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Deltek Acumen

PPM NextGen Risk Guide

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Overview

PPM NextGen Risk was designed to provide a secure and collaborative risk register for project teams which include contractors and external stakeholders. PPM NextGen Risk aims to offer comprehensive risk and opportunity management, tracking, and mitigation solutions across projects and portfolios. It is integrated with Deltek products like Acumen to provide accurate and quantitative insights into the impact of project risks throughout an organization.

PPM NextGen Risk

PPM NextGen Risk is a proactive planning process that involves identifying, evaluating, and prioritizing risks. It is a cloud-based solution that encompasses several key aspects, namely:

- Risk and opportunity tracking across your company, projects, and portfolios.
- A draft risk Kanban board to keep immature risks of the official risk register.
- A central, secure, and collaborative risk register with role-based security.
- AI capabilities, including real-time risk monitoring, automated risk scoring, and event-based notifications.

Acumen's integration with PPM NextGen Risk serves to provide you with a complete solution for risk modeling and risk management.

This guide documents functionality which allows Acumen to work with Deltek's new risk management solution.

Deltek Acumen Options Dialog

The PPM NextGen Authentication section was added to the Deltek Acumen Options dialog under the Risk tab.

The screenshot shows the 'Deltek Acumen Options' dialog box. On the left is a sidebar with a tree view containing the following items: General, User Interface, Workbook, Platforms (General), Platforms (Deltek), Platforms (Oracle), Platforms (Microsoft), Platforms (IPMDAR), Platforms (Other), Templates, Mentor, Risk (highlighted), AI, Contact Us, and About Deltek Acumen. The main content area has a dark header 'General' and contains the following settings:

- Primary default P value to show in charts: P75 (dropdown)
- Add P75 value to Activities and Risk Exposure (dropdown)
- Additional P value to show in charts: P50 (dropdown)

Below this is the 'PPM NextGen Authentication' section, which is highlighted with a red border. It contains:

- Enable PPM NextGen Integration
- Authentication Endpoint URL: [text input field]
- Authentication Tool:
 - Acumen Browser
 - Default Browser
- Customer ID: [text input field]
- PPM NextGen Endpoint URL: [text input field]
- Test Connection: [button]

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

This section displays fields which allow you to configure a connection to PPM NextGen Risk. These fields are the following:

- **Enable PPM NextGen Integration:** This checkbox is not selected by default. When you select this checkbox, the four fields below and the **Test Connection** button will be enabled.
- **Authentication Endpoint URL:** Use this field to enter the authentication server URL where Acumen will authenticate users before accessing PPM NextGen Risk.
- **Authentication Tool:** Use this field to determine which browser to use when testing authentication.
 - **Acumen Browser:** When you select this option, the Acumen login process will open in a Microsoft Edge compatible browser (WebView2). This is the default option.

- **Default Browser:** When you select this option, the Acumen login process will open in your system's default browser.
- **Customer ID:** Use this field to enter the PPM NextGen Risk customer identifier that Acumen connects to on PPM NextGen Risk.
- **PPM NextGen Endpoint URL:** Use this field to enter the base URL for the PPM NextGen Risk Management API services that Acumen will use to retrieve and manage risk data.
- **Test Connection:** Click this button to test your connection.

Note: This information will be provided when you purchase a license to use the new PPM NextGen Risk module.

You must complete all the fields to take advantage of PPM NextGen Risk and its features.

Once PPM NextGen Risk is available, you will be able to purchase licenses for it and connect it to your Acumen software. For more details, visit www.deltek.com.

Test the Connection

The **Test Connection** button will allow you to test the connection of the Endpoint URL with the other options.

After you fill out the fields and click **Test Connection**, Acumen will validate the information. If an error occurs because of mistakes in any of the fields, Acumen will display an error message that tells you what needs to be corrected.

Note: For more information, see *Appendix C: Troubleshooting of this document*.

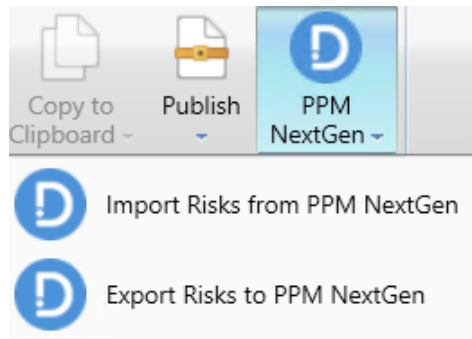
If the authentication fails, Acumen will display an error message that tells you what needs to be corrected. In addition, an error message will also be displayed if authentication succeeds but the PPM NextGen Risk connection fails.

If authentication and the PPM NextGen Risk connection succeed, then Acumen displays a success message.

After you have successfully connected to PPM NextGen Risk, Acumen will display and enable the **PPM NextGen** option in the S3 // Risk tab when the risk register is visible.

S3 // Risk Tab

Acumen will display the **PPM NextGen** option in the Import/Publish group in the S3 // Risk tab after you have successfully connected to PPM NextGen Risk. This option has a sub-menu with two additional options, **Import Risks from PPM NextGen** and **Export Risks to PPM NextGen**.

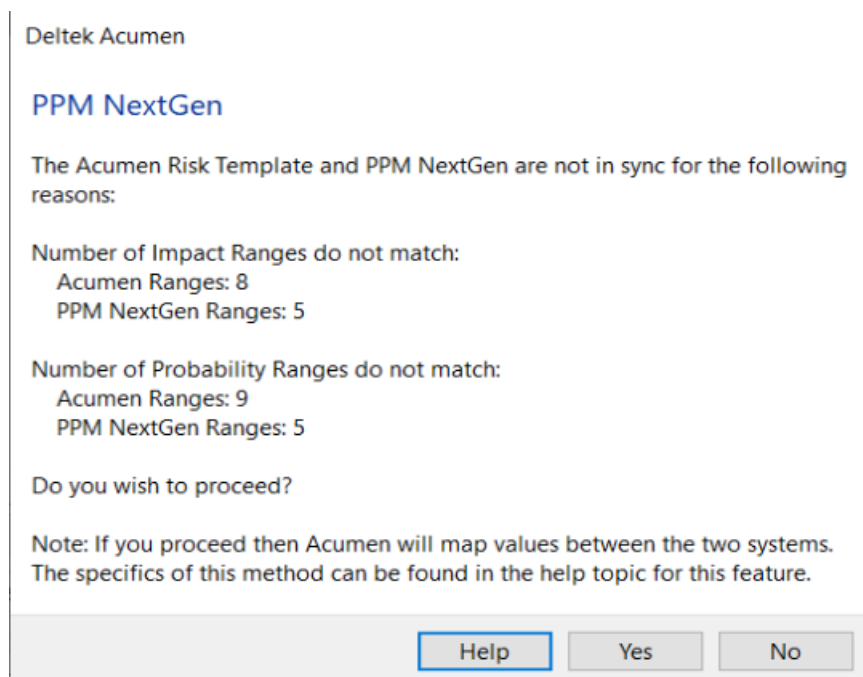


Acumen will display and enable the **PPM NextGen** option when the Risk Register is visible in the Left/Right panel after you successfully connect to PPM NextGen Risk.

Range Mapping Between Acumen and PPM NextGen Risk

When you select **Import Risks from PPM NextGen**, the system retrieves the probability and impact range values from PPM NextGen Risk and compares them to Acumen. This will determine how Acumen will compare its data to PPM NextGen Risk when you proceed to compare risk registers.

If the Acumen Risk Template and PPM NextGen Risk are not in sync, a dialog will display with additional information.

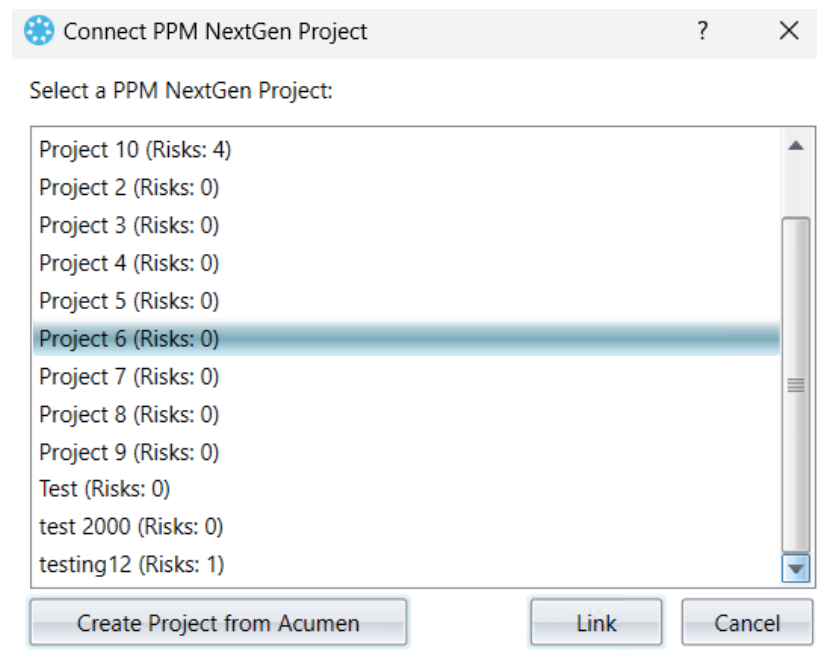


You can proceed based on the following options:

- **Help:** This option will redirect you to the Acumen online help topic that discusses value mapping.
- **Yes:** This option will redirect you to the import process. After choosing this option, the Connect PPM NextGen Risk Project dialog will display.
- **No:** This option will close the dialog.

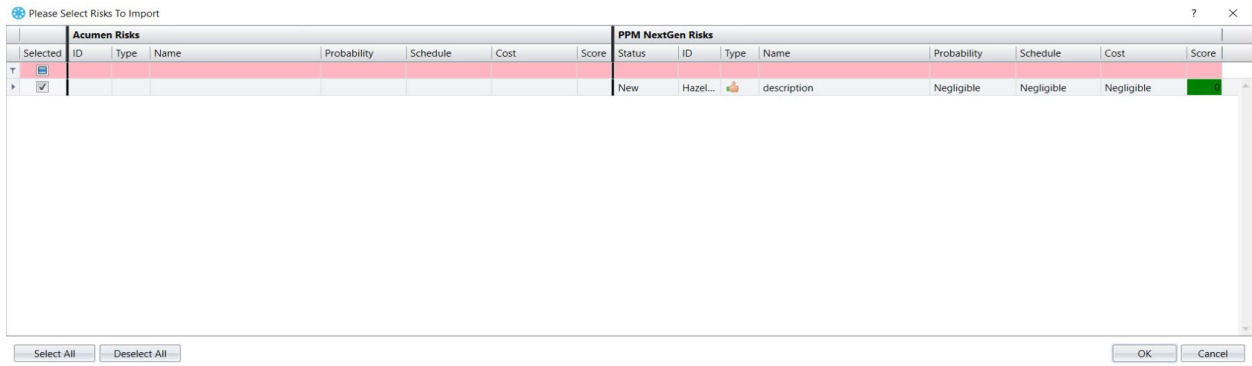
Import Risks from PPM NextGen Risk

When you select **Yes** from the range mapping dialog, it will close and the Connect PPM NextGen Project dialog will display. This dialog lists PPM NextGen Risk projects with their corresponding project risks.



You can select a PPM NextGen Risk project to link to your Acumen project from these options. The **Link** button is only enabled after you select a project. After you select a project, click the **Link** button to connect your chosen project with your Acumen project.

The risk comparison dialog, Please Select Risks To Import, will be displayed. The checkboxes are selected by default for new and updated risks that have never been imported. If a risk has been imported previously, the checkbox will remain blank by default. You can manually select these checkboxes if you want to include them.



If the risk status is closed in PPM NextGen Risk, the checkbox will be blank in Acumen.

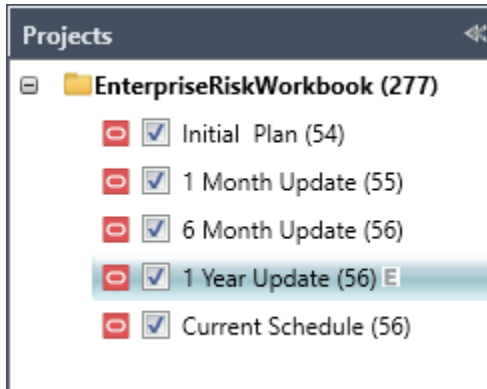
For every risk that is imported, the following Acumen Risks fields are updated:

- ID
- Type
- Name
- Probability
- Schedule Impact
- Cost Impact
- Score

If the risks from PPM NextGen Risk have defined mitigation steps, those steps will be included in the import process. The PPM NextGen Risk mitigation steps will have the following data imported to Acumen:

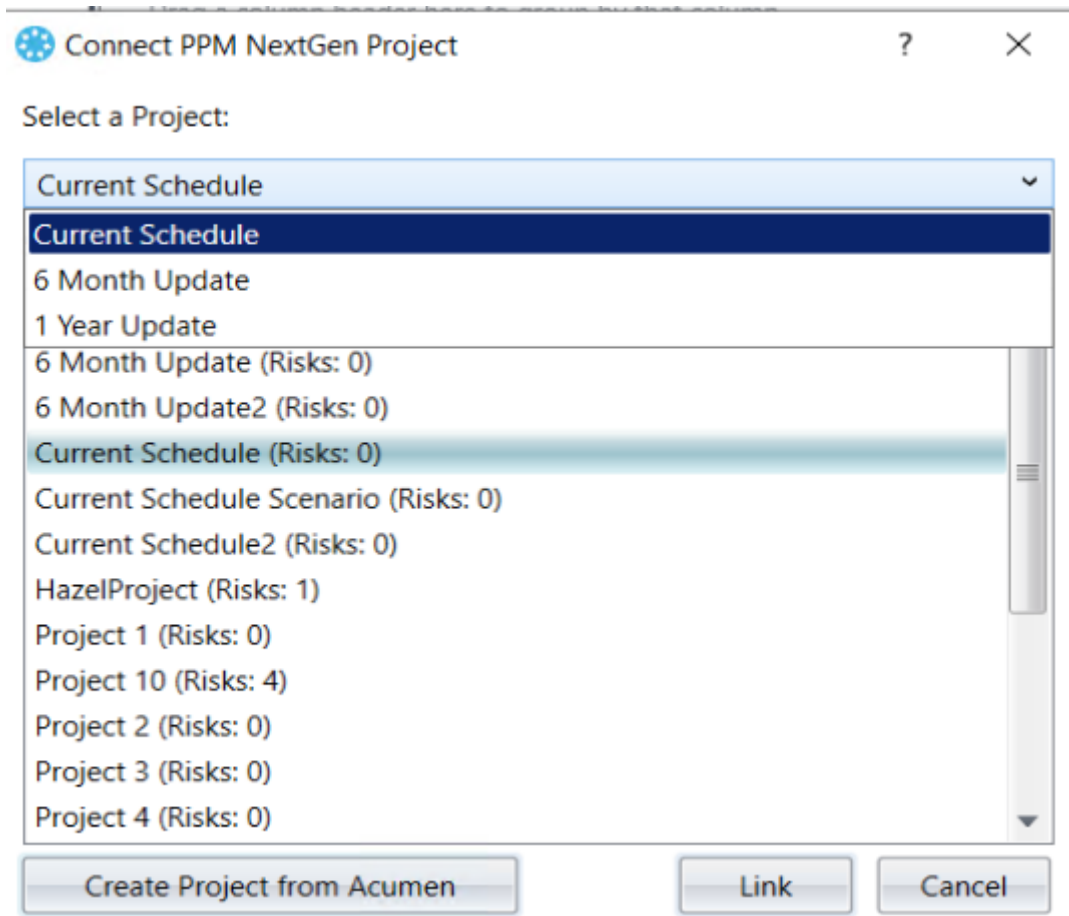
- Risk ID
- Step number
- Description
- Enabled
- Duration
- Cost
- Post mitigated probability
- Post mitigated values for each impact type (Schedule and Cost)
- Notes

When you link a project to a PPM NextGen Risk project, Acumen stores the project name in the workbook against the project. In addition, an “E” icon will display next to the project name in the Risk Register tree. This “E” icon will display in both the S1 // Projects and S3 // Risk tabs.



Select a Risk Register with Multiple Projects

If you select a Risk Register that has multiple projects associated with it, the Connect PPM NextGen Project dialog will display the **Select a Project** dropdown menu. Use this to select an Acumen project to connect with a PPM NextGen Risk project.

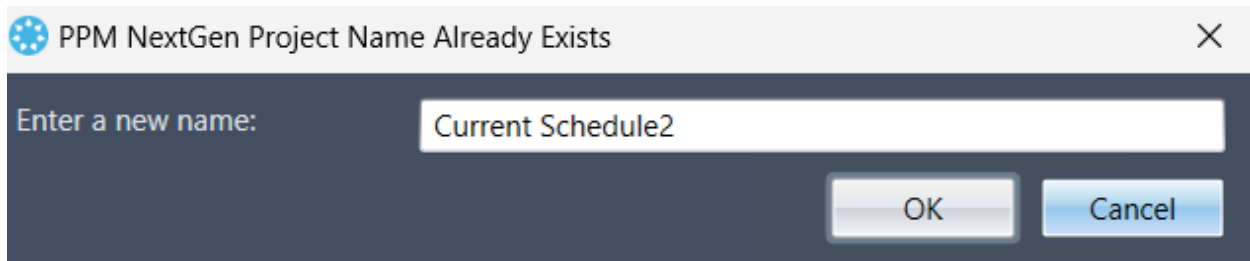


After you select an Acumen project, the Connect PPM NextGen Project dialog will display the appropriate PPM NextGen Risk projects. Select a project from the list and click the **Link** button.

Create a Project from Acumen

If you do not want to select a PPM NextGen Risk project from the list provided by the Connect PPM NextGen Project dialog, you can create your own by clicking the **Create Project from Acumen** button.

After you click **Create Project from Acumen**, the new PPM NextGen Risk project will be created. If the project name already exists, the PPM NextGen Project Name Already Exists dialog will display.



Enter a new name without special characters. Special characters that cannot be used include:

- ASCII control codes ASC(1-31)
- Non-breaking space ASC(160)
- Less than sign "<" (ASC(60))
- Greater than sign ">" (ASC(62))

If Acumen fails to create the project, an error dialog will display. When you click **Show details**, the dialog will expand to display with additional details.

After you successfully create a new PPM NextGen Risk project, Acumen populates the following fields:

- **Project Name:** Acumen project name
- **Description:** Acumen project description
- **Start Date:** Project start date
- **Finish Date:** Project finish date
- **Baseline Start:** Project baseline start
- **Baseline Finish:** Project baseline finish
- **Status Date:** Project status date
- **Actual Start:** Project actual start
- **Actual Finish:** Project actual finish
- **Percent Complete:** Summary project percent complete
- **Owner:** Acumen or Windows user used to connect to PPM NextGen Risk

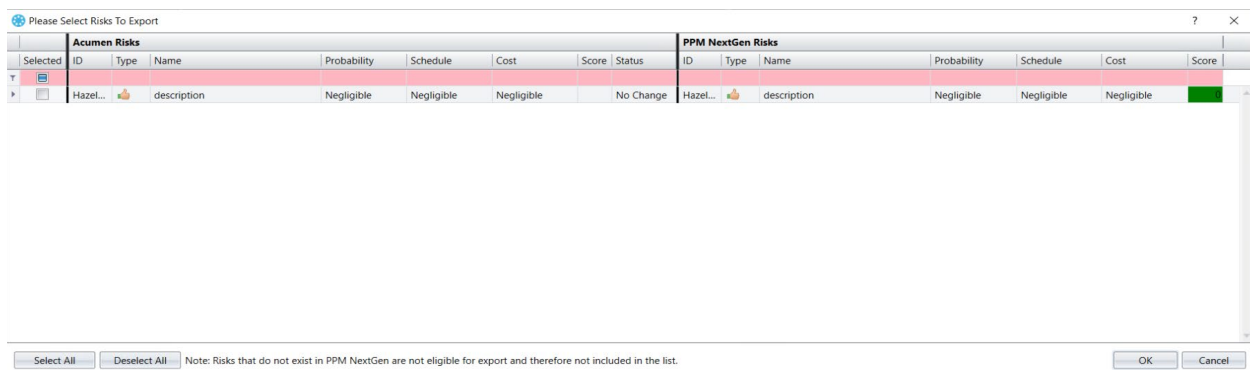
After the new project is created on PPM NextGen Risk, Acumen stores the project name in the workbook against the project. In addition, an "E" icon will display next to the project name in the Risk Register tree. This "E" icon will display in both S1 // Projects and S3 // Risk.

Export Risks to PPM NextGen Risk

When you select the **Export Risks to PPM NextGen** option, Acumen gets the list of risks assigned to your chosen project on PPM NextGen Risk. The current list of risks in PPM NextGen Risk is compared to the current list of risks in Acumen to identify risks that have changed in Acumen.

If a risk exists in Acumen without a corresponding entry in PPM NextGen Risk, it will be excluded from the export and will not appear in the list of risks. A note is displayed at the bottom of the dialog for additional information.

Once the comparison is complete, the risk comparison dialog, **Please Select Risks To Export**, will be displayed. If the risk was updated in Acumen, the checkbox is selected by default. If there is no change in the risk, the checkbox is left blank.



For the export, only the Acumen risks will have the Status column. The Status column will display the status of the Acumen risk with regards to PPM NextGen Risk. A tooltip will display to provide additional information on the status.

For every risk that is exported, the following PPM NextGen Risk values are updated:

- Description
- Probability
- Values for the Schedule and Cost impact types
- Risk Distribution Type
- Score
- First impact date

If the Acumen risk has mitigation steps, the list of mitigation steps in PPM NextGen Risk are replaced with the list in Acumen, including the following:

- Step number
- Description
- Enabled flag
- Duration
- Cost
- Probability
- Values for the Schedule and Cost impact types

- Mitigation Notes

When you export risks to a project in PPM NextGen Risk, the following project fields are updated:

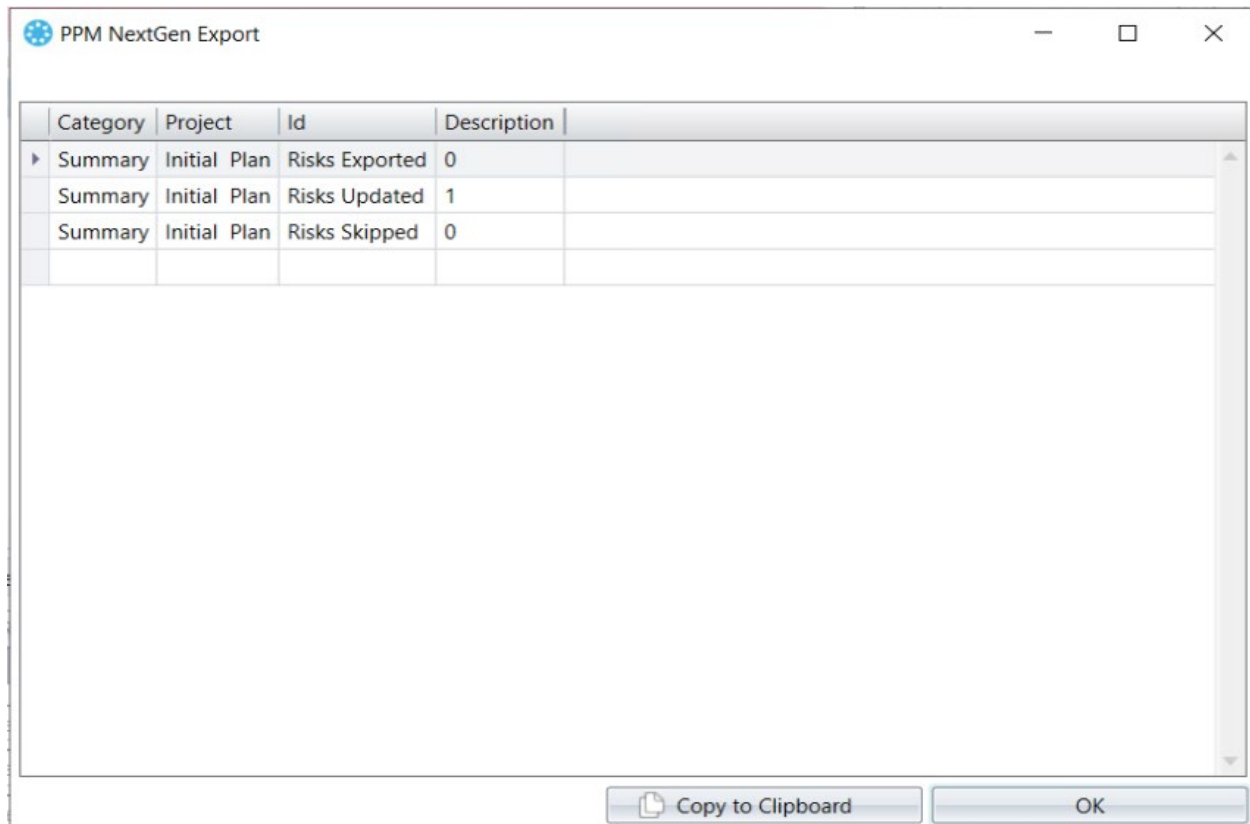
- Start Date
- Finish Date
- Baseline Start Date
- Baseline Finish Date
- Actual Start Date
- Actual Finish Date
- Overall Percent Complete
- Status Date

At the end of the export process, an export log dialog is displayed to summarize the actions performed.

Acumen can only export impact types that have a matching impact type in PPM NextGen Risk. The log will indicate any impact type values that were not exported to PPM NextGen Risk.

Mitigation steps in PPM NextGen Risk are required to have a description. For Mitigation Steps with a blank **Description**, the export populates the description with "Step number" and the step number. The log will indicate that the field will be populated.

In addition, any risks skipped during export will be clearly noted with the message: "Risk was skipped because it had no changes."



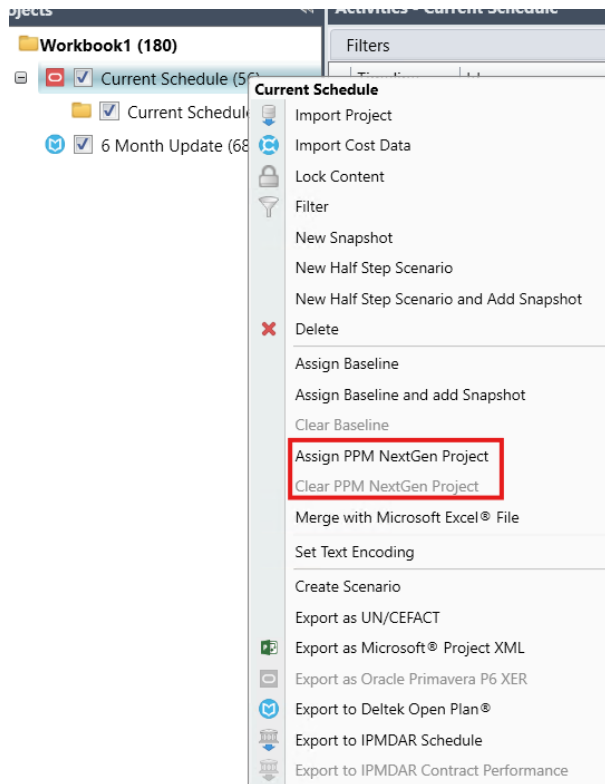
Appendix A: Using the Context Menu

After you have successfully connected Acumen to PPM NextGen Risk, new options will appear in the context menu of the S1 // Projects and S3 // Risk tabs.

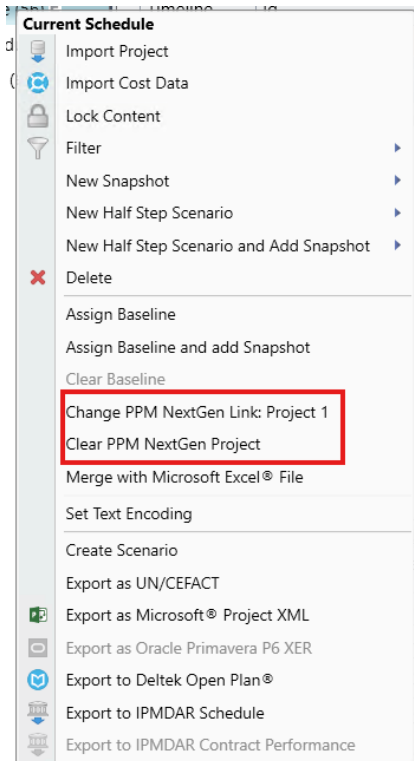
S1 // Projects

When you click on a project in the S1 // Projects tab, the context menu will include the following options:

- **Assign PPM NextGen Project:** This option allows you to assign a PPM NextGen Risk project to an Acumen project.
- **Clear PPM NextGen Project:** This option allows you to clear a PPM NextGen Risk project's connection from the Acumen project. This option is not enabled by default. It will only be enabled after you assign a PPM NextGen Risk project to your chosen Acumen project.



If a PPM NextGen Risk project is linked to the Acumen project, the **Change PPM NextGen Project: [Project Name]** option appears in the context menu. This option allows you to assign a different project to your chosen Acumen project.

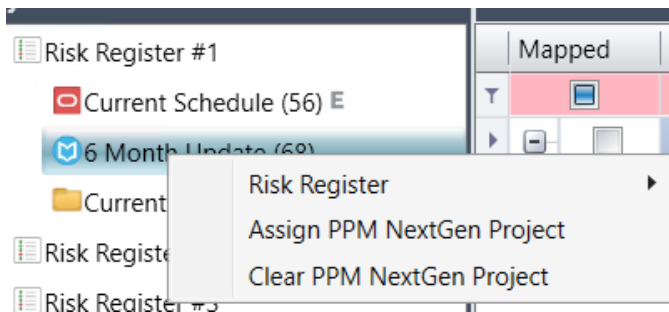


After successfully linking a PPM NextGen Risk project to an Acumen project, an “E” icon will appear next to the Acumen project’s name.

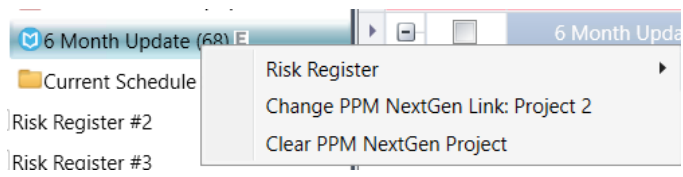
S3 // Risk

When you click on a project under a Risk Register in the S3 // Risk tab, the context menu will display the following options:

- **Assign PPM NextGen Project:** This option allows you to assign a PPM NextGen Risk project to an Acumen project.
- **Clear PPM NextGen Project:** This option allows you to clear a PPM NextGen Risk project’s connection from the Acumen project. This option is not enabled by default. It will only be enabled after you assign a project to your chosen Acumen project.



If a PPM NextGen Risk project is linked to the Acumen project, the **Change PPM NextGen Project: [Project Name]** option appears in the context menu. This option allows you to assign a different project to your chosen Acumen project.



After successfully linking a PPM NextGen Risk project to an Acumen project, an "E" icon will appear next to the Acumen project's name.

Appendix B: Missing PPM NextGen Risk Project

In some cases, when you try to integrate an Acumen project with a PPM NextGen Risk project, you will encounter an error. This can occur for two reasons, specifically because the project was deleted or because you no longer have access to it.

A dialog will display to indicate this error. You will be prompted to select a new project from the list in the Connect PPM NextGen Project dialog.

Appendix C: Troubleshooting

Acumen will inform you when an error occurs when you use PPM NextGen Risk. These error messages are specific to failure scenarios, making it easier to find a solution.

If an error occurs during the testing connection phase, Acumen displays one of the following messages.

Error Message	Solution
All PPM NextGen Risk Configuration fields are required in order to test the connection. Please complete all fields.	Make sure to complete all required fields.
Endpoint URL is invalid. It must contain either http:\\ or https:\\ or http:// or https://.	Make sure that the Endpoint URL contains either http:\\ or https:\\ or http:// or https://.
Could not connect to PPM NextGen Risk.	Make sure that you enter the correct PPM NextGen Risk Endpoint URL.
Could not Authenticate PPM NextGen Risk.	Make sure that you enter the correct Authentication Endpoint URL, Client ID, and or Customer ID.

Appendix D: If You Need Assistance

If you need assistance installing, implementing, or using Acumen, 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.