

# Deltek PM Compass 8.5

Cumulative Update 10 Release Notes

March 31, 2026



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## Overview

This document includes all of the enhancements, software issues resolved, and database changes that were made in PM Compass 8.5 Cumulative Update 01 through PM Compass 8.5 Cumulative Update 10.

**Important:** PM Compass 8.5 was initially released to a limited audience. The first public release began with PM Compass 8.5 Cumulative Update 01.

To learn more about the new features and enhancements included in PM Compass 8.5, see the *Deltek PM Compass 8.5 Release Notes*.

### 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 a Deltek Support Services analyst 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.

### 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 8.5, click <https://help.deltek.com/product/PMCompass/8.5/GA/>.

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

### Pre-Installation Information

Before you begin the installation and setup of PM Compass, it is important to understand the following information.

#### Upgrading PM Compass

If you are upgrading from a previous PM Compass version, review the “Installation Steps (PM Compass Upgrades)” section in the *Deltek PM Compass 8.5 Installation Guide* prior to beginning your installation.

PM Compass 8.5 is a 64-bit application. By default, Windows installs 32-bit applications into the C:\Program Files (x86) folder and 64-bit applications into the C:\Program Files folder.

## Upgrading from the Default 32-Bit Installation Location

For previous PM Compass installations, if you accepted the default installation path, the application would have been installed in the C:\Program Files (x86)\Deltek\PMCompass and C:\Program Files (x86)\Deltek\EPMSA folders.

Since Windows installs 64-bit applications in the C:\Program Files folder by default, if you are upgrading from the default 32-bit installation location, the upgrade will not overwrite your existing files. Instead, it will install to the C:\Program Files folder or an alternate folder that you select during the installation.

The PM Compass upgrade installer detects your previous installation location. If that location is in an x86 folder, the installer copies the configuration files into the new location, updates them to use the new installation path, and renames the old PMCompass and EPMSA folders.

## Upgrading from a Non-Default Installation Location

The PM Compass upgrade installer detects your previous installation location. If that location is not the default folder (C:\Program Files (x86)\Deltek\PMCompass), the installer performs an in-place upgrade that overwrites the old files.

## Pre- and Post-Installation Checklists

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

## Loading Reports onto Load Balanced SSRS Servers

Multiple SSRS servers in a load-balanced environment all have a common URL. After a release, to ensure that all SSRS servers are updated with the latest PM Compass reports, you should run a batch file that updates each individual SSRS server by its NetBIOS or host name.

**Attention:** For more information, refer to the “Loading Reports onto Load Balanced SSRS Servers” topic in the *Deltek PM Compass Advanced Technical Administration Guide*.

## Additional Security Configurations

PM Compass includes a new encryption mechanism. It creates an additional layer of protection beyond the traditional SSL encryption recommended for PM Compass implementations and prevents in-flight data transmission from being compromised.

These settings are included and enabled on the new PM Compass 8.2 and later installations. For upgrades, you will need to manually add them.

**Attention:** For more information about the new security configuration, refer to the **Secure the Web/Application Tier » Additional Security Configurations** topic in the *Deltek PM Compass Advanced Administration Guide*.

## Software Requirements (Compatibility Matrix)

Various parts of the PM Compass application are distributed to logical tiers for performance, scalability, and security purposes. These logical tiers are distinct technologies required to run PM Compass, such as Report Server software or Web server software. They may or may not be hosted on the same machine.

The method you use to distribute PM Compass's logical tiers across physical tiers or actual machines depends on your organization's needs.

**Note:** For a complete list of the recommended minimum software requirements, refer to the following:

- The "System Requirements" topic in the *Deltek PM Compass 8.5 Installation Guide*
- The *Deltek Product Support Compatibility Matrix* document that you can download from the [Deltek Support Center site](#)

## Cobra and Open Plan Integration

PM Compass 8.5 supports multiple versions of Cobra and Open Plan. The PM Compass installer selects the recommended Cobra and Open Plan integration files for installation, based on the data found in your PM Compass database tables.

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

**Note:** For additional information on Cobra and Open Plan integration with PM Compass, refer to the "Appendix K: Integrating with Cobra" and "Appendix L: Integrating with Open Plan" sections of the *Deltek PM Compass 8.5 Installation Guide*.

## Open Plan Engine Support

The table below indicates which PM Compass features are supported for each Open Plan engine when Microsoft Project Professional, Microsoft Project Server, or Oracle Primavera P6 is the scheduling tool.

Scheduling Tool	Feature	Open Plan 8.7
	Import	Yes

Scheduling Tool	Feature	Open Plan 8.7
<b>Microsoft Project Professional</b>	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes
	Resource % Complete	Yes
<b>Project Server</b>	Import	Yes
	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes
	Resource % Complete	Yes
<b>Primavera P6</b>	Import	Yes
	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes
	Resource % Complete	Yes

# PM Compass 8.5 Cumulative Update 10

**Released:** March 31, 2026

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 10 (8.5.0710.4424)

### PM Compass API Installation

There is no PM Compass API installation in this release.

### Client Component Installation

There is no client component installation in this release.

**Note:** Deltek PM Compass 8.5 Cumulative Update 10 was tested with the following PPM product:

- Deltek Cobra 8.7 Cumulative Update 03

## Enhancements

There are no enhancements in this release.

## Software Issues Resolved

### Model Changes » Modeling Session

Defect 2594206

**Description:** When you changed or added activity resources in Change Details and opened a modeling session, the time-phased values were not preserved if the PM Compass application ran in a different time zone than the PM Compass server.

**Customers Impacted:** This affects customers where the PM Compass application runs in a different time zone than the PM Compass server.

**Workaround Before Fix:** None.

**Files Updated:**

- Deltek.PMCompass.Items.Common.dll

## Security Enhancements

There are no security enhancements in this release.

## Cobra Integration Updates

### Cobra 8.7 Integration

**Note:** This integration release has been tested with Cobra 8.7 Cumulative Update 03 (Cobra 8.7 Integration (8.7.0703.3834) for PM Compass 8.5 CU10).

### Software Issues Resolved

This integration file relates to the following Cobra defect:

**Defect 2617833:** When you ran the Open Plan–Integration Wizard, Cobra encountered the “Alias 'TMPUDT' is not found” error under any of the following conditions:

- You integrated with an Open Plan master project and selected the **Code Assignments and User Fields** and **Resource Assignments** options on the Action Selection page.
- You selected the **Status** option on the Action Selection page and the **Update Assignment % Complete** option on the Status page.

**Attention:** For details about the defect, see the [Deltek Cobra 8.7 Cumulative Update 03 Release Notes](#).

## Open Plan Integration Updates

There are no Open Plan 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 8.5 Cumulative Update 09

**Released:** March 5, 2026

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 09 (8.5.0709.4414)

### PM Compass API Installation

There is no PM Compass API installation in this release.

### Client Component Installation

There is no client component installation in this release.

**Note:** Deltek PM Compass 8.5 Cumulative Update 09 was tested with the following PPM products:

- Deltek Cobra 8.7 Cumulative Update 02
- Deltek Cobra 8.6 Cumulative Update 11
- Open Plan 8.7 Cumulative Update 14

## Enhancements

This section includes enhancements in this release

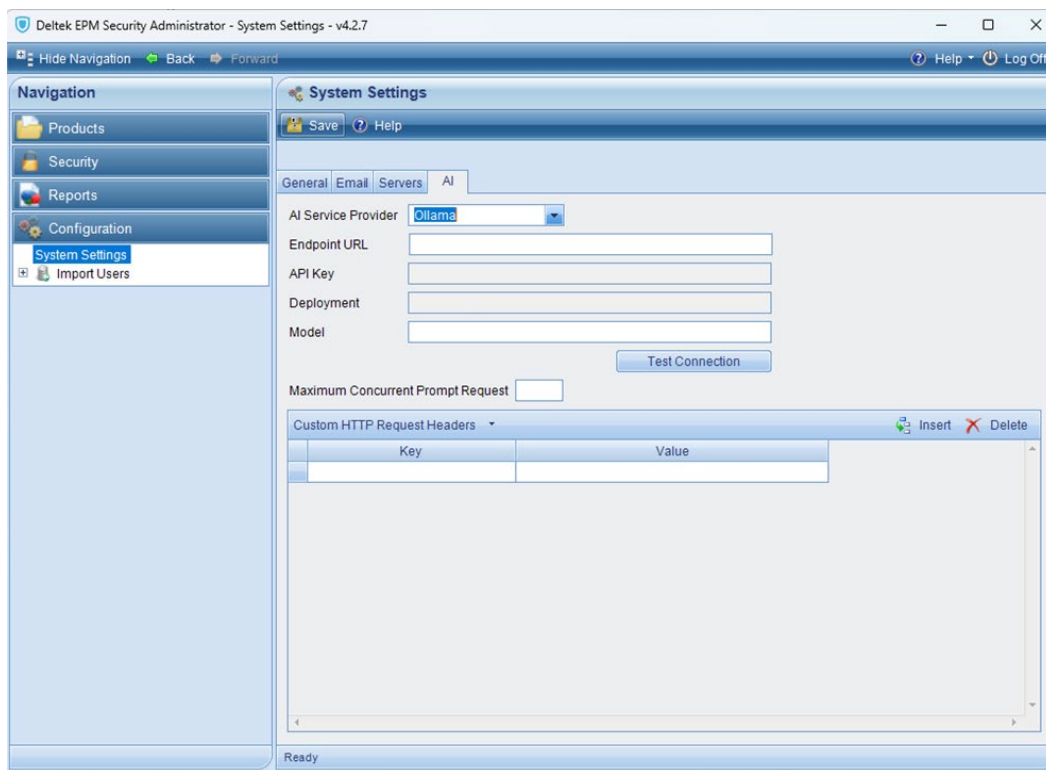
### Support for Ollama as an AI Service Provider

You can now select Ollama as your AI service provider, enabling you to run large language models (LLMs) directly on your own infrastructure. This option supports deployment either locally or within a private cloud environment, ensuring that your data stays private and secure.

Ollama lets you choose from a variety of open-source LLMs such as LLaMA3, Mistral or proprietary models that you can customize for your organization’s needs. This new enhancement allows you to choose models that align with your privacy, security, and customization needs.

**Note:** This enhancement introduces support for selecting Ollama as the AI service provider for the Narrative Score feature.

New fields are added to the AI Tab of the Systems Settings form in the EPM Security Administrator to support this latest update.



*AI Tab of the System Settings Form*

**Attention:** For more information on these fields, see the “AI Tab of System Settings” topic in the EPM Security Administrator Help System under **Configuration » System Settings » Forms, Toolbar, and Tabs**.

## Software Issues Resolved

There are no software issues resolved in this release.

## Security Enhancements

There are no security enhancements in this release.

## Cobra Integration Updates

### Cobra 8.7 Integration

#### Enhancements

**Note:** This integration release has been tested with Cobra 8.7 Cumulative Update 02 (Cobra 8.7 Integration (8.7.0702.3831) for PM Compass 8.5 CU09).

#### Support for Ollama as an AI Service Provider

PPM Administrator (PPMA) now supports configuring Ollama connection settings through the AI tab on the System menu form.

**Attention:** For more information on this enhancement, see the [Deltek PPM Administrator 1.0.0 Cumulative Update 02 Release Notes](#).

As part of this enhancement, Cobra has been updated to ensure full compatibility and enable the Narrative Score feature to function seamlessly when Ollama is selected as the AI service provider.

**Attention:** The [“Enable the Narrative Score Feature”](#) topic in the Cobra Help System has been updated to reflect this change.

**Attention:** For details about the enhancement, see the [Deltek Cobra 8.7 Cumulative Update 02 Release Notes](#).

### Cobra 8.6 Integration

#### Enhancements

**Note:** This integration release has been tested with Cobra 8.6 Cumulative Update 11 (Cobra 8.6 Integration (8.6.0711.3728) for PM Compass 8.5 CU09).

#### Support for Ollama as an AI Service Provider

EPM Security Administrator 8.6 now supports configuring Ollama connection settings through the AI tab in the System Settings dialog box.

**Attention:** For more information on this enhancement, see the [Deltek EPM Security Administrator 8.6 Cumulative Update 01 Release Notes](#).

As part of this enhancement, Cobra has been updated to ensure full compatibility and enable the Narrative Score feature to function seamlessly when Ollama is selected as the AI service provider.

**Attention:** The ["Enable the Narrative Score Feature"](#) topic in the Cobra Help System has been updated to reflect this change.

## Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 2361128:** When you ran the Open Plan–Integration Wizard, Cobra encountered the "Alias 'TMPUDT' is not found" error under any of the following conditions:
  - You integrated with an Open Plan master project and selected the **Code Assignments and User Fields** and **Resource Assignments** options on the Action Selection page.
  - You selected the **Status** option on the Action Selection page and the **Update Assignment % Complete** option on the Status page.

**Attention:** For details about the defect, see the [Deltek Cobra 8.6 Cumulative Update 11 Release Notes](#).

## Open Plan Integration Updates

### Open Plan 8.7 Integration

**Note:** This integration release has been tested with Open Plan 8.7 Cumulative Update 14 (Open Plan 8.7 Integration (8.7.0714.415) for PM Compass 8.5 CU09).

## Software Issues Resolved

This integration file relates to the following Open Plan defects:

- **Defect 2523925:** When you exported a project to Microsoft Project Standard (MSP) 2021 without selecting all MSP Export options, the resulting MPP file did not contain any activities.
- **Defect 2538264:** When you created a workflow in PM Compass and opened the associated project in Open Plan in Exclusive mode, undoing multiple activity deletions caused an error upon saving the model changes back to PM Compass.

- **Defect 2565733:** When you restored a project file and exported it to Microsoft Project Standard (MSP) 2021 with all MSP Export options unchecked, the export completed with errors if a calendar was labeled "24 hours."

**Attention:** For details about the defects, see the [Deltek Open Plan 8.7 Cumulative Update 14 Release Notes](#).

## 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

- Inserted new fields to support new AI Service Provider Ollama
- Migrate existing Azure OpenAI Configurations into WST\_CFG and WST\_UPF tables

## Documentation Changes

There are no documentation changes in this release.

# PM Compass 8.5 Cumulative Update 08

**Released:** February 10, 2026

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 08 (8.5.0708. 4402)

### PM Compass API Installation

There is no PM Compass API installation in this release.

### Client Component Installation

There is no client component installation in this release.

**Note:** Deltek PM Compass 8.5 Cumulative Update 08 was tested with the following PPM products:

- Deltek Cobra 8.7 Cumulative Update 01

## Enhancements

There are no enhancements in this release.

## Software Issues Resolved

This section includes software issues resolved in this release.

### Workflows » Change Management

Defect 2535445

**Description:** When you switched between work packages in the Change Details view, the resource assignments displayed incorrectly and the work package dates changed, causing the time-phased data to fall outside the activity dates.

**Customers Impacted:** This defect affects customers using change management.

**Workaround Before Fix:** None.

**Files Updated:**

- Deltek.PMCompass.Statusing.Client.dll
- Deltek.PMCompass.Statusing.TimePhased.dll

## Security Enhancements

There are no security enhancements in this release.

## Cobra Integration Updates

### Cobra 8.7 Integration

**Note:** This integration release has been tested with Cobra 8.7 Cumulative Update 01 (Cobra 8.7 Integration (8.7.0701.3824) for PM Compass 8.5 CU08).

### Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 2558134:** When you ran the Integration Wizard and loaded Control Account Managers (CAMs) or Work Package Managers (WPMs) from an import file, Cobra imported them based on the case of the imported value rather than using the case of the User ID from EPM Security Administrator (EPM SA) or the case of the code defined in the CAM code file.

**Attention:** For details about the defect, see the [Deltek Cobra 8.7 Cumulative Update 01 Release Notes](#).

## Open Plan Integration Updates

There are no Open Plan 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 8.5 Cumulative Update 07

**Released:** December 9, 2025

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 07 (8.5.0707.4378)

### PM Compass API Installation

There is no PM Compass API installation in this release.

### Client Component Installation

There is no client component installation in this release.

**Note:** Deltek PM Compass 8.5 Cumulative Update 07 was tested with the following PPM products:

- Deltek Cobra 8.7
- Deltek Cobra 8.6 Cumulative Update 09
- Deltek Open Plan 8.7 Cumulative Update 13

## Enhancements

This section includes enhancements in this release.

### Open Authorization 2.0 Authentication for SMTP Configuration

PM Compass now supports Open Authorization (OAuth) 2.0 authentication for email servers that use SMTP. This enhancement eliminates the need to share passwords and increases security through token-based authentication.

To support multi-factor authentication and conditional access policies, new fields have been added to the Email tab of the System Settings form in EPM Security Administrator.

The screenshot shows the 'System Settings' application window with the 'Email' tab selected. The 'OAuth Flow' dropdown is set to 'Authorization Code with PKCE'. The 'Basic SMTP Settings' section contains fields for Default Sender Email, SMTP Server, Username, Display Name, Port, and Password, with a checkbox for 'Use TLS Encryption'. The 'OAuth SMTP Settings' section has similar fields for Default Sender Email, SMTP Server, Display Name, and Port, also with a 'Use TLS Encryption' checkbox. The 'Authentication Settings' section includes Client ID, Client Secret, Authorization Endpoint, Token Endpoint, Redirect URI, and Scope. The 'OAuth Token Management' section features 'Get OAuth Token' and 'Refresh Token' buttons, along with status indicators for 'Token Status: No Token' and 'Token Expires: Not authenticated'. The 'Help Desk Email' section has a 'Default Help Desk Email' field and a 'Send Test Email To Default Help Desk' button.

*Email Tab of the System Settings Form*

**Attention:** For more information on these fields, see the “Email Tab of System Settings” topic in the EPM Security Administrator Help System under **Configuration » System Settings » Forms, Toolbar, and Tabs**.

## Software Issues Resolved

This section includes software issues resolved in this release.

### General » Installation

#### Defect 2526218

**Description:** When you ran the PMC\_Upgrade80to85\_Oracle.sql script on an Oracle database with PM Compass 8.5 already installed, you encountered the following error: “ORA-00001: unique constraint.”

**Customers Impacted:** This defect affects customers using Oracle databases that did not previously have PM Compass installed into them.

**Workaround Before Fix:** None.

#### Files Updated:

- PMC\_Upgrade80to85\_Oracle.sql
- DeltekPMCompass85CU07.exe
- Defect 2537851

**Description:** When you ran the PM Compass 8.5 Cumulative Update Installer on an existing PM Compass deployment, the installation required you to log on as the account running the PM Compass Application Pool in IIS.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

**Files Updated:**

- DeltekPMCompass85CU07.exe

## [Workflows » Change Management](#)

Defect 2524833

**Description:** When you added a resource to an activity in the Change Details view but did not select the **Update Baseline Dates to Match the Requested Dates** option on the General tab and then saved your changes, the **CA/WP/MS** column was not populated in the schedule change log of the Change Log dialog box.

**Customers Impacted:** This defect affects customers using change management.

**Workaround Before Fix:** None.

**Files Updated:**

- Deltek.PMCompass.ChangeRequest.Server.dll

## [Projects » Enter Schedule Progress](#)

Defect 2532774

**Description:** When you submitted a schedule progress entry on the Enter Progress form and clicked **OK** in the Comments dialog box, PM Compass encountered the following error: "Column USER\_DTExx does not exist."

**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 8.7 Integration

#### Enhancements

#### Support for Cobra 8.7

PM Compass now supports Cobra 8.7, beginning with PM Compass 8.5 Cumulative Update 07.

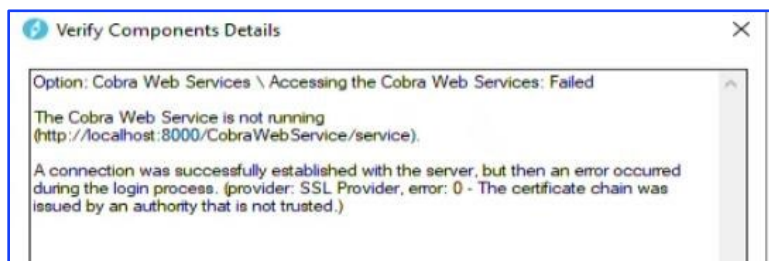
**Attention:** For details about Cobra 8.7, see the [Deltek Cobra 8.7 Release Notes](#).

**Note:** This integration release has been tested with Cobra 8.7 (Cobra 8.7 Integration (85\_8.7.0700.3805) for PM Compass 8.5 CU07).

#### Cobra 8.7 SQL Server Certificate Errors and Workarounds

If you are using Cobra 8.7 to integrate with PM Compass 8.5 on a SQL Server database, you may encounter SSL certificate validation errors.

**Error 1:** A connection was successfully established with the server, but then an error occurred during the login process. (provider: SSL Provider; Error: 0 – The certificate chain was issued by an authority that is not trusted.)



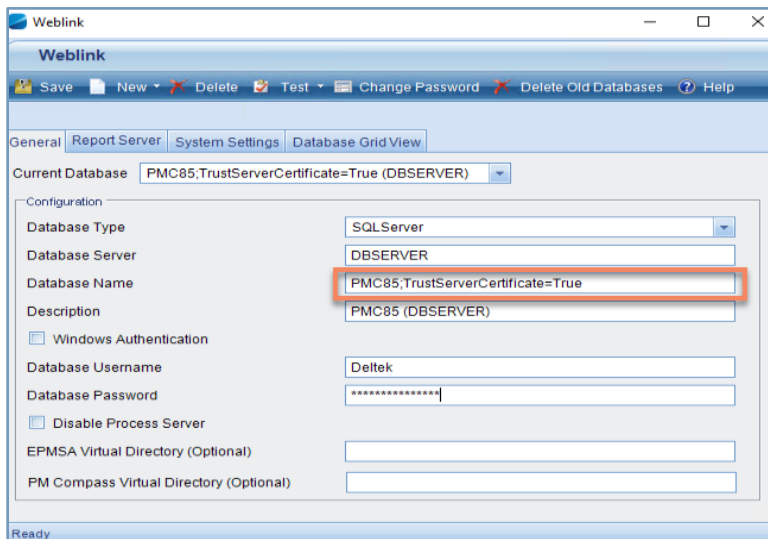
#### Cause

The SQL Server database server does not have a trusted certificate.

#### Workaround

1. On the General tab of EPM Security Weblink, add the following entry in the **Database Name** field value.

;TrustServerCertificate=True



- Restart the Cobra Web Service.

**Error 2:** A connection was successfully established with the server, but then an error occurred during the login process. (provider: SSL Provider, error: 0 – The target principal name is incorrect.)



### Cause

The SQL Server Database certificate name is different from the server name in the data source.

### Workaround

- On the General tab of EPM Security Weblink, use the SQL Server Database Server name associated with the certificate in the data source.
- Restart the Cobra Web Service.

### Cobra 8.6 Integration

**Note:** This integration release has been tested with Cobra 8.6 Cumulative Update 09 (Cobra 8.6 Integration (8.6. 0709.3709) for PM Compass 8.5 CU07).

## Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 2523429:** When you ran the Integration Wizard and loaded Control Account Managers (CAMs) or Work Package Managers (WPMs) from an import file, Cobra imported them based on the case of the imported value rather than using the case of the User ID from EPM Security Administrator (EPM SA) or the case of the code defined in the CAM code file.

**Attention:** For details about the defect, see the [Deltek Cobra 8.6 Cumulative Update 09 Release Notes](#).

## Open Plan Integration Updates

### Open Plan 8.7 Integration

**Note:** This integration release has been tested with Open Plan 8.7 Cumulative Update 13 (Open Plan 8.7 Integration (8.5.0713.408) for PM Compass 8.5 CU07).

## Software Issues Resolved

This integration file relates to the following Open Plan defect:

- **Defect 2498677:** When you created a PM Compass forecast baseline, Open Plan crashed.

**Attention:** For details about the defects, see the [Deltek Open Plan 8.7 Cumulative Update 13 Release Notes](#).

## 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

This section includes changes to the data applied by scripts.

- Upgrade script was modified to resolve the issue ORA-00001: unique constraint (DELTEK.PK\_WST\_DCT\_DESC\_CI) violated at "DELTEK.INSWST\_DCT" when applying to existing PM Compass 8.5 Oracle databases
- Added code to populate WST\_UPF from WST\_CFGEMail to support OAuth Authentication for SMTP Implementation
- Install scripts were modified to not remove existing entries in WST\_CFG

## Documentation Changes

This section includes documentation changes in this release.

Documentation	Description
<i>Deltek PM Compass 8.5 API Developer Guide</i>	<ul style="list-style-type: none"> <li>▪ Added a note about the PPM data sources log files and their location in the "Create a Data Source" section</li> </ul>
<i>Deltek PM Compass Installation Guide</i>	<ul style="list-style-type: none"> <li>▪ Updated the "Cobra Report Templates Folder Location" section under "Post Installation Steps"</li> <li>▪ Updated "Appendix H: Unicode and Case-Insensitive Prerequisites for Cobra and Open Plan Databases" to remove references to KB Article # 62096</li> <li>▪ Added "Cobra 8.7 SQL Server Certificate Errors" to the "Troubleshooting Cobra Integration Issues" section of "Appendix L: Configuring Advanced Cobra Options"</li> </ul>

# PM Compass 8.5 Cumulative Update 06

**Released:** November 5, 2025

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 06 (8.5.0706.4356)

### PM Compass API Installation

There is no PM Compass API installation in this release.

### Client Component Installation

There is no client component installation in this release.

**Note:** Deltek PM Compass 8.5 Cumulative Update 06 was tested with the following PPM products:

- Deltek Cobra 8.5 Cumulative Update 24

## Enhancements

There are no enhancements in this release.

## Software Issues Resolved

This section includes software issues resolved in this release.

### Workflows » Change Management

#### Defect 2494654

**Description:** When you ran the Replan process through the Cost Actions dialog box on a project where the work package was set to be validated against a code file, PM Compass incorrectly displayed a validation message stating that the work package ID was being validated even though it already existed in the code file, preventing you from proceeding with the Replan process.

**Customers Impacted:** This defect affects customers using change management.

**Workaround Before Fix:** Add the desired prefix or suffix for the new work package ID in the code file.

**Additional Notes:** PM Compass now displays a warning message, rather than a validation error, if the work package is validated against a code file. Clicking **OK** allows you to continue with the Replan process.

This information documented in the [Cost Actions Replan Options Dialog Box](#) topic of the PM Compass Help System.

**Files Updated:**

- Deltek.PMCompass.Items.Server.dll

## Default Data

Defect 2506179

**Description:** When you ran the PM Compass create table scripts that included Open Plan with existing Microsoft Project data and then logged into Open Plan, all field mapping entries in the **Group Options** field in the Microsoft Project Import Wizard were removed.

**Customers Impacted:** This defect affects customers integrating PM Compass with Open Plan.

**Workaround Before Fix:** Run the Oracle Data Pump Import utility using your most recent backup. Make sure the process adds missing entries instead of replacing them.

**Files Updated:**

- PMC\_DefaultData\_Oracle.sql
- PMC\_DefaultData\_SqlServer.sql

## Security Enhancements

There are no security enhancements in this release.

## Cobra Integration Updates

Cobra 8.5 Integration

**Note:** This integration release has been tested with Cobra 8.5 Cumulative Update 24 (Cobra 8.5 Integration (8.5.0724.3775) for PM Compass 8.5 CU06).

## Open Plan Integration Updates

There are no Open Plan 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

This section includes documentation changes in this release.

Documentation	Description
<i>Deltek PM Compass 8.5 Installation Guide</i>	Updated "Appendix H: Unicode and Case-Insensitive Prerequisites for Cobra and Open Plan Databases" to align the file names mentioned in this section with the versions included in KB Article # 62096

# PM Compass 8.5 Cumulative Update 05

**Released:** September 30, 2025

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 05 (8.5.0705.4340)

### PM Compass API Installation

The PM Compass API is a web API that runs on IIS and does not rely on any components of the PM Compass server or Process server. It can be installed on the same server as the PM Compass server components or on a separate server.

Product Module	DSM Release Name
Deltek PM Compass API	Deltek PM Compass API For Cumulative Update 05 (8.5.702.21)

### Client Component Installation

There is no client component installation in this release.

## Enhancements

There are no enhancements in this release.

## Software Issues Resolved

This section includes software issues resolved in this release.

## [API » Import Progress](#)

### Defect 2472139

**Description:** When you ran the Import Schedule Progress API process and an assignee in the database was not in uppercase, the process failed with the following error: "The given key was not present in the dictionary."

**Customers Impacted:** This defect affects customers importing progress.

**Workaround Before Fix:** None.

#### **Files Updated:**

- Deltek.PMCompass.ApplicationAncestors.Server.dll
- Deltek.PMCompass.Statusing.Server.dll

### Defect 2455645

**Description:** When you ran the Import Progress API process, the Import Summary report displayed a **Completed** import status even if all projects failed. In addition, when the process failed because the project was not visible in PM Compass or was a master project, the Import Summary report displayed a **Failed** status with zero total failed records and no failure message.

**Customers Impacted:** This defect affects customers importing progress.

**Workaround Before Fix:** None.

#### **Files Updated:**

- PPM.Engine.PMCompass.dll
- PPM.WebService.Engine.PMCompass.dll
- Deltek.PMCompass.APIReports.Client.dll
- Deltek.PMCompass.Statusing.Server.dll

## [General » Installation](#)

### Defect 2453828

**Description:** When you ran the PM Compass 8.5 Cumulative Update Installer, the Confirm Installation Features screen in the PM Compass Upgrade Wizard displayed only the Cobra and Open Plan integration versions but did not include their build numbers.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.



**Additional Notes:** The Confirm Installation Features screen of the PM Compass Upgrade Wizard now displays the Cobra and Open Plan integration build numbers. In addition, Step 6 of the “Upgrade PM Compass” section in the *Deltek PM Compass 8.5 Installation Guide* has been updated to reflect this change.

**Files Updated:**

- DeltekPMCompass85CU05.exe

### 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 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

This section includes documentation changes in this release.

Documentation	Description
<i>Deltek PM Compass 8.5 Installation Guide</i>	Added the Cobra and PM Compass licensing compatibility information to the “Deltek Product Integration” section in “Appendix A: System Requirements”
<i>Deltek PM Compass 8.5 Technical Overview and System Requirements</i>	Added the Cobra and PM Compass licensing compatibility information to the “Deltek Product Integration” section of “System Requirements”

# PM Compass 8.5 Cumulative Update 04

**Released:** August 29, 2025

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 04 (8.5.0704.4326)

### PM Compass API Installation

There is no PM Compass API installation in this release.

### Client Component Installation

There is no client component installation in this release.

**Note:** Deltek PM Compass 8.5 Cumulative Update 04 was tested with the following PPM products:

- Deltek Cobra 8.6 Cumulative Update 06
- Deltek Open Plan 8.7 Cumulative Update 12

## Enhancements

There are no enhancements in this release.

## Software Issues Resolved

This section includes software issues resolved in this release.

### Help

Defect 377022

**Description:** The PM Compass Help System did not include information on scenarios where two responsibilities were reassigned to the same user in a workflow step.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

**Additional Notes:** The last bullet in the "Rules for Moving Assignments" section of the [Add/Move Assignments Overview](#) topic now explains how PM Compass handles the scenario.

**Files Updated:**

- Deltek PM Compass 8.5 Help System

## Reports

Defect 2206638

**Description:** When you generated a report using saved search, it only included records based on the Search Limits settings configured on the General tab of the System Settings form.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** Increase the search limits or remove them.

**Files Updated:**

- Deltek.Framework.Lookup.Client.dll

## Projects » Enter Schedule Progress

Defect 2358760

**Description:** When you saved your changes on the Enter Schedule Progress form, PM Compass encountered the following error: "index and length did not refer to a valid location within the string."

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** Check the fields used and field name lengths in the following areas:

- **User Field Mapping**
- **System Settings » Progress Tab » Assignment Mapping**
- **Administration » Alerts » User-Initiated Alerts » Area=Progress**

If a field name, combined with its fully qualified table name, exceeds 25 characters, shorten it using the steps below:

1. Remove the field from User Defined fields in PM Compass.
2. Do the following in Open Plan:
  - a. Create a shorter-named field.
  - b. Copy the data from the long-named field to the new field using a global edit.
  - c. Remove the long-named field.

3. Create the user-defined field in PM Compass and then run the unrotate script.

**Files Updated:**

- Deltek.PMCompass.ApplicationAncestors.Server.dll

[Workflows](#) » [Change Management](#) » [Processes](#) » [Cost Actions](#) » [Replan WP](#)

Defect 2448844

**Description:** When you ran the Replan process on the workflow through the Cost Actions dialog box, the Change Log dialog box displayed a different replanned work package value for the resource in the **New Value** column than the value applied in the Cobra sandbox project.

**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.

## Cobra Integration Updates

Cobra 8.6 Integration

**Note:** This integration release has been tested with Cobra 8.6 Cumulative Update 06.

### Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 2446777:** When you ran the Open Plan-Integration Wizard to load milestones, Cobra did not load any milestones if a subset of the record from Open Plan already existed in Cobra. For example, if Cobra had **A.B.C.1** and you tried to load **A.B.C**, it did not load.

**Attention:** For details about the defect, see the [Deltek Cobra 8.6 Cumulative Update 06 Release Notes](#).

## Open Plan Integration Updates

### Open Plan 8.7 Integration

**Note:** This integration release has been tested with Open Plan 8.7 Cumulative Update 12.

## 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 8.5 Cumulative Update 03

**Released:** July 31, 2025

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 03 (8.5.0703.4317)

### PM Compass API Installation

There is no PM Compass API installation in this release.

### Client Component Installation

There is no client component installation in this release.

**Note:** Deltek PM Compass 8.5 Cumulative Update 03 was tested with the following PPM products:

- Deltek Cobra 8.6 Cumulative Update 05
- Deltek Cobra 8.5 Cumulative Update 23
- Deltek Open Plan 8.7 Cumulative Update 11

## Enhancements

This section includes enhancements in this release.

### Enhanced Logging for Workflow Completion

Logging in PM Compass now captures system-level activity related to processes, offering improved visibility for tracking issues during workflow completion. All logs for the following actions are consolidated into a single file named **PMC\_Application.log**, regardless of the user performing them:

- Completing the workflow
- Updating the source data

- Publishing the workflow

**Note:**

- This information is documented in the "[Logging](#)" topic of the PM Compass Help System under **Troubleshooting » Logging and Exception Tracing**.
- For more information on how to enable application logging, see the "[Enable Application Logging](#)" topic in the PM Compass Help System under **Troubleshooting » Logging and Exception Tracing » Logging**.

## Software Issues Resolved

This section includes software issues resolved in this release.

### Documentation

#### Defect 2431862

**Description:** The *Deltek PM Compass 8.5 Installation Guide* incorrectly stated that Microsoft Visual C++ 2013 was required instead of Microsoft Visual C++ 2015–2022.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

**Additional Notes:** The System Requirements section of the *Deltek PM Compass 8.5 Installation Guide* now correctly lists Microsoft Visual C++ Redistributable for Visual Studio 2015–2022. This update has also been applied to the *Deltek PM Compass 8.5 Technical Overview and System Requirements Guide* to ensure consistency across documentation.

#### Files Updated:

- DeltekPMCompass85InstallationGuide.pdf
- DeltekPMCompass85TechnicalOverviewandSystemRequirements.pdf

### Workflows » Change Management

#### Defect 2347496

**Description:** The Change Log entry for an item that never existed in the live project displayed the message, "No longer in the live Project".

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

**Additional Notes:** To avoid confusion and improve user-friendliness, the message has been updated to **Not in live Project**. Instances of the old message have been replaced with the new one in the "[Schedule Changes](#)" and "[Change Log Dialog Box](#)" topics in the PM Compass 8.5 Help System.

**Files Updated:**

- Deltek.PMCompass.ChangeRequest.Server.dll

## Security Enhancements

There are no security enhancements in this release.

## Cobra Integration Updates

### Cobra 8.6 Integration

**Note:** This integration release has been tested with Cobra 8.6 Cumulative Update 05.

### Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 2417339:** When you ran the Reclass process and the base results matched another Cobra field name, Cobra encountered the "SQL error getting base results cursor" error.

**Attention:** For details about the defect, see the [Deltek Cobra 8.6 Cumulative Update 05 Release Notes](#).

### Cobra 8.5 Integration

**Note:** This integration release has been tested with Cobra 8.5 Cumulative Update 23.

### Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 2352012:** When you ran the Open Plan-Integration process to load milestones, Cobra did not load any milestones if a subset of the record from Open Plan already existed in Cobra. For example, if Cobra had **A.B.C.1** and you tried to load **A.B.C**, it did not load.

**Attention:** For details about the defect, see the [Deltek Cobra 8.5 Cumulative Update 23 Release Notes](#).

## Open Plan Integration Updates

### Open Plan 8.7 Integration

**Note:** This integration release has been tested with Open Plan 8.7 Cumulative Update 11.

This integration file relates to the following Open Plan defects:

- **Defect 2393443:** After you pasted text into a cell in a spreadsheet, Open Plan would delete the text as soon as you entered a character.
- **Defect 2394992:** After you opened a project in shared mode and added **Activity Type** as a column, changing the activity type in the corresponding drop-down list would not work properly. You had to select the option again for it to take effect.

**Attention:** For details about the defects, see the [Deltek Open Plan 8.7 Cumulative Update 11 Release Notes](#).

## 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 8.5 Cumulative Update 02

**Released:** June 30, 2025

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 02 (8.5.0702.4312)

### PM Compass API Installation

There is no PM Compass API installation in this release.

### Client Component Installation

There is no client component installation in this release.

**Note:** Deltek PM Compass 8.5 Cumulative Update 02 was tested with the following PPM products:

- Deltek Cobra 8.6 Cumulative Update 04
- Deltek Cobra 8.5 Cumulative Update 22
- Deltek Open Plan 8.7 Cumulative Update 10

## Enhancements

This section includes enhancements in this release.

### Narrative Score Feature Updates

The following updates enhance the functionality of the Narrative Score feature:

- During the final approval stage of an Assisted Explanation of Variance workflow in PM Compass, the narrative score and a hyperlink to the narrative score criteria summary are now copied to Cobra. These values are displayed in the Narrative pane of the Analyze form for the selected

control account, along with narratives such as Explanation of Variance, Impact, and Corrective Action. Note that this functionality requires Cobra version 8.6 or later.

- When you select the **Copy Narratives — copies the narratives from the last period** option in the Copy Narratives and Corrective Actions dialog box, PM Compass now also copies the last generated narrative score, provided the Narrative Score feature is enabled, and a score exists from the prior period.

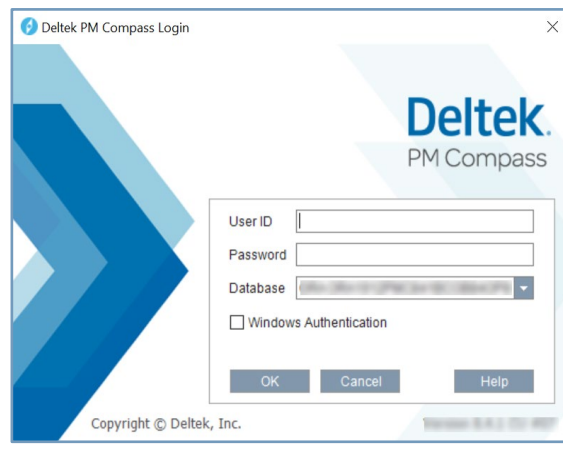
**Note:** This information is documented in the "[Narrative Score](#)" and "[General Tab of the Assisted Explanation of Variance Form](#)" topics of the PM Compass Help System under **Workflows » Explain Variance » Assisted Explanation of Variance**.

## Login Page Font Update

The Login page has been updated to use the new official Deltek corporate font. In addition, the Login dialog box has been adjusted to ensure it can display long database names properly.



*New Login Page*



*Previous Login Page*

## Support for Excel 2024 and Word 2024

PM Compass now supports Microsoft Excel 2024 and Microsoft Word 2024.

**Note:** This information is documented in the "System Requirements" section of the *Deltek PM Compass 8.5 Installation Guide* and *Deltek PM Compass 8.5 Technical Overview and System Requirements Guide*.

## Support for New AI Model Providers

PM Compass now supports the following AI Model providers:

- Microsoft Azure OpenAI GPT-4o
- Microsoft Azure Government OpenAI GPT-4o

**Note:** This information is documented in the “System Requirements” section of the *Deltek PM Compass 8.5 Installation Guide* and *Deltek PM Compass 8.5 Technical Overview and System Requirements Guide*.

## Software Issues Resolved

This section includes software issues resolved in this release.

### API » API Reports

#### Defect 2391163

**Description:** When you clicked the **Refresh** or **Export Data** button on an Import Summary report or Import Source report with a blank **Start Date** or **End Date** field, the query failed, and PM Compass did not display a message prompting you to enter the required dates.

**Customers Impacted:** This defect affects customers running API reports on a SQL Server database.

**Workaround Before Fix:** Populate the date fields.

#### Files Updated:

- Deltek.PMCompass.APIReports.Client.dll

### Help

#### Defect 2405589

**Description:** The PM Compass Help System did not mention that you must refresh the database when you are creating a new Budget Change Request using a new code in Cobra.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

**Additional Notes:** The Prerequisites section of the “[Budget Change Request](#)” topic now mentions refreshing the database before creating the BCR once the new code file has been added in Cobra.

#### Files Updated:

- Deltek PM Compass 8.5 Help System

## Projects » Enter Cost Progress

### Defect 2390118

**Description:** When you clicked the **Help** button in the Resource Progress dialog box of the Enter Cost Progress form, the corresponding help topic did not display.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

**Additional Notes:** The **Help** button now links to the "Earned Value Techniques (EVT)" topic.

#### Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

## Security Enhancements

There are no security enhancements in this release.

## Cobra Integration Updates

### Cobra 8.6 Integration

**Note:** This integration release has been tested with Cobra 8.6 Cumulative Update 04.

### Cobra 8.5 Integration

**Note:** This integration release has been tested with Cobra 8.5 Cumulative Update 22.

## Software Issues Resolved

This integration release relates to the following Cobra defect:

- **Defect 1699886:** When you ran the Reclass process and the base results matched another Cobra field name, Cobra encountered the "SQL error getting base results cursor" error.

**Attention:** For details about the defect, see the [Deltek Cobra 8.5 Cumulative Update 22 Release Notes](#).

## Open Plan Integration Updates

### Open Plan 8.7 Integration

**Note:** This integration release has been tested with Open Plan 8.7 Cumulative Update 10.

### Software Issues Resolved

This integration file relates to the following Open Plan defect:

- **Defect 2367591:** When you restored a project in **Exclusive mode** and reopened a previously completed activity, setting its progress type to **Remaining Duration** (for example, 20 days) and clicking **Apply** failed to retain the change.

**Attention:** For details about the defect, see the [Deltek Open Plan 8.7 Cumulative Update 10 Release Notes](#).

## 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 8.5 Cumulative Update 01

**Released:** May 16, 2025

## Installation Files

For the fixes in this release to take effect, you must download and install the files listed below.

### Server Component Installation

Install PM Compass server components on all Web/Application and Process servers. These components include the Web server backend (running on IIS) and the Process server (a Windows service), which can be installed either on the same server or on separate servers.

Product Module	DSM Release Name
Deltek PM Compass	Deltek PM Compass 8.5 Cumulative Update 01 (8.5.0701.4301)

### PM Compass API Installation

The PM Compass API is a web API that runs on IIS and does not rely on any components of the PM Compass server or Process server. It can be installed on the same server as the PM Compass server components or on a separate server.

Product Module	DSM Release Name
Deltek PM Compass API	Deltek PM Compass API For Cumulative Update 01 (8.5.701.20)

### Client Component Installation

Install these files on all client machines.

Product Module	DSM Release Name
Deltek Open Plan AddIn	Deltek Open Plan Addin for PM Compass 8.5_8.5.0701.4301

**Note:** Deltek PM Compass 8.5 Cumulative Update 01 was tested with the following PPM products:

- Deltek Cobra 8.6 Cumulative Update 02
- Deltek Cobra 8.5 Cumulative Update 19
- Deltek Open Plan 8.7 Cumulative Update 08
- Deltek Open Plan 8.6 Cumulative Update 13

## New Features and Enhancements

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

### PM Compass API

The RESTful API for Deltek PM Compass accepts JSON (JavaScript Object Notation) files through specific endpoints, allowing customers to build custom applications that interact with PM Compass.

**Attention:** For more information on how PM Compass utilizes the API elements, see “PM Compass API Elements” in the *Deltek PM Compass API Developer Guide*.

The PM Compass API provides coverage of the PM Compass solution for importing cost and/or schedule progress.

In addition, PM Compass system administrators can configure a custom menu item within the PM Compass interface to connect to an external API endpoint through the Custom Menu feature.

### Import Progress API

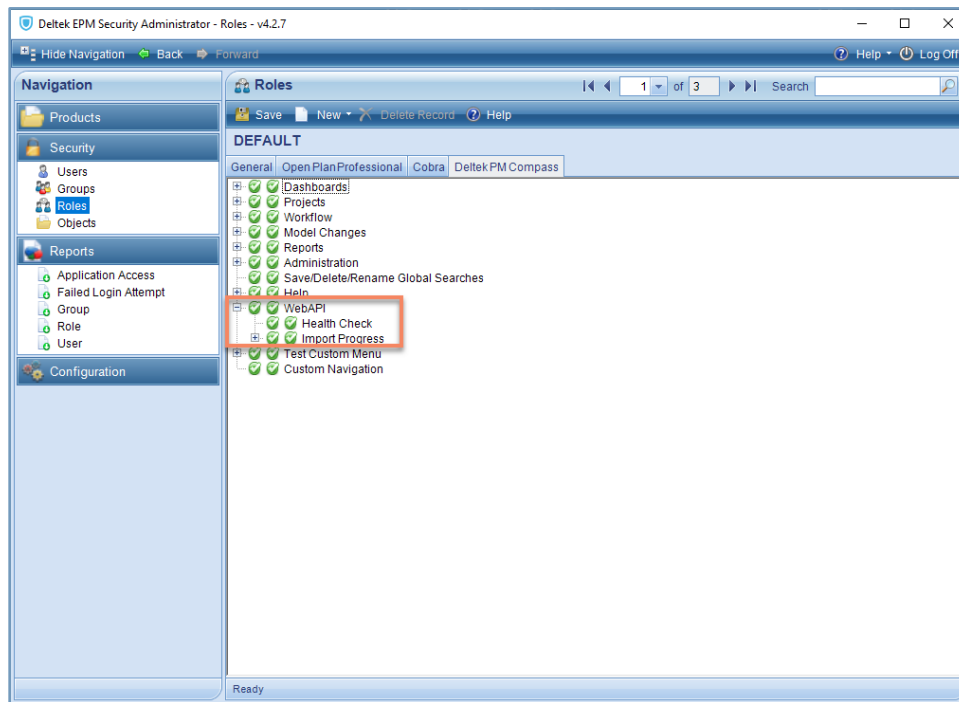
The Import Progress API feature enables importing of cost and schedule progress data, reducing the manual data entry when the progress information is available in a different system.

The Import Progress API enables batch importing of progress, which can include multiple projects for Cost, Schedule, or both. The process determines whether the progress is entered into the cost system (work packages) or the schedule system (activities) as specified in the **Source System to Update** field on the Progress tab of the Projects form.

The Import Progress API endpoints are as follows:

- Health Check API endpoint
- Import Progress API endpoint
- Import Progress Status API endpoint

You enable the API endpoints through the Deltek EPM Security Administrator (EPM SA) tool.



## WebAPI Node in EPM SA

**Attention:** For more information on the API endpoints, see “Enabling the Endpoints in EPM SA” in the *Deltek PM Compass API Developer Guide*.

## OpenAPI Specification Document

The PM Compass API is documented using OpenAPI Specification (OAS) 3.0. This document provides a detailed and standardized overview of the API's endpoints, structures, operations, and data models. It is a comprehensive guide for developers, enabling them to effectively understand and interact with the PM Compass API.

The PM Compass OAS document is available in the [Deltek Learning Hub](#).

**Note:** To access the Deltek Learning Hub, go to <https://learning.deltek.com/>. On the Discover By Product page, click **Project Portfolio Management**. Locate **PM Compass** and click **View All**. On the PM Compass page, click **API Reference** in **Developer Resources**.

## Using the Import Progress API

This table outlines the steps needed to utilize the Import Progress API.

	Step	Description	Reference
1	Set up the PM Compass API.	<p>This step covers installing and setting up the PM Compass API to ensure effective utilization of the feature.</p> <ul style="list-style-type: none"> <li>▪ Installing and configuring Microsoft Internet Information Services (IIS)</li> <li>▪ Installing the 64-bit Oracle Database Client (Administrator)</li> <li>▪ Installing the PM Compass API</li> <li>▪ Enabling Windows Authentication on the PM Compass API application in IIS</li> <li>▪ Creating a data source</li> <li>▪ Enabling the endpoint permissions in EPM SA</li> </ul>	For the detailed steps, see “Setting Up the PM Compass API” in the <i>Deltek PM Compass API Developer Guide</i> .
2	Test your API platform using the PM Compass API Test Utility.	Deltek provides a simple, web-based tool called the Deltek PM Compass API Test Utility, which you can use for basic testing of the PM Compass API. The utility is installed along with the PM Compass API.	For the detailed steps, see “Testing the API Using the PM Compass API Test Utility” in the <i>Deltek PM Compass API Developer Guide</i> .
3	Process the imported progress entries.	Use the Enter Progress forms to review and modify the imported progress entries as needed. If you encounter errors, you can check the status log and the API reports. Once any errors are resolved, or if you have completed your additional changes, you may proceed with submitting the workflow.	For more information, see “Processing the Imported Progress Entries” in the PM Compass Help System.

	Step	Description	Reference
4	Clear old, imported progress entries.	PM Compass provides a script that you can use to clear out old, imported progress entries. This step is optional.	For more information, see "Clearing Old Imported Progress Entries" in the <i>Deltek PM Compass API Developer Guide</i> .

### Handling the Import Progress API Errors

The PM Compass API performs validation checks on the import progress process. These checks help identify and resolve any issues that may occur during the import.

During the first-tier validation, the PM Compass API performs validation checks on the import progress process.

**Attention:** To learn about the success and error codes, see "Success Codes" and "Error Codes" in the *Deltek PM Compass API Developer Guide*.

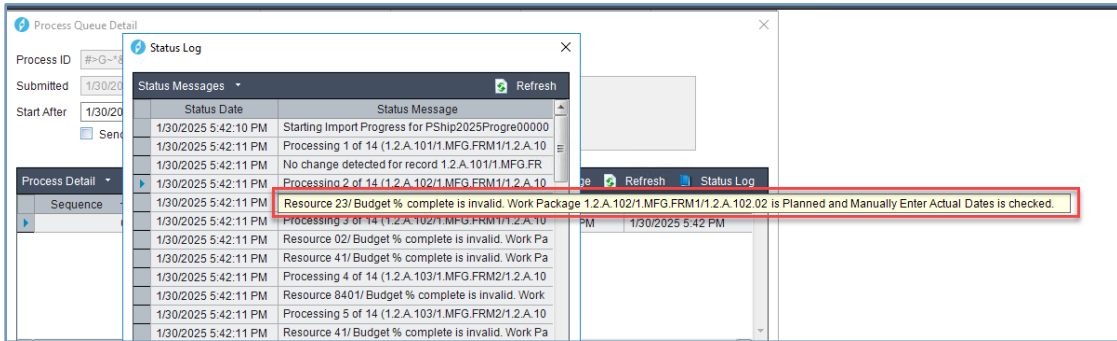
After the first-tier validation is complete, the API performs the second-tier validation when processing the imported progress entries using the Process Server. If the imported progress entries pass all validations, progress entries are created, and an email is sent to the assignee based on the assignment mapping hierarchy.

Depending on the error, one of the following actions may occur:

- A message is written on the API report if the record is invalid.

**Attention:** For more information on the Import Source and Import Summary reports, see the "API Reports Overview" topic in the PM Compass Help System under **Reports » API Reports Overview**. You can also review the Progress History Cost and Schedule reports to see how a work package or an activity has changed over time. For more information, see the "Progress History Cost and Schedule Reports" topic in the PM Compass Help System under **Reports » Progress Reports**.

- A warning is written to the log.



- The import progress process has stopped.

**Attention:** For more information on errors and warnings, as well as the required actions, see the “Import Cost Progress Errors” and “Import Schedule Progress Errors” topics in the PM Compass Help System under **Error Messages and Codes**.

### Checking the Imported Progress Entries on the Progress Forms

When cost or schedule data is successfully imported, cost or schedule progress entries are created. If duplicate cost or schedule records are encountered during import, the data from the last duplicate record will be loaded into PM Compass.

The imported progress entries are displayed like all other progress entries regardless of their source and are shown as **Active** with the appropriate highlighting for updated data. To see the imported progress entries, navigate to the Enter Progress form. When the API is installed, additional columns are available at the beginning of the Cost Progress grid on the Enter Cost Progress form or the Schedule Progress grid on the Enter Schedule Progress form, indicating the progress entry was imported.

The additional columns include:

- Source
- Import Date
- Imported By
- QBD
- Justification

**Attention:** For more information on these fields, see the “Enter Cost Progress Form” and “Enter Schedule Progress Form” topics in the PM Compass Help System under **Projects » Progress » Enter Progress**.

Enter Cost Progress

P3CA\_Cobra\_EVTDemo — Period End Date: 6/29/2024

Source	Import Date	Imported By	QBD	Justification	Workflow Status	CBS	WBS	CBS	WP	Description	Actual Start	Actual Finish	Percent Complete	Forecast Start	Forecast Finish	Comment	Bas
SSID0000000110	1/23/2025 10:39 AM	Rex Amsterdam	SRID0000000208		Active	1000	1.1.1	1 ENG SCHULT	J_Cobronzy	WP w/single resource (EVT-MS);	6/29/2024	6/29/2024		6/29/2024	6/29/2024		10/30/2024
SSID0000000110	1/23/2025 10:39 AM	Rex Amsterdam	SRID0000000208		Active	1000	1.1.10	1 MFG FRM1		WP w/single resource (EVT-MS);	6/28/2024	6/28/2024		6/28/2024	6/28/2024		12/5/2024
SSID0000000110	1/23/2025 10:39 AM	Rex Amsterdam	SRID0000000208		Active	1000	1.1.10	1 MFG FRM1		WP no resources (EVT-MS); resu	6/28/2024	6/28/2024		6/28/2024	4/23/2029		4/10/2024
SSID0000000110	1/23/2025 10:39 AM	Rex Amsterdam	SRID0000000208		Active	1000	1.1.10	1 MFG FRM1		WP w/single resource (EVT-MS);	6/28/2024	6/28/2024		6/28/2024	6/28/2024		4/24/2024
SSID0000000110	1/23/2025 10:39 AM	Rex Amsterdam	SRID0000000208		Active	1000	1.1.10	1 MFG FRM1		WP w/single resource (EVT-MS);				5/8/2029	5/21/2029		5/8/2024
SSID0000000110	1/23/2025 10:39 AM	Rex Amsterdam	SRID0000000208		Active	1000	1.1.10	1 MFG FRM1		WP w/single resource (EVT-MS);	6/28/2024			6/28/2024	6/4/2029		5/22/2024
SSID0000000110	1/23/2025 10:39 AM	Rex Amsterdam	SRID0000000208		Active	1000	1.1.10	1 MFG FRM1		WP w/single resource (EVT-MS);	6/29/2024			6/29/2024	7/16/2029		7/3/2024

### Enter Cost Progress Form

Enter Schedule Progress

3KeysimpProgSch — Period End Date: 9/28/2024

Source	Import Date	Imported By	QBD	Justification	Schedule Project Description	Activity ID	Duration	Actual Start	Actual Finish	Start No Earlier Than	Expected Finish	Physi
SchedResourceVal	11/11/2024 2:46 PM	Oyie Lizardo	YESCHED000076A		Progress, Workflows, and Report1	1.1.1.1	60d			10/12/2024		
SchedResourceVal	11/11/2024 2:46 PM	Oyie Lizardo	YESCHED000076B		Progress, Workflows, and Report1	2.1.1.1	60d			11/10/2025		
SchedResourceVal1	12/4/2024 4:19 PM	System Administrator	YESCHED000079B		Progress, Workflows, and Report1	2.1.1.3	20d			10/1/2024		
SchedResourceVal1	12/4/2024 4:19 PM	System Administrator	YESCHED000079B		Progress, Workflows, and Report1	2.1.1.10	142m	9/1/2024		6/1/2016		
SchedResourceVal	11/11/2024 2:46 PM	Oyie Lizardo	YESCHED000080A		Progress, Workflows, and Report1	2.1.2.14	65d			10/1/2024	3/8/2025	
SchedResourceVal	11/11/2024 2:46 PM	Oyie Lizardo	YESCHED000080A		Progress, Workflows, and Report1	4.1.1.1	270d				12/8/2024	
SchedResourceVal	11/11/2024 2:46 PM	Oyie Lizardo	YESCHED000080A		Progress, Workflows, and Report1	4.1.1.2.1	50d	12/1/2021			12/8/2024	

### Enter Schedule Progress Form

### Submitting the Imported Progress Entries

If you need to change the imported progress entries, you can do so, but you must enter a justification on the Enter Progress form before submitting it for approval.

Once any errors are resolved, or if you have completed your additional changes, you may proceed with submitting the workflow. Note that imported progress entries do not go into the live project until they have been approved.

### Using the Custom Menu Feature to Configure an External API Endpoint

As a PM Compass system administrator, you can use the Custom Menu feature to create custom menu items for multiple external API endpoints, which you can then execute from the **Navigation** menu within PM Compass.

**Important:** This feature is not designed to call the PM Compass API directly from PM Compass.

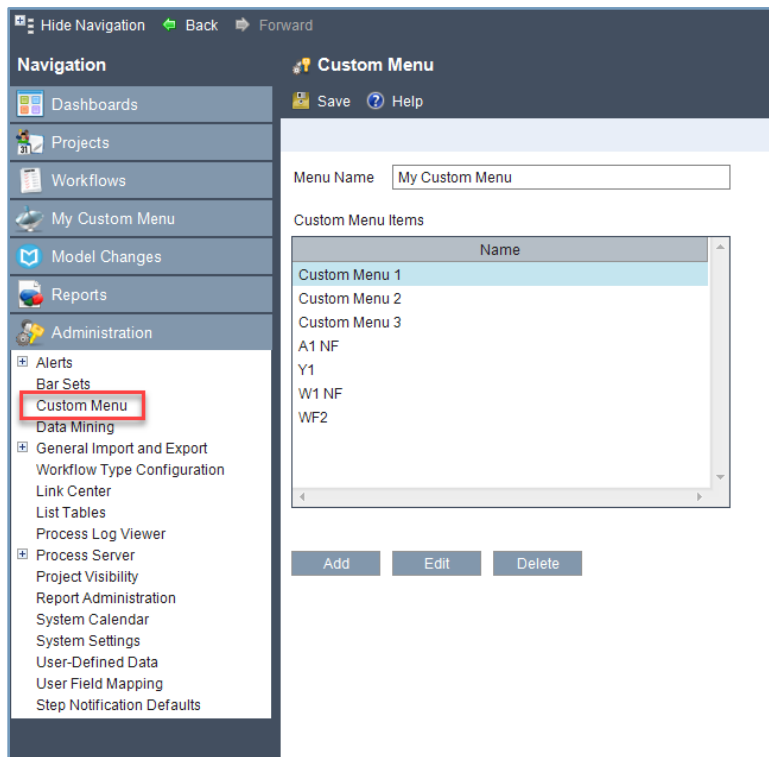
**Attention:** For more information on this feature, see the “Custom Menu Overview” topic in the PM Compass Help System under **Administration**.

Use the Custom Menu form to:

- Create custom menu items for multiple external API endpoints.
- Add the fields you want to send through the API endpoint.
- Configure the parameters required to implement Open Authorization (OAuth) for the API endpoint.

## Custom Menu Form

To display the Custom Menu form, click **Administration » Custom Menu** on the Navigation menu.



## Custom Menu Form

On the Custom Menu form, enter a custom menu name in the **Menu Name** field and click the **Add** button. If you want to edit an existing custom menu item, select an item in the **Custom Menu Items** grid and click the **Edit** button.

In the Custom Menu Item dialog box, click each tab and enter or specify the values in the appropriate fields.

Dialog box titled "Edit Custom Menu Item" with a close button (X) in the top right corner. The "Name" field contains "Custom Menu". The dialog has three tabs: "General" (selected), "OAuth Settings", and "Field Definitions". Under the "General" tab, the following fields are visible:

- API Name: Test
- HTTP Verb: POST (dropdown menu)
- API URL: https://google.com
- Body Content Type: Form URL Encoded (dropdown menu)
- Body Template: (Large empty text area)

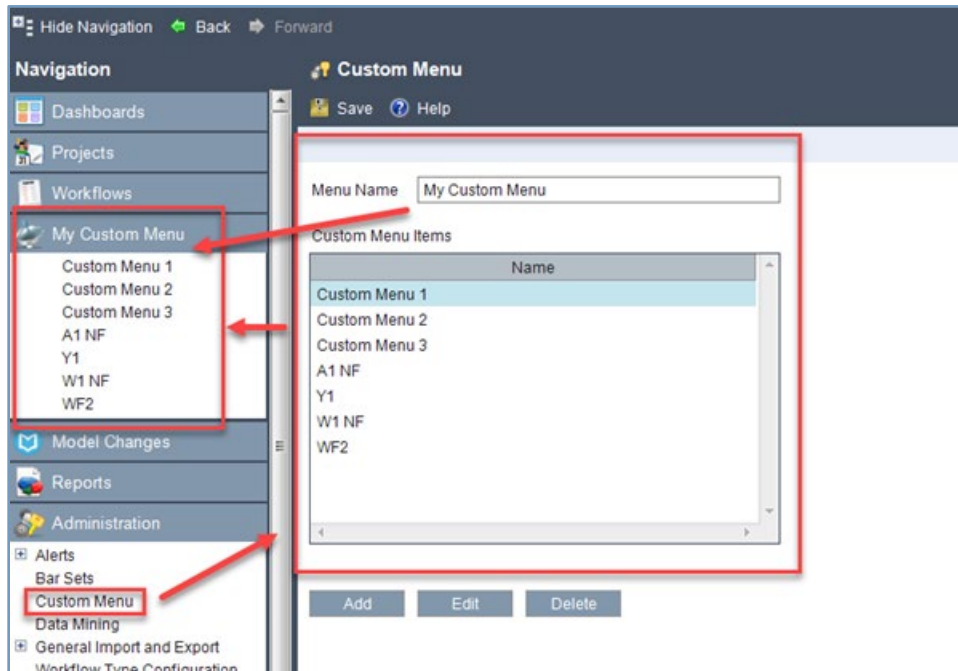
Buttons at the bottom right: OK, Cancel, Help.

*Custom Menu Item Dialog Box*

**Attention:** For more information on each tab and its fields, see the "Custom Menu Item Dialog Box" topic in the PM Compass Help System under **Administration » Custom Menu**.

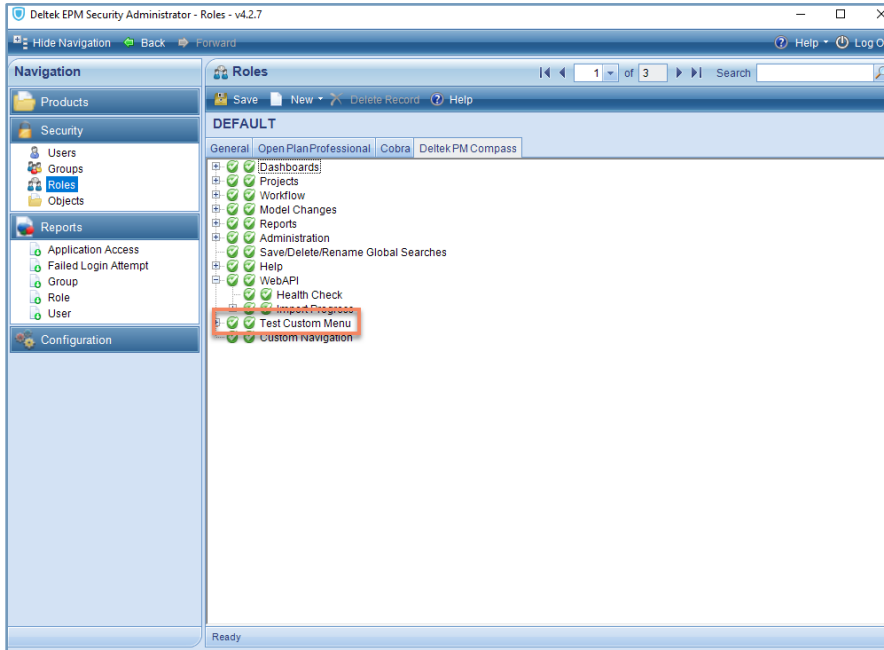
## Custom Menu Items

The custom menu items created by the PM Compass system administrators using the Custom Menu feature are then grouped and displayed on the **Navigation** menu after **Workflows**.



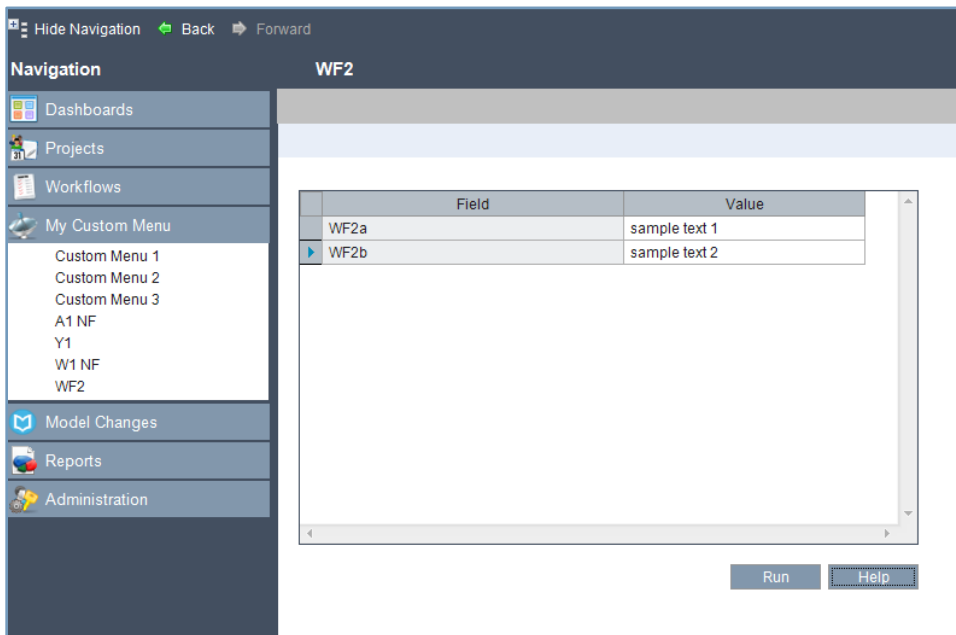
**Attention:** For more information, see “Custom Menu” in the PM Compass Help System under **Custom Menu**.

The ability to view and execute a custom menu item depends on your user role. To make a custom menu item available to specific users, grant them access in EPM SA. Custom menu items can be configured on the Roles form under the Deltek PM Compass tab categories.



## Deltek PM Compass Tab in EPM SA

When you click a custom menu item in the list, the Field and Value grid displays. Use this grid to specify values for the API fields and execute the API call. The grid information dynamically updates based on the API fields defined on the Field Definitions tab of the Custom Menu Item dialog box. Click the **Run** button to connect and execute the external API endpoint as defined on the General tab of the Custom Menu Item dialog box.



## Field and Value Grid of a Custom Menu Item

### External API Logging

When you click the **Run** button to connect and execute the external API endpoint, the call will be logged in a text file and will include detailed log information.

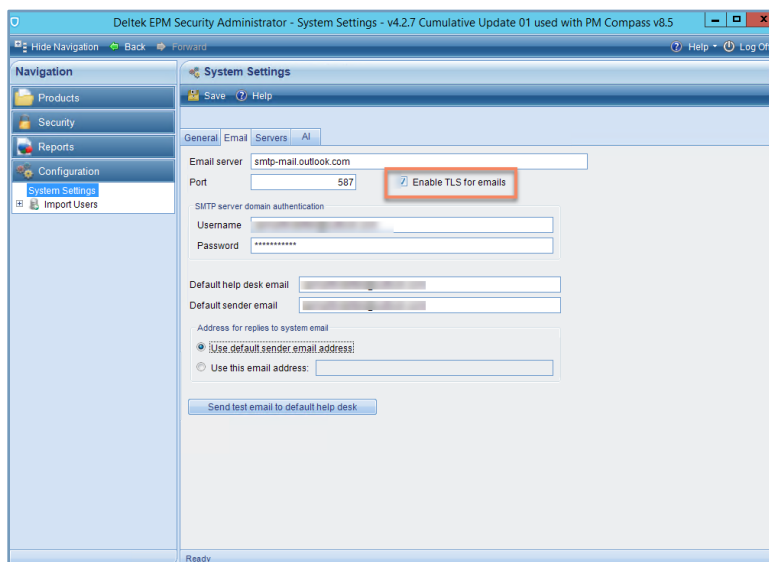
The log file is created inside the **API** folder, which is in the same directory specified in the **Integration Process Logs** field on the File Folders tab of the System Settings form. The log file follows the following format: **yyyymmdd\_ExternalAPILog.log**. A single log file is generated for all external API executions on the same day, regardless of the user.

JTC	Timestamp	User	Api Name	Custom Menu Name	HTTP Method	Endpoint URL	Request Body	Status Code	Response Message	Elapsed Time
2024-12-18	14:55:49	SYSADMIN	Test Test	Test Test	POST	https://pmc85-test.auth.us-east-1.amazonaws.com/oauth2/authorize		405	- MethodNotAllowed	0.4216476
2024-12-18	14:57:03	SYSADMIN	Test Test	Test Test	POST	https://pmc85-test.auth.us-east-1.amazonaws.com/oauth2/authorize		405	- MethodNotAllowed	0.3281377
2024-12-18	15:04:43	SYSADMIN	Test Test	Test Test	POST	https://login.microsoftonline.com/84b254de-bf4e-43ae-b7e7-f3f17328f13c/oauth2/v2.0/authorize		200	- OK	<!-- Copyrig

### Sample Log File

### Enable TLS for Emails

As Microsoft phases out SMTP relay for email, it is essential to ensure that PM Compass email notifications remain functional by supporting Transport Layer Security (TLS). The new **Enable TLS for emails** option on the Email tab of the System Settings form in EPM Security Administrator facilitates secure email communication, ensuring that all notifications sent through PM Compass are protected and comply with modern security standards.

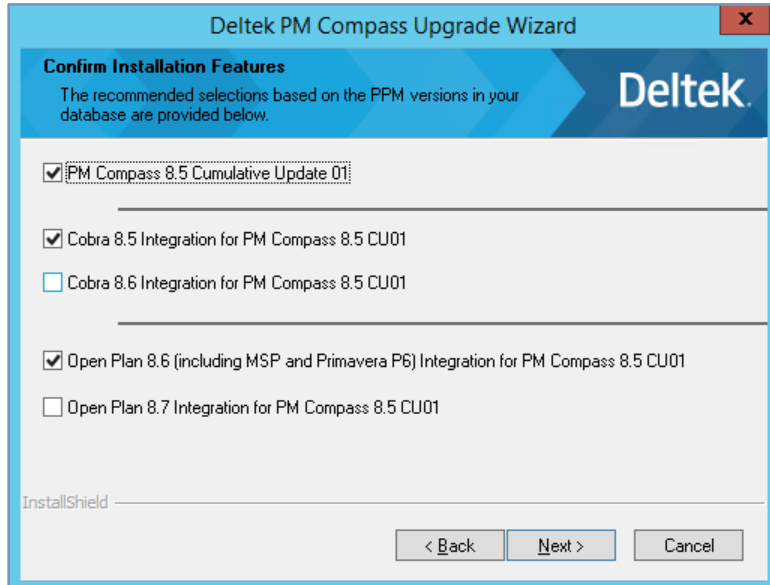


### Email Tab of the System Settings Form in EPM SA

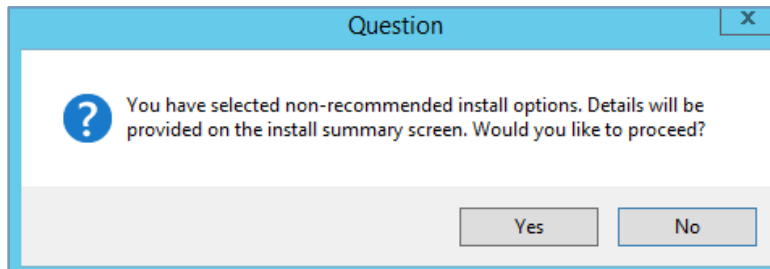
### Updates to PM Compass Installers

Several updates have been made to the PM Compass installers to ensure a more efficient and user-friendly installation process, enhancing the overall experience.

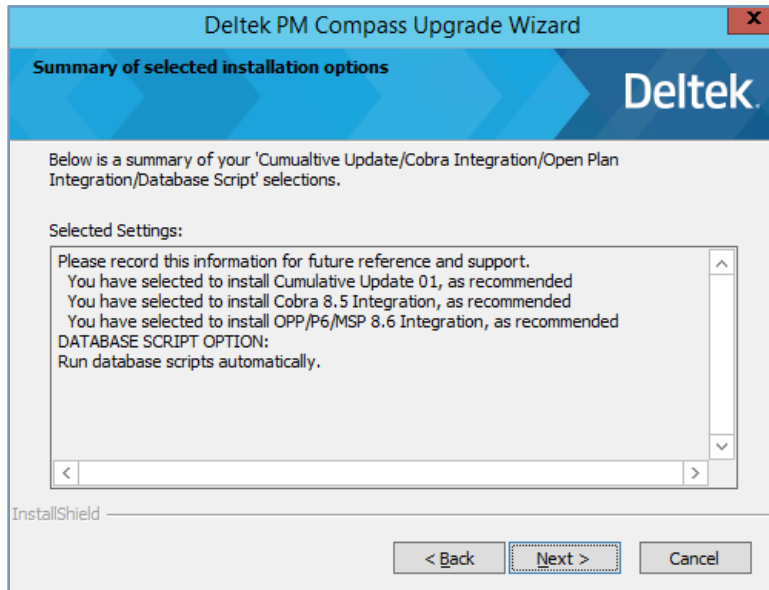
The PM Compass Cumulative Update installer now includes both the PM Compass installation and integration installers, eliminating the need for separate installers for Cobra or Open Plan integration.



It incorporates Open Plan and Cobra engines compatible with the PM Compass version and provides warnings if any selections are not recommended.



In addition, the installer offers a summary of the selected installation options and a description of what will be installed, which you can copy, paste, or save for your records.



Furthermore, the sample databases have been separated from the main installer, zipped, and made available in DSM to reduce the size of the installers.

ReleaseTypeNa	ReleaseName	FileName	FileSize	DatePosted
Complete	Deltek PM Compass 8.5 Cumulative Update 01	Deltek.PMCompass85CU01.exe	733 MB	05/02/2025
Sub-Release	Deltek PM Compass 8.5 Sample Databases	PMCompass85SampleDatabases_20250501.zip	231 MB	05/02/2025
Sub-Release	Deltek Open Plan Multi-User (OP/MSP) For PM 8.5	Deltek.OpenPlanMultiUser(OP/MSP)ForPM8.5.exe	3 MB	05/02/2025
Sub-Release	Deltek PM Compass 8.5 API For Cumulative Update 01	Deltek.PMCompassAPI_8.5.701.20.exe	231 MB	05/02/2025

**Note:** The *Deltek PM Compass 8.5 Installation Guide* has been revised to include the recent updates to the installers.

## Software Issues Resolved

This section includes software issues resolved in this release.

### API » External API » Administration » Custom Menu

#### Defect 2365056

**Description:** When you created custom menus using the **Custom Menu** option under the **Administration** menu, the custom menus were editable and movable within the Navigation Menu Designer.

**Customers Impacted:** This defect affects customers creating custom menus.

**Workaround Before Fix:** Do not make any changes to the Navigation Menu Designer.

#### Files Updated:

- Deltek.Framework.ControlDialogs.Client.dll

- Deltek.PMCompass.SysLogin.Server.dll

## API » Import Progress

### Defect 2343527

**Description:** When you ran the Import Schedule Progress API process with **Progress Type = Percent Complete**, **Progress Value = 0**, and **Physical Percent Complete = 25**, PM Compass displayed an error message.

**Customers Impacted:** This defect affects customers importing progress.

**Workaround Before Fix:** None.

#### Files Updated:

- Deltek.PMCompass.Submit.Server.dll

### Defect 2343412

**Description:** When you submitted a JSON file with a missing comma through the PM Compass API Test Utility, the custom JSON validation did not execute correctly.

**Customers Impacted:** This defect affects customers importing progress.

**Workaround Before Fix:** Correct the JSON file.

#### Files Updated:

- PPM.WebService.Engine.PMCompass.dll
- Projects

### Defect 2179704

**Description:** When you navigated to the Resources tab of the Enter Schedule Progress form, extra columns without grid headers were displayed.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

#### Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

## [Projects » Cost Analysis » Activities Tab](#)

### Defect 2350835

**Description:** When you opened a project with an associated schedule project in the Cost Analysis view, the linked activity of the work package was not displayed on the Activities tab during the initial load of the view.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** Click the next work package with a linked activity, and then click the previous work package again.

**Files Updated:**

- Deltek.PMCompass.Statusing.Client.dll

## [Projects » Enter Progress](#)

### Defect 2305380

**Description:** When all the work packages in the Cost Progress grid of the Enter Cost Progress form were populated, and there was already an existing approved progress, generating the Workflow History report displayed the following message: "An error occurred during report processing (rsProcessingAborted). Query execution failed for dataset 'ReportDataset' (rsExecutingCommand)."

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

**Files Updated:**

- Item History.rdl
- Deltek.PMCompass.Statusing.Client.dll

## [Workflows » Change Management](#)

### Defect 2333730

**Description:** When you reassigned a workflow and selected an existing user as a new assignment, PM Compass did not display a warning message.

**Customers Impacted:** This defect affects customers using change management.

**Workaround Before Fix:** None.

**Files Updated:**

- Deltek.PMCompass.Items.Server.dll

## Workflows » Explain Variance

Defect 2324655

**Description:** When you clicked the **Generate Narrative Score** hyperlink with a score of **0**, PM Compass displayed a blank page.

**Customers Impacted:** This defect affects all customers.

**Workaround Before Fix:** None.

**Files Updated:**

- Deltek.PMCompass.dlgNarrativeSummary.Client.dll

## Security Enhancements

This release includes security enhancements to address findings from ongoing security monitoring.

## Database Changes

This section includes database changes in this release.

### Tables

This section includes changes to tables.

#### New Tables

Table Name
CAM_ImportProgressBatch
CAM_ImportProgressCost
CAM_ImportProgressMSSStep
CAM_ImportProgressProcessSplit
CAM_ImportProgressResourceAsg
CAM_ImportProgressSchedule
CAM_ItemImportProgress

### Columns

This section includes changes to columns.

## New Columns in Existing Tables

Table Name	Column Name	Data Type
CAM_ItemUpdateStatus	Justification	nvarchar(1000)
CAM_SystemSettings	ImportProgressCounter	int NOT NULL
WST_CFGEmail	UseTLS	tinyint NOT NULL

## Indexes

This section includes changes to indexes.

### New Indexes

Table Name	Index Name	Index Fields
CAM_ImportProgressBatch	CAM_ImportProgressBatchIDX	BatchID, CreatedDate
CAM_ImportProgressCost	CAM_ImportProgressCostIDX	ImportProgressBatch_UID
CAM_ImportProgressMSStep	CAM_ImportProgressMSStepIDX	ImportProgressItem_UID, ImportProgressBatch_UID
CAM_ImportProgressResourceAsg	CAM_ImportProgressResourceAsgIDX	ImportProgressItem_UID, ImportProgressBatch_UID
CAM_ImportProgressSchedule	CAM_ImportProgressScheduleIDX	ImportProgressBatch_UID

## Data Changes

This section includes changes to data applied by scripts.

- Updated WST\_Tab, WST\_DCT and WST\_DCT\_DESC to reflect schema changes

## Documentation Changes

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

Documentation	Description
Deltek PM Compass 8.5 Help System	Included the missing error codes in the "MSP Integration Errors that Display in PM Compass" topic

Documentation	Description
	Added the "Configure Microsoft Project for Automation in DCOM" and "Configure Microsoft Project on the Process Servers" topics to the Troubleshooting section

## Downloading Deltek Products using Deltek Software Manager

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

### Accessing DSM from within the Deltek Support Center

**To access DSM from within the Deltek Support Center:**

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

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

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

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

Options include:

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

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

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

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

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

## Accessing DSM Lite

### To access Deltek Software Manager Lite:

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

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

## DSM Documentation and Troubleshooting

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

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

## Appendix A: If You Need Assistance

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

### Customer Services

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

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

**Attention:** Find out more about these and other services from the [Deltek Support Center](#).

### Deltek Support Center

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

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

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

- Initiate a Chat to submit a question to a Deltek Support Services analyst online

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

## Access Deltek Support Center

### To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

**Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.