




Deltek

Deltek PM Compass 8.4

Cumulative Update 10
Release Notes

July 19, 2024



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Overview

This document includes all of the enhancements, software issues resolved, and database changes that were made in PM Compass 8.4 Cumulative Update 01 through PM Compass 8.4 Cumulative Update 10.

Custom Programs Affected

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Customer Success at <https://support.deltek.com> before you install the update.

Attention: For steps to install the cumulative update, see “[Appendix A: Download and Install the Cumulative Update](#)” in this document.

Loading Reports onto Load-Balanced SSRS Servers

Multiple SSRS servers in a load-balanced environment all have a common URL and a common database. Apply the Cumulative Update (CU) to all Web Servers so that updated Report RDL files are installed. Next, launch PM Compass, navigate to **Administration » Report Administration**, and click the **Load Report Files** button to ensure that the updated reports are loaded onto the SSRS database server so that they are available for all the SSRS servers.

Since reloading reports updates the SSRS database, you can also optionally enable the checkbox to reload reports at least once during the CU installation on one of the Web or Process Server installations.

Attention: For more information, see “[Loading Reports onto Load Balanced SSRS Servers](#)” in the *Deltek PM Compass Advanced Technical Administration Guide*.

Viewing the Online Help

The Deltek PM Compass Help System provides help for all areas of the PM Compass application. To access all documents available for PM Compass 8.4, click <https://help.deltek.com/product/PMCompass/8.4/GA/>.

Note: You can access the online help using Microsoft Edge, Chrome, or Firefox.

Software Requirements (Compatibility Matrix)

To see the list of the supported and compatible technologies, see “Software Requirements” in the [Deltek PM Compass 8.4 Installation Guide](#).

For a complete list of the recommended minimum software requirements, see the Deltek Product Support Compatibility Matrix document, which you can download from the [Deltek Support Center](#) site.

PM Compass 8.4 Cumulative Update 10

Released: July 19, 2024

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 10 (8.4.0710.3721)	

Note: Deltek PM Compass 8.4 Cumulative Update 10 was tested with the following PPM products:

- [Deltek Cobra 8.5 Cumulative Update 09](#)
- [Deltek Cobra 8.4 Cumulative Update 31](#)
- [Deltek Open 8.7 Cumulative Update 02](#)
- [Deltek Open Plan 8.6 Cumulative Update 09](#)

Client Component

There are no client components in this release.

Enhancements

This section includes enhancements in this release.

Software Issues Resolved

This section includes software issues resolved in this release.

Workflows

Defect 2184299

Description: When you opened a workflow, PM Compass sometimes displayed the following error: "FrameworkException: Invalid column name 'NarrativeAnalysisScore'. Invalid column name 'NarrativeAnalysisExplanation'."

Customers Impacted: This defect affects customers opening workflows.

Workaround Before Fix: None.

Files Updated:

- Change implemented in installation package

Security Enhancements

There are no security enhancements in this release.

Cobra Integration Updates

There are no Cobra integration updates in this release.

Open Plan Integration Updates

There are no Open Plan integration updates in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Database Changes

There are no database changes in this release.

Data Changes

There are no data changes in this release.

Documentation Changes

There are no documentation changes in this release.

PM Compass 8.4 Cumulative Update 09

Released: June 28, 2024

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 09 (8.4.0709.3718)	

Note: Deltek PM Compass 8.4 Cumulative Update 09 was tested with the following PPM products:

- [Deltek Cobra 8.5 Cumulative Update 09](#)
- [Deltek Cobra 8.4 Cumulative Update 31](#)
- [Deltek Open 8.7 Cumulative Update 01](#)
- [Deltek Open Plan 8.6 Cumulative Update 09](#)

Client Component

There are no client components in this release.

Enhancements

This section includes enhancements in this release.

Support for Narrative Score Assessment in Explain Variance

PM Compass introduces a new feature called Narrative Score, which allows you to input an intended Explanation of Variance narrative, have the content assessed by industry best-practice criteria, and generate a score.

The narrative content is evaluated based on the following criteria:

- Challenges and Mitigation
- Clarity and Conciseness
- Completeness
- Future Outlook
- Language and Style
- Metrics and Quantification

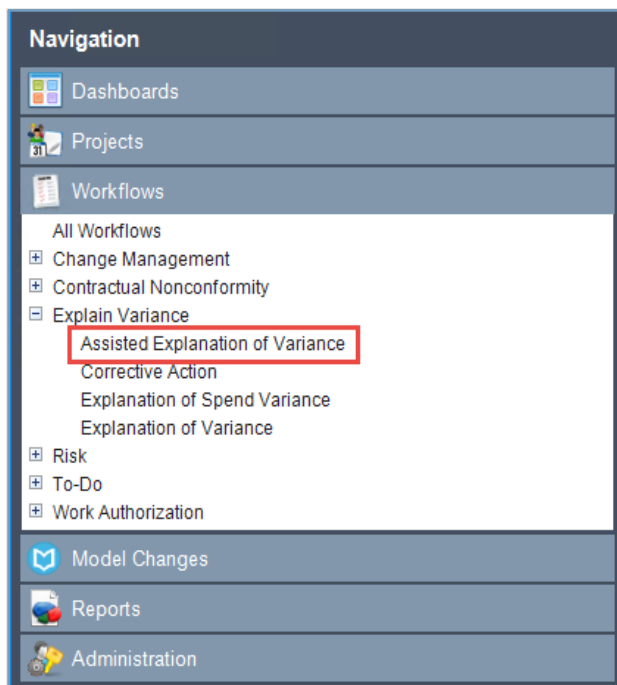
- Structure

This feature employs an artificial intelligence tool that utilizes publicly available information and proprietary data created and owned by Deltek.

Attention: For more information on the Narrative Score feature, see the [“Narrative Score”](#) topic in the PM Compass Help System.

Assisted Explanation of Variance Workflow Type

To support the Narrative Score feature, a new workflow type called Assisted Explanation of Variance has been created. This workflow type enables you to easily generate and assess narrative scores for Explanation of Variance, Corrective Action, and Impact narratives based on seven criteria, allowing support for the acceptance of Explanation of Variance reports by the respective customers.

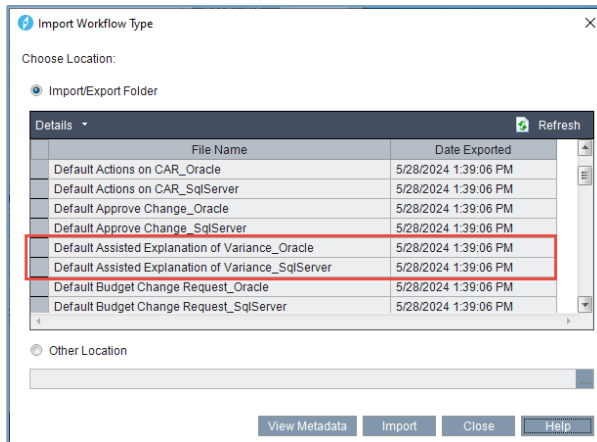


Assisted Explanation of Variance on the Navigation Menu

Attention: For more information on Assisted Explanation of Variance, see the [“Assisted Explanation of Variance Form”](#) topic in the PM Compass Help System.

To restore the Assisted Explanation of Variance workflow type, perform the following steps:

1. Access **Workflow Type Configuration**.
2. Click **Import**.
3. Select which workflow type you want to restore based on the database you are using.



Import Workflow Type Dialog Box

Note: You can also create workflows of this type automatically. For more information, see the [“Automatically Create Explanation of Variances”](#) topic in the PM Compass Help System.

Enabling the Narrative Score Feature

To enable and utilize the Narrative Score feature, you must have valid artificial intelligence login credentials entered into the EPM Security Administrator (EPM SA) tool.

Only Azure OpenAI Service (ChatGPT-3.5 and ChatGPT-4) is currently supported.

Attention: For more information on [Azure Open AI Service](#), see the Azure OpenAI Service documentation on the Microsoft website.

System Settings

Save Help

General Email Servers **AI**

Azure OpenAI Authentication

API Key

Deployment

Endpoint URL

Test Connection

Azure OpenAI Authentication Pane of the System Setting Form in EPM SA

Field	Description
API Key	Use this field to enter the text string provided when the Azure OpenAI account is created. This field also refers to your account ID.
Deployment	Use this field to enter the name of the deployment you want to use.
Endpoint URL	Use this field to enter the URL that directs to the current instance of Azure OpenAI referenced in the Deployment field.
Test Connection	<p>Click this button to test your connection.</p> <ul style="list-style-type: none"> ▪ If the connection is successful, a "Connection Successful" message displays. ▪ If the connection is not successful, a "Connection Failed. Please make sure credentials are valid." message displays.

Attention: For more information on these fields, see the following topics:

- ["Enable the Narrative Score Feature"](#) in the PM Compass Help System
- ["AI Tab of System Settings"](#) in the EPM Security Administrator Help System

Generating the Narrative Score

On the General tab of the Assisted Explanation of Variance form is the **Generate Narrative Score** button. This button is enabled only for workflows that have a status of **New** or In **Review**.

Assisted Explanation of Variance

Save

New

List View

Refresh

Start Workflow

Delete Workflow

Print

Help

Search

Example Assisted EoV

General

Child Workflows

Links

Progress

ID

VAR0000001638

Due Date

6/27/2024

Title

Example Assisted EoV

Status Date

2/28/2023

Project

Inter-Planet Shuttle

Inter-Planet Space Shuttle

Control Account

1.1.2.1/1600

Ergonomics Design

Cost Detail

	BCWS	BCWP	ACWP	SV	SV %	CV	CV %	SPI	CPI
Current:	13,406.00	0.00	0.00	-13,406.00	-100	0.00	0	0.00	0.00
Cumulative:	33,171.00	14,757.00	5,870.00	-18,414.00	-56	8,888.00	60	0.44	2.51

	BAC	EAC	VAC	VAC %	TCPI to BAC	TCPI to EAC
At complete:	57,855.00	74,159.00	-16,304.00	-28	0.83	0.63

Variances that exceeded thresholds:

Schedule variance: Current value, Cumulative percentage.

Cost variance: Cumulative percentage, At complete percentage.

Values calculated using: COM, DIRECT, FRINGE, G&A, OVERHEAD

Generate Narrative Score

0

Copy Narratives

Explanation of Variance

Edit

We had to stop work on this CA because the original design was too difficult to use when wearing gloves.

Impact

Edit

The new design is now complete so we should be able to get much of the work from this month done next month.

Corrective Action

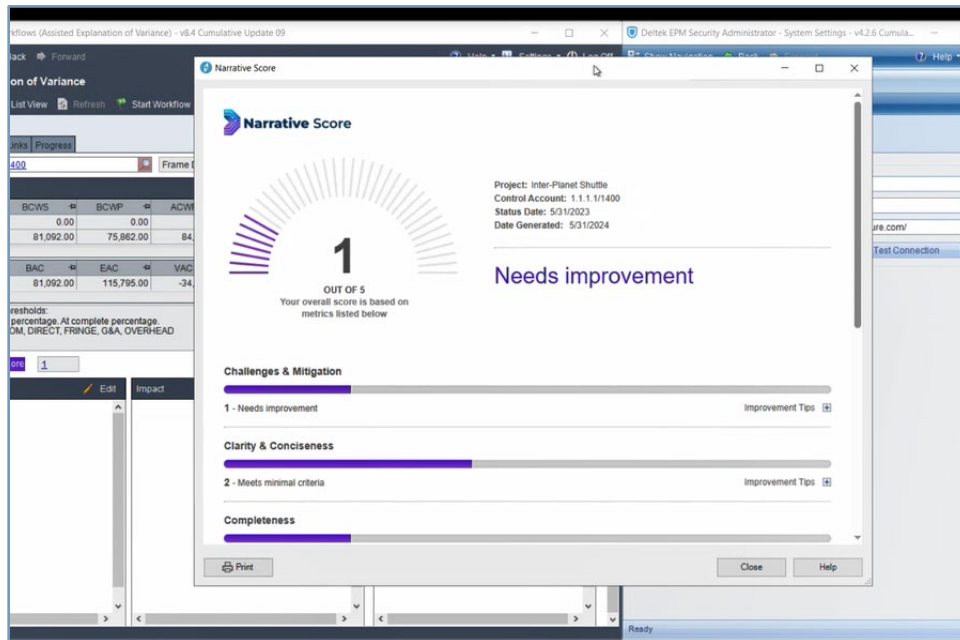
Edit

I'm going to pull someone from team B to help make sure we get this all done this month.

Generate Narrative Score Button on the Assisted Explanation of Variance Form

When the information in the EPM SA tool is valid and you have entered your intended narrative on Assisted Explanation of Variance form, click the **Generate Narrative Score** button to generate the narrative score. The narrative score, which is a hyperlink, is then displayed next to the button. Clicking the hyperlink displays a read-only view of the detailed narrative score summary.

Attention: For more information, see the "[Generate the Narrative Score](#)" topic in the PM Compass Help System.



Narrative Score Criteria Summary

Narrative Score Criteria Summary

The totals in the seven categories are non-weighted averages, resulting in an overall narrative score. This score ranges from **1** (indicating that the text does not meet the analysis criteria) to **5** (indicating alignment with the analysis rules). You can generate scores multiple times, adjusting and rerunning the narrative to reflect changes.

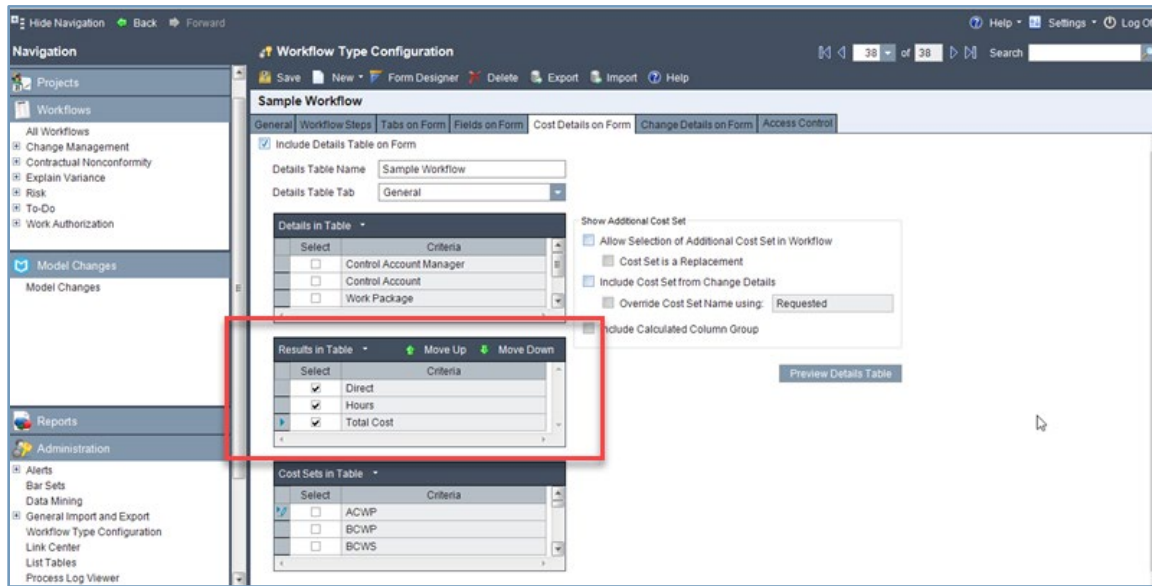
Attention: For more information on the criteria, see the [“Narrative Score Criteria Summary”](#) topic in the PM Compass Help System.

Enhanced Details Grid Display on the Workflow Form

For new workflows initiated after upgrading to PM Compass 8.4 Cumulative Update 09, the results displayed in the Details grid on the General tab of the Workflow form are now **Hours**, **Direct**, and **Total Cost**. These values are determined using the result code in the resource file in Cobra. Existing workflows are not changed.

Results with a result code of **H** are summed together and displayed in the **Hours** columns. Results with a result code of **D** are summed together and displayed in the **Direct** column. All currency results are summed up and displayed in the **Total Cost** column. This is useful when you have more than one hour and/or direct results. For instance, if you have two direct results—such as **Labor Direct** and **Subcontractor Direct**—they will be added together in the **Direct** column on the workflow form. This consolidation provides a clearer view of changes without requiring excessive scrolling. These values also correspond to the information displayed in the Change Details view.

If you want to remove a result, for example, the **Direct** result, you should access **Workflow Type Configuration**, navigate to your workflow type, click the Cost Details on Form tab, and clear **Direct** in the Results in Table grid.



Cost Details on Form Tab of Workflow Type Configuration

Note: For existing workflows, these results are not available, and the grid will retain the previously chosen results even if you refresh or modify the assignments in the Change Details view.

Attention: This information is documented in the [“Cost Details on Form Tab of Workflow Type Configuration”](#) topic of the PM Compass Help System.

Retain Cost Set Selection on the Enter Cost Progress Form

PM Compass now remembers the cost sets selected by a specific user for a particular project on the Resource tab of the Enter Cost Progress form.

Attention: This information is documented in the [“Resource Tab of the Enter Cost Progress Form”](#) topic of the PM Compass Help System.

Software Issues Resolved

This section includes software issues resolved in this release.

Workflows » Change Management

Defect 2127745

Description: When you performed the Continue Complete workflow action, control accounts that had already been successfully reclassified were run again, resulting in the removal of existing data.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Items.Server.dll
- Deltek.PMCompass.CobraIntegration.Server.dll
- Deltek.PMCompass.Globals.Server.dll

Workflows » Explain Variance

Defect 2122932

Description: When you created an Explanation of Variance (EoV) through a scheduled alert, narratives older than the latest might have been copied incorrectly.

Customers Impacted: This defect affects customers using the Copy Narrative functionality.

Workaround Before Fix: Display the created EoV and click **Copy Narratives**.

Files Updated:

- Deltek.PMCompass.Items.Common.dll

Security Enhancements

There are no security enhancements in this release.

Cobra Integration Updates

There are no Cobra integration updates in this release.

Open Plan Integration Updates

There are no Open Plan integration updates in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Database Changes

This section includes database changes in this release.

Columns

This section includes changes to columns.

New Columns

Table Name	Column Name	Data Type
CAM_ItemData	NarrativeAnalysisScore	decimal(5,2)
CAM_ItemData	NarrativeAnalysisExplanation	nvarchar(max)

Changes to Existing Columns

Table Name	Column Name	Data Type
CAM_UserPreferences	ESupportPassword	nvarchar(178)

Data Changes

The following are changes to the data applied by scripts:

- Removed non-encrypted values from the ESupportPassword column in CAM_UserPreferences
- Added Azure OpenAI credential information
- Updated the results data of existing workflow types

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none">▪ Documented troubleshooting for failed change management workflows in the “Failed Change Management Workflows” section of the Help system▪ Fixed the topics in the “Logging and Exception Tracing” section of the Help system▪ Created a new topic “Advanced Configuration Settings in the web.config File” to house the configuration settings that can be added to the web.config file

Documentation	Description
	<ul style="list-style-type: none"> Updated the "Columns Tab of the Report Options Dialog Box" topic to mention that you can view and select code fields added in User Defined Data = Schedule on the Columns tab of the Report Options dialog box for the Activity List report Updated the "Schedule Analysis Barchart Overview" and "Barchart Options Dialog Box" topics to mention that you can display relationship lines in a Schedule Analysis dashpart
<i>Deltek PM Compass 8.4 Installation Guide</i>	<ul style="list-style-type: none"> Removed instances of "Microsoft Visual C++ 2013 Redistributable Package"
<i>Deltek PM Compass 8.4 Technical Overview and System Requirements Guide</i>	<ul style="list-style-type: none"> Removed instances of "Microsoft Visual C++ 2013 Redistributable Package"

PM Compass 8.4 Cumulative Update 08

Released: April 30, 2024

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 08 (8.4.0708.3656)	
Deltek Cobra 8.x Integration	Deltek Cobra 8.5 Integration for PM Compass 8.4_8.5.0709.3562 Cobra Build 8.5.0709.3562	Cobra Integration Updates
Deltek Open Plan 8.x Integration	Deltek Open Plan Integration for PM Compass 8.4_8.6.0709.462 Open Plan Build 8.6.0709.462	Open Plan Integration Updates

Note: Deltek PM Compass 8.4 Cumulative Update 08 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 09
- Deltek Cobra 8.4 Cumulative Update 31
- Deltek Open 8.7 General Availability (GA)
- Deltek Open Plan 8.6 Cumulative Update 09

Client Component

There are no client components in this release.

Enhancements

This section includes enhancements in this release.

Updated Standard Reports

The standard reports have been updated to use the SQL Server 2016 Report Builder. During the installation, if you opt not to reload the reports automatically, you have to manually reload them by following these steps:

1. On the PM Compass menu, click **Administration » Report Administration**.

2. On the Load Reports tab, click **Load Report Files**.

This process updates all standard reports and any standard reports that have been saved under a new name.

Update Support for SSRS Report-Writing Tools

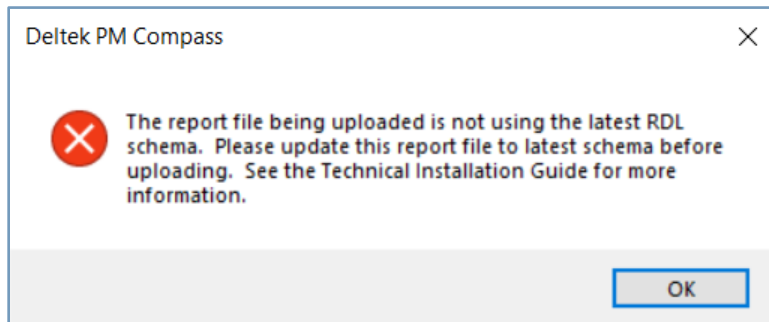
PM Compass now provides support for the following Microsoft SQL Server Reporting Services (SSRS) report-writing tools for creating custom reports:

- SQL Server Data Tools - Microsoft Reporting Services Projects for Visual Studio 2019
- SQL Server Data Tools - Microsoft Reporting Services Projects for Visual Studio 2022
- SQL Server 2016 Report Builder

These report-writing tools automatically update the report file to utilize the Report Definition Language (RDL) 2016 schema. If a custom report still utilizes the RDL 2010 schema, you must upgrade to the RDL 2016 schema. To upgrade the custom report to the RDL 2016 schema, open the custom report using one of the supported report-writing tools and then save the report. The upgraded report can then be loaded into SSRS for use by PM Compass.

Note: As the newly supported report-writing tools automatically update the report file to utilize the RDL 2016 schema, the **Apply Schema Update to Custom Report File** group box on the Custom Reports tab of the Report Administration form has been removed.

In addition, the error message that displays when attempting to load a report created using an unsupported SSRS report-writing tool version into PM Compass has been updated. The new error message reads as follows:



Attention: For more information on custom reports and reporting services, see the *Deltek PM Compass 8.4 Custom Reports and MS SQL Server Reporting Services Guide*.

Software Issues Resolved

This section includes software issues resolved in this release.

Projects

Defect 2125407

Description: When you reviewed any project schedule grid (such as Schedule Analysis, Schedule Progress, My Schedule Analysis, and Enter Schedule Progress), including the Schedule Analysis dashpart, clicking the column header had no effect, preventing you from sorting the column data.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Security Enhancements

There are no security enhancements in this release.

Cobra Integration Updates

Cobra 8.5 Integration

Enhancements

This integration file relates to the following Cobra enhancement.

Prevent Changes to Historical Time-Phased Values During Schedule Integration

In Cobra 8.5 Cumulative Update 08, a new option called **Prevent changes to historical time phased values** was added to the Change Control page of the Integration Wizard.

If you want to prevent changes to time-phased values during schedule integration as part of a change request, determine the configuration file used by the change request, edit the configuration file, and select this option.

To determine the configuration used by the change request:

1. In PM Compass, display the Workflow Type Configuration form.
2. Navigate to your change request workflow type.
3. On the Change Details on Form tab, take note of the **Schedule Integration Configuration** value.

This is the configuration file used by the change request.

Workflow Type Configuration

Save New Form Designer Delete Export Import Help

Contract Change Request

General Workflow Steps Tabs on Form Fields on Form Cost Details on Form Change Details on Form Access Control

☒ Include Change Details on Form

Workflow Type Template Project: PM Compass Template

Change Class: Requested

Model Change as:

☒ A New or Change Amount

☐ A Replacement of Existing Time Phased Data

Initialize Work Package Cost Data with a Copy of Class: [Field]

When Workflow is Complete, Move to Class: Budget

Schedule Integration Configuration: PM Compass Template

Respread these Classes to Remain within Dates: Budget

☒ Automatically Update Baseline Dates When a Change Causes the Activity Dates to Change

☒ Significant Change

Change Number Prefix: CCR

Actions Allowed:

☒ Create or Delete Work Packages

☒ Create, Edit or Delete Activities

☐ Edit Work Package Dates when Linked to Activities

Cobra Export Report: [Field]

Import File Configuration: [Field]

☐ Next Step Assignee Can Edit Current Step

☐ Update the Forecast with the Budget Change

Forecast Class: [Field]

Forecast Baseline Options:

☐ Ignore Progress

☐ Use Remaining Quantity

To modify the schedule integration configuration:

1. In Cobra, select **Integration » Open Plan**.
2. On the Integration Configuration page, select the **Open an existing configuration** option, and select the configuration file used in PM Compass.
3. Navigate to the pages of the Integration Wizard.
4. On the Change Control page, make sure the **Prevent changes to historical time phased values** option is selected.

Integration Wizard

Change Control
Select the options for Cobra to use when loading data.

Get the Control Account descriptions from: Schedule Activities then Key Field 1 Structure

☒ Prevent changes to historical time phased values.

☐ Apply historical budget changes as an adjusting entry in the current status period.

☐ Apply historical forecast changes as an adjusting entry in the current status period.

☐ Force existing Work Package dates to match the schedule for: Baseline

☐ Update Control Account dates to span Work Package dates exactly.

☐ Update the description for existing Control Accounts and Work Packages.

☐ Recalculate existing milestone weights.

☐ Delete items from Cobra that are no longer in the schedule.

☐ Delete Control Accounts and Work Packages no longer in the schedule.

☐ Delete milestones no longer in the schedule.

☐ Delete resource assignments no longer in the schedule.

☐ Delete only resources with the default or selected class.

☐ Delete only items that match the following criteria:
Deletion Criteria...

☐ List deleted items in the process log.

☐ Create Work Packages that do not exist when loading forecast

Help <Back Next> Finish Cancel

5. Continue through the pages of the Integration Wizard.
6. On the Save and Load page, clear the **Load data now?** option, and select the **Save your Configuration?** option.

Software Issues Resolved

This integration file relates to the following Cobra defects:

- **Defect 2092758:** When you ran the Replan process and the work packages used a progress technique option other than **Milestones**, Cobra did not move the completed milestones to the replanned work packages.
- **Defect 2093957:** When you ran the Schedule Integration Wizard to expand baseline dates, Cobra encountered the "Subscript is outside defined range" error.

Attention: For details about the enhancement and defects, see the [Deltek Cobra 8.5 Cumulative Update 09 Release Notes](#).

Note: For the PM Compass integration with Cobra to work correctly, you must install the Cobra 8.5 Integration for PM Compass 8.4 file (Deltek Cobra 8.5 Integration for PM Compass 8.4_8.5.0709.3562).

Open Plan Integration Updates

Open Plan 8.6

Software Issues Resolved

This integration file relates to the following Open Plan defects:

- **Defect 2001089:** When you opened the Activity Details dialog box of a parent activity in an external subproject, you encountered an error message that should not have been displayed, or an incorrect warning message displayed.
- **Defect 2094148:** In certain scenarios, Open Plan filtered a project during a Microsoft Project import, resulting in a process failure.

Attention: For details about the defects, see the [Deltek Open Plan 8.6 Cumulative Update 09 Release Notes](#).

Note: For the PM Compass integration with Open Plan to work correctly, you must install the Open Plan 8.6 Integration for PM Compass 8.4 file (Deltek Open Plan Integration for PM Compass 8.4_8.6.0709.462).

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Database Changes

There are no database changes in this release.

Data Changes

There are no data changes in this release.

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none"> ▪ Improved the documentation regarding editing schedules in the following topics: <ul style="list-style-type: none"> ▪ Change Details View Toolbar

Documentation	Description
	<ul style="list-style-type: none"> ▪ Change Management Process Overview (in “The CAM reviews the change request”) ▪ Removed incorrect statements in the User Fields Tab of the Cost Analysis View topic
<i>Deltek PM Compass 8.4 Installation Guide</i>	<ul style="list-style-type: none"> ▪ Added "SQL Server Collation" and "Oracle Character Set" to “Appendix G: Unicode and Case-Insensitive Prerequisites for Cobra and Open Plan Databases”
<i>Deltek PM Compass 8.4 Cumulative Update 08 Release Notes</i>	<ul style="list-style-type: none"> ▪ Added Cobra 8.5 integration updates

PM Compass 8.4 Cumulative Update 07

Released: March 29, 2024

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 07 (8.4.0707.3640)	
Deltek Open Plan 8.x Integration	Deltek Open Plan Integration for PM Compass 8.4_8.6.0709.454 Open Plan Build 8.6.0709.454	Open Plan Integration Updates

Note: Deltek PM Compass 8.4 Cumulative Update 07 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 07
- Deltek Cobra 8.4 Cumulative Update 31
- Deltek Open 8.7 General Availability (GA)
- Deltek Open Plan 8.6 Cumulative Update 09

Client Component

There are no client components in this release.

Enhancements

There are no enhancements in this release.

Software Issues Resolved

This section includes software issues resolved in this release.

Administration » User-Defined Data

Defect 1333818

Description: When you ran the un-rotate script, invalid data was reported, even if there was none.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: Manually update the stored procedure to include the following: **TABLE_TYPE** IN ('ACT', 'BSA').

Files Updated:

- N/A

Workflows » Change Management

Defect 2093944

Description: You could not remove an expected finish date from an activity during a modeling session.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Items.Client.dll

Defect 2092440

Description: When you edited a resource by using copy and paste and then saved the changes, the schedule change log displayed two entries for the same resource.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ChangeRequest.Server.dll

Security Enhancements

There are no security enhancements in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Open Plan Integration Updates

Open Plan 8.6 Integration

Software Issues Resolved

This section includes software issues resolved in this release.

[Defect 2102300](#)

Description: Microsoft Project Server import failed with the following termination message: "Value does not fall within the expected range."

Customers Impacted: This defect affects customers integrating with Microsoft Project.

Workaround Before Fix: None.

Files Updated:

- Open Plan 8.6 Integration for PM Compass 8.4

Note: For the PM Compass integration with Open Plan to work correctly, you must install the Open Plan 8.6 Integration for PM Compass 8.4 file (Deltek Open Plan Integration for PM Compass 8.4_8.6.0709.454).

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Cobra Integration Updates

There are no Cobra integration updates in this release.

Database Changes

This section includes database changes in this release.

Objects

This section includes changes to functions, stored procedures, views, indexes, and objects.

Modified Objects

Object Name	Object Type
CAM_CheckInvalidScheduleData	Stored Procedure

Data Changes

There are no data changes in this release.

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none"> Updated the User Preferences Dialog Box topic to correctly describe the options in the dialog box

PM Compass 8.4 Cumulative Update 06

Released: February 29, 2024

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 06 (8.4.0706.3632)	
Deltek Cobra 8.x Integration	Deltek Cobra 8.5 Integration for PM Compass 8.4_8.5.0707.3522 Cobra Build 8.5.0707.3522	Cobra Integration Updates
	Deltek Cobra 8.4 Integration for PM Compass 8.4_8.4.0731.3366 Cobra Build 8.4.0731.3366	

Note: Deltek PM Compass 8.4 Cumulative Update 06 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 07
- Deltek Cobra 8.4 Cumulative Update 31
- Deltek Open Plan 8.6 Cumulative Update 06

Client Component

There are no client components in this release.

Enhancements

There are no enhancements in this release.

Software Issues Resolved

This section includes software issues resolved in this release.

Workflows » Change Management

Defect 2079269

Description: After you edited and saved notes in the Change Details view, the **New Value** column in the change log displayed HTML markups instead of the text you entered on the Notes tab.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Delttek.PMCompass.dlgChangeActions.Client.dll

Security Enhancements

There are no security enhancements in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Open Plan Integration Updates

There are Open Plan integration updates in this release.

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Cobra Integration Updates

Cobra 8.5 Integration

Enhancements

This integration file relates to the following Cobra enhancement.

Improved Performance When Creating BCR Snapshots

The BCR snapshot process now runs faster for Template projects containing large ancillary files and for a sandbox project with many activities. The BCR snapshot process is a Cobra process that PM Compass utilizes for the BCR Analysis report.

Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 2088660:** When you ran the Recalc process with the **Allow editing current period** project preference option selected, Cobra did not allow you to select the current period.

Attention: For details about these enhancement and defect, see the [Deltek Cobra 8.5 Cumulative Update 07 Release Notes](#).

Note: For the PM Compass integration with Cobra to work correctly, you must install the Cobra 8.5 Integration for PM Compass 8.4 file (Deltek Cobra 8.5 Integration for PM Compass 8.4_8.5.0707.3522).

Cobra 8.4 Integration

This integration file relates to the following Cobra defects:

- **Defect 1745992:** When you ran the Replan process and the work packages used a progress technique option other than Milestones, Cobra did not move the completed milestones to the replanned work packages.
- **Defect 2078704:** When you ran the Recalc process with the **Allow editing current period** project preference option selected, Cobra did not allow you to select the current period.

Attention: For details about these defects, see the [Deltek Cobra 8.4 Cumulative Update 31 Release Notes](#).

Note: For the PM Compass integration with Cobra to work correctly, you must install the Cobra 8.4 Integration for PM Compass 8.4 file (Deltek Cobra 8.4 Integration for PM Compass 8.4_8.4.0731.3366).

Database Changes

There are no database changes in this release.

Data Changes

There are no data changes in this release.

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none"> ▪ Resolved the formatting issue in the Navigation Menu Designer Overview topic ▪ Re-attached the Before You Begin topic to the Getting Started with PM Compass section in the application help system ▪ Restored the heading for the Change Management Overview topic

Documentation	Description
Deltek EPM Security Administrator Help System	<ul style="list-style-type: none"> Created a new topic called Ensure that All Users Are Properly Logged Out from All PPM Applications Added a note about polling interval to the following topics: <ul style="list-style-type: none"> Send a Message to a User Send Message Dialog Box Terminate a User's Application Session
<i>Deltek PM Compass 8.4 Cumulative Update Release Notes</i>	<ul style="list-style-type: none"> Added the following sections to "Appendix A: Download and Install the Cumulative Update": <ul style="list-style-type: none"> Ensure that All Users Are Properly Logged Out from All PPM Applications Pause the PM Compass Process Queues Continue the Process Queues

PM Compass 8.4 Cumulative Update 05

Released: January 19, 2024

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 05 (8.4.0705.3624)	

Note: Deltek PM Compass 8.4 Cumulative Update 05 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 05
- Deltek Cobra 8.4 Cumulative Update 29
- Deltek Open Plan 8.6 Cumulative Update 06

Client Component

There are no client components in this release.

Enhancements

There are no enhancements in this release.

Software Issues Resolved

This section includes software issues resolved in this release.

Workflows » Change Management

Defect 2053598

Description: During the workflow approval, PM Compass encountered the following error while updating the before snapshot data: "ORA-01747: invalid user.table.column, table.column, or column specification."

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Globals.Server.dll

Defect 2061646

Description: When you expanded either the predecessor or successor of an activity in Change Details, PM Compass encountered the following error: "Object reference not set to an instance of an object."

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Security Enhancements

There are no security enhancements in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Open Plan Integration Updates

There are no Open Plan integration updates in this release.

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Cobra Integration Updates

There are no Cobra integration updates in this release.

Database Changes

There are no database changes in this release.

Data Changes

There are no data changes in this release.

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none"> ▪ Added the Integrating with Microsoft Excel topic to the "Learn more about" section of the following topics: <ul style="list-style-type: none"> ▪ Step 1: Configure a Shared Report Template Directory in Cobra ▪ Step 2: Configure the Cobra Export Report in Cobra

Documentation	Description
	<ul style="list-style-type: none"> ▪ Step 3: Configure an Import File Integration Configuration in Cobra ▪ Updated the General Tab of Workflow Type Configuration topic to include information on creating a custom report for the workflow type in the “Specific Report to Run” section ▪ Created a new topic called Defining a Default Calendar Work Week for MSP Import to explain the Open Plan system preference setting PS_DEFAULT_WORKING_SHIFTS ▪ Updated the Link Center Overview topic to mention that users can utilize a shared UNC folder to store documents and added a reference to the File Folders Tab of the System Settings Form topic ▪ Added an example to the Sync Cobra and Open Plan Before Starting a Change Request topic ▪ Added “The SQL Server Native Client is not installed” to the table in the Troubleshooting: Cannot Connect to the Open Plan Engine topic

PM Compass 8.4 Cumulative Update 04

Released: November 30, 2023

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 04 (8.4.0704.3613)	
Deltek Open Plan 8.x Integration	Deltek Open Plan Integration for PM Compass 8.4_8.6.0706.438 Open Plan Build 8.6.0706.438	Open Plan Integration Updates

Note: Deltek PM Compass 8.4 Cumulative Update 04 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 04
- Deltek Cobra 8.4 Cumulative Update 28
- Deltek Open Plan 8.6 Cumulative Update 06

Client Component

There are no client components in this release.

Enhancements

There are no enhancements in this release.

Software Issues Resolved

This section includes software issues resolved in this release.

Reports

Defect 2035537

Description: When you clicked the **Schedule** button for any of the reports, PM Compass encountered the “Object reference not set to an instance of an object” error.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Report.Client.dll

Security Enhancements

There are no security enhancements in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Open Plan Integration Updates

Open Plan 8.6 Integration

Enhancements

This integration file relates to the following Open Plan enhancement.

Ability to Define Default Calendar Work Week for Imports

A new string System Preference option called **PS_DEFAULT_WORKING_SHIFTS** allows you to define a default workweek and shifts for all calendars imported from Microsoft Project Server.

- You can define a non-working day by setting it to **0**.
- You can specify up to five work shifts per day, separating them by the bar delimiter (**|**).
- You can set days of the week by separating each day with a comma.

Software Issues Resolved

This integration file relates to the following Open Plan defect:

- **Defect 2028880:** Error 0x80004005 occurred when integrating Microsoft Project and Project Server data.

Attention: For details about the enhancement and defect, see the [Deltek Open Plan 8.6 Cumulative Update 06 Release Notes](#).

Note: For the PM Compass integration with Open Plan to work correctly, you must install the Open Plan 8.6 Integration for PM Compass 8.4 file (Deltek Open Plan Integration for PM Compass 8.4_8.6.0705.433).

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Cobra Integration Updates

There are no Cobra integration updates in this release.

Database Changes

There are no database changes in this release.

Data Changes

There are no data changes in this release.

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none"> Added Next Step Assignee to the Assigned To/Based on the workflow option in the Workflow Steps Tab of Workflow Type Configuration topic Updated the Integrating with Microsoft Excel topic to explain which Cobra data is imported when integrating with Microsoft Excel
<i>Deltek PM Compass 8.4 Installation Guide</i>	<ul style="list-style-type: none"> Added Step 6 to the "Installation Steps (PM Compass Upgrades)" section

PM Compass 8.4 Cumulative Update 03

Released: October 31, 2023

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 03 (8.4.0703.3604)	
Deltek Cobra 8.x Integration	Deltek Cobra 8.5 Integration for PM Compass 8.4_8.5.0704.3469 Cobra Build 8.5.0704.3469	Cobra Integration Updates
Deltek Open Plan 8.x Integration	Deltek Open Plan Integration for PM Compass 8.4_8.6.0705.433 Open Plan Build 8.6.0705.433	Open Plan Integration Updates

Note: Deltek PM Compass 8.4 Cumulative Update 03 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 04
- Deltek Cobra 8.4 Cumulative Update 27
- Deltek Open Plan 8.6 Cumulative Update 05

Client Component

There are no client components in this release.

Enhancements

There are no enhancements in this release.

Software Issues Resolved

This section includes software issues resolved in this release.

Projects » My Schedule Analysis

Defect 1352189

Description: In areas with a combination of a grid and a Gantt chart, such as the Schedule Analysis, Cost Analysis, and Change Details view, the horizontal scrollbar reset when you moved the vertical scrollbar.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- Deltek.Framework.Scheduling.Client.dll
- Deltek.Framework.Controls.Client.dll

Security Enhancements

There are no security enhancements in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Open Plan Integration Updates

Open Plan 8.6 Integration

This integration file relates to the following enhancement.

Open Plan Integration File Update

This integration file relates to the removal of the configuration file entries that were included in the installer.

Note: For the PM Compass integration with Open Plan to work correctly, you must install the Open Plan 8.6 Integration for PM Compass 8.4 file (Deltek Open Plan Integration for PM Compass 8.4_8.6.0705.433).

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Cobra Integration Updates

Cobra 8.5 Integration

This integration file relates to the following Cobra defects:

- **Defect 2019093:** When you ran the Recalc process with the **Prevent editing of historical time-phased values** project preference option selected and you did not select the **Allow Recalc on classes not editable in the time-phase grid** option on the Options page, Cobra modified the historical time-phased values.
- **Defect 2015616:** When you ran the Integration process to load data from a combined import file where more than one **Result** column was selected and then selected the **Apply historical budget changes as an adjusting entry in the current status period** option on the Change Control page, Cobra did not create an adjustment entry in the current period.
- **Defect 2015604:** When you ran the Reclass process and the source or target class ID contained a double pipe (||), Cobra encountered an error, and no class was processed.
- **Defect 2015594:** When you ran the Recalc process with the **Prevent editing of historical time-phased values** project preference option selected, Cobra allowed you to respread all the periods.
- **Defect 1983672:** When you ran the Integration process, Cobra incorrectly recalculated milestone weight for milestones with the completed status.
- **Defect 103758:** When you ran the Integration process to load data from a file whose first 10 rows contained unpaired double quotes ("), Cobra displayed an error message.

Attention: For details about these defects, see the [Deltek Cobra 8.5 Cumulative Update 04 Release Notes](#).

Note: For the PM Compass integration with Cobra to work correctly, you must install the Cobra 8.5 Integration for PM Compass 8.4 file (Deltek Cobra 8.5 Integration for PM Compass 8.4_8.5.0704.3469).

Database Changes

There are no database changes in this release.

Data Changes

There are no data changes in this release.

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none"> ▪ Created a topic called "Sync the Status Date and Time Now and the Save Time Analysis" and attached it to the Change Management Concepts section in the application help system ▪ Renamed the topic "Set Access to the PM Compass Application Server" as "Tell Open Plan How to Find the PM Compass Application" and made changes to the topic overview ▪ Updated the "Enable SQL Logging and SQL Exceptions" topic

Documentation	Description
<i>Deltek PM Compass 8.4 Installation Guide</i>	<ul style="list-style-type: none"> Updated the "PM Compass SQL Logging and SQL Exceptions" section

PM Compass 8.4 Cumulative Update 02

Released: October 3, 2023

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 02 (8.4.0702.3593)	
	Deltek PM Compass 8.4 (8.4.700.0)	
Deltek Cobra 8.x Integration	Deltek Cobra 8.5 Integration for PM Compass 8.4_8.5.0703.3448 Cobra Build 8.5.0703.3448	Cobra Integration Updates
Deltek Open Plan 8.x Integration	Deltek Open Plan Integration for PM Compass 8.4_8.6.0705.433 Open Plan Build 8.6.0705.433	Open Plan Integration Updates
	Deltek MSP Server Integration for PM Compass 8.4_8.6.0705.433	
	Deltek P6 Server Integration for PM Compass 8.4_8.6.0705.433	

Note: Deltek PM Compass 8.4 Cumulative Update 02 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 03
- Deltek Cobra 8.4 Cumulative Update 26
- Deltek Open Plan 8.6 Cumulative Update 05

Client Component

There are no client components in this release.

Enhancements

This section includes enhancements in this release.

CAM Field Available on the Enter/Approve Cost Progress Forms

The **Control Account Manager** field (CAM) now displays on the General tab of the following forms:

Deltek PM Compass - Enter Cost Progress - v8.4 Cumulative Update 02

Navigation: Dashboards, Projects, Workflows, Model Changes, Reports, Administration

Enter Cost Progress

IP Shuttle_FCR_X — Period End Date: 7/25/2023

Select	Workflow Status	WBS	OBS	WP	Description	Actual Start	Actual Finish	Percent Complete	Forecast Start	Forecast Finish
<input type="checkbox"/>	New	1.1.1.1	1400	02	Wing Design	6/1/2022		100.00	6/1/2022	10/1/2022
<input type="checkbox"/>	New	1.1.1.1	1400	03	Heat Shield Design	6/1/2022			6/1/2022	7/1/2022
<input type="checkbox"/>	New	1.1.1.2	1420	04	Booster Release Design	7/19/2022		40.00	7/19/2022	1/15/2023
<input type="checkbox"/>	New	1.1.2.1	1600	01	Control Room	9/15/2022		50.00	9/15/2022	4/15/2023
<input type="checkbox"/>	New	1.1.2.1	1600	02	Experiment Room	9/15/2022		40.00	9/15/2022	4/15/2023

General | Resource | Milestones/Steps | Activities | Codes | User Fields | Notes

Work Package: 1.1.1.1/1400/02 Status: In-progress

Description: Wing Design

Dates: Start: 6/1/2022, Finish: 10/1/2022

Actual: 6/1/2022, Forecast: 6/1/2022, Baseline: 6/1/2022

Control Account Manager: Sam Willson

Enter Cost Progress Form

Deltek PM Compass - Approve Cost Progress - v8.4 Cumulative Update 02

Navigation: Dashboards, Projects, Workflows, Model Changes, Reports, Administration

Approve Cost Progress

IP Shuttle_FCR_X — Period End Date: 7/25/2023

Select	Workflow Status	WBS	OBS	WP	Description	Actual Start	Actual Finish	Percent Complete	Forecast Start	Forecast Finish
<input type="checkbox"/>	Approved	1.1.1.1	1400	02	Wing Design	6/1/2022		100.00	6/1/2022	10/1/2022
<input type="checkbox"/>	Approved	1.1.1.2	1420	04	Booster Release Design	7/19/2022		41.00	7/19/2022	1/15/2023
<input type="checkbox"/>	Approved	1.1.2.1	1600	01	Control Room	9/15/2022		51.00	9/15/2022	4/15/2023

General | Resource | Milestones/Steps | Activities | Codes | User Fields | Notes

Work Package: 1.1.2.1/1600/01 Status: In-progress

Description: Control Room

Dates: Start: 9/15/2022, Finish: 4/15/2023

Actual: 9/15/2022, Forecast: 9/15/2022, Baseline: 10/19/2022

Control Account Manager: Sam Willson

Earned Value Technique: % Complete 51.00

Approve Cost Progress Form

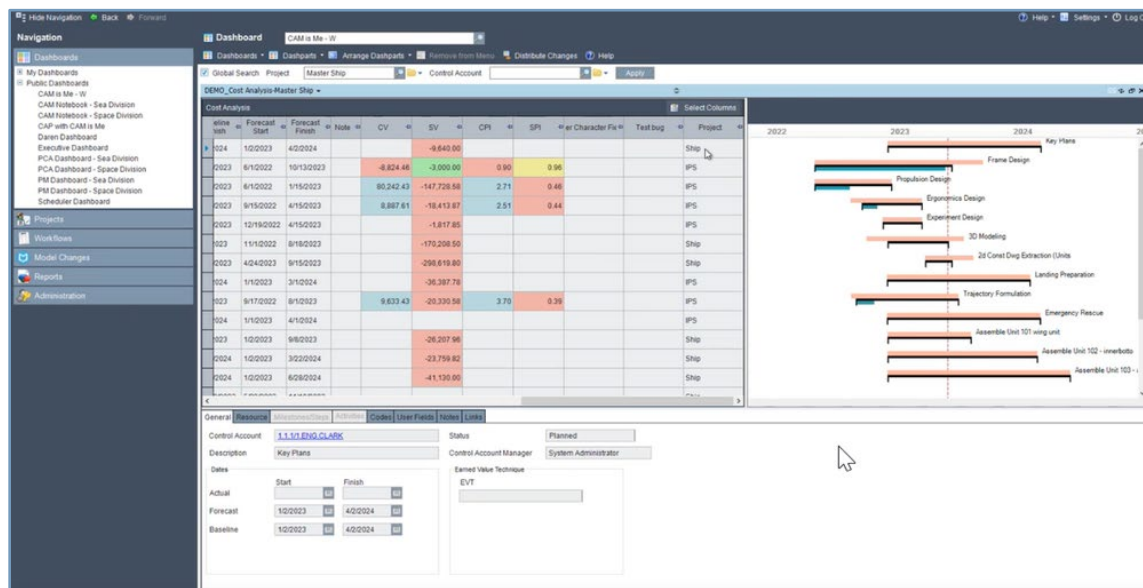
Note: This information is documented in the following topic in the Deltek PM Compass Help System:

- General Tab of the Enter Cost Progress Form

Ability to Use a Single Cost Analysis or Schedule Analysis Dashpart for Globally Selected Projects

You can now configure a Cost Analysis dashpart or a Schedule Analysis dashpart in PM Compass without a selected project. Instead of having to create a dashpart for every project, you can use the Global Search feature to control which project is shown in the dashpart and to further filter the setup of any of these dashparts. For example, if your configuration or report selection is for **CAM is Me** with no project selected, the global search can limit the data displayed in the dashpart to a particular project or to a particular control account.

In addition, you can use the global search to select a master project and see all the projects within the master project in the dashpart.



Cost Analysis Dashpart

Note: This information is documented in the following topic in the Deltak PM Compass Help System:

- [Global Searches in Dashboards and Dashparts](#)

Software Issues Resolved

This section includes software issues resolved in this release.

General » Installation

Defect 2001894

Description: In a dedicated process server deployment, installing PM Compass 8.4 Cumulative Update (CU) 01 might inadvertently remove the process server setup and configuration.

Customers Impacted: This defect affects customers upgrading from PM Compass 8.4 GA to CU01 and then repeating the installation sequence without uninstalling PM Compass 8.4 GA first.

Workaround Before Fix: Uninstall and then reinstall PM Compass 8.4 GA, and then install PM Compass 8.4 CU01.

Additional Notes: The Deltek PM Compass 8.4 GA installer has been updated for this issue.

Files Updated:

- DeltekPMCompass84.exe
- DeltekPMCompass84CU02.exe

Workflows » Change Management

Defect 1978459

Description: The **Original Value** column in the cost change log did not include costs that already existed in the work package.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ChangeRequest.Server.dll

Defect 1979118

Description: When you clicked **Change Details** in a change request, PM Compass encountered the "ORA-12704: character set mismatch" error.

Customers Impacted: This defect affects customers using change management on an Oracle database.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll
- Deltek.PMCompass.Controls.Client.dll

Defect 1993442

Description: Running Replan on workflow did not correctly copy the data to the live project.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: Advance the calendar before completing the workflow.

Files Updated:

- Deltek.PMCompass.Items.Client.dll
- Deltek.PMCompass.Items.Server.dll

Security Enhancements

There are no security enhancements in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Open Plan Integration Updates

Open Plan 8.6 Integration

Enhancements

This integration file relates to the following Open Plan enhancements.

Support for the Updated Encryption Functionality

Open Plan 8.6 Cumulative Update 05 is compatible with the updated encryption functionality in the latest PM Compass and Cobra installations.

Microsoft Project and Microsoft Project Server Updates

This integration file relates to supporting multi-projects in Microsoft Project (Standard/Professional) and Microsoft Project Server Import and Export.

Software Issues Resolved

This integration file relates to the following Open Plan defects:

- **Defect 1837296:** The **Expected Finish Date** option on the Progress tab in the Project Properties dialog box was not working correctly.
- **Defect 1994842:** The MS Project to Open Plan Field Mapping dialog box on the Options page of the Microsoft Project Import Wizard took longer to display.
- **Defect 2001074:** In the Time-phased view of the Activity Details Resource Assignment tab, setting the **Total Qty** value of a resource assignment to **0** and selecting any spread method deleted the resource assignments.

Attention: For details about the enhancements and defects, see the [Deltek Open Plan 8.6 Cumulative Update 05 Release Notes](#).

Note: For the PM Compass integration with Open Plan to work correctly, you must install the Open Plan 8.6 Integration for PM Compass 8.4 file.

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Cobra Integration Updates

Cobra 8.5 Integration

This integration file relates to the following Cobra defect:

- **Defect 1997810:** Running Reclass on a code file with codes containing an open bracket ([) did not reclass those records for the selected code file.

Attention: For details about the defect, see the [Deltek Cobra 8.5 Cumulative Update 03 Release Notes](#).

Note: For the PM Compass integration with Cobra to work correctly, you must install the Cobra 8.5 Integration for PM Compass 8.4 file.

Database Changes

There are no database changes in this release.

Data Changes

There are no data changes in this release.

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none">Added Workflow Status and updated the description of Stage in the Workflows List View topicCreated a new topic called "Expected Finish" and attached it to the Change Management Concepts section in the application help system
<i>Deltek PM Compass 8.4 Installation Guide</i>	<ul style="list-style-type: none">Removed the "Installation Sequences" section in "Appendix Q: PPM Encryption Conversion Utility"
<i>Deltek PPM Encryption Conversion Utility</i>	<ul style="list-style-type: none">Updated the "Supported PPM Product Versions" section

PM Compass 8.4 Cumulative Update 01

Released: August 31, 2023

Installation Files

To install this cumulative update, you must download and install the files listed below.

Server Component

Install these files on all Web/Application and Process Servers. The installer deploys the files to the PM Compass installation folder.

Product Module	DSM Release Name	Notes
Deltek PM Compass	Deltek PM Compass 8.4 Cumulative Update 01 (8.4.0701.3571)	
Deltek Cobra 8.x Integration	Deltek Cobra 8.5 Integration for PM Compass 8.4_8.5.0702.3430 Cobra Build 8.5.0702.3430	Cobra Integration Updates
	Deltek Cobra 8.4 Integration for PM Compass 8.4_8.4.0726.3308 Cobra Build 8.4.0726.3308	

Note: Deltek PM Compass 8.4 Cumulative Update 01 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 02
- Deltek Cobra 8.4 Cumulative Update 26
- Deltek Open Plan 8.6 Cumulative Update 02

Client Component

There are no client components in this release.

Enhancements

There are no enhancements in this release.

Software Issues Resolved

This section includes software issues resolved in this release.

Administration » Workflow Type Configuration

Defect 1953220

Description: When you copied a workflow type, the stored procedure actions were not copied.

Customers Impacted: This defect affects customers copying workflow types.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ItemConfig.Client.dll
- Deltek.PMCompass.ItemConfig.Server.dll

Defect 1973286

Description: When the Reclass process failed, the workflow got suspended, and the **Continue Complete** workflow action was not available.

Customers Impacted: This defect affects customers running the Cobra Reclass process.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.UpdateForecast.dll

Reports » BCR Analysis

Defect 1978422

Description: When you generated the BCR Analysis report before the scheduler step, the activity EVT was missing in the generated report.

Customers Impacted: This defect affects customers using the BCR Analysis report.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ChangeRequest.Server.dll

Workflows » Change Management

Defect 1984450

Description: You could not create work packages with dates beyond 2009.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.Framework.Controls.Client.dll

Defect 1849022

Description: You could not add relationships to a new activity using the Relationships tab of the Change Details view.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: Add the relationships directly to the new activity or exit and then return to the Change Details view.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Defect 1987394

Description: When completing 1,000 or more workflows, PM Compass encountered the following error: "ORA-01000: maximum open cursors exceeded."

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: Complete the workflows in batches of 500.

Files Updated:

- Deltek.PMCompass.Items.Client.dll
- Deltek.PMCompass.Items.Server.dll

Security Enhancements

There are no security enhancements in this release.

Open Plan Add-In Updates

There are no Open Plan add-in updates in this release.

Open Plan Integration Updates

There are no Open Plan integration updates in this release.

Primavera P6 Updates

There are no Primavera P6 updates in this release.

Cobra Integration Updates

Cobra 8.5 Integration

Enhancements

Improved Performance When Creating BCR Snapshots

This integration file relates to improved performance when creating BCR snapshots.

Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 1975388:** Running concurrent apportionment calculations created multiple records with the same unique row ID in the database table

Attention: For details about the enhancement and defect, see the [Deltek Cobra 8.5 Cumulative Update 02 Release Notes](#).

Note: For the PM Compass integration with Cobra to work correctly, you must install the Cobra 8.5 Integration for PM Compass 8.4 file.

Cobra 8.4 Integration

This integration file relates to the following Cobra defects:

- **Defect 1897090:** Cobra did not load code values containing commas during integration.
- **Defect 1884117:** Cobra regarded the commas as extra fields in an import file during integration and loaded the data incorrectly.
- **Defect 1431042:** Cobra did not reclass codes containing an open bracket ([) in the code file.

Attention: For details about these defects, see the [Deltek Cobra 8.4 Cumulative Update 26 Release Notes](#).

Note: For the PM Compass integration with Cobra to work correctly, you must install the Cobra 8.4 Integration for PM Compass 8.4 file.

Database Changes

There are no database changes in this release.

Data Changes

The following are changes to the data applied by scripts:

- Added **ItemUID** to the **Deltek.PMCompass.UpdateForecast.CostActions.Reclass** custom method. With this change, the workflow will be in a Continue Complete state when the Reclass process fails

Documentation Changes

This section includes changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.4 Help System	<ul style="list-style-type: none"> Removed the “Display Language Links section” from the “Deltek PM Compass Login Dialog Box” topic Updated the “Date Calculation Differences in Open Plan and PM Compass” topic to include information on the expected finish dates Removed “Activity Codes – Project” from the Primavera Field Name - Activity Table in the Source Fields Tab when Area = Schedule topic Updated the Forecast Start/Finish description in the General Tab of the Enter Cost Progress Form topic to include the term “live project” Updated the Schedule Projects Search Dialog Box and Schedule Integration Tab of the Projects Form topics to mention that the schedule project must have a baseline before you can associate the schedule with the project Updated the descriptions for WP, Activity ID, and Requested Start/Finish in the Change Details View topic to indicate the conditions when the fields are highlighted Created a new topic called Create a Saved Search for CAM is Me Updated the Configure PM Compass for Primavera P6 Integration topic to mention that Primavera fields can only be linked to user-character fields Updated the rules for deleting activities in the Rules for Editing Change Details Data topic Updated Step 10 in the Cobra Integration Wizard Configuration File Settings for a Change Request topic Updated the Source Fields topic to add a note about clearing contents of the source fields Updated the Dashpart Configuration Dialog Box topic to remove “Web Outlook 2007”
<i>Deltek PM Compass 8.4 Installation Guide</i>	<ul style="list-style-type: none"> Updated sections with outdated screenshots and information

Appendix A: Download and Install the Cumulative Update

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.

Access DSM and Download the Cumulative Update

Use these instructions to download the cumulative update from DSM.

To download the cumulative update:

1. Using Microsoft Edge browser, go to <https://dsm.deltek.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 **Run Deltek Software Manager**.
6. Log in using your Deltek Support Center credentials.
7. In the Deltek Software Manager dialog box, at the top right, click **Settings**.
8. In the Settings dialog box, specify the folder where you want to download the 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.

9. In the left pane, expand the Deltek product that you want to download, if it is not already expanded, and select **Cumulative Update**.
10. In the table, select the checkbox that corresponds to the cumulative update 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.

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

Ensure that All Users Are Properly Logged Out from All Applications

Before upgrading PM Compass, make sure that all PM Compass and EPM Security Administrator (EPM SA) users, as well as Cobra and Open Plan users, are properly logged out.

Attention: For more information, see [“Ensure that All Users Are Properly Logged Out from All PPM Applications”](#) the EPM SA Help System.

Pause the PM Compass Process Queues

Prior to upgrading PM Compass, Deltek recommends pausing the PM Compass Process Server processes.

To pause the PM Compass process queues:

1. Log into PM Compass and navigate to **Administration » Process Server » Process Queue Manager**.
2. Select each queue and ensure that no Process Server jobs are in **Running** status.
3. Log into EPM SA, navigate to **Configuration » System Settings view**, and click the Servers tab.
4. In the Process Queue grid header, click **Pause**. If you have more than one server, perform this step on each server.
5. If you have configured PM Compass to use a database session state, you need to run a SQL query to clear out the session state.
 - a. Launch Weblink and click the System Settings tab.
 - b. If the **Store Session State** field is set to:
 - **In Database Server:** Run the `DELETE FROM FW_SessionState` SQL query against the database listed on the System Settings tab to clear out the session state entries in the database.
 - **In Memory:** Continue with the PM Compass upgrade without running the query.

Install the Cumulative Update

Run the executable (.exe) file on all the Web/Application Server and Process Server machines. After the update is complete, click **Finish**.

Confirm that the Cumulative Update Is Installed

See the following sections for steps to confirm that the cumulative update is installed.

In PM Compass

In PM Compass, do one of the following:

- Look at the version number in the title bar.
- Click **Help » About** and look at the version number in the Application Version line.

Web/Application Server

On each Web/Application server:

1. Launch PM Compass.
2. Click **Help » About** (in the upper-right corner) to display the Application version that contains the cumulative update # (if applied).

Web/Application and Process Servers Not Logged into PM Compass

You can use Windows File Explorer or Control Panel to confirm the update on each server.

Windows File Explorer

1. Open Windows File Explorer.
2. Navigate to the PM Compass installation folder (the default is C:\Program Files (x86)\Deltek\PMCompass\Hotfixes).

The folder contains XML files installed by the cumulative update. The highest version number reflects the last CU applied. Because the CUs are cumulative, you will also see the XML files for previous versions of CUs.

Control Panel

1. Open Control Panel.
2. Click **Programs and Features**.
3. Scroll down to **Deltek PM Compass Cumulative Update <#>** to confirm that the version reflects the last CU applied.

Continue the Process Queues

After completing the upgrade, you need to continue the queues.

To continue the PM Compass queues:

1. Log into EPM SA, navigate to **Configuration » System Settings view**, and click the Servers tab.
2. In the Process Queue grid header, click **Continue**.

Appendix B: For Additional Information

Deltek Support Center

The Deltek Support Center is a support website 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 Customer Success 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 Customer Success analyst online

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

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.



About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management, and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com