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Deltek PM Compass 8.5

Cumulative Update 16 Release Notes

September 30, 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 16.

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: Review 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
Microsoft Project Professional	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes
	Resource % Complete	Yes
Project Server	Import	Yes
	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes
	Resource % Complete	Yes
Primavera P6	Import	Yes
	Export	Yes
	Enter Progress	Yes
	Resource Remaining Qty	Yes
	Resource % Complete	Yes

PM Compass 8.5 Cumulative Update 16

Released: September 30, 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 16 (8.5.0716.4512)

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.

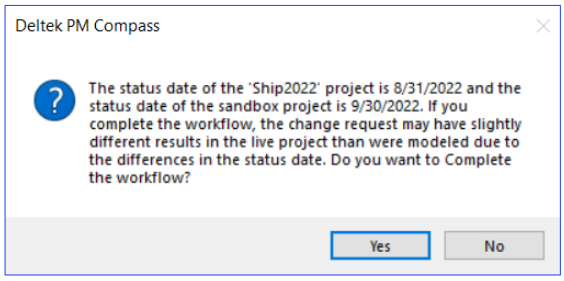
Note: Deltek PM Compass 8.5 Cumulative Update 16 was tested with the following PPM product:

- Open Plan 8.8 Cumulative Update 04

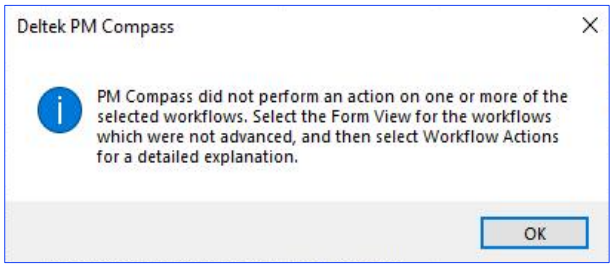
Enhancements

Disable the Status Date Mismatch Warning When Completing a Change

When you complete a change management workflow, PM Compass checks whether the live project's status date matches the associated sandbox project's status date. If the dates do not match, PM Compass displays a warning before you can proceed.



Status Date Mismatch Warning Dialog Box in Form View



Status Date Mismatch Warning Dialog Box in List View

Note: This behavior is documented in the "Complete a Change When the Calendar Has Been Advanced" in the PM Compass 8.5 Help System.

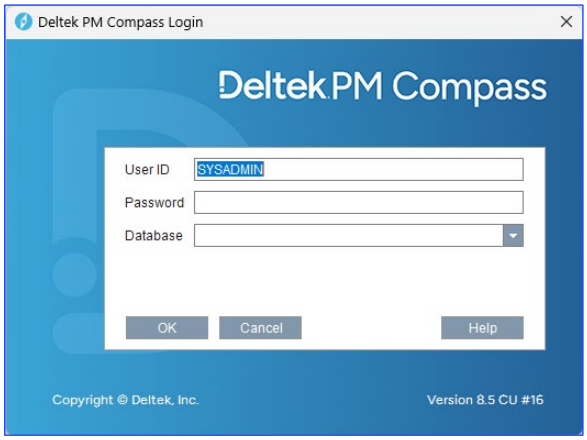
If this check impacts your change approval process, PM Compass provides scripts to disable the status date mismatch warning. The scripts to disable the status date mismatch check are attached to *Knowledge Base Article (KBA) 127508: Disable the Status Date Mismatch Warning When Completing a Change* in the Knowledge Center in the Deltek Support Center. Separate scripts are available for SQL Server and Oracle environments.

After you run the Disable script, PM Compass no longer performs the status date mismatch check or displays a warning. To restore the check, run the accompanying Enable script.

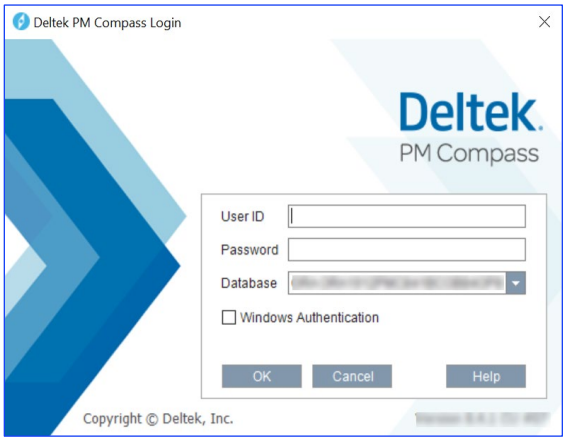
Note: If you need assistance in downloading the scripts, contact a Deltek Support Services analyst.

Login Page Logo Update

The PM Compass login page has been updated with the new official Deltek logo.



New Login Page



Previous Login Page

Software Issues Resolved

General » Installation

Defect 2650773

Description: When you ran the PM Compass Cumulative Update installer with **databases.enc** configured in a non-default location, the installer continued searching for the default directory instead of the configured path, causing the upgrade to fail.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: Place a copy of **databases.enc** in a default directory and run the upgrade.

Files Updated:

- DeltekPMCompass85CU16.exe

Workflows » Change Management » Import Change Request

Defect 2812231

Description: When you clicked **Change Details** after completing an import for an Import Change Request workflow type, PM Compass displayed an error instead of displaying the Change Details view.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None

Files Updated:

- Deltek.PMCompass.Items.Client.dll

Defect 2869950

Description: When you imported a resource assignment through an Import Change Request workflow, the resource was successfully imported but was not displayed in the Change Log.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Items.Server.dll

Security Enhancements

There are no security enhancements in this release.

Cobra Integration Updates

There are no Cobra updates in this release.

Open Plan Integration Updates

Open Plan 8.8 Integration

Note: This integration release has been tested with Open Plan 8.8 Cumulative Update 04 (Open Plan 8.8 Integration (8.8.0704.372) for PM Compass 8.5 CU16).

This integration file relates to the following Open Plan defect:

- **Defect 2530264**: If you are using the special **Activity Predecessors** and/or **Activity Successors** fields, and you had an activity with two or more predecessor relationships (for example, "2 FS, 3 FS, 4 FS") and tried to add, remove, or modify a lag value such as "+1d" — either directly in the cell or in the text box above the data grid — an error message occurred. After you dismissed the error, a second message displayed indicating your change was being discarded, and the row reverted to its original value.

Attention: For details about the defect, see the *Deltek Open Plan 8.8 Cumulative Update 04 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 15

Released: August 28, 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 15 (8.5.0715.4495)

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.

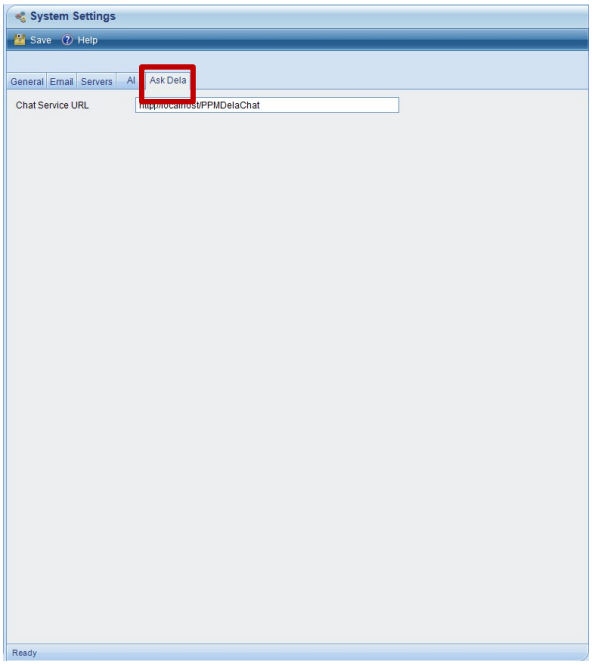
Note: Deltek PM Compass 8.5 Cumulative Update 15 was tested with the following PPM products:

- Cobra 8.7 Cumulative Update 08
- Open Plan 8.8 Cumulative Update 03

Enhancements

Ask Dela Tab Renamed

The **Dela** tab on the System Settings form of EPM Security Administrator has been renamed to **Ask Dela**.



Ask Dela tab on the System Settings form of EPM Security Administrator

For more information, see the "Ask Dela Tab of System Settings" topic in the PM Compass EPM SA Help System.

Software Issues Resolved

General » Installation

Defect 2776129

Description: When you ran the PM Compass 8.5 Cumulative Update installer and selected a database containing ";TrustServerCertificate=True", the installer returned to the Select Database page without continuing to the next page or displaying an error message.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: In EPM Security Weblink, remove the the ";TrustServerCertificate=True" from the database name. After completing the upgrade, add ";TrustServerCertificate=True" back to the database name.

Files Updated:

- DeltekPMCompass85CU15.exe

Workflows » Change Management » Contract Change

Defect 2593028

Description: When a process interruption occurred during workflow completion, the workflow could remain in the "In-Progress" stage while incorrectly displaying the "Completed" workflow status, preventing you from advancing, modifying, or completing the workflow.

Customers Impacted: This defect affects customers using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ApplicationAncestors.Server.dll
- Deltek.PMCompass.Items.Server.dll
- Deltek.PMCompass.Items.Client.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 08 (Cobra 8.7 Integration (8.7. 8.7.0708.3891) for PM Compass 8.5 CU15).

Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 2710497**: When you ran the Reclass process through the Cobra Web Service, the process continued running even after the web service was stopped.

Attention: For details about the defects, see the *Deltek Cobra 8.7 Cumulative Update 08 Release Notes*.

Open Plan Integration Updates

Open Plan 8.8 Integration

> **Note:** This integration release has been tested with Open Plan 8.8 Cumulative Update 03 (Open Plan 8.8 Integration (8.8.0703.367) for PM Compass 8.5 CU15).

Software Issues Resolved

This integration file relates to the following Open Plan defect:

- **Defect 2798054**: When you added values to rotated user-defined fields (such as USER_DTE02, USER_NUM02, or USER_CHR02) and created a baseline, the values initially displayed correctly. However, after you switched to a different baseline, the values in these rotated fields no longer displayed — even though the corresponding unrotated fields continued to display their saved data correctly.

> **Attention:** For details about the defect, see the *Deltek Open Plan 8.8 Cumulative Update 03 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.

Deltek

PM Compass 8.5 Cumulative Update 14

Released: July 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 14 (8.5.0714.4485)

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 14 was tested with the following PPM products:

- Cobra 8.7 Cumulative Update 07
- Open Plan 8.8 Cumulative Update 02
- Open Plan 8.7 Cumulative Update 17

Enhancements

MCP Server Support and Installer Update for the PPM REST API

This release introduces Model Context Protocol (MCP) Server support for the PPM REST API. The MCP Server enables MCP-compatible AI assistants to securely access and interact with supported PPM product data using natural language. Working together with the PPM REST API, it exposes product-specific tools and data for use by AI-enabled applications and assistants.

To support this capability, Deltek has introduced the **Deltek PPM REST API and MCP Server** installer, which deploys both components in a single package. The installer provides a unified deployment experience for supported PPM products, including Cobra, Open Plan, and PM Compass, allowing you to

select and deploy one or more supported products from a single installer. The new installer replaces previous product-specific REST API installers, simplifying deployment and upgrade management for customers using multiple PPM products. You can download the **Deltek PPM REST API and MCP Server** installer and related documentation from Deltek Software Manager (DSM) under **PPM Administrator » PPM Administrator 1.0 » Sub-Release.**

Attention: For more information, see the following documents in DSM and Deltek Learning Hub:

- *REST APIs and MCP Server for Deltek PPM Products 1.0 Installation Guide*
- *REST APIs and MCP Server for Deltek PPM Products 1.0 Release Notes*
- *MCP Server Setup Guide for REST APIs*

In addition, see "Appendix T: Integrating PM Compass with the REST API and MCP Server" in the *Deltek PM Compass 8.5 Installation Guide*.

Software Issues Resolved

Projects » Approve Schedule Progress

Defect 2616097

Description: When you submitted imported progress entries and selected an activity on the Approve Schedule Progress form, the **Delete** button on the Resources tab became enabled.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Statusing.Client.dll

Workflows » Work Authorization » Initial Work Authorization

Defect 2661827

Description: When multiple Budget Change Requests (BCRs) shared the same control account within a revised Work Authorization Document (WAD), a workflow could enter an invalid state in which it was published but remained In-progress. As a result, the workflow became stuck and could not be completed or modified through PM Compass.

Customers Impacted: This defect affects all customers.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.Items.Server.dll

PPM Administrator » Dela Chat

Defect 2827379

Description: Ask Dela did not function correctly when installed in an environment without PPMA installed. It displayed the message "AI features are currently unavailable. Please try again later." instead of returning a response to your query.

Customers Impacted: This defect affects Ask Dela users who logged in to a supported PPM product other than PPM Administrator.

Workaround Before Fix: None.

Additional Notes: To obtain the fix, download and install the latest **Deltek Ask Dela for PPM Products** installer. To download the installer, navigate to **PM Compass » PM Compass 8.5 (GA) » Sub-Release**.

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 07 (Cobra 8.7 Integration (8.7.0707.3881) for PM Compass 8.5 CU14).

Software Issues Resolved

This integration file relates to the following Cobra defects:

- **Defect 2637976**: When you ran the Calculate Progress Wizard and selected the **Calculate Assignment Percent Complete for Apportioned Work Packages** option on the Options page, an apportioned resource with multiple source resources could receive an incorrect Assignment % Complete value. Instead of calculating a BAC-weighted average across all source resources, Cobra applied the Assignment % Complete value of a single source resource to all source resources.
- **Defect 2733906**: When you ran the Open Plan-Integration Wizard to load status and multiple activities were mapped to a single work package in Open Plan, incorrect percent complete values were reflected in Cobra.

> **Attention:** For details about the defects, see the *Deltek Cobra 8.7 Cumulative Update 07 Release Notes*.

Open Plan Integration Updates

Open Plan 8.8 Integration

Note: This integration release has been tested with Open Plan 8.8 Cumulative Update 02 (Open Plan 8.8 Integration (8.8.0702.364) for PM Compass 8.5 CU14).

Software Issues Resolved

This integration file relates to the following Open Plan defect:

- **Defect 2665485**: When you exported an Open Plan project to a Microsoft Project Long Term Support Channel (LTSC version), Microsoft Project did not import relationships and might not have imported actual dates.

Attention: For details about the defect, see the *Deltek Open Plan 8.8 Cumulative Update 02 Release Notes*.

Open Plan 8.7 Integration

Note: This integration release has been tested with Open Plan 8.7 Cumulative Update 17 (Open Plan 8.7 Integration (8.7.0717.427) for PM Compass 8.5 CU14).

Software Issues Resolved

This integration file relates to the following Open Plan defect:

- **Defect 2665379**: When you exported an Open Plan project to a Microsoft Project Long Term Support Channel (LTSC version), Microsoft Project did not import relationships and might not have imported actual dates.

Attention: For details about the defect, see the *Deltek Open Plan 8.7 Cumulative Update 17 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

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

Documentation	Description
Deltek PM Compass 8.5 Installation Guide	▪ Updated the "Web and Process Servers Software Requirements" in "Appendix A: System Requirements"
Deltek PM Compass 8.5 Technical Overview and System Requirements	▪ Updated the "Web and Process Servers Software Requirements" in "System Requirements"

PM Compass 8.5 Cumulative Update 13

Released: June 30, 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 13 (8.5.0713.4478)

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 13 was tested with the following PPM product:

- Cobra 8.7 Cumulative Update 06

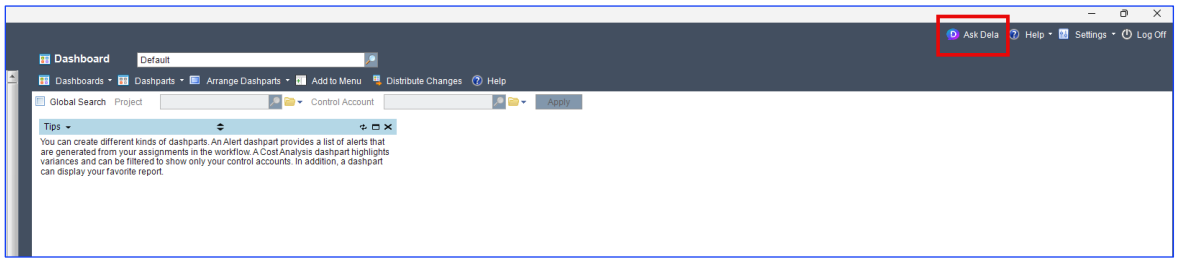
Enhancements

This section includes enhancements for this release.

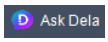
Support for Ask Dela

PM Compass now supports Ask Dela, Deltek's AI-powered help chat assistant that enables you to submit natural language questions about PM Compass, allowing you to navigate the product more efficiently.

Ask Dela is powered by Dela, Deltek's underlying AI platform that enables the chat-based assistance available in the application.

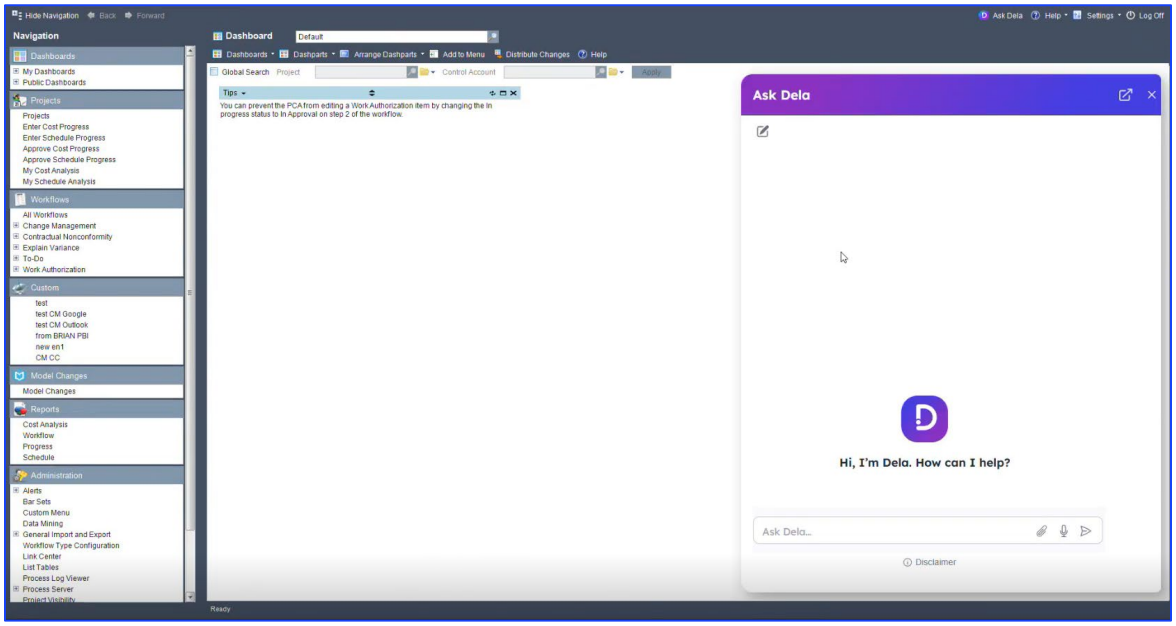


Ask Dela button in PM Compass Application toolbar

A new **Ask Dela** button 

is available on the PM Compass application toolbar. When Dela is configured, clicking the button displays the Ask Dela chat window. If Dela is not configured, the button appears disabled. When you hover over or click the disabled button, PM Compass displays a message indicating that Dela is not configured.

The Ask Dela chat window displays at the bottom right of your PM Compass screen. You can enter questions about PM Compass and review the generated responses. The chat interface includes controls such as starting a new chat, copying messages, and deleting conversations. When you delete a conversation, both the question and response are removed. You will receive a confirmation prompt before deletion.



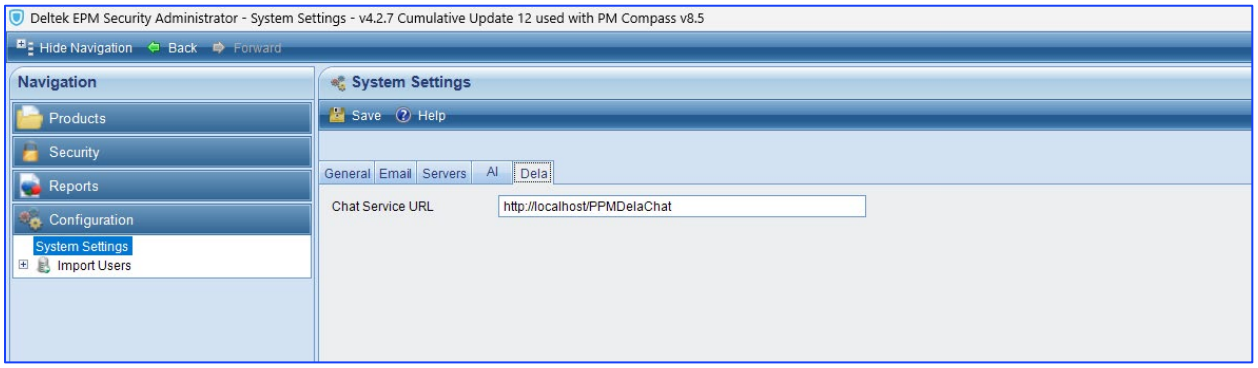
Ask Dela chat window in PM Compass

To enable Dela in PM Compass, run the Ask Dela installer.

Attention: You can download the **Deltek Ask Dela for PPM Products** installer and related documentation from the Deltek Software Manager (DSM). To download the installer, navigate to **PM Compass » PM Compass 8.5 (GA) » Sub-Release.**

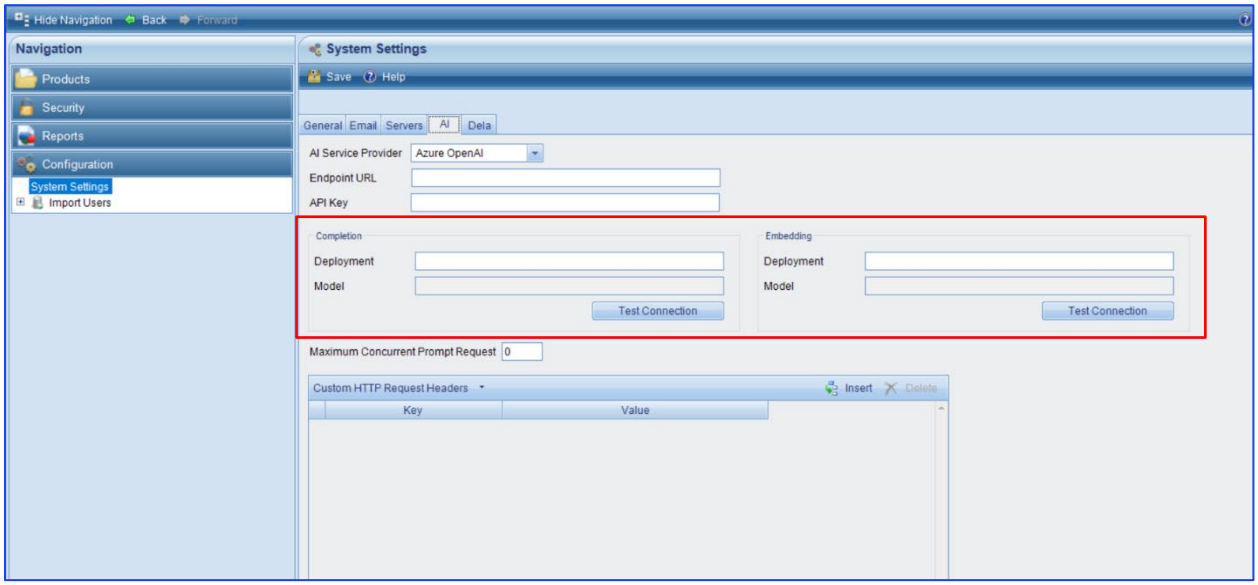
For installation instructions, see the "Enable Dela" topic in the PM Compass Help System and the *Deltek PPM Ask Dela Installation Guide.*

Administrators can configure the **Dela Chat Service URL** field in EPM Security Administrator.



Dela tab in the System Settings form in PM Compass EPM Security Administrator

Additional AI configuration settings are also available on the AI tab of the System Settings form to support the AI service provider used by Ask Dela. This update includes separate configurations for completion and embedding for your preferred AI service provider.



AI tab in the System Settings form in PM Compass EPM Security Administrator

Attention: This information is documented in the following help topics:

- "Ask Dela" in the PM Compass Help System
- "Application Toolbar" in the PM Compass Help System
- "Dela Tab of System Settings" in the EPM SA Help System
- "AI Tab of System Settings" in the EPM SA Help System

Software Issues Resolved

Workflows » Change Management

Defect 2380948

Description: When multiple projects contain the same class name but different types, PM Compass failed to retrieve the correct change class during workflow validation, which caused snapshots to be created for the forecast class.

Customers Impacted: This defect affects all using change management.

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ChangeRequest.Server.dll
- Deltek.PMCompass.Items.Server.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 06 (Cobra 8.7 Integration (8.7.0706.3870) for PM Compass 8.5 CU13).

Software Issues Resolved

This integration file relates to the following Cobra defects:

- **Defect 2701113**: When you ran the Open Plan-Integration Wizard to load milestones and multiple step records existed in the work package in Open Plan, milestone weights were not correctly reflected in Cobra.

- **Defect 2701456**: When you ran the Open Plan Integration Wizard to load milestones and steps against work packages, the process log displayed the "Could not find Milestones" error even when the milestones existed.

Attention: For details about the defects, see the *Deltek Cobra 8.7 Cumulative Update 06 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

To be added

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 12

Released: June 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 12 (8.5.0712.4463)

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 12 was tested with the following PPM product:

- Cobra 8.7 Cumulative Update 05

Enhancements

This section includes enhancements for this release.

Support for PM Compass REST API

This cumulative update adds support for the PM Compass REST API, a secure, read-only REST API that provides external applications with access to PM Compass data for reporting and integration scenarios.

The REST API exposes PM Compass data through route-prefixed HTTP endpoints and is documented using the OpenAPI Specification (OAS). Installation and configuration are handled separately from PM Compass.

The following requirements and compatibility considerations apply when using the PM Compass REST API:

- The minimum supported version is PM Compass 8.5 Cumulative update 12 or later.

- The REST API is installed and configured separately from PM Compass.
- The REST API does not need to be installed on the same server as the PM Compass application or database.

Attention: For more information, see the following documents on DSM and Deltek Learning Hub:

- *REST APIs for Deltek PPM Products Installation Guide*
- *REST APIs for Deltek PPM Products Release Notes*
- PM Compass REST Service (OAS)

In addition, see "Appendix T: Integrating PM Compass with the REST API" in the *Deltek PM Compass 8.5 Installation Guide*.

Software Issues Resolved

Workflows » Change Management » Forecast Change Request

Defect 2658287

Description: When you processed a large volume of workflows with forecast data, PM Compass responded slowly and experienced performance degradation.

Customers Impacted: This defect affects customers using change management

Workaround Before Fix: None.

Files Updated:

- Deltek.PMCompass.ApplicationAncestors.Server.dll

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 05 (Cobra 8.7 Integration (8.7.0705.3853) for PM Compass 8.5 CU12).

Open Plan Steps Integration with Cobra

Updates have been made to the handling of Open Plan activity steps during integration with Cobra. These changes ensure that the progress technique for work packages is determined by Integration Wizard settings and project preferences.

Attention: For more information about this enhancement, see the *Deltek Cobra 8.7 Cumulative Update 05 Release Notes*.

Software Issues Resolved

This integration file relates to the following Cobra defects:

- **Defect 2635366**: When you ran the Open Plan–Integration Wizard and multiple Open Plan activities were mapped to the same Cobra work package, the integration skipped the BAC-weighted average rollup and used the % Complete of the first Activity ID.
- **Defect 2668939**: When you ran the File-Integration Wizard, control accounts and work packages were concatenated and truncated if they exceeded the maximum character limit, preventing their data from loading. The process log generated warnings referencing the shortened work package names.

Attention: For details about the defects, see the *Deltek Cobra 8.7 Cumulative Update 05 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

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

Documentation	Description
Deltek PM Compass 8.5 Installation Guide	▪ Updated Step 9 for the Web/Application Tier in the Pre-Installation Checklists section to include IIS configuration information for Windows Authentication environments ▪ Added a new section, "Additional Considerations for Windows Authentication," in Appendix B: Microsoft Internet Information Services (IIS) Installation on Windows Server
KB Article 126077 - HTTP 400 Bad Request Error When Launching PM Compass	▪ Created the KBA to provide instructions to resolve the HTTP bad request error

PM Compass 8.5 Cumulative Update 11

Released: April 30, 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 11 (8.5. 0711.4459)

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 11 was tested with the following PPM products:

- Deltek Open Plan 8.8
- Cobra 8.7 Cumulative Update 04
- Cobra 8.6 Cumulative Update 13

Enhancements

There are no enhancements in this release.

Software Issues Resolved

Workflows» Change Management

Defect 2078050

Description: When you added a new step into an activity in Changed Details and saved your changes, the modeling session failed and displayed an error message.

Customers Impacted: This defect affects all 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.

Cobra Integration Updates

Cobra 8.7 Integration

Note: This integration release has been tested with Cobra 8.7 Cumulative Update 04 (Cobra 8.7 Integration (8.7.0704.3846) for PM Compass 8.5 CU11).

Cobra 8.6 Integration

Note: This integration release has been tested with Cobra 8.6 Cumulative Update 13 (Cobra 8.6 Integration (8.6.0713.3741) for PM Compass 8.5 CU11).

Software Issues Resolved

This integration file relates to the following Cobra defect:

- **Defect 1596260**: When you ran the File-Integration Wizard, work packages with similar names were truncated, preventing their data from loading. The process log generated warnings referencing the shortened work package names.

Attention: For details about the defect, see the *Deltek Cobra 8.6 Cumulative Update 13 Release Notes*.

Open Plan Integration Updates

Open Plan 8.8 Integration

Support for Open Plan 8.8

PM Compass now supports Open Plan 8.8, beginning with PM Compass 8.5 Cumulative Update 11.

Attention: For details about Open Plan 8.8, see the *Deltek Open Plan 8.8 Release Notes*.

Note: This integration release has been tested with Open Plan 8.8 (Open Plan 8.8 Integration (85_8.8.0100.336) for PM Compass 8.5 CU11).

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 8.5 Installation Guide	▪ Updated the "Deltek Product Integration" and "Web and Process Servers Software Requirements" in "Appendix A: System Requirements" ▪ Removed "Platform Virtualization" section
Deltek PM Compass 8.5 Technical Overview and System Requirements	▪ Updated the "Deltek Product Integration" and "Web and Process Servers Software Requirements" in "System Requirements" ▪ Removed "Platform Virtualization" section

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

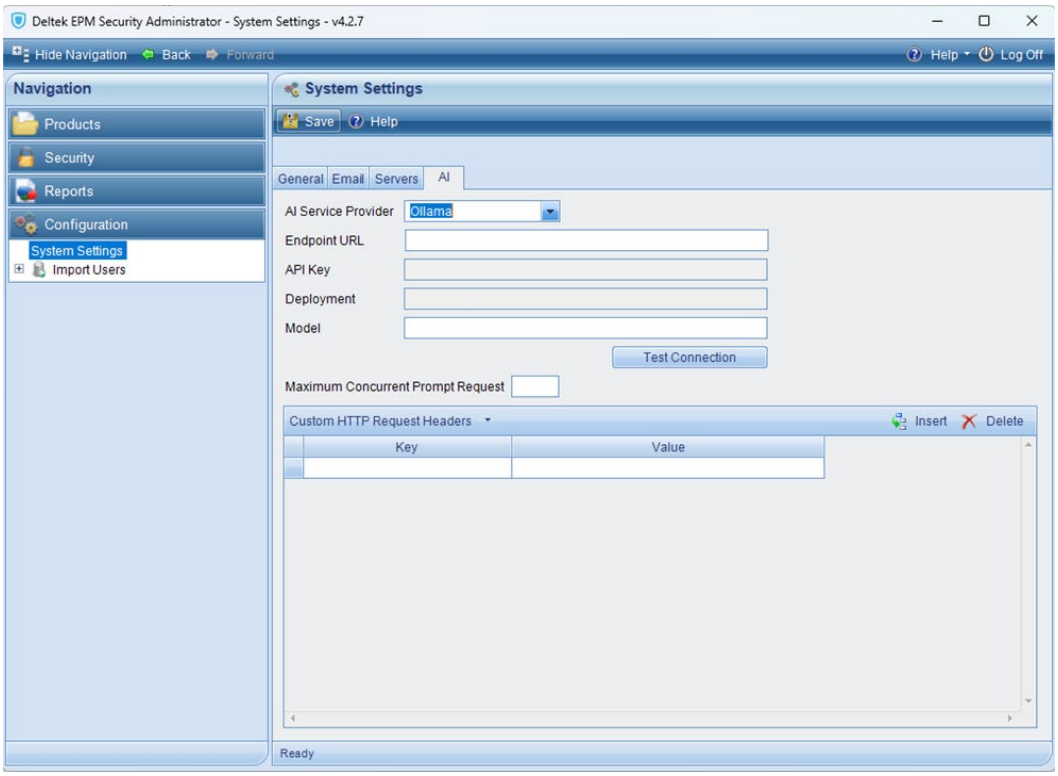
Support for Ollama as an AI Service Provider

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

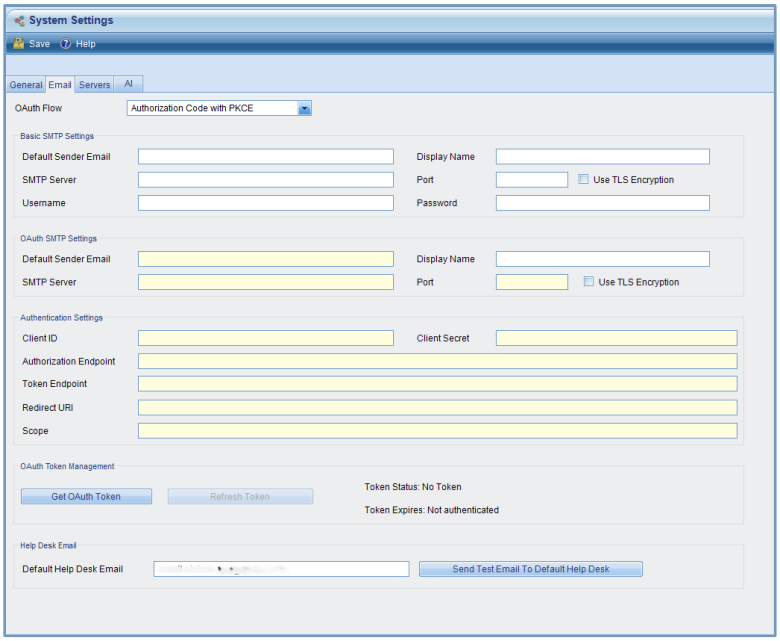
Enhancements

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.



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.

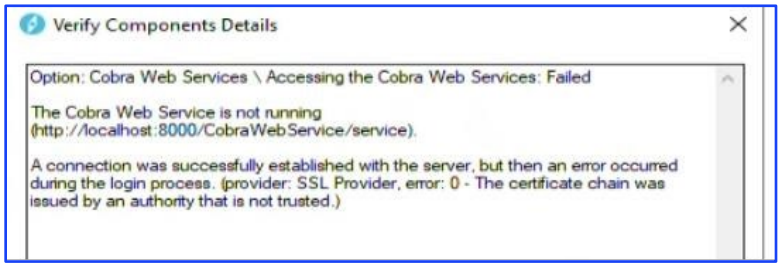
Attention: For details about Cobra 8.7, see the *Deltek Cobra 8.7 Release Notes*.

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.)



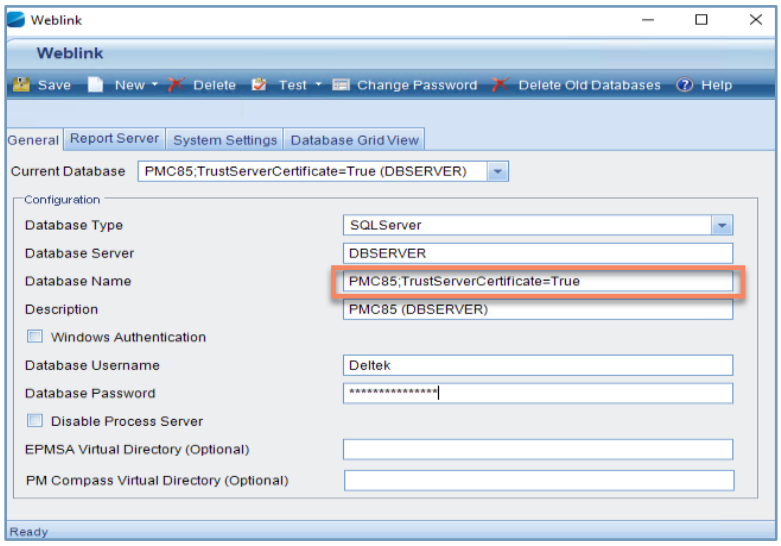
Cause

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
```



2. 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

1. On the General tab of EPM Security Weblink, use the SQL Server Database Server name associated with the certificate in the data source.
2. 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 changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.5 API Developer Guide	▪ Added a note about the PPM data sources log files and their location in the "Create a Data Source" section
Deltek PM Compass Installation Guide	▪ Updated the "Cobra Report Templates Folder Location" section under "Post Installation Steps" ▪ Updated "Appendix H: Unicode and Case-Insensitive Prerequisites for Cobra and Open Plan Databases" to remove references to KB Article # 62096 ▪ Added “Cobra 8.7 SQL Server Certificate Errors” to the “Troubleshooting Cobra Integration Issues” section of “Appendix L: Configuring Advanced Cobra Options”

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 changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.5 Installation Guide	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 changes to the documentation that are in addition to any enhancements.

Documentation	Description
Deltek PM Compass 8.5 Installation Guide	Added the Cobra and PM Compass licensing compatibility information to the "Deltek Product Integration" section in "Appendix A: System Requirements"
Deltek PM Compass 8.5 Technical Overview and System Requirements	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

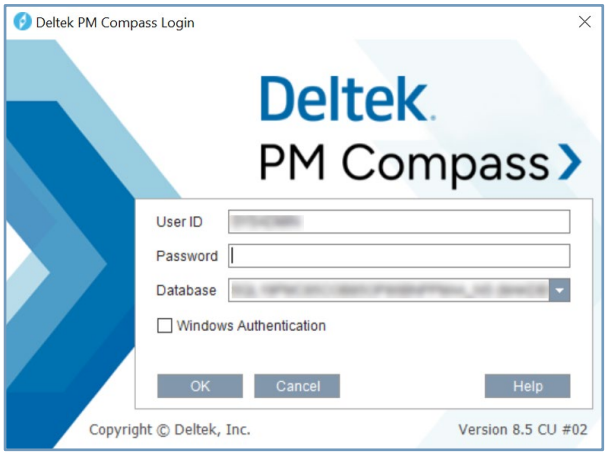
control account, along with narratives such as Explanation of Variance, Impact, and Corrective Action. Note that this functionality requires Cobra version 8.6 or later.

- 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.

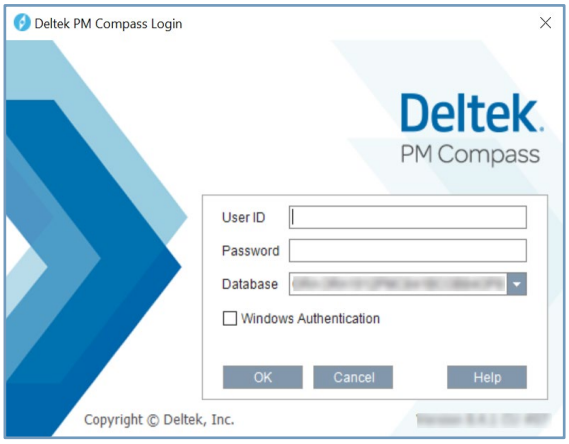
Note: This information is documented in the "Narrative Score" and "General Tab of the Assisted Explanation of Variance Form" topics of the PM Compass Help System under **Workflows » Explain Variance » Assisted Explanation of Variance**.

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

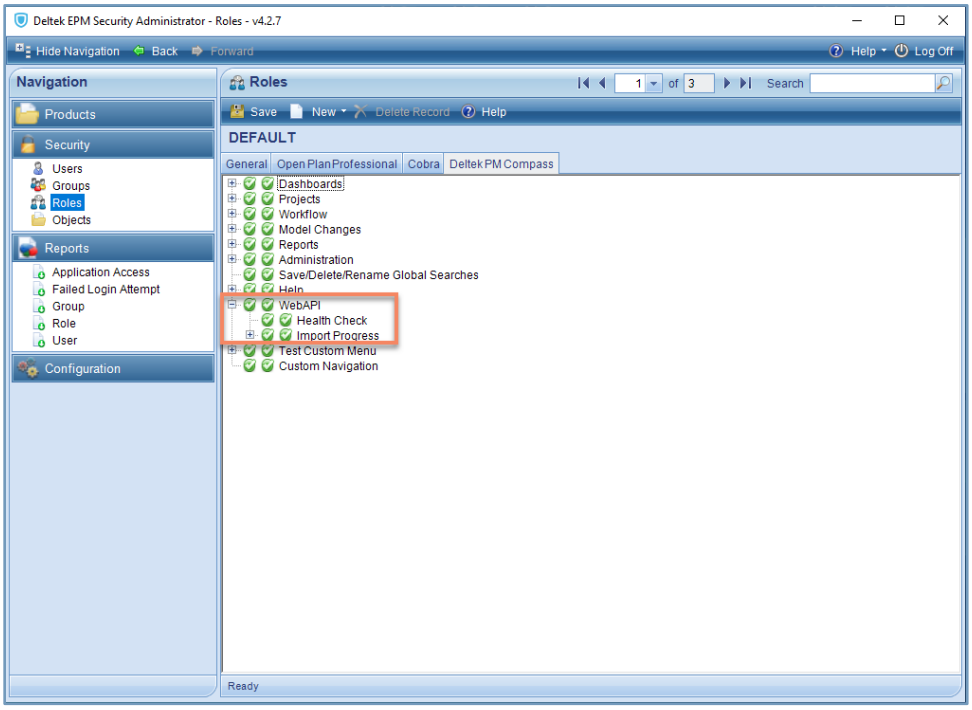
The Import Progress API feature enables importing of cost and schedule progress data, reducing the manual data entry when the progress information is available in a different system.

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.	This step covers installing and setting up the PM Compass API to ensure effective utilization of the feature. ▪ Installing and configuring Microsoft Internet Information Services (IIS) ▪ Installing the 64-bit Oracle Database Client (Administrator) ▪ Installing the PM Compass API ▪ Enabling Windows Authentication on the PM Compass API application in IIS ▪ Creating a data source ▪ Enabling the endpoint permissions in EPM SA	For the detailed steps, see "Setting Up the PM Compass API" in the *Deltek PM Compass API Developer Guide*.
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 *Deltek PM Compass API Developer Guide*.
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 *Deltek PM Compass API Developer Guide*.

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*.

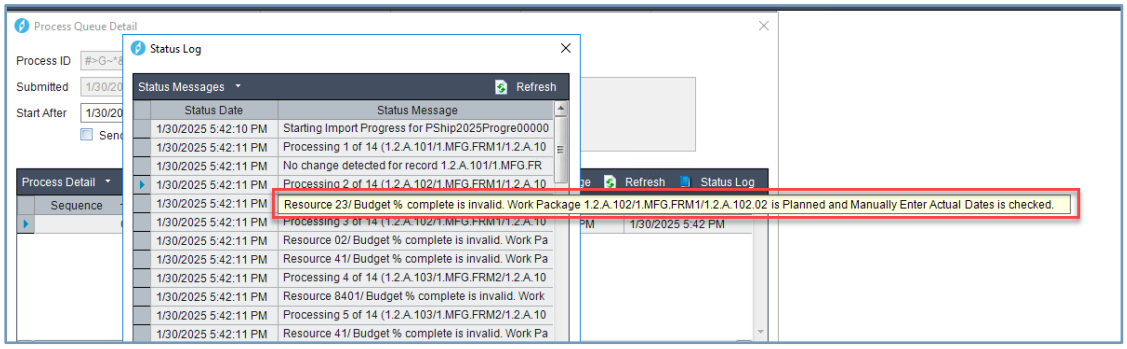
After the first-tier validation is complete, the API performs the second-tier validation when processing the imported progress entries using the Process Server. If the imported progress entries pass all validations, progress entries are created, and an email is sent to the assignee based on the assignment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

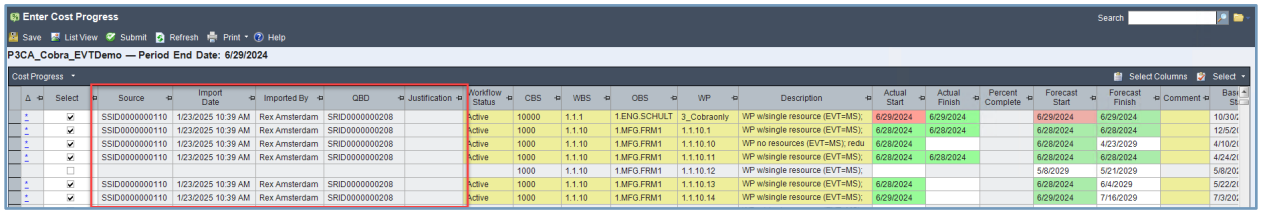
When cost or schedule data is successfully imported, cost or schedule progress entries are created. If duplicate cost or schedule records are encountered during import, the data from the last duplicate record will be loaded into PM Compass.

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.

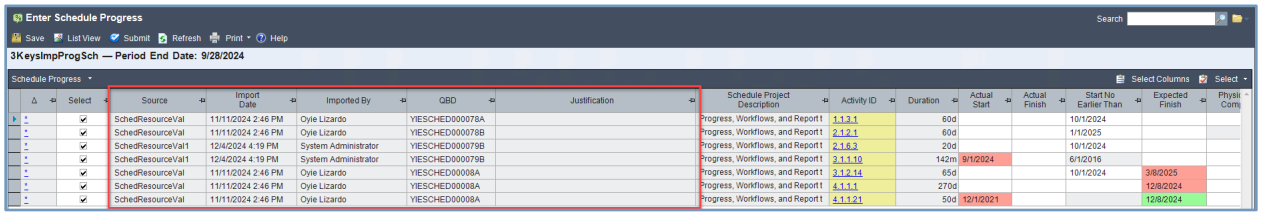
The additional columns include:

- 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 Form



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.

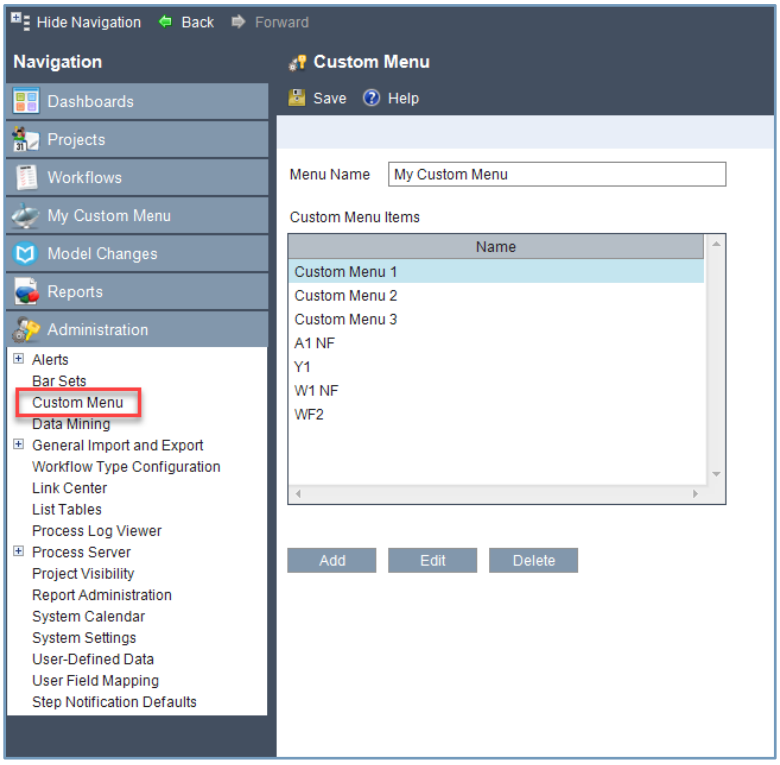
Attention: For more information on this feature, see the "Custom Menu Overview" topic in the PM Compass Help System under **Administration**.

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

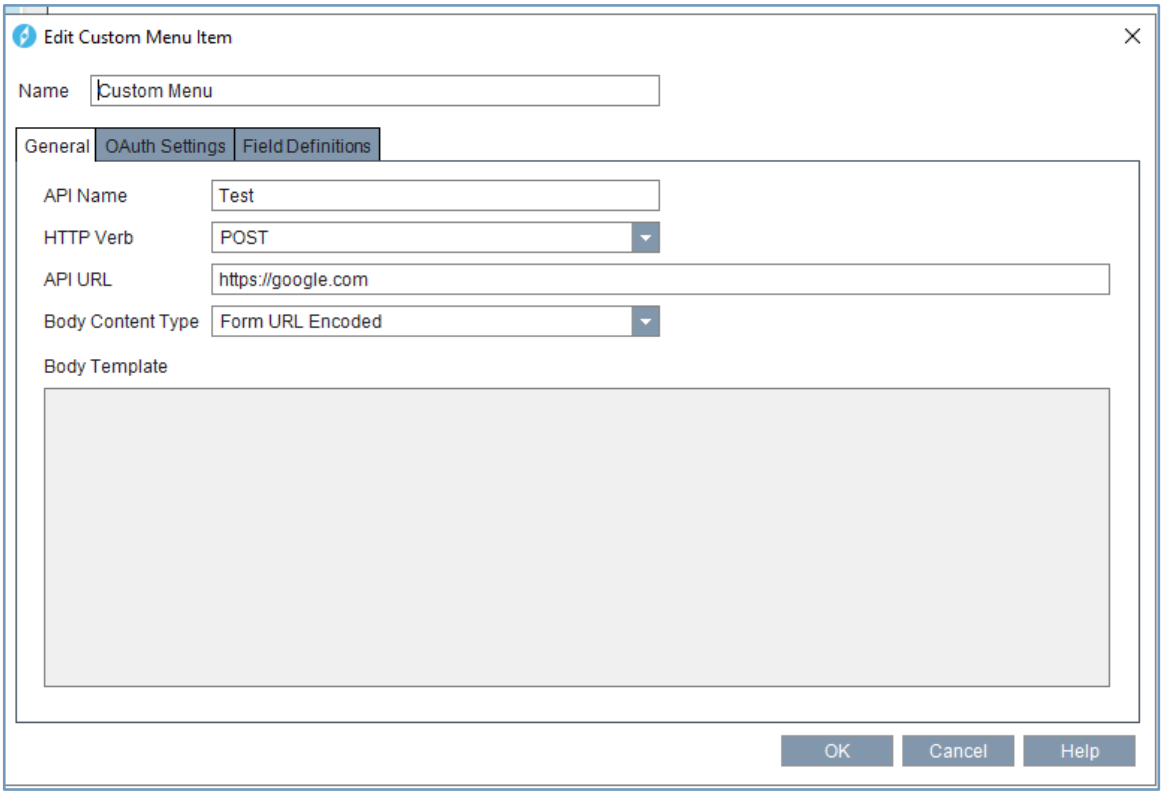
To display the Custom Menu form, click **Administration » Custom Menu** on the Navigation menu.



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.

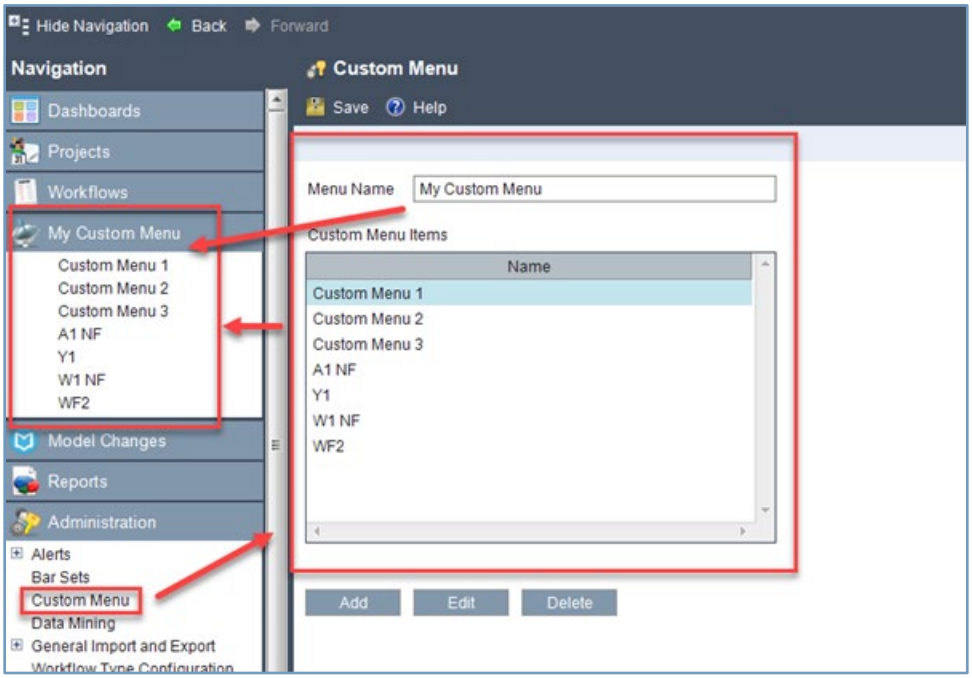


Custom Menu Item Dialog Box

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**.

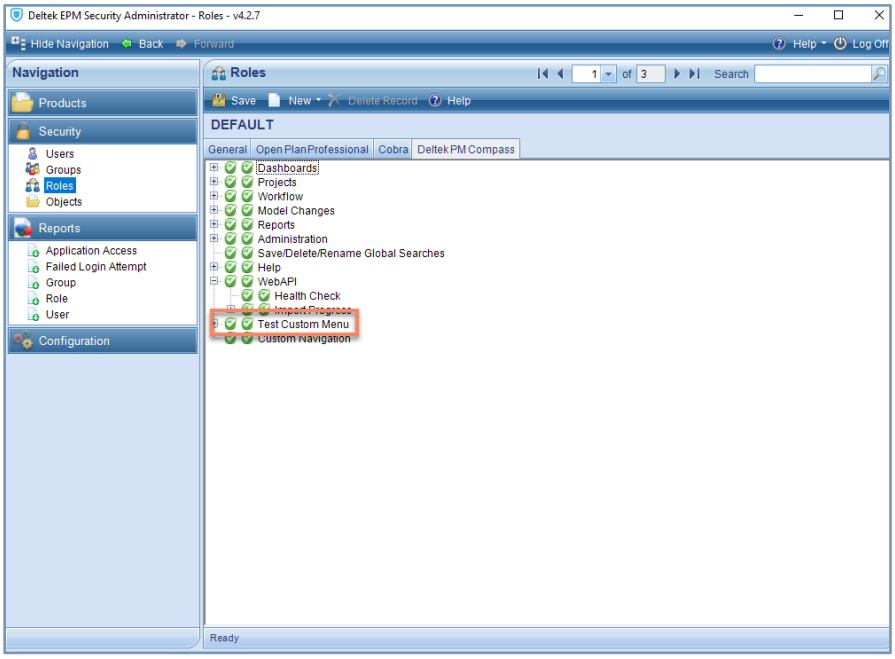
Custom Menu Items

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**.



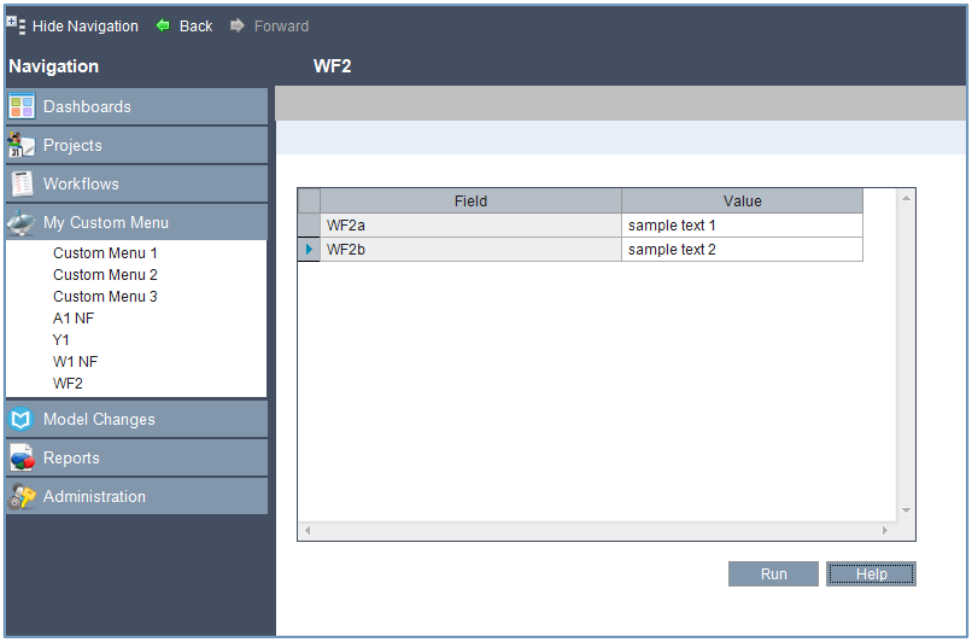
Attention: For more information, see "Custom Menu" in the PM Compass Help System under **Custom Menu**.

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.

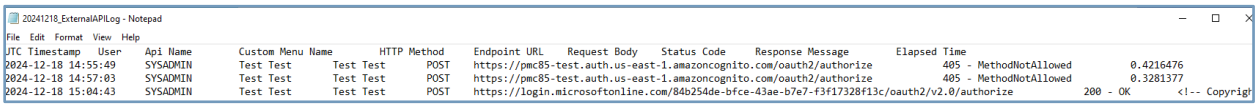


Field and Value Grid of a Custom Menu Item

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.

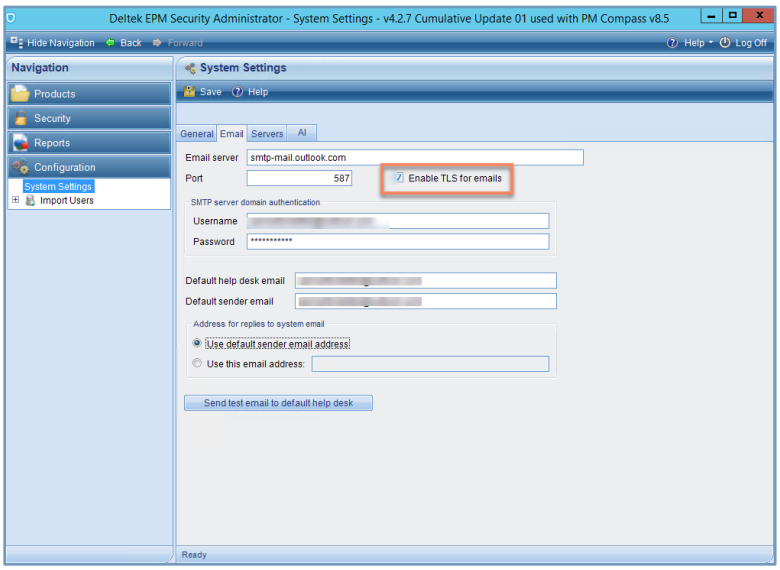
The log file is created inside the **API** folder, which is in the same directory specified in the **Integration Process Logs** field on the File Folders tab of the System Settings form. The log file follows the following format: **yyyymmdd_ExternalAPILog.log**. A single log file is generated for all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



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.

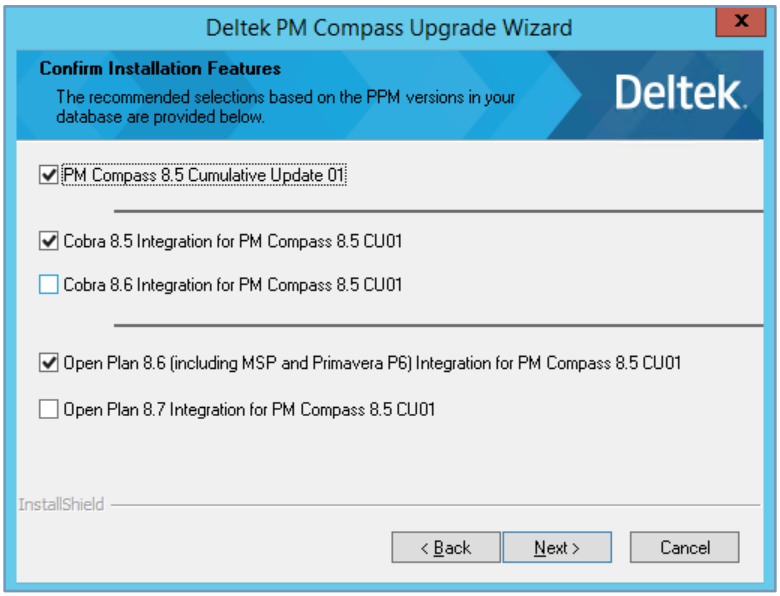


Email Tab of the System Settings Form in EPM SA

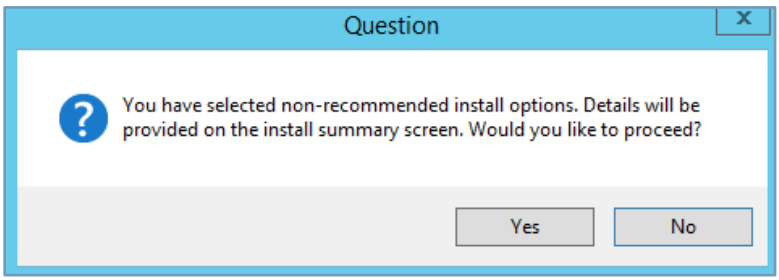
Updates to PM Compass Installers

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

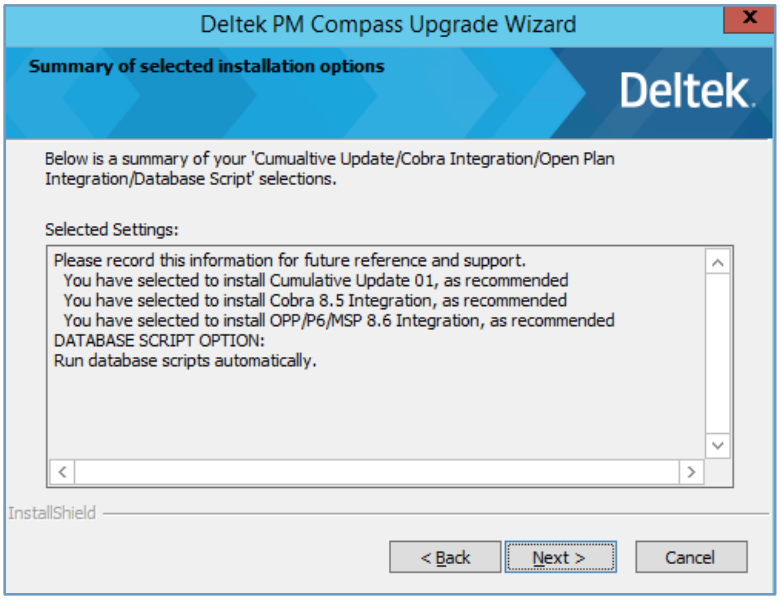
The PM Compass Cumulative Update installer now includes both the PM Compass installation and integration installers, eliminating the need for separate installers for Cobra or Open Plan integration.



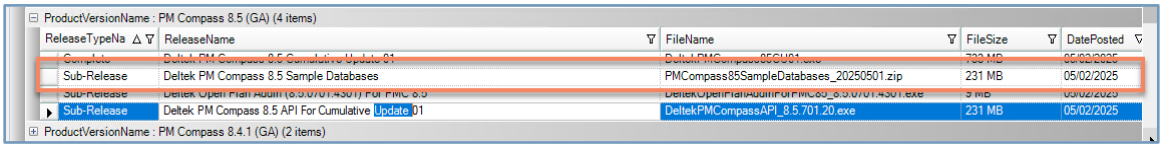
It incorporates Open Plan and Cobra engines compatible with the PM Compass version and provides warnings if any selections are not recommended.



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.



> **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_ImportProgressMSStep
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

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.
6. Launch Weblink and click the System Settings tab.
7. 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:

1. Look at the version number in the title bar.
2. 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 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.