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Deltek EPM Security Administrator 8.6

Release Notes

December 5, 2025



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Contents

Overview	1
Pre-Installation Information.....	2
Pre- and Post-Installation Checklists.....	2
Software Requirements (Compatibility Matrix).....	2
New Features and Enhancements.....	3
EPM SA 8.6 Installation.....	3
Stand-Alone Installer	3
Supported PPM Product Versions.....	4
System Menu Changes.....	4
Email Configuration Dialog Box.....	6
Establishing Password Policies.....	7
System Settings Dialog Box.....	8
Authentication Tab on the User Details Form.....	11
Assigning Users to wInsight Analytics Without a License.....	13
Email Preferences Warning for New Users with Basic Authentication.....	13
Updated Data Sources Dialog Box.....	14
Add Data Source Dialog Box.....	14
Edit Data Source Dialog Box.....	16
Import Data Source Dialog Box	16
.NET Framework Data Provider for SQL Server Connection Properties Dialog Box.....	17
Oracle Data Provider for .NET (ODP.NET) Connection Properties Dialog Box.....	18
Message Upon Login to EPM SA.....	18
Removal of OWNER_DELEGATE from Groups Primary Role	18
Software Issues Resolved	19
Database Changes	20
Appendix A: For Additional Information.....	21
Deltek Support Center.....	21
Access Deltek Support Center.....	21
Available Documentation for this Release.....	22

Overview

Welcome to Deltek EPM Security Administrator 8.6 Release Notes. These release notes contain a summary of the following:

- New Features and Enhancements
- Software Issues Resolved

Note: In this documentation, all succeeding references to Deltek EPM Security Administrator will be referred to as EPM SA.

Pre-Installation Information

Before you begin the installation and setup of EPM Security Administrator, it is important to understand the following information.

Pre- and Post-Installation Checklists

The EPM Security Administrator 8.6 Installation Guide provides pre- and post-installation checklists that include all the necessary steps for a successful implementation. Deltek recommends reviewing these topics for both new and upgrade installations to ensure that you have the correct configuration.

Software Requirements (Compatibility Matrix)

To see the list of the supported and compatible technologies, see the "System Requirements" section in the EPM Security Administrator Installation Guide.

New Features and Enhancements

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

EPM SA 8.6 Installation

Deltek has introduced PPM Administrator, a web-based tool that is the next generation of Deltek EPM SA, combining the Windows desktop and Smart Client versions into a single, modern solution. It provides streamlined administration experience and is compatible with Acumen Touchstone, Cobra, Open Plan, PM Compass, and wInsight Analytics.

Note: It delivers the same capabilities as EPM SA, along with refreshed interface and improvements based on user feedback.

If you prefer a stand-alone installation, EPM SA 8.6 serves as an alternative to PPM Administrator. It supports the minimum version of each PPM product that includes the common security table changes introduced in EPM SA 8.5.1.

Attention: For more information, see the [Supported PPM Product Versions](#) section in this document.

Important: You must use either PPM Administrator or EPM SA, but not both. If you are using a PPM product in a stand-alone environment, Deltek recommends using EPM SA.

Stand-Alone Installer

The EPM SA 8.6 version is installed as a stand-alone application with separate 64-bit (**DeltekEPMSA86x64.msi**) and 32-bit (**DeltekEPMSA86x86.msi**) 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 Windows **Start** menu for easy access.

Attention: For more information, see *Deltek EPM Security Administrator 8.6 Installation Guide*.

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

During installation, it creates a DATASOURCES.DAT file in the ProgramData\Deltek\PPM folder if one does not yet exist, leaving it empty by default and granting read and write access to the Local Users group. It also stores the config.dat file in the EPM SA 8.6 installation folder.

Attention: 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. For more information, see the [Supported PPM Product Versions](#) section in this document.

Supported PPM Product Versions

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

Application	Version
Acumen	<ul style="list-style-type: none"> 8.11
Cobra	<ul style="list-style-type: none"> 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.

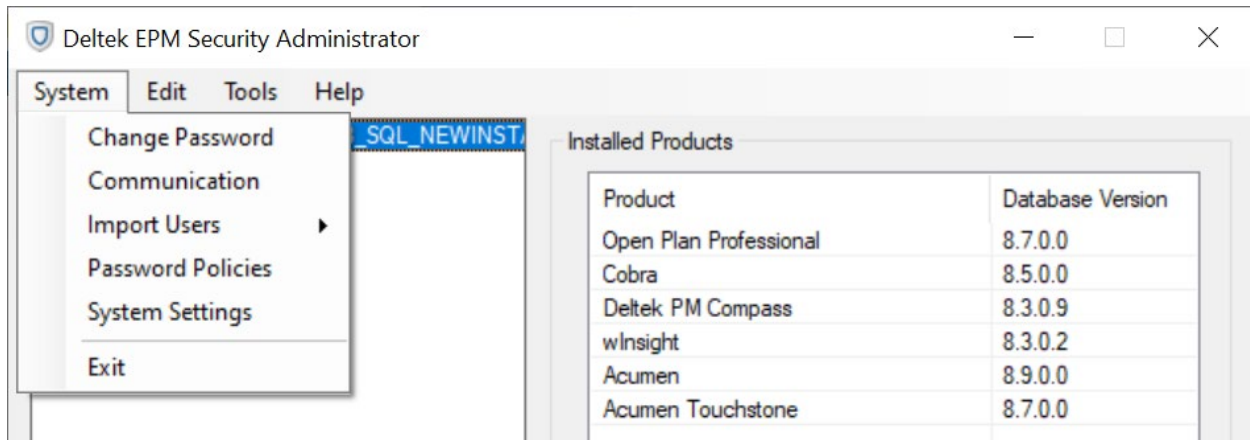
Moreover, the table below lists the minimum PPM product versions compatible with EPM SA 8.6:

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

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.

System Menu Changes

In this release, several product-level options from the previous version have been moved to the **System** menu, along with the addition of new options.



Option	Description
Change Password	<p>This option enables the currently logged-in user to change their password by opening the Change Password dialog box.</p> <p>You can change your password by navigating to the Authentication tab on the User Details form and clicking the Password button. Clicking Password displays the Change Password dialog box. Make sure the new password complies with the established password policies.</p>
Communication	<p>This option allows you to configure the email settings used for sending system-related emails by opening the Email Configuration dialog box.</p>
Password Policies	<p>This option, previously named Password Rules, allows you to define the requirements for acceptable PPM product passwords before adding users using the Password Policies dialog box.</p> <p>The new Password Policies option applies to products that support this version of EPM SA. However, the Minimum Length and Maximum Retries Before Lockout settings still apply to PPM products that are not compatible with this EPM SA version.</p>
System Settings	<p>This option allows you to set authentication preferences, and configure security-related options for each PPM product using the System Settings dialog box.</p>

Attention: For more information, see the System Menu section in the *Deltek EPM Security Administrator Help*.

Managing Authentication Settings

If the selected product in the Products folder is not yet compatible with PPM Administrator, you can access and update the **Authentication Options** via the **Tools** menu for that product. If it is compatible, a message displays directing you to go **System > System Settings** to make changes.

Email Configuration Dialog Box

You can now configure the email settings used for sending system-related emails through the Email Configuration dialog box, which you can access by selecting the **Communication** option. These settings become the default for all PPM products that support email, ensuring that messages related to granted access, passwords, and forgotten User IDs are sent from this configured email.

Field	Description
Email Server	Enter a valid host name or IP address of the SMTP server that will be used to send emails from EPM SA and other PPM products
Port	Enter a port number for SMTP (Simple Mail Transfer Protocol) communication.

Field	Description
Use TLS	Select this option to use the TLS (Transport Layer Security) protocol.
Username	Enter the username that will be used to access the email server.
Password	Enter the password associated to the username used to access the email server.
System Email	Enter a valid email address that will display in the From field as the sender of the system-generated emails.
System Email Display Name	Enter a displayed name when sending email from the System Email address.
Send Test Email to System	Click this button to send an email message to verify that the configured SMTP settings are accurate and can successfully send email to the system email account.

Attention: For more information, see the Email Configuration Dialog Box section in the *Deltek EPM Security Administrator Help*.

Establishing Password Policies

Before you add users, you need to establish the criteria for acceptable PPM product passwords by selecting the **Password Policies** option. These policies apply when users change their own passwords, which they can do after they initially log in. The new password must adhere to the established password policies, and blank passwords are not allowed.

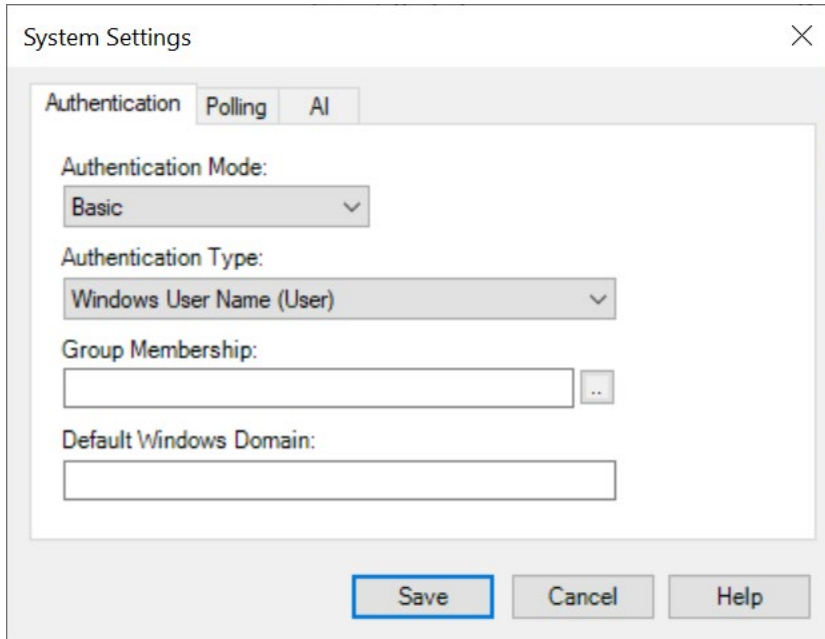
Selecting the **Password Policies** option displays the Password Policies dialog box, you can specify the options and restrictions for passwords.

Field	Description
Password Strength	To specify the password requirements, select Weak , Medium , Strong , or Custom from the drop-down list.
Password Complexity	This option controls the requirements for character and number combinations. It is automatically set and disabled based on the defined password strength. It is enabled only for the Custom password strength.
Minimum Length	Enter the minimum number of characters that users must enter for a password.
Expiration	To set the period when a password expires, select Never , 30 Days , 60 Days , 90 Days , 6 Months , or 1 Year from the drop-down list.
Max Retries Before Lockout	Enter the number of invalid login attempts allowed before a user is disabled from using any PPM products.

Attention: The **Password Strength**, **Password Complexity**, and **Expiration** settings only apply if all installed PPM products support EPM SA 8.6. For more information, see the Password Policies Dialog Box section in the *Deltek EPM Security Administrator Help*.

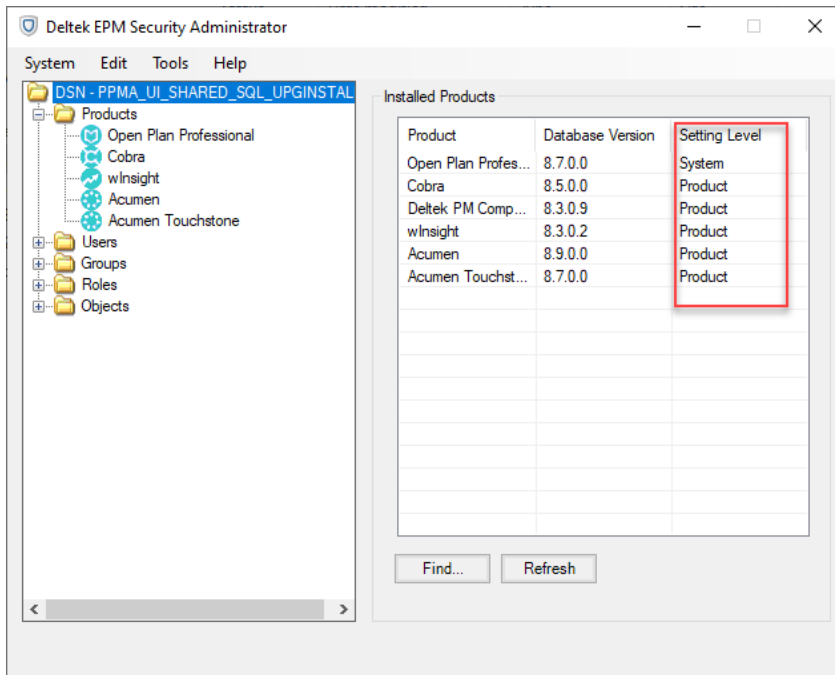
System Settings Dialog Box

If the installed product supports EPM SA 8.6, certain product-level options from the previous version are now available in the new System Settings dialog box. If the installed product does not yet fully support this EPM SA version, continue using the existing product settings found under **Tools » Authentication**.



Note: System-level settings are shared preferences that apply across all products that support PPM Administrator. Product-Level settings are preferences specific to the selected PPM product.

To check if a PPM product supports system-level settings, you can view it in the **Installed Products** form.



System Settings Authentication Tab

Below are the changes to the existing Authentication functionality:

Field	Description
Authentication Mode	<p>This drop-down list includes a new option called Mixed, allowing both the Basic and Windows user authentication modes.</p> <p>In addition, If Authentication Mode is set to Basic, the Authentication Type, Group Membership, and Default Windows Domain fields are disabled. If it is set to Windows or Mixed, those fields remain enabled.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Note: For both upgrades and clean installations of PPM Products, the Authentication Mode field defaults to Basic. Upgraded PPM products no longer retain previous authentication settings from EPM SA 8.5.1.</p> </div>
Max Retries Before Lockout	<p>The option, which was previously called Max Login Retries, is now located in the Password Policies dialog box.</p>

Attention: For more information, see the System Settings Authentication Tab section in the *Deltek EPM Security Administrator Help*.

System Settings Polling Tab

Here are the added options to the existing Polling functionality:

The screenshot shows the 'System Settings' dialog box with the 'Polling' tab selected. The settings are as follows:

- Polling Interval:** 30
- Polling Interval Unit:** Seconds
- Max Time of Inactivity:** 0
- Max Time of Inactivity Unit:** Minutes

Buttons at the bottom: Save, Cancel, Help.

Field	Description
Polling Interval Unit	To set the unit to be used for the polling interval, select Seconds , Minutes , or Hours from the drop-down list.
Max Time of Inactivity	<i>This option only applies to Cobra and Acumen Touchstone.</i> It specifies the number of minutes a user can remain inactive before the application automatically closes. The default value is 0 , meaning there is no time limit, and user sessions will not expire.
Max Time of Inactivity Unit	<i>This field only applies to Cobra and Acumen Touchstone.</i> It displays Minutes and is always disabled.

Attention: For more information, see the System Settings Polling Tab section in the *Deltek EPM Security Administrator Help*.

System Settings AI Tab

The AI tab, formerly known as **AI Account Settings**, is now included in the System Settings dialog box.

Attention: For more information, see the System Settings AI Tab section in the *Deltek EPM Security Administrator Help*.

Authentication Tab on the User Details Form

You can assign authentication rules for the login of a particular user to the PPM product suite using the Authentication tab on the **User Details** form.

User Details: AARMISTEADBA

Address Data Notes Products Authentication

Basic Authentication:

Set Password

Windows Authentication:

Domain:

about.com

Option	Description
Basic Authentication	This option requires you to enter your user ID and password each time you access the PPM product. It is always selected for the SYSADMIN user.
Set Password	<p>If all installed PPM products support EPM SA 8.6 and the selected user is assigned to a product license, you can set a password by clicking this button. This button only becomes enabled when the Basic Authentication option is selected.</p> <p>Clicking this button displays the Set Password dialog box, asking you to confirm whether this version of EPM SA will send you a temporary password to your registered email address.</p> <p>The temporary password is valid for only 24 hours. Upon logging in using the temporary password, the PPM Administrator will prompt you to set your new password.</p> <p>If at least one product does not support this EPM SA version, it displays the Password button instead. Clicking Password displays the Change Password dialog box. The new password must comply with the established password policies, and blank passwords are not allowed.</p>

Windows Authentication	Select this option to log on to the PPM product without providing a user ID and password on the login dialog box. Selecting the Windows Authentication option integrates your Windows ID with this EPM SA version.
Domain	Enter a domain. This field is only enabled, and a specific value is required, when you select the Windows Authentication option.

Attention: For more information, see the [User Details Form: Authentication Tab](#) section in the *Deltek EPM Security Administrator Help*.

Temporary Password When Assigning a User to a Product License

When all installed PPM products support this version of EPM SA, and you are assigning a user to a product license or adding a product to a user for the first time, Deltek sends a temporary password to their registered email as a one-time access credential. If the user does not log in with these credentials, and another user later unassigns and reassigns the product license, the email will be sent again. Since the user has not yet logged into the product, the system will consider them as a new user.

Note: Users cannot use the temporary password to log into this version of EPM SA. To do so, they must first use the temporary password to log in to the PPM product that supports EPM SA. After logging in to the PPM product, they can then use the new password to access EPM SA.

SYSADMIN Can Receive Temporary Password Even Without a License

If all installed products are compatible with PPM Administrator, then selecting a SYSADMIN user on the **Users** form and clicking **Set Password** (on the Users Authentication tab) automatically sends an email containing a temporary password — even if that SYSADMIN account has *not* been assigned a license.

Assigning Users to wlnsight Analytics Without a License

Most PPM products require a valid license before you can assign users, or you encounter an error message. For wlnsight Analytics, however, no license is needed to assign users. You can always click the **Assign Users** button in the Licenses section on the **Product Details** form or the **Add** button on the Products tab within the **Users** form. When a license is later applied, assigned users automatically get access if they have the right permissions.

Email Preferences Warning for New Users with Basic Authentication

EPM SA now displays a warning if email preferences are not configured and the system authentication is set to **Basic**.

- **Adding a new user**
When you click **Add** on the **Users** form without setting up system email preferences, EPM SA displays the warning message.
- **Assigning a product license**
On the Users Products tab, if you assign a license and then save the user record while email

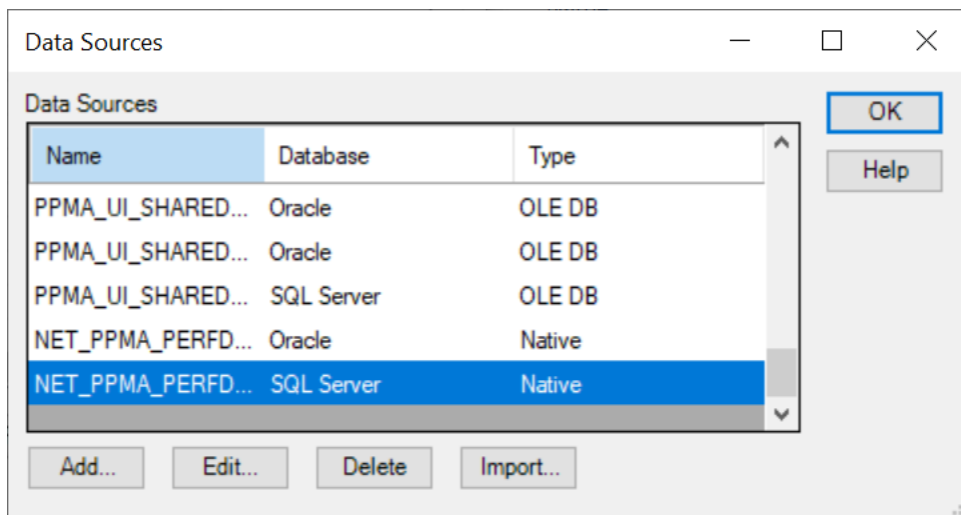
preferences are not configured, EPM SA displays the message and does not send a temporary password.

- **Setting a password**

When you click **Set Password** on the Users Authentication tab, EPM SA displays the warning message.

Updated Data Sources Dialog Box

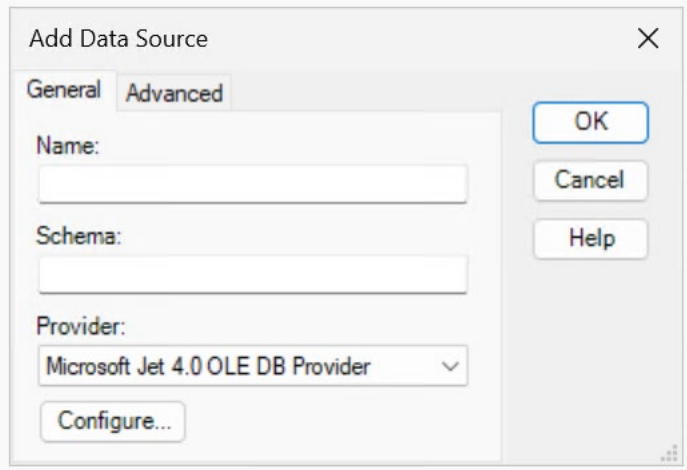
When navigating to **Tools » Change Data Source**, the EPM SA now opens the updated Data Sources dialog box, which displays a list of existing database connections or data sources, along with detailed information for each, such as the database management system and type. In addition to options for adding, editing, and deleting data sources, it also allows you to import another DATASOURCES.DAT file.



Attention: For more information, see the Data Sources Dialog Box section in the *Deltek EPM Security Administrator Help*.

Add Data Source Dialog Box

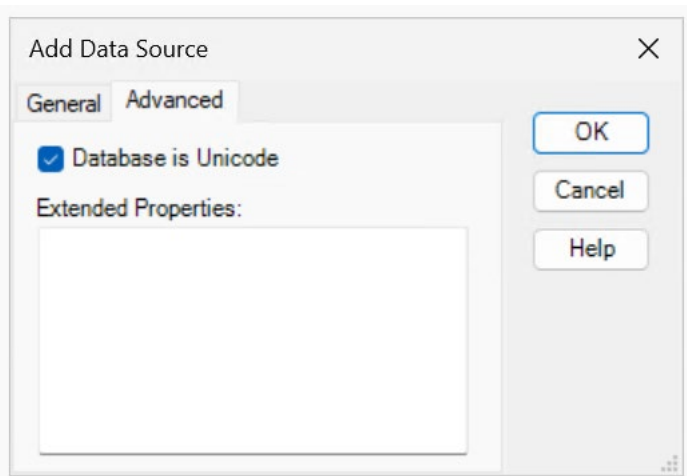
In this release, clicking the **Add** button displays the new Add Data Source dialog box with two tabs: General and Advanced. In the previous release, clicking **Add** would automatically displays the Data Link Properties dialog box.



The General tab allows you to set the required connection properties.

Fields	Description
Name	Enter a unique name for the data source.
Schema	You can enter the schema (database name) in this field.
Provider	Select a provider to use when the EPM SA connects to the database.
Configure	Click this button to display either the Data Link Properties dialog box or the Connection Properties dialog box.

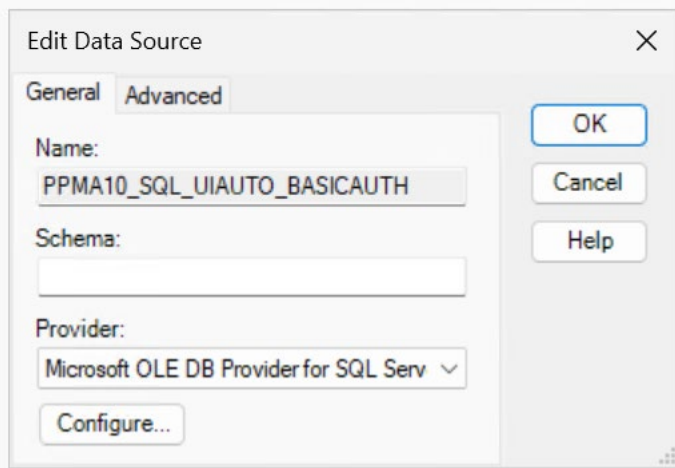
The Advanced tab allows you to set the **Database is Unicode** option and the **Extended Properties** field.



Attention: For more information, see the Add Data Sources Dialog Box section in the *Deltek EPM Security Administrator Help*.

Edit Data Source Dialog Box

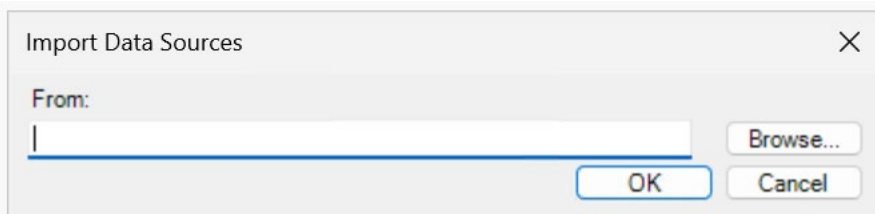
The Edit Data Source dialog box interface now resembles the new Add Data Source dialog box, with the exception that the **Name** field on the General tab is read-only.



Attention: For more information, see the Edit Data Source Dialog Box section in the *Deltek EPM Security Administrator Help*.

Import Data Source Dialog Box

This new dialog box lets you add a data source by importing an additional DATASOURCES.DAT file.



Attention: For more information, see the Import Data Source Dialog Box section in the *Deltek EPM Security Administrator Help*.

.NET Framework Data Provider for SQL Server Connection Properties Dialog Box

When you select **SQL Server .NET Framework** from the **Provider** list in the Add Data Source or Edit Data Source dialog box and click **Configure**, this dialog box displays allowing you to configure the connection to a SQL Server database using the .NET Framework.

The screenshot shows the 'General' tab of the '.NET Framework Data Provider for SQL Server Connection Properties' dialog box. The 'Server Name' field is a dropdown menu with a 'Refresh' button to its right. Below this is the 'Log on the server' section, which has two radio buttons: 'Use Windows Authentication' (selected) and 'Use SQL Server Authentication'. Under 'Use SQL Server Authentication', there are text boxes for 'User name:' and 'Password:', and a checkbox for 'Save my password'. The 'Connect to a database' section has two radio buttons: 'Select or enter a database name:' (selected) and 'Attach a database file:'. The 'Select or enter a database name:' option has a dropdown menu. The 'Attach a database file:' option has a text box and a 'Browse...' button. Below these is a 'Logical name:' text box. At the bottom of the dialog, there are three buttons: 'Help', 'OK', and 'Cancel'. A 'Test Connection' button is located above the 'OK' and 'Cancel' buttons.

Attention: For more information, see the .NET Framework Data Provider for SQL Server Connection Properties Dialog Box section in the *Deltek EPM Security Administrator Help*.

Oracle Data Provider for .NET (ODP.NET) Connection Properties Dialog Box

When you select **Oracle ODP.NET** from the **Provider** list in the Add Data Source or Edit Data Source dialog box and click **Configure**, this dialog box displays allowing you to configure the connection to an Oracle database using the .NET Framework.

Attention: For more information, see the Oracle Data Provider for .NET (ODP.NET) Connection Properties Dialog Box section in the *Deltek EPM Security Administrator Help*.

Message Upon Login to EPM SA

When you log in to EPM SA on data source shared with other PPM products, and none of those products are compatible with PPM Administrator, an error message displays, indicating a compatibility issue. The message advises you to either upgrade your PPM products to work with this version of EPM SA or downgrade to EPM SA 8.5.1.

A **Help** button is also available, providing more information about version compatibility.

Removal of OWNER_DELEGATE from Groups Primary Role

You can no longer assign OWNER_DELEGATE role to a group. The corresponding option has been removed from the **Primary Role** drop-down list on the General tab within the **Groups** menu.

Software Issues Resolved

There are no software issues resolved in this release.

Database Changes

There are no changes to the database in this release.

Appendix A: For Additional Information

Deltek Support Center

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

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

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Deltek 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.

Available Documentation for this Release

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

Document Name	Description
Deltek EPM Security Administrator 8.6 Online Help	This documentation provides an overview of concepts and step-by-step instructions for using the EPM Security Administrator.
Deltek PPM Datasource Management Tool Online Help	This documentation provides an overview of concepts and step-by-step instructions for using the PPM Datasource Management Tool.