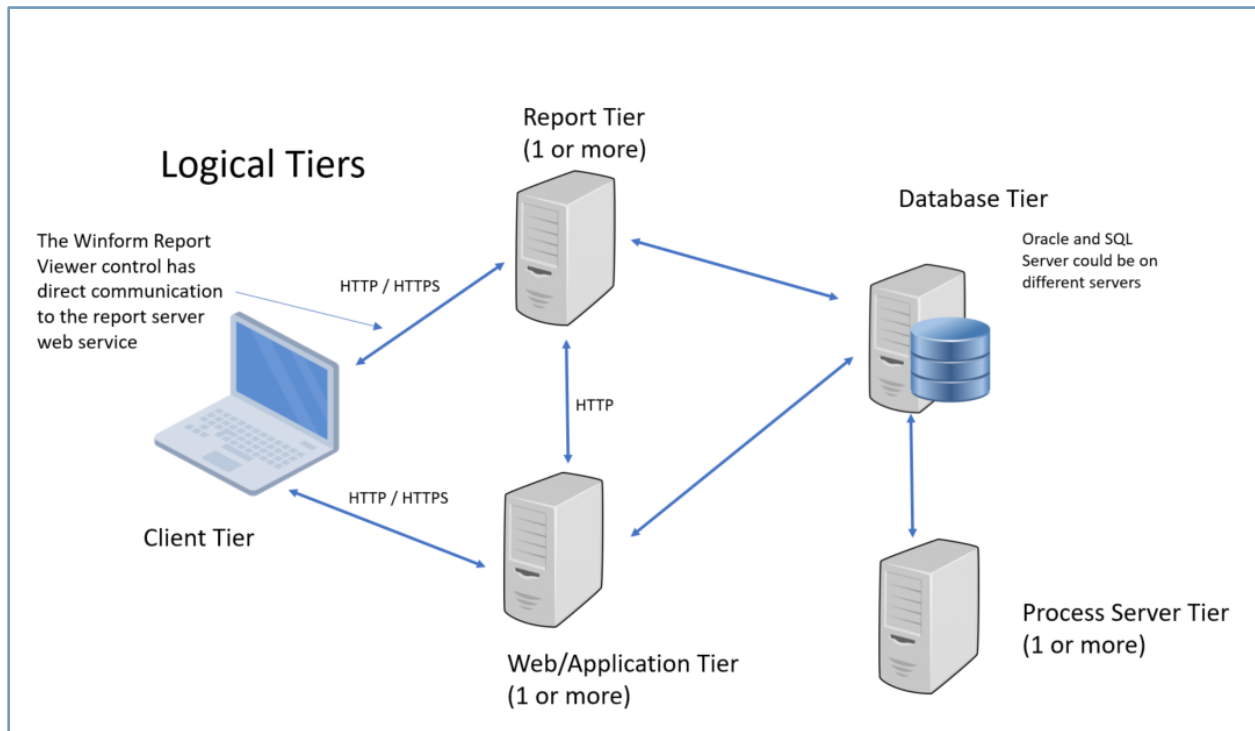
- **Client Tier:** This is PM Compass' user interface layer. It presents input data to the Application/Web server tier. PM Compass uses the ClickOnce deployment technology to check for new updates on the Web/Application server each time the application is launched, the necessary client files are automatically installed into the local user's profile (%USERPROFILE%\Local Settings\Apps\2.0\...).

Before You Begin Deployment

- **Web/Application Server Tier:** This tier performs PM Compass' functional process logic. After a request is sent by the client tier, this tier processes that request (such as retrieving stored data or performing a specific function) and then returns the result to the client tier. This tier also uses IIS to host the Deltek PM Compass and EPM Security Administrator applications.
- **Process Server Tier:** This tier allows the user to schedule processes and profiles to run automatically in the background. All reports and all scheduled alerts are examples of processes that can run on the Process server.
- **Report Server Tier:** This tier handles all reporting requests. It uses Microsoft SQL Server Reporting Services.
- **Database Tier:** This tier consists of Database servers where the PM Compass data is stored and retrieved. This can either be an Oracle database or a SQL Server database. PM Compass requires Open Plan and Cobra data stored in the same database as PM Compass. Your Oracle Database server should be on a separate server. All connections to your Database server are made from the Web/Application or Report server.

Logical Tier Model

The diagram below provides information about the logical tiers and technologies utilized at each tier of a Deltek PM Compass deployment. Logical tiers do not necessarily require a separate server for each tier. For example, a single-server deployment includes each of the tiers below installed and configured on the single server.



Logical Tier Model

Attention: For more information on other deployments and the following topics, see the *Deltek PM Compass Advanced Administration Guide*:

- Load Balancing
- Reverse Proxy
- Secure Socket Layer

Database Requirements

PM Compass data can be stored in a SQL Server database or an Oracle database. If you are not integrating with an existing Cobra or Open Plan database and are not upgrading an existing installation, you must create a new blank database before performing the installation. The installation will provide database script options for applying the PM Compass schema into the blank database. During the installation, you will be asked to provide the server and database name for the various components. If your database is not set to auto expand, make sure that there is enough space to accommodate the objects and data that PM Compass will be introducing.

PM Compass database is Unicode and uses case-insensitive indexes. When you are upgrading an existing Open Plan database to PM Compass, ensure that the database is Unicode-enabled and uses case-insensitive indexes.

Attention: For more information, see “Appendix H: Unicode and Case-Insensitive Prerequisites for Cobra and Open Plan Databases” in the *Deltek PM Compass 8.5 Installation Guide*.

Sample Database

The PM Compass installation includes a backup of a sample database. This sample database serves as a valuable resource for learning how to use PM Compass and troubleshooting issues. If a Customer Success Analyst requests it, you can attempt to recreate an issue in the sample database. This process assists the analyst in determining whether the problem is data-related or if there is indeed an issue within PM Compass.

Attention: For more information, see “Using the Sample Database” in the *Deltek PM Compass 8.5 Installation Guide*.

SQL Server Reporting Services

PM Compass reporting requires SQL Server Reporting Services and a Microsoft SQL Server database even if you are storing your Cobra and PM Compass data in Oracle. The database component of Microsoft SQL Server Reporting Services requires certain settings.

Note: Review “Appendix C: Microsoft SQL Server Reporting Services” in the *Deltek PM Compass 8.5 Installation Guide* to make sure the report server database configuration is correct.

- **Oracle Database:** When PM Compass data is stored in an Oracle database, the sample database should be restored into the SQL Server database used by the SQL Reporting Services. When you perform the Report tier installation, the backup file containing the sample database is copied onto the Report server into the PM Compass installation location.

At the end of the Web/Application tier installation, you have the option to restore the sample database from the backup file on the Report server. If you choose to restore the sample database, even though you are on Web/Application server, the process restores the sample database into the SQL Server database engine used by the Report server.

- **Microsoft SQL Server Database:** When PM Compass data is stored in a Microsoft SQL Server database, the sample database can be restored into your SQL Server database engine. When you perform the Database tier installation, the backup file containing the sample database is copied onto the Database server into the PM Compass installation location.

At the end of the Web/Application tier installation, you have the option to restore the sample database from the backup file located on the Database server. Even though you are performing the restore from the Web/Application server, the process to restore the sample database is being performed remotely on the Database server.

Installation/Deployment Models

When you install PM Compass, you are asked to select an installation model. There are three different models used to deploy PM Compass. The model you choose depends on your organization’s needs with regard to size, cost considerations, security requirements, and fault tolerance. The following table provides information about each model. The installation steps for each model are included in this document. Once you decide which model you want to install, click the Installation Steps hyperlink to take you to the installation instructions for that model.

Attention: For more information, see “Installation/Deployment Models” in the *Deltek PM Compass 8.5 Installation Guide*.

Deployment Model	Overview	When Would I Use This Model?
<p>One-Server (Single Server) One-Server Installation Steps</p>	<p>Install PM Compass tiers (Web, Application, Process, Report, and Database server) on the same server.</p> <p>Optionally install database on a different server.</p> <p>Infrastructure security is not a concern with this model because all application usage is internal to the organization.</p>	<p>Deployment needs are simple. For example, you are installing PM Compass on a test server.</p> <p>All users are at a single location and will only access PM Compass in the office or over a Virtual Private Network (VPN) connection into the corporate network.</p> <p>Small organization (fewer than 25 employees)</p> <p>If your Web/Application server, Report server, and database tier are all on the same server, you must use this installation model.</p>
<p>Two-Server (Two-Tier) Configuration 1 Two-Server Installation Steps</p>	<p>Install the database and report components on one or more servers and the Web/Application and Process Server components on a separate server.</p>	<p>Your organization has one SQL Server license.</p> <p>All users are at a single location and will only access PM Compass in the office or over a</p>

Deployment Model	Overview	When Would I Use This Model?
	<p>In this configuration the PM Compass client application needs a direct connection to the Report server to run and view reports.</p> <p>Infrastructure security is not a concern with this model because all application usage is internal to the organization.</p>	<p>Virtual Private Network (VPN) connection into the corporate network.</p> <p>Since the Database server is also on the Report server, it is not suitable for use in an environment with users accessing the application over the Internet without a VPN connection.</p> <p>Small to medium organization that may not have a technical staff.</p> <p>If your Report server is on the same server as your database tier, you must use this installation model.</p>
<p>Two-Server (Two-Tier) Configuration 2 Two-Server Installation Steps</p>	<p>Install the database component on a server and the Web/Application server, Process server, and Report server components on a separate server.</p> <p>Reporting services are installed on a server separate from the database engine.</p>	<p>Your organization has additional Microsoft SQL Server licenses, and you split the Report server (Web Service) from the Database server hosting the Report server database.</p> <p>Users are accessing the application over the internet.</p> <p>Small to medium organization that may not have a technical staff.</p> <p>If your Web/Application server and your Report server are on the same server, you must use this installation model.</p>
<p>Three or More Servers Three or More Servers Installation Steps</p>	<p>Install any of the following:</p> <ul style="list-style-type: none"> ▪ A single Database server ▪ One or more Report servers ▪ One or more Web/Application servers ▪ One or more Process servers 	<p>You have a large organization with many PM Compass users.</p> <p>Have a need for additional Report, Web/Application, or Process servers for load balancing, performance, security, or fault tolerance reasons.</p> <p>Organizations with proficient firewall management.</p> <p>Having each tier on a separate server enhances performance</p>

Deployment Model	Overview	When Would I Use This Model?
		<p>and scalability. In addition, it is easy to add additional servers after deployment.</p> <p>Require load balancing multiple servers for better performance.</p>

Secure Transport Layer Security (TLS)

Transport Layer Security (TLS), and its predecessor, Secure Sockets Layer (SSL), are protocols that use cryptographic algorithms to provide secure communications between machines. Although there are several versions of TLS and SSL, only TLS 1.2 and TLS 1.3 are considered secure. Since TLS 1.3 is still relatively new and not fully implemented throughout the industry, best practices recommend using TLS 1.2 for secure communication between machines. Using the older protocols is considered a security risk. The industry standard is to enable TLS 1.2 and disable TLS 1.1, 1.0, and disable SSL 3.0, 2.0, 1.0.

For the Deltek application to communicate correctly between all tiers (Database, Application/Web, Report, and Client), the Operating System (OS) on all machines in the deployment must share the same TLS configuration. In addition, any components used by the application (the .NET Framework and database client drivers) must support the TLS version implemented on the OS.

If your company implements the secure TLS by enabling TLS 1.2 and disabling the older protocols on the machines in your environment, ensure the following are performed:

- The TLS configuration on all machines (servers and clients) must be the same.
- The Operating System must support TLS 1.2.

Attention: For more information, see <https://docs.microsoft.com/en-us/security/solving-tls1-problem#ensuring-support-for-tls-12-across-deployed-operating-systems>.

- The version of Microsoft .NET Framework in use must support TLS 1.2.

Attention: For more information, see <https://docs.microsoft.com/en-us/dotnet/framework/network-programming/tls#support-for-tls-12>.

- If you are using load balancing, ensure that it is configured to support the hardened TLS settings.
- If you use Oracle, TLS 1.2 is supported with Oracle client versions supported by PM Compass.
- If you use SQL Server, the default Microsoft OLE DB Provider only supports TLS 1.0. The following Microsoft drivers support TLS 1.2:
 - SQL Server Native Client 11.0
 - Microsoft OLE DB Driver
 - Microsoft OLE DB Provider for SQL Server
 - Supported on Windows 10 (Open Plan client)
 - Supported on Windows Server 2019 with this specific Windows update applied: October 20, 2020—KB4580390 (OS Build 17763.1554)

Load Balancing

If you select three or more server installations, you can configure load balancing according to your vendor's (for example, Microsoft Windows Server) recommendations. Make sure that you set the affinity to Single or Sticky (terminology depends on the vendor). This ensures that user sessions are maintained on the same server as long as a user remains logged on.

- **Configure Database Session State for PM Compass:** Session state information is typically stored in memory on the Web server in the IIS Application Pool process serving the application (w3wp.exe). Database session state is normally not a consideration unless you will be load balancing multiple front-end PM Compass Web/Application servers and you would like to isolate your user's session information from a failure or error on one Web server where their session information may be lost.

One benefit of storing the session state in the database is that, when there is a Web Server failover, the work that was being performed at the time is not lost.

Attention: For more information, see "Configure Database Session State for PM Compass" in the *Deltek PM Compass Advanced Administration Guide*.

- **Configure a Shared Location for Databases.enc:** If your PM Compass deployment includes multiple Web/Application servers, or even just a dedicated Process server, configuring a shared location for the database connection information and credentials (databases.enc file) to eliminate the need to synchronize changes made to the databases.enc file across your servers.

Attention: For more information, see "Configure a Shared Location for Databases.enc" in the *Deltek PM Compass Advanced Administration Guide*.

- **Loading Reports onto Load Balanced SSRS Web Service Servers:** When you have multiple SSRS servers in a load balanced environment, they all have a common URL; therefore, you do not know to which Web server you are connecting. The only way to ensure that all SSRS Servers are updated with the latest PM Compass reports is to run a batch file that updates each individual SSRS Server by its NetBIOS or host name.

System Requirements

Deltek recommends that you carefully consider the system requirements necessary to run PM Compass properly.

Server Software Requirements

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

The software requirements for each logical tier are listed in the tables below.

- **Supported Versions:** These are the actively tested versions of technologies used to deploy Cobra. These technologies are neither embedded in nor directly supported by Deltek. Changes to these technologies are made at the discretion of the technology vendors.
- **Compatible Versions:** These are previously supported and tested technologies used to deploy Cobra. These are not actively tested but are believed to be compatible with Cobra. Deltek does not recommend these technologies for new deployments but will make its best effort to answer related questions. These technologies may not be available for troubleshooting by Deltek.

Supported Deployment Technology	Compatible Deployment Technology
Database Server (Oracle)	
<p>The supported minimum software requirements for the complete installation of Deltek PM Compass database tier with Oracle include:</p> <p>Operating System</p> <ul style="list-style-type: none"> ▪ Microsoft Windows Server 2022 Azure Edition ▪ Microsoft Windows Server 2022 ▪ Microsoft Windows Server 2019 <p>Database Platform</p> <p>Oracle Databases (Standard/Enterprise)</p> <ul style="list-style-type: none"> ▪ Oracle RDBMS 19.10 or higher <p>JServer Java Virtual Machine Required</p>	<p>Operating Systems</p> <ul style="list-style-type: none"> ▪ Microsoft Windows Server 2016 ▪ UNIX supported with Oracle Databases ▪ Standard and Enterprise editions supported ▪ 64-bit (x64) Database Server supported ▪ JServer Java Virtual Machine ▪ Supported on Linux, Unix, and Exadata
Database Server (Microsoft SQL Server) 64-bit only	
<p>The supported minimum software requirements for a complete installation of Deltek PM Compass database tier with Microsoft SQL Server include:</p> <p>Operating System</p> <ul style="list-style-type: none"> ▪ Microsoft Windows Server 2022 Azure Edition ▪ Microsoft Windows Server 2022 	<p>Operating System</p> <ul style="list-style-type: none"> ▪ Microsoft Windows Server 2016 <p>Database Platform</p> <ul style="list-style-type: none"> ▪ Microsoft SQL Server 2017 ▪ Microsoft SQL Server 2016

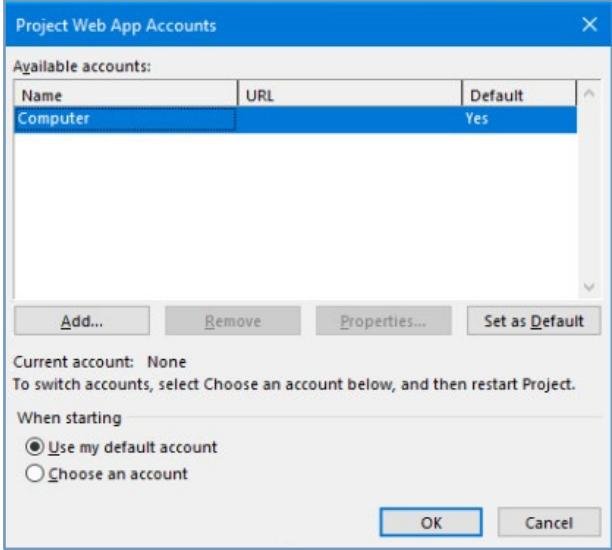
Supported Deployment Technology	Compatible Deployment Technology
<ul style="list-style-type: none"> ▪ Microsoft Windows Server 2019 <p>Database Platform</p> <ul style="list-style-type: none"> ▪ Microsoft Azure SQL ▪ Microsoft SQL Server 2022 ▪ Microsoft SQL Server 2019 <p>Other</p> <ul style="list-style-type: none"> ▪ Microsoft .NET Framework 4.8 (Required for the optional installer) <p>Database Compatibility Level</p> <ul style="list-style-type: none"> ▪ Microsoft SQL Server 2022 (150) ▪ Microsoft SQL Server 2019 (140) 	
AI Model Provider	
<ul style="list-style-type: none"> ▪ Microsoft Azure OpenAI GPT-35-Turbo ▪ Microsoft Azure OpenAI GPT-4-Turbo ▪ Microsoft Azure OpenAI GPT-4o ▪ Microsoft Azure Government Cloud GPT-35-Turbo ▪ Microsoft Azure Government Cloud GPT4-Turbo ▪ Microsoft Azure Government OpenAI GPT-4o 	
Report Server (Microsoft SQL Server) 64-bit only	
<p>The supported minimum software requirements for the complete installation of Deltek PM Compass Report server tier with Microsoft SQL Server include:</p> <p>Operating System</p> <ul style="list-style-type: none"> ▪ Microsoft Windows Server 2022 Azure Edition ▪ Microsoft Windows Server 2022 ▪ Microsoft Windows Server 2019 <p>Microsoft SQL Server Reporting Services with Report Server database on PM Compass supported SQL Server versions ¹</p> <ul style="list-style-type: none"> ▪ Microsoft SQL Server Reporting Services 2022 ▪ Microsoft SQL Server Reporting Services 2019 ▪ Microsoft SQL Server Reporting Services 2017 	<p>Operating Systems</p> <ul style="list-style-type: none"> ▪ Microsoft Windows Server 2016 <p>Operating Systems</p> <ul style="list-style-type: none"> ▪ Microsoft Visual C++ Redistributable for Visual Studio 2015–2022

Supported Deployment Technology	Compatible Deployment Technology
<p>Warning: ¹SSRS Report Server databases cannot be hosted on Microsoft Azure SQL because Microsoft SSRS does not support it.</p> <p>Oracle Client - (For Oracle databases only) (64-bit/x64)</p> <ul style="list-style-type: none"> Must match OS Platform Version must match Oracle database server. 19c (64-bit only) Oracle Server name/SID defined in tnsnames.ora must be the same on your PM Compass Application, Report, and Process server tiers. <p>Other</p> <ul style="list-style-type: none"> Microsoft .NET Framework 4.8 Microsoft Visual C++ Redistributable for Visual Studio 2015–2022 <p>Required when running PM Compass client on the Web server</p>	

Web and Process Servers Software Requirements

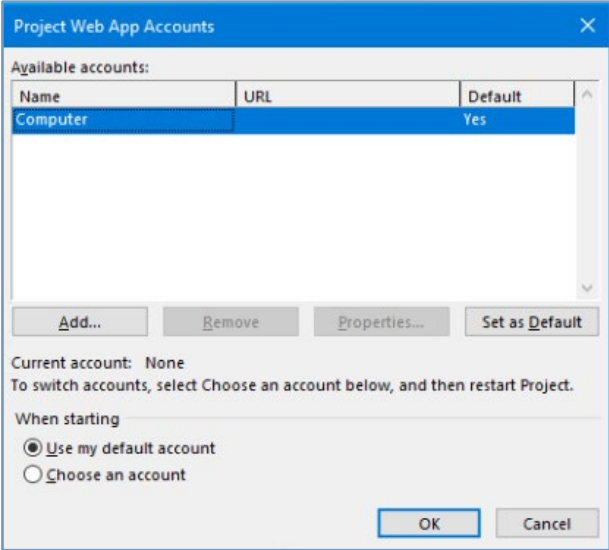
Supported Deployment Technology	Compatible Deployment Technology
Web Server	
The supported minimum software requirements for the complete installation of Deltek PM Compass Web server tier include:	
<p>Operating System</p> <ul style="list-style-type: none"> Microsoft Windows Server 2022 Azure Edition - With Microsoft Internet Information Services (IIS) 10.0 Role enabled Microsoft Windows Server 2022 - With Microsoft Internet Information Services (IIS) 10.0 Role enabled Microsoft Windows Server 2019 - With Microsoft Internet Information Services (IIS) 10.0 Role enabled 	<p>Operating System</p> <ul style="list-style-type: none"> Microsoft Windows Server 2016 - With Microsoft Internet Information Services (IIS) 10.0 Role enabled
<p>Transport Layer Security (TLS)</p> <p>If you have implemented TLS, review Appendix S: Secure Transport Layer Security (TLS).</p>	

Supported Deployment Technology	Compatible Deployment Technology
<p>Oracle Client - For Oracle databases only</p> <p>You must install both the 32-bit and 64-bit Oracle client on the Web server.</p> <ul style="list-style-type: none"> ▪ Version must match the Oracle database server. <ul style="list-style-type: none"> ▪ 19c (Deltek recommends 19.3 or higher¹) ▪ Oracle Server name/SID defined in tnsnames.ora must be the same on your PM Compass Application, Report, and Process server tiers. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note:</p> <ul style="list-style-type: none"> ▪ You must install the supported .NET Framework before installing the Oracle client. ▪ ¹The Oracle client installations do not register the data access components. See “Register your Oracle Client” section in “Appendix F: Using Oracle with PM Compass” of this guide for details to register the Oracle data components to avoid an error in the PM Compass application when it tries to connect to the Oracle database. </div>	
<p>SQL Server Database Drivers - For SQL Server databases only (32-bit and 64-bit)</p> <ul style="list-style-type: none"> ▪ Microsoft OLE DB Driver 19 for SQL Server (x64) ▪ Microsoft ODBC Driver 17.3 for SQL Server ▪ Microsoft Command Line Utilities 15 for SQL Server ▪ Microsoft SQL Server 2012 Native Client ▪ Microsoft Visual FoxPro OLEDB Provider 	
<p>Optional Scheduling Integration with Microsoft Project Files (.mpp files)</p> <p>For PM Compass to integrate with Microsoft Project files (.mpp files):</p> <ul style="list-style-type: none"> ▪ You must install one of the following on the PM Compass server: <ul style="list-style-type: none"> ▪ Microsoft Project Professional 2013 (on Windows Server 2016 and 2019) ▪ Microsoft Project Professional 2016 (on Windows Server 2022) ▪ Microsoft Project Professional 2019 	

Supported Deployment Technology	Compatible Deployment Technology
<ul style="list-style-type: none"> ▪ Microsoft Project Professional 2021 ▪ Microsoft Project Professional 2024 <p>Microsoft Project Professional 2019, 2021, and 2024 are supported for .mpp files only.</p> <p>Microsoft Project Standard is also supported for those versions.</p> <p>AND</p> <ul style="list-style-type: none"> ▪ You must configure the Project Server accounts on the Project Web App Accounts setting menu by selecting the following: <ul style="list-style-type: none"> ▪ Computer Account ▪ Set as Default 	
<p>Optional Scheduling Integration with Microsoft Project Server (Project Web Application versions 2013 or 2016 only)</p> <p>For PM Compass to integrate with Microsoft Project Server, the PM Compass server requires Microsoft Project Professional 2013 SP1 64-bit version only with update from Nov 10, 2015 applied on the server.</p> <p>Supported Microsoft Project Server / PWA scenarios:</p> <ul style="list-style-type: none"> ▪ Microsoft Project Server / PWA 2013 with Microsoft Project Professional 2013 ▪ Microsoft Project Server / PWA 2016 with Microsoft Project Professional 2013 <p>Not supported:</p> <ul style="list-style-type: none"> ▪ Connection to Microsoft Project Server / PWA 2019 	

Supported Deployment Technology	Compatible Deployment Technology
<ul style="list-style-type: none"> ▪ Connection to Microsoft Project Server / PWA using Microsoft Project Professional 2016 or higher <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>Warning: PM Compass supports integrating and connecting to Microsoft Project Server, but it REQUIRES that the Microsoft Project Professional 2013 64-bit client be installed on the PM Compass Web/Application and Process servers.</p> <p>Do not install Microsoft Project Professional 2016 on the PM Compass Web/Application and Process servers.</p> <p>Microsoft Windows Server 2022 does not support Microsoft Project Professional 2013 installation and license activation.</p> <p>PM Compass does not support connection to Project Web Application 2019.</p> </div>	
<p>Optional Scheduling Integration with Oracle Primavera</p> <ul style="list-style-type: none"> ▪ Oracle Primavera P6 EPPM 23.12 ▪ Oracle Primavera P6 EPPM 22.12 ▪ Oracle Primavera P6 EPPM 21.12 	<p>Oracle Primavera</p> <ul style="list-style-type: none"> ▪ Oracle Primavera P6 EPPM 19.12 ▪ Oracle Primavera P6 EPPM 18.8 ▪ Oracle Primavera P6 EPPM 17.12
<p>Other</p> <ul style="list-style-type: none"> ▪ Regional Language: The Format field (on the Formats tab under Control Panel » Region) on the server should be the same as the end user's setting. ▪ Solid PDF Converter: PM Compass installs it if not detected during installation. ▪ SSL Supported: Steps to configure PM Compass for use with SSL are detailed in the "Configure the Secure Sockets Layer (SSL)" section of the <i>Deltek PM Compass Advanced Administration Guide</i>. <p>The SSL architecture of PM Compass is such that, if you are using SSL for PM Compass, you must use SSL for Reporting Services. You cannot run SSL for PM Compass without an SSL binding configured for Reporting Services. You cannot run PM Compass without SSL and still use SSL for Reporting Services.</p> <ul style="list-style-type: none"> ▪ Microsoft Visual C++ Redistributable for Visual Studio 2015–2022 ▪ Microsoft .NET Framework 4.8 	
<p>Process Server</p>	

Supported Deployment Technology	Compatible Deployment Technology
<p>The supported minimum software requirements for the complete installation of Deltek PM Compass Process server tier include:</p>	
<p>Operating System</p> <ul style="list-style-type: none"> ▪ Microsoft Windows Server 2022 Azure Edition - With Microsoft Internet Information Services (IIS) 10.0 Role enabled ▪ Microsoft Windows Server 2022 - With Microsoft Internet Information Services (IIS) 10.0 Role enabled ▪ Microsoft Windows Server 2019 - With Microsoft Internet Information Services (IIS) 10.0 Role enabled 	<p>Operating System</p> <ul style="list-style-type: none"> ▪ Microsoft Windows Server 2016 - With Microsoft Internet Information Services (IIS) 10.0 Role enabled
<p>Transport Layer Security (TLS)</p> <p>If you have implemented TLS, review Appendix S: Secure Transport Layer Security (TLS).</p>	
<p>Oracle Client - For Oracle databases only</p> <p>You must install both the 32-bit and 64-bit Oracle client on the Web server.</p> <ul style="list-style-type: none"> ▪ Version must match the Oracle database server. <ul style="list-style-type: none"> ▪ 19c (Deltek recommends 19.3 or higher¹) ▪ Oracle Server name/SID defined in tnsnames.ora must be the same on your PM Compass Application, Report, and Process server tiers. <div style="border: 1px solid #0070C0; padding: 10px; margin-top: 10px;"> <p>Note:</p> <ul style="list-style-type: none"> ▪ You must install the supported .NET Framework before installing the Oracle client. ▪ ¹The Oracle client installations do not register the data access components. See “Register your Oracle Client” section in “Appendix F: Using Oracle with PM Compass” of this guide for details to register the Oracle data components to avoid an error in the PM Compass application when it tries to connect to the Oracle database. </div>	
<p>SQL Server Database Drivers - For SQL Server databases only (32-bit and 64-bit)</p> <ul style="list-style-type: none"> ▪ Microsoft OLE DB Driver 19 for SQL Server (x64) ▪ Microsoft ODBC Driver 17.3 for SQL Server ▪ Microsoft Command Line Utilities 15 for SQL Server 	

Supported Deployment Technology	Compatible Deployment Technology
<ul style="list-style-type: none"> ▪ Microsoft SQL Server 2012 Native Client ▪ Microsoft Visual FoxPro OLEDB Provider 	
<p>Optional Scheduling Integration with Microsoft Project Files (.mpp files)</p> <p>For PM Compass to integrate with Microsoft Project files (.mpp files only):</p> <ul style="list-style-type: none"> ▪ You must install one of the following on the PM Compass server: <ul style="list-style-type: none"> ▪ Microsoft Project Professional 2013 (on Microsoft Windows Server 2016 and 2019) ▪ Microsoft Project Professional 2016 (on Microsoft Windows Server 2022) ▪ Microsoft Project Professional 2019 ▪ Microsoft Project Professional 2021 ▪ Microsoft Project Professional 2024 <p>Microsoft Project Professional 2019, 2021, and 2024 are supported for .mpp files only.</p> <p>Microsoft Project Standard is also supported for those versions.</p> <p>AND</p> <ul style="list-style-type: none"> ▪ You must configure the Project Server accounts on the Project Web App Accounts setting menu by selecting the following: <ul style="list-style-type: none"> ▪ Computer Account ▪ Set as Default 	

Supported Deployment Technology	Compatible Deployment Technology
<p>Optional Scheduling Integration with Microsoft Project Server (Project Web Application versions 2013 or 2016 only)</p> <p>For PM Compass to integrate with Microsoft Project Server, the PM Compass server requires Microsoft Project Professional 2013 SP1 64-bit version only with update from Nov 10, 2015 applied on the server.</p> <p>Supported Microsoft Project Server / PWA scenarios:</p> <ul style="list-style-type: none"> Microsoft Project Server / PWA 2013 with Microsoft Project Professional 2013 Project Server / PWA 2016 with Microsoft Project Professional 2013 <p>Not supported:</p> <ul style="list-style-type: none"> Connection to Microsoft Project Server / PWA 2019 Connection to Microsoft Project Server / PWA using Microsoft Project Professional 2016 or higher <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>Warning: PM Compass supports integrating and connecting to Microsoft Project Server, but it REQUIRES that the Microsoft Project Professional 2013 64-bit client be installed on the PM Compass Web/Application and Process servers.</p> <p>Do not install Microsoft Project Professional 2016 on the PM Compass Web/Application and Process servers.</p> <p>Microsoft Windows Server 2022 does not support Microsoft Project Professional 2013 installation and license activation.</p> <p>PM Compass does not support connection to Project Web Application 2019.</p> </div>	
<p>Optional Scheduling Integration with Oracle Primavera</p> <ul style="list-style-type: none"> Oracle Primavera P6 EPPM 23.12 Oracle Primavera P6 EPPM 22.12 Oracle Primavera P6 EPPM 21.12 	<p>Oracle Primavera</p> <ul style="list-style-type: none"> Oracle Primavera P6 EPPM 19.12 Oracle Primavera P6 EPPM 18.8 Oracle Primavera P6 EPPM 17.12
<p>Other</p> <ul style="list-style-type: none"> Regional Language: The Format field (on the Formats tab under Control Panel » Region) on the server should be the same as the end user's setting. Solid PDF Converter: PM Compass installs it if not detected during installation. 	

Supported Deployment Technology	Compatible Deployment Technology
<ul style="list-style-type: none"> ▪ SSL Supported: Steps to configure PM Compass for use with SSL are detailed in the “Configure the Secure Sockets Layer (SSL)” section of the <i>Deltek PM Compass Advanced Administration Guide</i>. <p>The SSL architecture of PM Compass is such that, if you are using SSL for PM Compass, you must use SSL for Reporting Services. You cannot run SSL for PM Compass without an SSL binding configured for Reporting Services. You cannot run PM Compass without SSL and still use SSL for Reporting Services.</p> <ul style="list-style-type: none"> ▪ Microsoft Visual C++ Redistributable for Visual Studio 2015–2022 ▪ Microsoft .NET Framework 4.8 	

Client Software Requirements

Supported Deployment Technology	Compatible Deployment Technology
Client Operating Systems	
<p>The supported minimum software requirements for the PM Compass Workstation include:</p> <p>Operating Systems (32-bit or 64-bit/x64)</p> <ul style="list-style-type: none"> ▪ Microsoft Windows 11 ▪ Microsoft Windows 10 <p>Citrix</p> <ul style="list-style-type: none"> ▪ XenApp 7.x (Win Svr 2022) ▪ XenApp 7.x (Win Svr 2019) ▪ XenApp 7.x (Win Svr 2016) 	
<p>Microsoft Edge</p> <ul style="list-style-type: none"> ▪ Microsoft Edge v87 (Nov 2020 or later) <div style="border: 1px solid #0070c0; padding: 5px; margin-top: 10px;"> <p>Note: You can launch PM Compass from Edge if ClickOnce is enabled. ClickOnce is enabled by default from Edge build 87 (Nov 2020).</p> </div>	

Supported Deployment Technology	Compatible Deployment Technology
<p>Note: You can launch PM Compass from Chrome with a chrome web store third-party ClickOnce extension. For example, Windows ReMix ClickOnce helper, Meta4 ClickOnce Launcher, or ClickOnce for Google Chrome by Menarva.</p>	
<p>Microsoft Excel</p> <ul style="list-style-type: none"> Microsoft Excel 365 Microsoft Excel 2024 Microsoft Excel 2021 Microsoft Excel 2019 <p>Microsoft Word</p> <ul style="list-style-type: none"> Microsoft Word 365 Microsoft Word 2024 Microsoft Word 2021 Microsoft Word 2019 Microsoft Office 365 is supported but requires the full product installation. Adobe Reader or compatible PDF Reader (for exporting reports in PDF format) <p>Note: PM Compass supports integration with Microsoft Office with exporting of lists and reports to Excel, and reports to Word.</p>	<ul style="list-style-type: none"> Adobe Reader or compatible PDF Reader (for exporting reports in PDF format) <p>Microsoft Excel</p> <ul style="list-style-type: none"> Microsoft Excel 2016 <p>Microsoft Word</p> <ul style="list-style-type: none"> Microsoft Word 2016
<ul style="list-style-type: none"> Microsoft .NET Framework 4.8 Microsoft Visual C++ Redistributable for Visual Studio 2015–2022 	

Deltek Product Integration

Supported Deployment Technology	Compatible Deployment Technology
Deltek Product Integration	
The versions listed below are the minimum supported versions installed on Client machines. Subsequent cumulative update (CU) releases	

Supported Deployment Technology	Compatible Deployment Technology
<p>within the listed major/minor release will be supported unless otherwise noted. Subsequent major or minor releases are not supported.</p> <p>Deltek Cobra¹</p> <ul style="list-style-type: none"> ▪ Cobra 8.7 (Beginning with PM Compass 8.5 Cumulative Update 07) ▪ Cobra 8.6 ▪ Cobra 8.5 Cumulative 17 or later <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Note: ¹Cobra Web Service updates are included in the PM Compass Web and Process server installation. Cobra Web Service uses port 8000. For more information, see the <i>Deltek PM Compass Advanced Administration Guide</i>.</p> </div> <p>Cobra and PM Compass License Compatibility</p> <p>Cobra licenses—whether concurrent or named—do not impact PM Compass operations or compatibility. It is not necessary to convert Cobra licenses to named-user licenses for use with PM Compass.</p>	
<p>Deltek Open Plan (64-bit)</p> <ul style="list-style-type: none"> ▪ Open Plan 8.8 (Beginning with PM Compass 8.5 Cumulative Update 11) ▪ Open Plan 8.7 Cumulative 07 or later ▪ Open Plan 8.6 Cumulative 11 or later <p>Deltek Open Plan Add-In for PM Compass</p> <ul style="list-style-type: none"> ▪ Open Plan Add-In for PM Compass 8.5 <p>Integration Installers</p> <p>Installs the appropriate integration files on the PM Compass Web/Application and Process servers. The files are located in DSM under the PM Compass folder in the Sub-Release section.</p> <ul style="list-style-type: none"> ▪ Cobra 8.5 Integration for PM Compass 8.5 ▪ Cobra 8.6 Integration for PM Compass 8.5 ▪ Open Plan 8.6 Integration for PM Compass 8.5 ▪ Open Plan 8.7 Integration for PM Compass 8.5 ▪ MSP Server Integration for PM Compass 8.5 	

Supported Deployment Technology	Compatible Deployment Technology
(Provides Project Server Integration with Progress support for non-Open Plan users) <ul style="list-style-type: none"> Primavera P6 Server Integration for PM Compass 8.5 (Provides Primavera P6 Server Integration with Progress support for non-Open Plan users)	

Open-Source Software

This table describes the open-source software included in PM Compass.

Software	Company
Oracle Data Access Components 4.122.1.20161216	Oracle
Pcrypt	Public domain Password encryption based on D3DES
Newtonsoft Json.NET 12.0.3.23909	Newtonsoft

Hardware Sizing Considerations

There are several factors that go into sizing an appropriate server infrastructure. The number of concurrent users accessing the system at any given time, the amount of data being analyzed, and growth expectations all have an impact on the initial sizing plans. The hardware profiles are intended as a starting point for deployment. It is expected that our clients will use the product in many ways. Plans for future releases, and client customizations will all impact the growth and scaling of the overall solution. Further in-depth discussion of the business needs of the solution during implementation of application will provide final guidance on hardware requirements.

Memory Requirements for a Typical/Average Use

Below are details on the memory footprint of the product.

Tier	Memory*
Client Tier	<ul style="list-style-type: none"> 200 MB - 250 MB for PMC when progressing a single project with 500 – 1,000 activities
Application Tier (Citrix/Terminal Server only)	<ul style="list-style-type: none"> 75 MB – 100 MB per concurrent user.
Reporting Tier	<ul style="list-style-type: none"> 350MB – 500MB for PM Compass per concurrent user per report when running reports with 900 activities and 75-100 control accounts with 300-400 work packages.

Tier	Memory*
Database Tier	<ul style="list-style-type: none"> Database instance memory should be 10% - 15% of the database size. For example, if database size is expected to be 500GB then allocate 50GB - 75GB memory.

* Per concurrent client instance and in addition to any memory needed for the operating system and other applications that may run in parallel with this product.

Definition of Typical/Average Use

A user using PM Compass when progressing a single project (500 – 1,000 activities) using the Progress view.

Hardware Requirements

The number of people using PM Compass, the PM Compass processes they are using, and the size of your database all have an effect on the hardware and software requirements for your servers.

Note: Specific server hardware configurations may have an impact on your overall Deltek product licensing requirements. It is recommended you confirm with a Deltek Technical Sales Engineer if the server hardware you plan to deploy is in line with your Deltek license agreement and how overall server infrastructure expansion in the future may affect your Deltek licensing.

Single-Server Deployment (One Server)

The following table lists the recommended minimum hardware requirements for a PM Compass single deployment.

Installation for 1 to 25 Concurrent Users

Tier	Hardware Required	Determining Factors
Database / Web / Application / Reporting Tier	Server Class Machine <ul style="list-style-type: none"> 2 x Logical Processor 2.8 GHz or faster CPU 16 GB Physical Memory 	

Two-Server Deployment (Two Servers)

The following table lists the recommended minimum hardware requirements for a PM Compass two-server deployment.

Installation for 25 to 200 Concurrent Users

Tier	Hardware Required	Determining Factors
Database Tier/Reporting Tier	Server Class Machine	<ul style="list-style-type: none"> Database Size

Tier	Hardware Required	Determining Factors
<p>*The report tier can be installed on either the Web server or the SQL Server.</p> <p>Additional SQL licensing costs may be incurred if installing SQL Reporting Services on PM Compass web tier.</p>	<ul style="list-style-type: none"> 1 - 2 x Logical Processor 2.6 GHz or faster CPU 8+ GB Physical Memory 	<ul style="list-style-type: none"> Database Growth
<p>Web/Application/Reporting Tier</p> <p>*The report tier can be installed on either the Web server or the SQL Server.</p> <p>(Additional SQL licensing costs may be incurred if installing SQL Reporting Services on PM Compass web tier.</p>	<p>Server Class Machine</p> <ul style="list-style-type: none"> 1 - 2 x Logical Processor 2.6 GHz or faster CPU 8+ GB Physical Memory 	<ul style="list-style-type: none"> Total Users Power Users User Location Database Size

Three-or-More Server Deployment (Three or More Servers)

The following table lists the recommended minimum hardware requirements for a PM Compass three-or-more server deployment.

Installation for 200+ Concurrent Users

The three-or-more-servers installation model is designed for large organizations. There might be additional Report, Application, or Web servers required for load balancing, performance, security, or fault tolerance reasons. You can use additional servers to run multiple reports, applications, or Web servers on additional servers. Contact your Deltek Technical Services representative for instructions.

Tier	Hardware Required	Determining Factors
<p>Database Tier</p>	<p>Server Class Machine</p> <ul style="list-style-type: none"> 2 x Logical Processor 2.8 GHz or faster CPU 16+ GB Physical Memory 	<ul style="list-style-type: none"> Database Size Database Growth PM Compass Processes
<p>Reporting Tier</p> <p>*Additional SQL licensing costs may be incurred if installing SQL Reporting Services on a dedicated Report server.</p>	<p>Server Class Machine</p> <ul style="list-style-type: none"> 2 x Logical Processor 2.6 GHz or faster CPU 16+ GB Physical Memory 	<ul style="list-style-type: none"> Power Users Database Size
<p>Web/Application Tier</p>	<p>Server Class Machine</p> <ul style="list-style-type: none"> 2 x Logical Processor 2.6 GHz or faster CPU 8+ GB Physical Memory 	<ul style="list-style-type: none"> Total Users Power Users User Location

Tier	Hardware Required	Determining Factors
		<ul style="list-style-type: none"> PM Compass Processes

Workstation Deployment (Client Tier)

The following table lists the recommended minimum hardware requirements for the client tier (web application only).

Client Tier	Hardware Required	Determining Factors
Minimum	<ul style="list-style-type: none"> 1.8 GHz or faster CPU 2 GB RAM 40 GB Hard Drive 1024x768 SVGA Video Display 	Usage (for web application only, not for workstations running the Smart Client application)
Recommended	<ul style="list-style-type: none"> 2.0 GHz or or faster CPU 2 GB RAM 40 GB Hard Drive 	Usage

Using PM Compass with Citrix or Remote Desktop

Note: If you are running Model Changes which is part of the integrated BCR process and Open Plan is running in a Citrix environment, then you will need to follow the steps in the “Using PM Compass with Citrix or Remote Desktop (ClickOnce Bypass)” in the *Deltek PM Compass Advanced Administration Guide*.

This is required because the Open Plan Client process and the PM Compass web client must be running in the same user session on the same server.

If Open Plan is running on a Citrix box, then the PM Compass client will also need to be launched on the Citrix box launched from within Open Plan.

The Deltek PM Compass Smart Client Web application uses the Microsoft .NET Framework ClickOnce deployment technology which makes it easy for administrators to deliver Windows-based applications to end-users by sending them a URL. However, in cases where Citrix is used, the ClickOnce deployment behavior may not be supported by Microsoft or Citrix.

Attention: For more information about the Smart Client ClickOnce Deployment Options, see “Using PM Compass with Citrix or Remote Desktop (ClickOnce Bypass)” in the *Deltek PM Compass Advanced Administration Guide*.

Unsupported Scenarios

Deltek does not support the following scenarios because they can cause significant issues in the performance, reliability, and functionality of your PM Compass application, as well as with other applications on your network.

- Deltek PM Compass and previous versions cannot be run at the same time on the same Web/Application server.
- You cannot perform a single-server deployment on the Microsoft Essentials Edition of Windows Server. Only the PM Compass SQL Server database tier and/or report tier can be installed on this server.
- You cannot install any PM Compass tier on the Microsoft ISA server or on any other software-based firewall (except Windows firewall).
- You cannot install any PM Compass tier on any server with Citrix configured as a Remote Desktop Session Host Server.
- Server administration via a remote desktop connection is fully supported.
- PM Compass does not support using desktop operating systems for production server installation.
- You cannot install any PM Compass tier on:
 - A Domain Controller
 - Any version of Microsoft Exchange Server
 - Any version of Microsoft SharePoint Server

About Deltek

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