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Deltek EPM Security Administrator 8.6

Installation Guide

December 5, 2025



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This edition published December 2025.

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Overview

The Deltek EPM Security Administrator (EPM SA) allows you to define the security rights for Deltek PPM applications. The applications offer different options, but they all follow the same premise.

In earlier versions, the EPM SA tool was installed automatically when you installed the corresponding PPM application. Starting with 8.6, it is available as a standalone application with a separate 64-bit or 32-bit installer. Deltek, however, strongly recommends using the web-based PPM Administrator, which replaces both desktop and Smart Client versions of EPM SA. While PPM Administrator is preferred, EPM SA 8.6 standalone is still offered for legacy needs.

EPM Security Administrator 8.6 (Stand-Alone Alternative)


If you need a traditional installer instead of the web-based version, **EPM SA 8.6** is available as a full stand-alone setup. It supports the minimum versions of each PPM product that include the common security table changes introduced in **EPM SA 8.5.1**.

By default, it is installed in C:\Program Files\Deltek\EPMSA 8.6 (for the 64-bit installer) or C:\Program Files (x86)\Deltek\EPMSA 8.6 (for the 32-bit installer). Additionally, a shortcut for EPM SA 8.6 is automatically added to the Windows **Start** menu for easy access.

Adding Custom Notes to This Guide

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

To add a custom note using Adobe Reader X:

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

Note: Deltek recommends that you save the document to a slightly different filename so as to keep the original from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, cumulative updates, and sub-releases. You can access DSM through the Deltek Support Center or use Deltek Software Manager Lite to download Deltek products.

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

1. In your Web browser, go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password** and click **Login**.
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products and click **OK**.

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

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

6. In the left pane, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download.

Options include:

- **Complete**
- **Cumulative Updates**
- **HotFixes**
- **Sub-Release**

8. In the table, select the check box that corresponds to the Deltek product that you want to download.

The right pane displays a message stating that the product has been added to the download queue.

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

9. Click **Download** at the bottom of the left pane to download the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite:

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

Note: The download behavior and download folder may differ depending on the browser and browser settings that you are using.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click here.
- To view a tutorial on how to use Deltek Software Manager, click here.
- To view more information on troubleshooting Deltek Software Manager, click here.

Note: When you click a link, you will be asked to log into DSM if you aren't already logged in.

Pre-Installation Checklist

Preinstallation Checklist

Steps		Related Topics
1.	<i>Check product versions and make sure you are updating the correct machine.</i>	Software Requirements

Important: Check to see if the PPM product you are integrating with EPM SA has support for PPM Encryption Conversion Utility. This will help you make sure the right installation steps are taken, avoiding any potential problems.

Before You Begin Deployment

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

- Logical Tiers
- Installation / Deployment Models
- Hardware and Software Requirements

System Requirements

Your organization has made a substantial commitment to ensure it has a fully integrated earned value management (EVM) solution. To support that commitment, Deltek recommends that you carefully consider the hardware requirements necessary to run EPM SA properly.

Display Settings

Deltek recommends a display resolution of 1920 x 1080 with a minimum resolution of 800 x 600.

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 provided in the previous sections are intended as a starting point for deployment. It is expected that our clients will use the product in many different ways, plan for future release, 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 implementations of application will provide final guidance on hardware requirements.

Memory Requirements for Typical/Average Use

Below are details on the memory footprint of the product. This can be helpful when sizing a client tier that runs in a virtual environment, Citrix, or Terminal Server.

Tier	Memory*
Client Tier	<ul style="list-style-type: none"> 50 MB for an EPM SA project with about 2,000 activities, 2,000 relationships and 4,000 resource assignments (plus memory required by the database driver being used).
Application Tier (Citrix/Terminal Server only)	<ul style="list-style-type: none"> Please see your vendor for recommendations.
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 working with moderate-sized projects (2,000 – 5,000 activities), one project at a time, in either exclusive or shared mode, and using spreadsheet or bar chart views of moderate complexity.

If the user is working with views in EPM SA that put a heavy demand on memory (for example, a bar chart view with many types of bars defined, a large number of “normal” calculated fields, or a smaller number of calculated fields that are calculation-intensive), larger amounts of memory will be used.

In addition, for customers doing either Microsoft Project or Primavera integrations, EPM SA requires more memory.

Note: With the 32-bit version of Open Plan, a maximum of 3-4 GB may be used by the application due to operating system constraints. The 64-bit version of Open Plan can use up to 192 GB for the Professional, Enterprise, and Ultimate versions of Windows 7.

Hardware Requirements

The number of people using EPM SA, 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. Deltek recommends that you confirm with a Deltek Technical Sales Engineer that the server hardware you plan to deploy is in line with your Deltek license agreement and that you learn how overall server infrastructure expansion in the future may affect your Deltek licensing.

Standalone Deployment

The following table lists the recommended minimum hardware and software requirements for a deployment of Deltek EPM SA in standalone, workstation environment.

Tier	Hardware/Software Required	Determining Factors
Client Database Tier	Intel 2.0 GHz or higher 2 GB RAM 10-20GB of available disk space for application, plus additional space for each project	Usage Integration Requirements Database Size Database Growth

Client/Server and Citrix/Terminal Server Deployment

In the client/server model, you install the client and application tiers on workstations (or Citrix / Terminal Server) that directly connect to a database server.

The following tables list the recommended minimum hardware and software requirements for a deployment of Deltek EPM SA in a client / server environment.

Small Client/Server Installation: 1 - 25 Concurrent Users

Tier	Hardware/Software Required	Determining Factors
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Database	Server Class Machine: Logical Cores 2.0+ GHz or faster CPU 8+ GB Physical Memory High performance disk volume – SSD preferred	Database Size Database Growth Usage
Application Server (Citrix/Terminal Server only)	Server Class Machine: 4 - 8 x Logical Cores 2.5 GHz or faster CPU 8+ GB Physical Memory 125 MB of available disc space for application, plus additional space for each project	Total Users Power Users User Location
Client	Desktop Class Machine: 1.8 GHz or faster CPU Recommend 4 GB Physical memory 530 MB of available disk space for application, plus additional space for each project Monitor resolution must be at least 1024×768	Applications running in client machine

Medium Client/Server Installation: 25 – 50 Concurrent Users

Tier	Hardware Required	Determining Factors
Database	Server Class Machine: 8 x Logical Cores 2.8 GHz or faster CPU 8+ GB Physical memory 100 GB Hard drive 100 MB Network card	Database Size Database Growth
Application Server (Citrix/Terminal Server only)	Server Class Machine: 8 x Logical Cores 2.5 GHz or faster CPU 12 GB Physical memory 200 GB Hard drive space 125 MB of available disc space for application, plus additional space for each project	Total Users Power Users User Location
Client	1.8 GHz or faster CPU Recommend 4 GB Physical memory	Applications running in client machine

	<p>530 MB of available disk space for application, plus additional space for each project</p> <p>Monitor resolution must be at least 1024×768</p>	
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Large Client/Server Installation: 50+ Concurrent Users

Tier	Hardware Required	Determining Factors
Database	<p>Server Class Machine:</p> <p>8 x Logical Cores 2.8 GHz or faster CPU</p> <p>8+ GB Physical memory</p> <p>100 GB Hard drive</p> <p>High performance disk volume – SSD preferred</p> <p>100 MB Network card</p>	<p>Database Size</p> <p>Database Growth</p>
<p>Application Server</p> <p>(Citrix/Terminal Server only)</p>	<p>Server Class Machine:</p> <p>8 x Logical Cores 2.5 GHz or faster CPU</p> <p>16 GB Physical Memory</p> <p>200 GB Hard drive space</p> <p>125 MB of available disc space for application, plus additional space for each project</p>	<p>Total Users</p> <p>Power Users</p> <p>User Location</p>
Client	<p>Desktop Class Machine</p> <p>1.8 GHz or faster CPU</p> <p>Recommend 4 GB Physical memory</p> <p>530 MB of available disk space for application, plus additional space for each project</p> <p>Monitor resolution must be at least 1024×768</p>	<p>Applications running in client machine</p>

Software Requirements

The supported minimum software requirements for a complete installation of Deltek EPM SA are listed below.

Attention: For a complete list of the recommended minimum software requirements, see the *Deltek Product Support Compatibility Matrix* document that you can download from the [Deltek Customer Care Connect site](#).

Supported Deployment Technology

Note: Supported versions are the current actively tested versions of technologies used to deploy Open Plan. Except for the Deltek Integrated Products, these technologies are not directly supported by Deltek. Changes to these technologies occur at the discretion of the individual technology vendors.

Supported Deployment Technology	
Operating System	<ul style="list-style-type: none"> ▪ Windows Server 2016 ▪ Windows Server 2019 ▪ Windows Server 2022 ▪ Windows 10 ▪ Windows 11
Database Platform	<p>Microsoft SQL Server</p> <ul style="list-style-type: none"> ▪ SQL Server 2016 ▪ SQL Server 2017 (also supported on Linux and Unix) ▪ SQL Server 2019 (also supported on Linux and Unix) ▪ SQL Server Express 2016 ▪ SQL Server Express 2017 ▪ SQL Server Express 2019 <p>Oracle</p> <ul style="list-style-type: none"> ▪ Oracle 12.2 ▪ Oracle 18.3 ▪ Oracle 19.3 <p>Oracle is supported on Linux, Unix, and Exadata</p> <p>Microsoft Access</p> <ul style="list-style-type: none"> ▪ Microsoft Access 2013

	<ul style="list-style-type: none"> ▪ Microsoft Access 2016 ▪ Microsoft Access 2019
Database Driver	<p>PPM Datasource Management Tool supports Oracle and SQL Server databases through an OLEDB 2.1 compliant provider. The data source providers to use for each database type are listed below.</p> <ul style="list-style-type: none"> ▪ Oracle Provider for OLE DB ▪ MS SQL Server 2012 Native Client, version 11.4.7001.0 or higher ▪ MS OLE DB Driver for SQL Server, version 18.2.2.0 or higher ▪ Microsoft OLE DB Provider for Jet

Supported PPM Product Versions

The table below lists the PPM product versions that fully supports EPM SA 8.6:

Application	Version
Acumen	8.11
Cobra	Cobra 8.7

Installing any of these product versions removes EPM SA 8.5.1 and requires you to either install PPM Administrator or EPM SA 8.6 separately.

Note: For PM Compass, continue using the EPM SA that comes bundled with it, unless you install a version of PM Compass that fully supports PPM Administrator. Notably, PM Compass uses a different versioning system for EPM SA; for instance, the corresponding version for EPM SA 8.5.1 for PM Compass 8.4 is 4.2.6.

Moreover, the table below lists the minimum PPM product versions compatible with EPM SA 8.6:

Application	Version
Acumen Touchstone	<ul style="list-style-type: none"> ▪ 8.10
Cobra	<ul style="list-style-type: none"> ▪ 8.5 CU 16 ▪ 8.6
Open Plan	<ul style="list-style-type: none"> ▪ 8.6 CU 13 ▪ 8.7 CU 08
PM Compass	<ul style="list-style-type: none"> ▪ 8.4 CU 16 ▪ 8.5

wInsight Analytics	<ul style="list-style-type: none">▪ 8.3.2 CU 06▪ 8.3.3 CU 02
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To successfully install EPM SA 8.6, at least one PPM product must be on a supported version, while all other products must meet or exceed the minimum compatible version.

Once you install PPM Administrator 1.0 or EPM SA 8.6, you can use it across all PPM products. If you use PPM Administrator, you can access it via a URL because it is a web-based tool. If you use EPM SA 8.6, you can only access it on the computer where you installed it.

Upgrade EPM Security Administrator

The EPM SA 8.6 version is installed as a stand-alone application with separate 64-bit and 32-bit installers. Installing EPM SA 8.6 does not update the EPM SA version within each product folder but instead installs in its own dedicated Program folder. In addition, it creates a shortcut to the **Start** menu.

The EPM SA installer automatically checks for compatible PPM products on your computer. Installation proceeds successfully when it finds at least one compatible version.

The installation creates a DATASOURCES.DAT file in the ProgramData\Deltek\PPM folder if one does not already exist, leaving it empty by default and assigning read and write access to the local users' group. Additionally, it stores the config.dat file in the EPM SA 8.6 installation folder.

Note: The config.dat file contains the following information:

[System]

DataSources=C:\ProgramData\Deltek\PPM\DataSources.dat

The EPM SA 8.6 application supports the minimum version of each PPM product that includes common security table changes introduced in EPM SA 8.5.1. To function properly, at least one supported PPM product must be installed in the database.

Install EPM Security Administrator

This section describes how to install EPM SA on either a stand-alone PC or on a network drive.

To install EPM SA:

1. Download the EPM SA software using the instructions in the [Downloading Deltek Products using Deltek Software Manager](#) section.
2. Go to the location where you saved the EPM SA stand-alone installer.
3. Run the appropriate installation package version to launch the installation wizard.
 - **32-bit version** — The installation package for the 32-bit version of EPM SA is **DeltekEPMSA86x86.msi**
 - **64-bit version** — The installation package for the 64-bit version of EPM SA is **DeltekEPMSA86x64.msi**

Note: Always run the EPM SA installer with elevated permissions. To do this, open the **Command Prompt** as an Administrator and run the installer by entering **<location> \<installation package version>**.

4. On the Destination Folder page, click **Next** to install the application in one of the following default locations:
 - C:\Program Files (x86)\Deltek\EPMSA 8.6 (for the 32-bit installer)
 - C:\Program Files\Deltek\EPMSA 8.6 (for the 64-bit installer)

You can also click **Change** to install it to a different folder.

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

The installation progress displays.

Note: If no PPM product is compatible with EPM SA 8.6, the installation displays an error message and terminates.

6. On the InstallShield Wizard Complete page, click **Finish**.

Note: After a successful installation, it creates the following

- **C:\Program Files (x86)\Deltek\EPMSA 8.6** (for the 32-bit installer) or **C:\Program Files\Deltek\EPMSA 8.6** (for the 64-bit installer) with EPM SA files
- **C:\ProgramData\Deltek\PPM**
- **datasources.dat** with no existing data sources listed and only includes the encryption parameter that initially contains:

```
[EncryptionProtocol]
EncryptionProtocol=1
```
- **Config.dat** with following information:

```
[System]
DataSources=C:\ProgramData\Deltek\PPM\DataSources.dat
```
- EPM SA 8.6 shortcut in the Windows **Start** menu

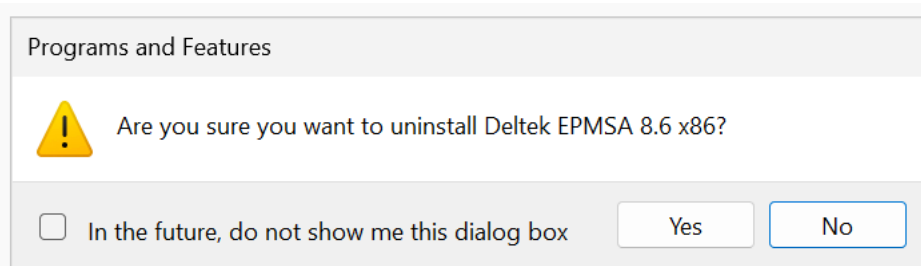
Uninstall EPM SA

Follow this procedure to uninstall EPM SA.

To uninstall EMP SA:

1. Launch the Windows Control Panel and click **Programs and Features**.
2. On the program list, right-click **Deltek EPM Security 8.6 x86** or **Deltek EPM Security 8.6 x64** and click **Uninstall**.

Programs and Features asks if you want to uninstall Deltek EPM SA 8.6 and its features.



- If you select **Yes**, the uninstallation process proceeds.
- If you select **No**, the uninstallation process is canceled, and the program remains installed on your computer.

Appendix A: If You Need Assistance

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

Customer Services

Deltek has always maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center
- Phone and email support from Deltek Support Services analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

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 Support Services 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 Support Services analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

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.

Additional Documentation

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
Deltek EPM Security Administrator Online Help	This document contains detailed information and instructions on how to use various features of the application.
Deltek PPM Datasource Management Tool Help	This document contains detailed information and instructions on how to use various features of the tool.