Deltek Open Plan® 8.0

Release Notes

March 4, 2016

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Contents

Overview

Welcome to the Deltek Open Plan 8.0 Release Notes. These release notes contain a summary of the following:

- Pre-Installation Information
- Major New Features
- Enhancements
- Software Issues Resolved
- Known issue

Open Plan 8.0 represents a significant improvement in the user interface and user experience for Open Plan users. It also includes many great new features.

Open Plan now uses ribbon menus and provides easier access and visibility to functionality that has always been there, just harder to use. The new menus also include many new features like direct access to views in your project or in the views library as well as the ability to identify your favorites for quick access.

Open Plan now displays all open windows (Views and the Explorer) in tabs so you can see what you have open and directly navigate to the window you want. As the Explorer is now just one tab in Open Plan it cannot be closed so it is always available for use.

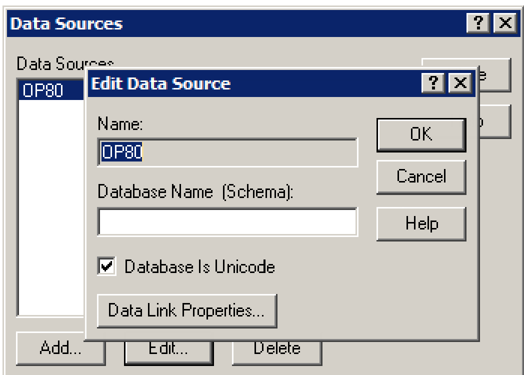
Open Plan 8.0 is the first of the updated Deltek 8.0 tools to be released. More are coming. Cobra 8.0 will share the new look and feel and contain common icons for common functions to make it easier for users of more than one Deltek tool to move between them. Further down the road are 8.0 versions of Acumen, PM Compass and wInsight Analytics that will converge on the new look and feel over time in their own ways. Web tools will not use the ribbons, for example, but will share other aspects of the look and feel. All of the 8.0 versions of the tools will be compatible with each other.

There are many other new and enhanced features in 8.0, so continue reading and take advantage of this new improved experience.

Pre-Installation Information

Before you begin the installation of Open Plan 8.0, it is important to understand the information discussed in this section.

- With Open Plan 8.0, there is no longer an Open Plan Desktop version of the software. Contact your sales rep if you currently use Open Plan Desktop along with Professional.
- With Open Plan 3.5, the default setting of the UNICODE variable in the SQL Server and ORACLE database creation scripts was changed from 0 (non-Unicode) to 1 (Unicode). In Open Plan 8.0, we have changed the default setting of the Database Is Unicode checkbox in the Edit Data Source dialog to be consistent with the default behavior:

  If you create a connection to a non-Unicode database, be sure to uncheck the Database Is Unicode setting.
- Open Plan is compatible with the following IPM products:
  - Deltek Cobra™
    - Deltek Cobra™ 8.0, (When Cobra 8.0 is released. Check the Cobra 8.0 Compatibility Matrix upon release.)
    - Deltek Cobra™ 5.1.4
    - Deltek Cobra™ 5.1.3 – If you are running SQL Server or Oracle, you must run a script to add a column to the WST_PRD table. For more information, see Knowledge Base Article 84410 on the Deltek Customer Care site (http://support.deltek.com).
  - Deltek PM Compass
    - Deltek PM Compass 8.0 (When PM Compass 8.0 is released. Check the PM Compass 8.0 Compatibility Matrix upon release.)
    - Deltek PM Compass 2.2 Cumulative Update 4 or later. (When PM Compass 2.2 Cumulative Update 4 is released. Check the PM Compass 2.2 Cumulative Update 4 Release Notes upon release).
  - Deltek Acumen Suite
    - Deltek Acumen Suite 8.0 (When Deltek Acumen 8.0 is released. Check the Deltek Acumen 8.0 Compatibility Matrix upon release.)
    - Deltek Acumen Suite 7.0
    - Deltek Acumen Suite 6.1

Open Plan users who are integrating data with these products must ensure that the products are upgraded to the compatible versions.

- The following software requirements (Database Tier) have been tested for compatibility and are fully supported by Open Plan:
  - Operating System
    - Windows Server 2012 R2
    - Windows Server 2012
    - Windows Server 2008 R2 (x64)
  - Database Platform
    - Oracle 12.1, 11.2
    - Microsoft SQL Server 2014, 2012, 2008 R2
    - Microsoft Access 2013, 2010

    Open Plan supports Access, Oracle, and SQL Server databases through an OLEDB 2.1 compliant provider. The following table lists the data source providers to use for each database type:

Data Source Provider	Database Type
SQL Server	Microsoft OLE DB Provider for SQL Server SQL Native Client
Oracle	Oracle Provider for OLE DB Microsoft OLE DB Provider for Oracle
Microsoft Access	Microsoft Jet 3.51 or 4.0 OLE DB Provider

- The following software requirements (Client Tier) have been tested for compatibility and are fully supported by Open Plan:
  - Operating System
    - Windows 10
    - Windows 8.1
    - Windows 7
  - Windows Terminal Services/Citrix
    - XenApp 7.7 (Windows Server 2012 R2)
    - XenApp 7.6 (Windows Server 2012 R2)
    - XenApp 7.0 (Windows Server 2012 R2)
    - XenApp 7.0 (Windows Server 2012)
    - XenApp 7.0 (Windows Server 2008 R2)
- Integration Products (Optional)
  - Microsoft Project® 2016, 2013, 2010 SP2, 2007 SP3

Custom Programming

Before you upgrade to Open Plan 8.0:

- Review all existing custom work at least eight weeks prior to your intended go-live date.
- Compare your custom work to the new functionality being provided in this release.
- If this new version possesses the functionality contained in your custom work, these custom programs may no longer be needed. If the functionality contained in your custom work is not provided in this release, you must ensure that the custom work remains intact through the upgrade process.
- Identify any hot fixes or patches that you plan to deploy with your Open Plan 8.0 upgrade. Ensure that, following the hot fix or patch deployment, you retain all custom functionality.
- Deltek strongly recommends that when upgrading, you first deploy an instance of Open Plan 8.0 in your test environment. This allows for functional UAT (User Acceptance Testing) to ensure that all mission-critical custom features are still available to the user community. Typical deployments call for a 30 – 45 day test period before upgrading into your production environment.

Deltek's Technical Services team is available to support you as you plan for this upgrade. We offer both technical and custom services, ensuring the best possible Deltek experience. If you would like consulting assistance, contact your Deltek account representative.

New Features

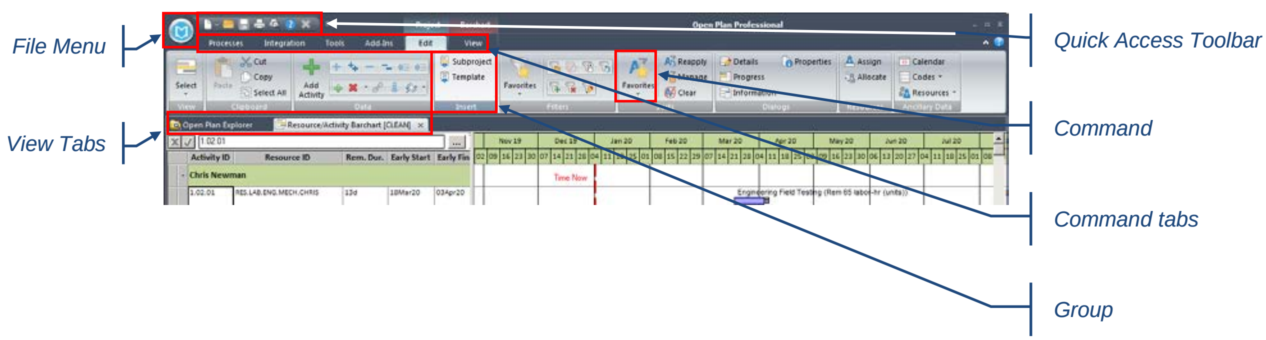
This section includes summaries of the new features included for this release.

Ribbon Menus

Open Plan now has ribbon menus that have replaced the menus and toolbars of the previous version.

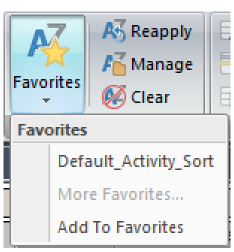
These ribbon menus contain tabs that contain commands you need for easier access to Open Plan functionality. The commands that are displayed depend on the view that you are currently in.

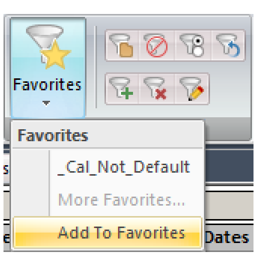
The views and the Open Plan Explorer are presented in tabs, which provide an easier way for you to navigate your way around Open Plan.



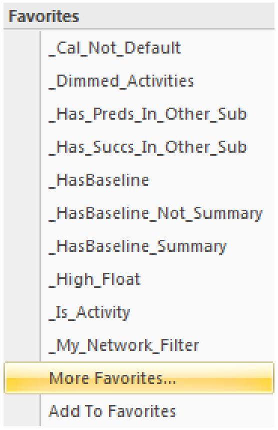
Sorts, Filters, and Views Favorites

You can now designate previously applied sorts, filters, and views as favorites. The favorite sorts and filters are added to a separate favorites list. The favorite sorts and filters lists are easily accessible from the **Edit** tab » **Filters** group and **Edit** tab » **Sorts** groups.

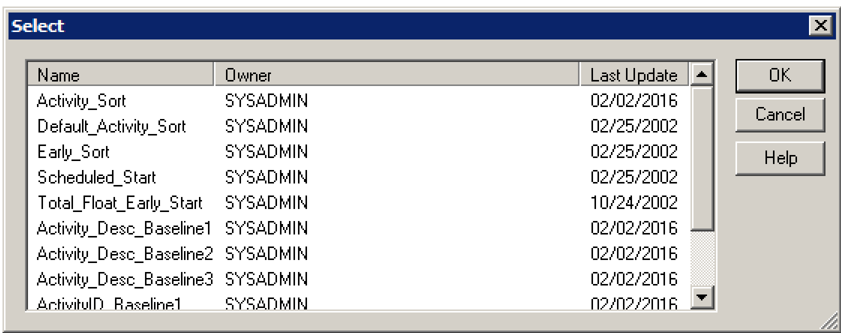




A maximum of 10 favorite sorts and filters can be displayed in their respective lists. To display the rest of the sorts and filters, you can click the **More Favorites** button.

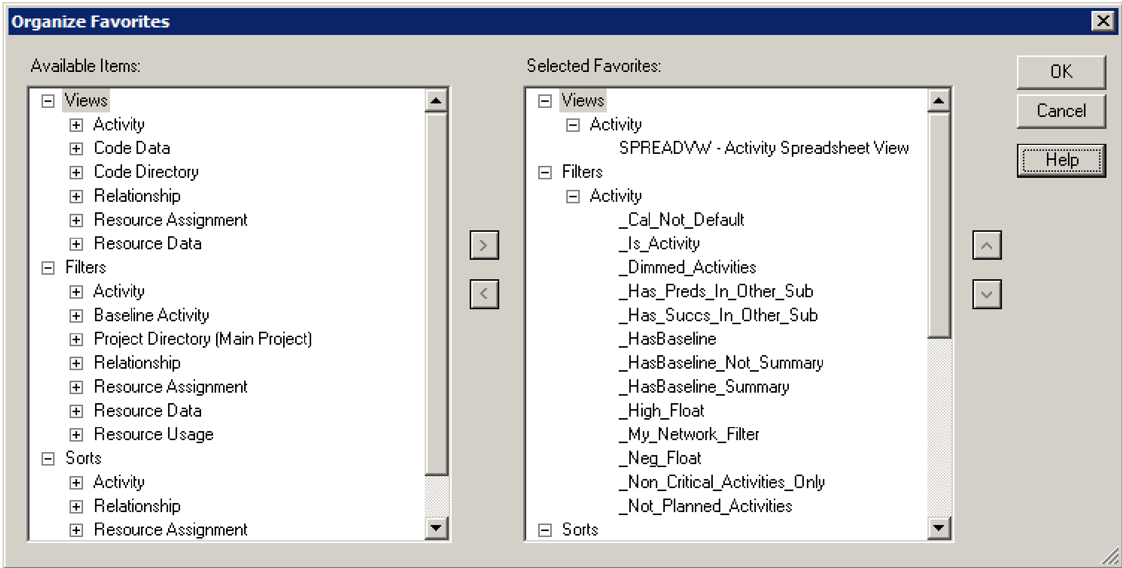


This opens the Select dialog box.



Organize Favorites Dialog Box

You can also manage your favorites list using the Organize Favorites dialog box.



This dialog box functions similarly to the Organize Spreadsheet Columns dialog box.

For more information, see Chapter 03 “Getting Started” and Chapter 23 “Project Utilities”.

Tool Tip Descriptions For Conditional Formatting Rules

You are now able to create explanatory hover text messages in spreadsheets, barcharts, and network views. This feature allows you to explain why a certain row or activity box has specific formatting (such as font, text color, background color, etc.) and what conditions or rules are set for the formatting to be applied.

This feature may be set in the following locations:

- In Spreadsheets and spreadsheets in Barcharts:
  - View tab » Conditional Formatting
  - Right click the spreadsheet and select Conditional Formatting…
- In Barchart views:
  - View tab » Bar Sets. After selecting a bar set, click New, Copy, or Edit in the Bar Sets dialog box
- In the Network View:
  - Right-click within the view, and select Conditional Formatting…
  - Click View tab » select Conditional Formatting.

A new column called **Show This Explanation** has been added to the **Bar Sets Preferences** and **Conditional Formatting** dialog boxes.

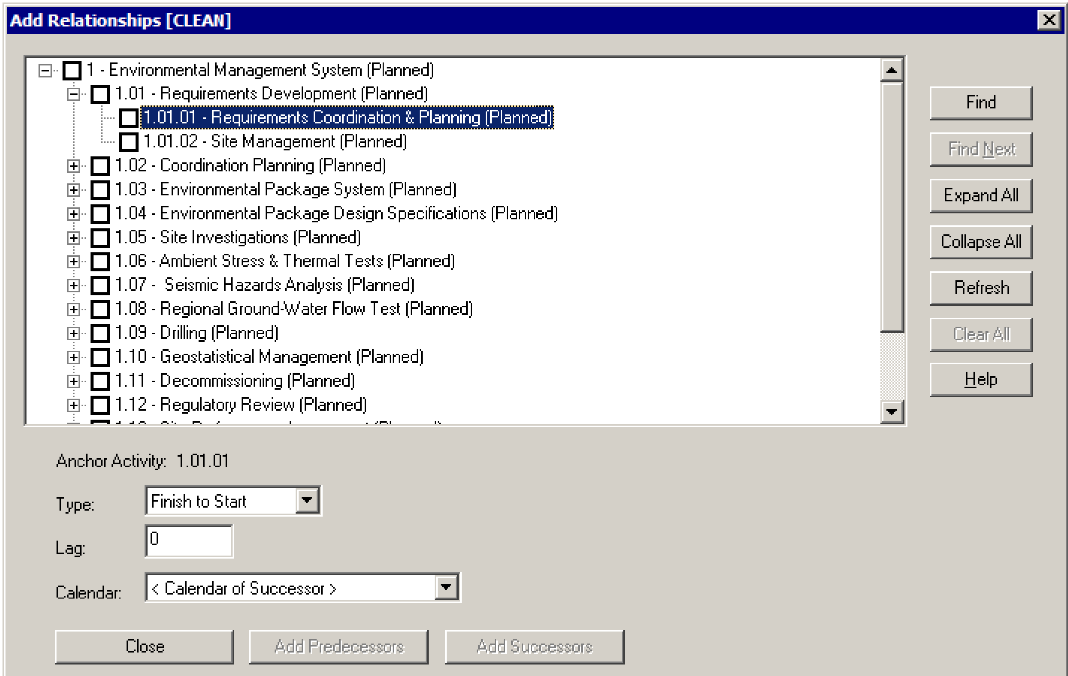
A new option has also been added to the dialog boxes called **Display Explanation When Hovering over Applied Rule(s)**.

The explanatory hover text is shown in blue. When this option is disabled, any pre-existing tooltip will be shown.

For more information on how to use this new feature, see Deltek Open Plan 8.0 User Guide and the Online Help.

Add Relationships Dialog Box

A new dialog box had been added to the Open Plan 8.0 release. This is called the **Add Relationships** dialog box.



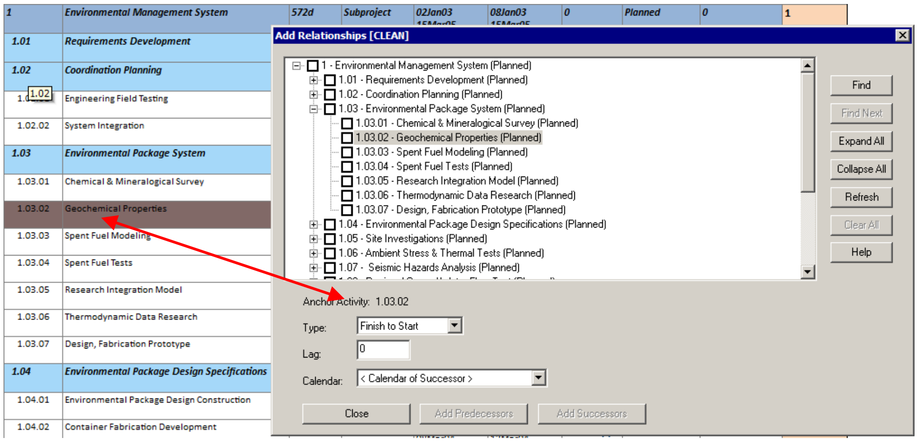
This new dialog box has the following features:

- **Non-modal** — this means that you are able to work elsewhere in Open Plan while this dialog box is open, floating on top of the view you are in
- You can display the dialog box by:
  - Clicking the Add Relationship button .
  - Selecting the activity row » right-click » select **Add Relationships** from the context menu
  - From the **Activity Details** dialog box, in the **Predecessors** or **Successors** tabs, click the **New** button.

> You can launch the **Add Relationships** dialog box only when a single activity has been selected.

- When launched, the dialog box is populated with activities from the project that you are in.

The **Anchor Activity** field is the **Activity ID** of the activity that is currently displayed or has focus. This is the activity that the relationship will be added to.



If no activity is in focus, the **Anchor Activity** field will be <None>.

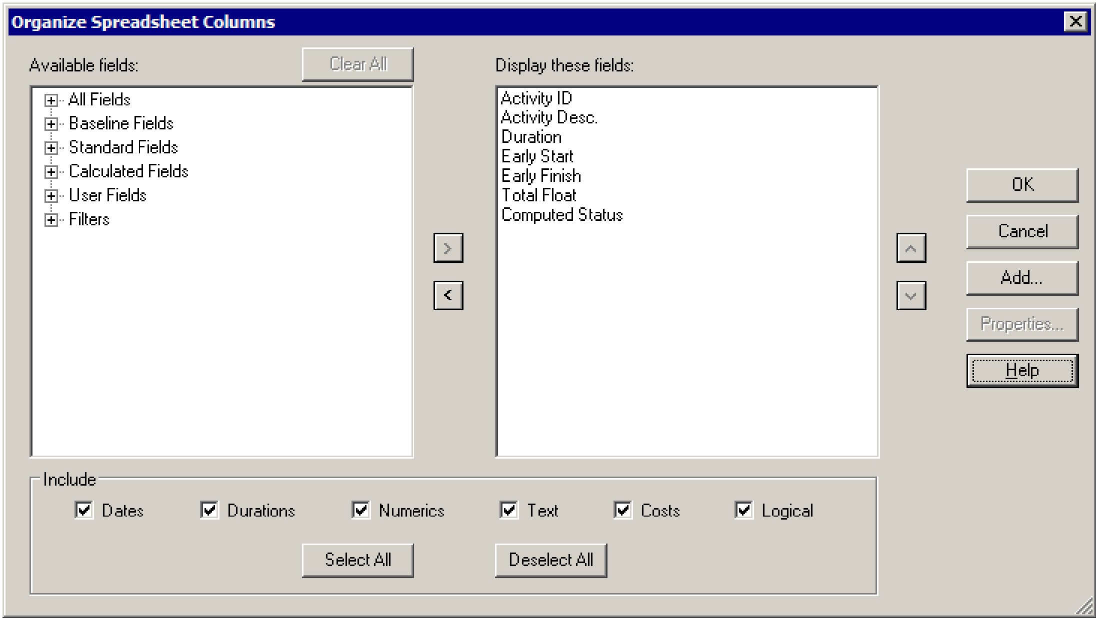
The field always displays the anchor activity for the relationships that will be added.

- When multiple projects are open, and you shift from one project to another, the activity list and calendar will be refreshed.
- Closing a project also closes the **Add Relationships** dialog box.
- The old **Add Relationship** dialog box has been replaced by the new dialog box, except in the **Relationship Spreadsheet** view, where it is still being used, primarily because this view does not have an anchor activity (Activity ID).
- When the dialog box is launched from the **Predecessors** or **Successors** tab of the **Activity Details** dialog box, if you create new relationships, they are added to the appropriate tab in the activity details dialog. You are able to undo these new relationships from the dialog as you would with any other changes made in the dialog.

  On the other hand, when launched from an activity-related view (**Network** view, for example), changes are made to the activity directly, and the **Undo** button in the **Activity Details** dialog box has no effect on relationships added in this way.

Organize Spreadsheet Columns Dialog Box

This new feature allows you to manage multiple columns in a spreadsheet.



The **Organize Spreadsheet Columns** dialog box has two panes:

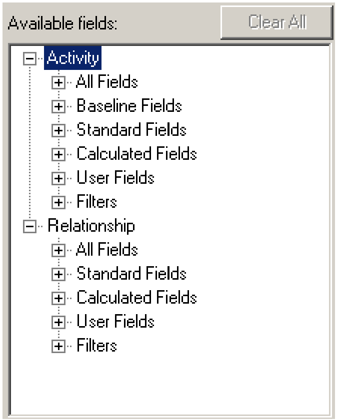
- Available fields
- Display these fields

Available Fields Pane

The **Available fields** pane has six categories:

- All Fields
- Baseline Fields (only when the activity table is the main table)
- Standards Fields (excluding calculated fields, filters, and user fields)
- Calculated Fields
- User Fields
- Filters

When the dialog box is launched while you are in a multi-table spreadsheet or multi-table barchart, these categories are repeated for each table used in the view.



Display These Fields Pane

This pane displays the fields that are currently in use in the spreadsheet or barchart from which the dialog box was launched.

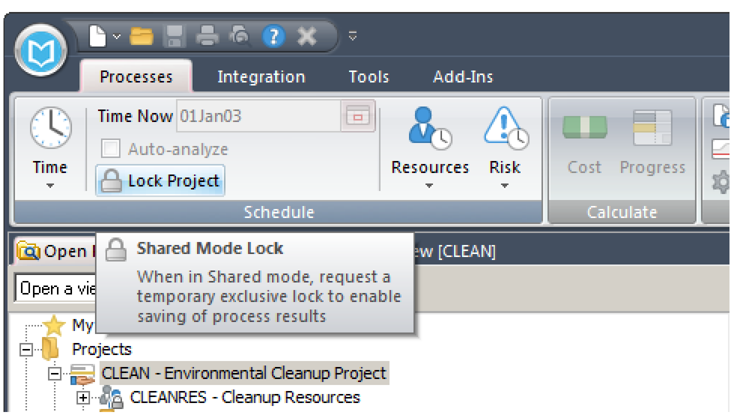
For more information on using the **Organize Spreadsheet Columns** dialog box, see **Customizing Spreadsheet Columns** of **Chapter 20 Spreadsheet Views**.

Shared Mode Locking

When in Shared mode, you can now apply a temporary exclusive lock on a project to perform processes (such as Time Analysis, Resource Scheduling, Risk Analysis, Cost Calculations, and Progress Calculations) and save changes without obligating other users to exit shared mode.

A new security option has been added to control which groups of users can acquire temporary shared mode locks. See chapter 25 for more information on setting up security.

You can acquire a temporary lock by selecting a project and clicking the Lock Project command located in the Processes tab.



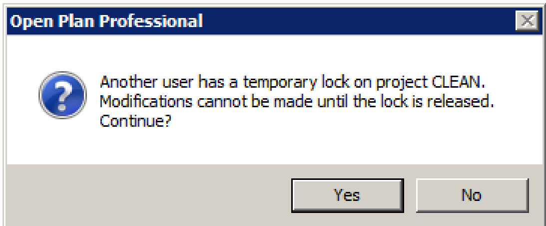
Alternatively, you can also right-click the project, and select **Shared Mode Lock** from the context menu.

This feature can be controlled through the EPM Security Administrator.

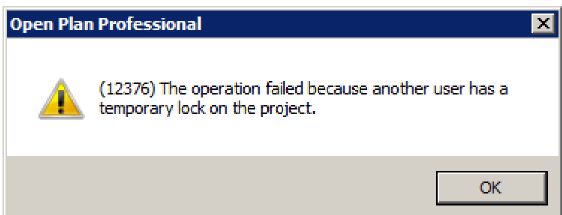
Shared Mode Locking Characteristics

This feature has the following characteristics:

- This button is only enabled when you are in Shared mode.
- When you open a project (in Shared mode), and this project has been locked by another user, the following dialog box is displayed:



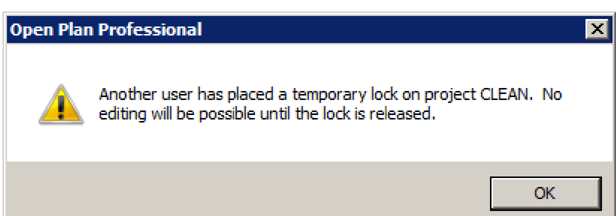
- When you try to acquire a temporary exclusive lock on a project that has been previously locked by another user, the following dialog box is displayed:



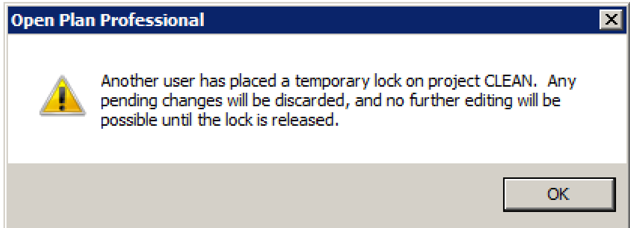
- Once you have acquired a temporary lock on a project, you will be able to edit and save project data as you would in Exclusive mode. Project data is automatically refreshed from the database when you acquire a lock to ensure you have the most current data.

For more information about saving data with the new shared mode locking feature, see the topic **Working in a Multi-User Environment** under **Chapter 23 System Utilities**.

- The following lists the different scenarios when more than one user works on a project (where **User A** is the user who acquired the temporary lock on the project and **User B** is another user working on the same project):
  - When **User A** places a temporary lock on the project while **User B** has the project open in shared mode, **User B** will see one of the following message boxes:

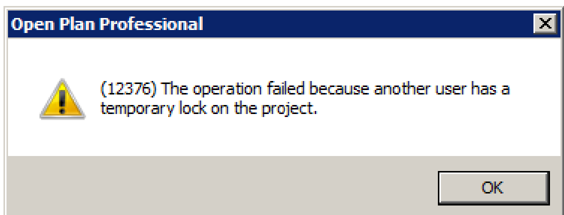


or

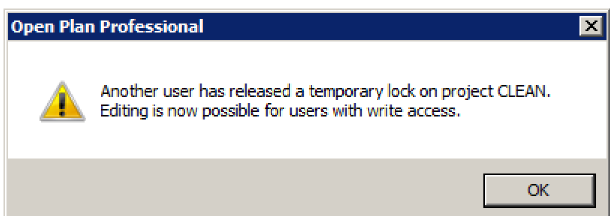


The type of dialog box **displayed** depends on whether or not **User B** has unsaved changes that were made to the project.

- When **User A** places a temporary lock on the project while **User B** is in the process of performing and saving an update on the project, the save will fail and **User B** will see the following message box:



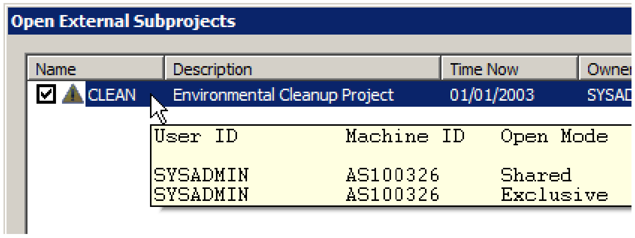
- When **User A** releases the temporary lock, **User B** will see the following message box:



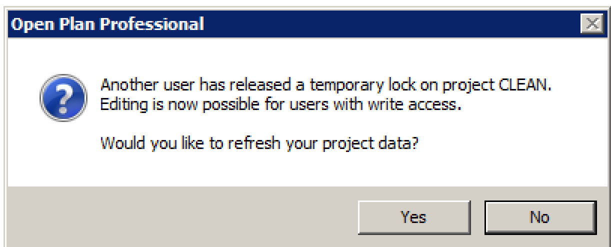
- A new standard option or system-wide preference has been made available in Open Plan 8.0, called **_SHARED_LOCK_DEFAULT_DURATION**. The threshold has been set to 30 minutes, by default. This option keeps track of how long the lock has been in effect and gives a reminder to the user who placed the lock if the threshold has been exceeded.
- For **User B**, the project will be in Read Only mode until **User A** releases the lock.

- For multi-projects:
  - All external projects that were opened along with the master project are also locked.
  - If **User A** wants to lock external subprojects that were not opened along with the master project at the time the lock was applied, **User A** must first release the lock on the master project, open the external subproject, and then re-apply the lock. **User A** may also open the external subproject as a standalone project, and edit this separately. In case another user, **User B**, has this external project opened as a standalone project in Shared Mode, **User A** must first acquire a separate lock on the project and proceed to edit this separately.
  - If **User A** acquired a lock on a project that is included as an external project of a master project, **User B** will not be able to acquire a lock for that master project, until **User A** releases the lock.

- If **User A** tries to open a master project in Shared Mode without expanding its external subprojects after **User B** opened those external subprojects with an exclusive lock, **User A** will see warning icons and hover text. This will cause the subproject to be in read-only mode.



- After **User A** releases a temporary exclusive lock on a project, **User B** will see the following message box:



Clicking **Yes** refreshes the project, as well as all open external subprojects, if applicable. This ensures that all shared mode users will have updated project data as changes may have been made by **User A** while the lock is in place. Note that the refresh retrieves data changed by other users but not globally calculated data such as the results of Time Analysis. To update calculated data, run the process on your machine.

Enhancements

This section includes summaries of the enhancements made to existing features in this release.

Group Profiles

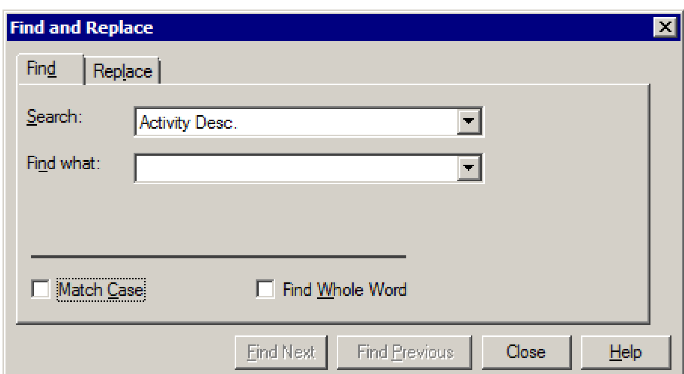
A user need not belong to a group in order to log on to a supported application.

Find and Replace

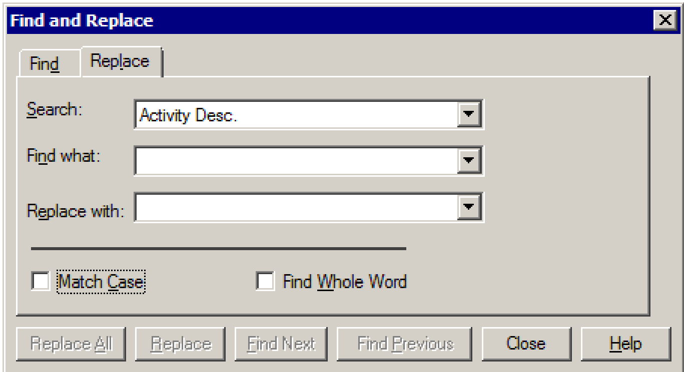
The Find functionality has been enhanced, and Replace functionality has been added in Open Plan 8.0. These features have the following capabilities:

- The **Find and Replace** dialog box is now non-modal. This means that you are able to work elsewhere in Open Plan while this dialog box is open, floating on top of the view you are in.
- When several views are open, the dialog box will apply and communicate with the view that has focus, provided that the view has Find and Replace functionality. Views that have this functionality are the following:
  - spreadsheets
  - barcharts
  - multi-table spreadsheets and barcharts
  - tornado
  - network
- **Find** and **Replace** tabs. The table below summarizes the fields and buttons available in these two tabs.

  Find tab



  Replace tab



<table>
<tr><th>Field</th><th>Find tab</th><th>Replace tab</th></tr>
<tr><td rowspan="2">Search — Use this dropdown to select the field you want to search.</td><td>This list contains all fields in the view.</td><td>This list contains only columns that are editable.</td></tr>
<tr><td colspan="2">The default value for this dropdown is the column that is selected when you open a dialog.

When you change views or add/remove columns, the options in the dropdown also change.</td></tr>
<tr><td>Find what — Use this field to enter the text you want to find.</td><td>The dropdown allows you to choose values previously used. (The last 10 values are stored)</td><td>The dropdown allows you to choose values previously used. (The last 10 values are stored)</td></tr>
<tr><td>Replace with — Use this field to enter the text you want to replace the text that was searched.</td><td>N/A</td><td>The dropdown allows you to choose values previously used. (The last 10 values are stored)</td></tr>
<tr><td>Find Next and Find Previous — These buttons allow you to go to the next or previous search matches.</td><td colspan="2">While doing a find next or find previous, the search will be reset during the following scenarios:
Column name change
Search text change
Selecting or deselecting the Match Case or Find Whole Word options.
Another view is brought to the front</td></tr>
<tr><td>Replace— This button replaces the text that you searched for and navigates to the next record with the Find What value</td><td>N/A</td><td>This button is disabled by default, and only becomes enabled after you enter your text in the Replace with field and click the Find Next or Find Previous buttons.</td></tr>
</table>

Field	Find tab	Replace tab
Replace All — This button replaces all occurrences of the text that you were seeking.	N/A	This button is disabled by default, and only becomes enabled after you enter your text in the **Replace with** field.

- When you choose the view's main ID field as the search field and a match has been found, the entire row is selected, instead of just the ID cell.
- The default **Search:** field when in the Network view is **Activity ID**.
- In multi-table spreadsheets, matches may be found in fields that contain values that are being suppressed (i.e., the fields are displayed as blank to improve readability for the view).

For more information on how to use the **Find and Replace** dialog box, see the *Deltek Open Plan 8.0 User Guide*.

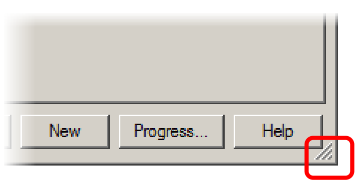
Flexible Dialog Boxes

You can now resize the following dialog boxes:

- Activity Details
- Activity Information
- Activity Progress
- Calculated Field Expression
- Organize Spreadsheet Columns
- Project Properties dialog
- Batch Global Edits dialog

These dialog boxes can be resized by dragging any corner or side of the dialog box, when the cursor becomes a double-headed arrow ↖↘, ↔, or ↕.

A dialog box is resizable when you see a resizing grip at the lower right corner of the dialog box.



These dialog boxes have a minimum size which displays all controls.

The size is saved after you close and reopen the dialog box.

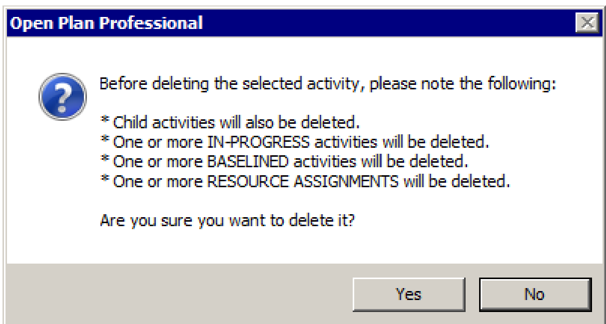
Additionally, in dialogs that display two separate panes (e.g., the Organize Spreadsheet Columns dialog), it is possible to change the relative widths of the left and right panes by dragging in the space between the two panes.

Second Warning Message When Deleting Activities

A second warning message is now generated when you delete an activity from the network view, an activity-related spreadsheet or barchart, or by group deletion.

The second warning prompt applies to activities that meet the following conditions:

- Activity is in-progress
- Activity is part of a baseline
- Activity has resource assignments
- Activity has children



For multi-tables, you are now able to perform the following

- Delete resource assignment rows without deleting activities (no secondary warning message)

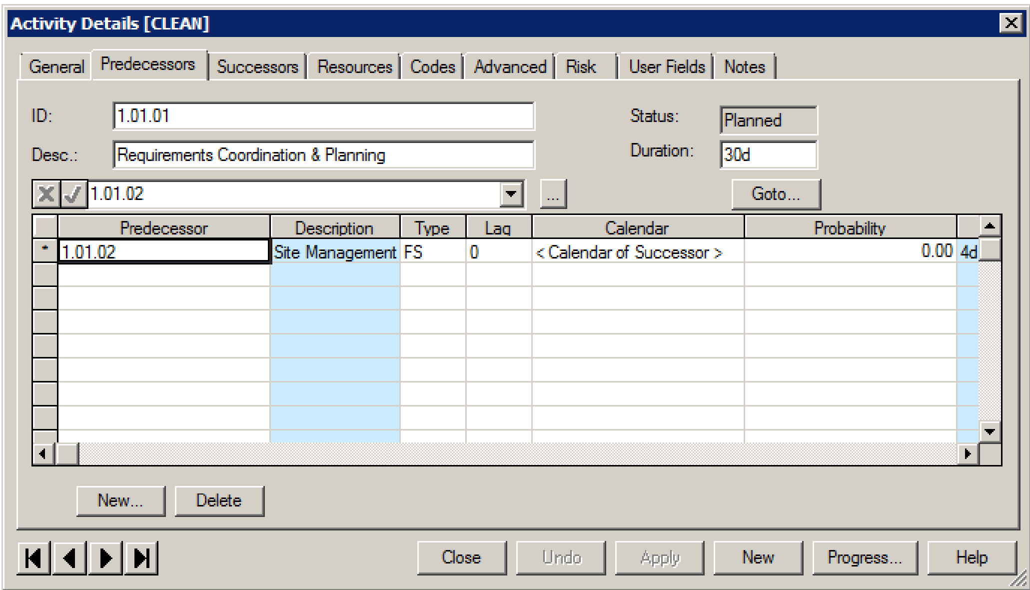
A reference to an activity's children, when present, is now indicated in the warning message.

For more information on deleting activities, see Utilities in Chapter 06 Activity Information.

Activity Details Dialog Box

The **Relationships** tab of the **Activity Details** dialog box has been replaced by two tabs: **Predecessors** and **Successors** tabs to display more information and simplify the management of relationships.

You can display the Add-In Task Form to see both predecessors and successors on the same form at the bottom of the screen



These new tabs have the following feature changes:

- The **Description** column has been added to the grid. This is read only.
- In the **Type** column, abbreviations are used to save space:
  - **FS** — Finish to Start
  - **SS** — Start to Start
  - **SF** — Start to Finish
  - **FF** — Finish to Finish

You can hover your cursor above the abbreviated text to display the type as a tooltip.

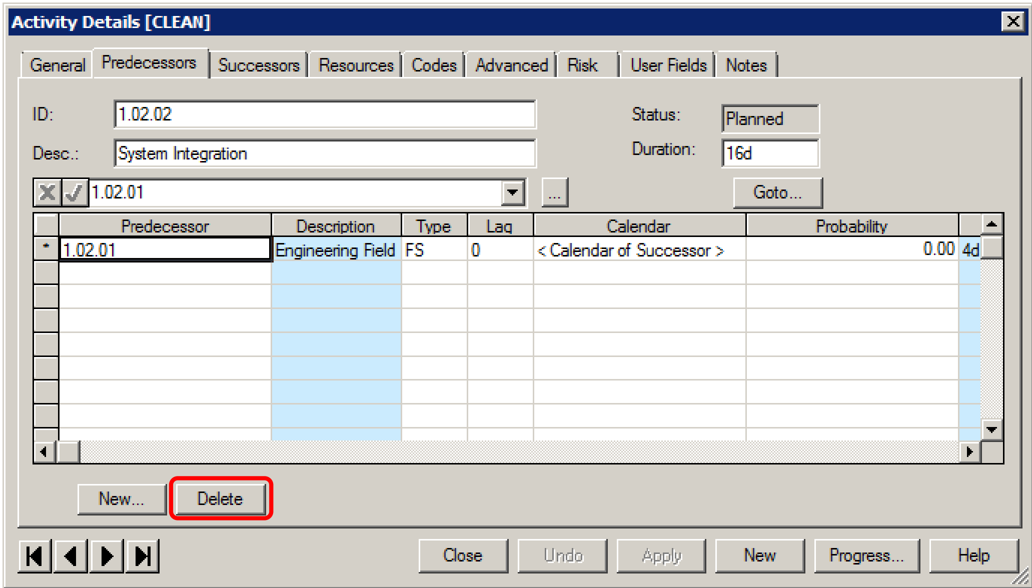
- Custom fields on the relationship table are automatically displayed as columns at the right side of the grid.
- Two new buttons were added:
  - **New** — this button launches the **Add Relationships** dialog box. (See this dialog in the New Features section.)
  - **Delete** — this button deletes the row, or group of rows selected.

    The **Delete** button is only enabled when a cell is selected in a row that is not empty, or when a number of populated rows are selected.

The **Apply** and **Undo** buttons are enabled after you have deleted one or more relationships.

Deleting Relationships in the Predecessors and Successors Tabs in the Activity Details Dialog Box

A new Delete button makes it easy to delete existing relationships in the Activity Details Dialog Box.



The Delete button is only enabled when you have selected anywhere in a row or when one or more rows have been selected that have existing relationships.

The Undo and Apply buttons are enabled after you have deleted relationships.

For more information on how to delete relationships, see Entering Activity Relationships (Chapter 05 Activity Information) of the *Deltek 8.0 User Guide.*

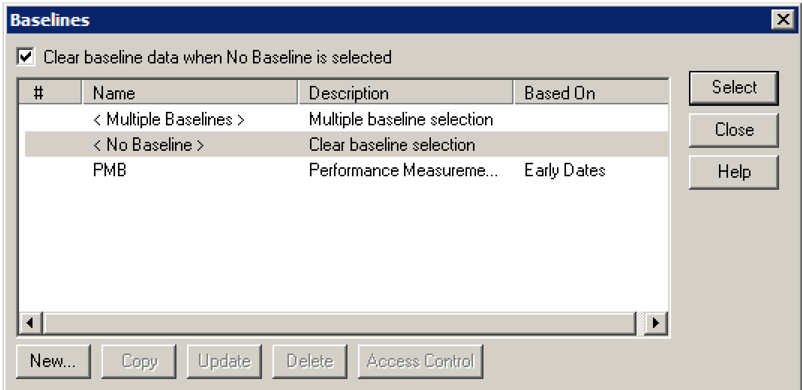
Set Column/Row Attributes Dialog Box

The **Set Column/Row Attributes** dialog box has been renamed, and is now called **Conditional Formatting** dialog box.

Baseline Management

Baselines Dialog Box

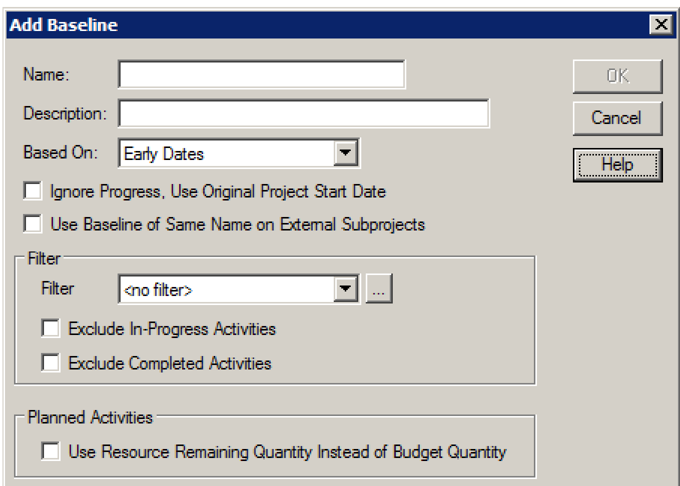
A new option has been added to the Baselines dialog box, called **Clear baseline data when No Baseline** is selected. This option allows you to clear activity baseline data when you select < No Baseline >. The option is enabled only when you have "< No Baseline >" selected.



Add Baseline and Update Baseline Dialog Boxes

The Add and Update Baseline dialog boxes have been split into two, to eliminate options that do not apply in all cases and to provide additional capability and control over the options for updating baselines.

Add Baseline dialog box:



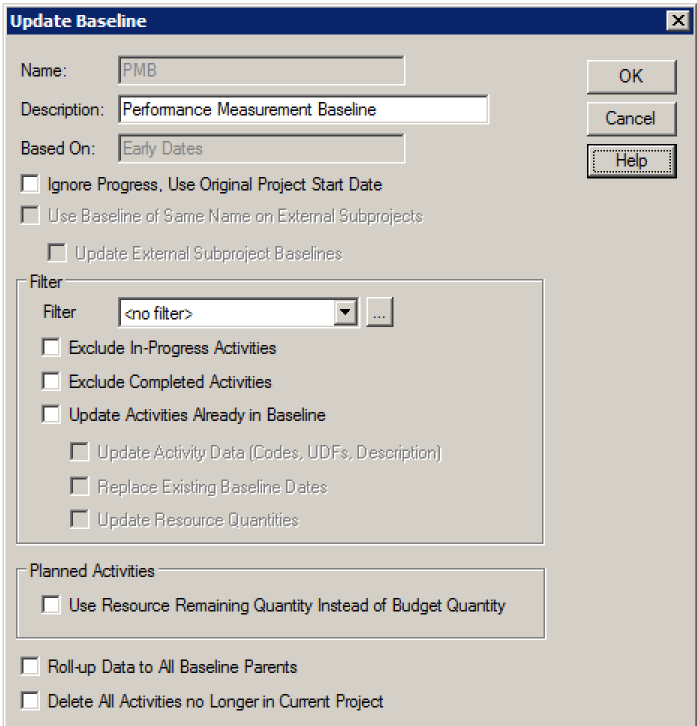
The following options that only apply when updating baselines have been removed from the Add Baseline dialog box:

- In-Progress and Complete Activities » Baseline Dates Group Box:
  - Keep Existing Baseline Dates
  - Update Baseline Dates with Current Plan Dates
- Roll-up Data to All Baseline Parents
- Delete All Activities no Longer in Current Project

The following objects have been renamed in the dialog box:

- “Include In-Progress Activities” is now called “Exclude In-Progress Activities”
  - This is the reverse of the previous option and in intended to clarify the intent of the option.
- “Include Completed Activities” is now called “Exclude Completed Activities”
  - This is the reverse of the previous option and is intended to clarify the intent of the option.

Update Baseline dialog box:



The following options have been removed from the dialog box and replaced by new options below:

- In-Progress and Complete Activities » Baseline Dates Group Box:
  - Keep Existing Baseline Dates
  - Update Baseline Dates with Current Plan Dates

The following options have been added to control what data is updated when updating activities that are already in the baseline:

- Update Activity Data (Codes, UDFs, Description)
  - This updates activity fields that would be populated when creating a baseline excluding the dates and resources which have their own controls below.
- Replace Existing Baseline Dates
  - This replaces baseline dates on activities in the baseline with either the Current Plan Dates or the dates calculated by the option to “Ignore Progress, Use Original Project Start Date”.
- Update Resource Quantities
  - If dates are also being updated, the resource quantity is spread over the updated dates.
  - If dates are not being updated, the changed resource quantity is pro-rated over the existing baseline dates.

The following objects have been changed/renamed in the dialog box:

- “Include In-Progress Activities” is now called “Exclude In-Progress Activities”.
  - This is the reverse of the previous option and is intended to clarify the option.

- "Include Completed Activities" is now called "Exclude Completed Activities". (If selected, this option now excludes complete activities in the baseline as well as enabling the Baseline Dates option)
  - This is the reverse of the previous option and is intended to clarify the option.

For more information on the changes made to the dialog boxes, see Chapter 16 Status Information.

- A new option, Replace Existing Baseline Dates with Current Plan Dates has been added to the Update Baseline dialog box. This option instructs Open Plan to replace the baseline dates of activities that already exist in the baseline with Current Plan Dates. This is applicable to all activities that meet the chosen filter, excluding those activities that fall under the Exclude In-Progress/Completed Activities that meet the filter option

Updating Baselines From a Master Project

External subproject baselines that have the same name can now be updated when the master project baseline is updated. Security has been added to control which users or groups can perform these updates.

This update can be performed if the following conditions are met:

- In the master project, the baseline would need to be created with the option to "Use Baseline of Same Name on External Subprojects".
- The owner of the baseline in the external subproject also needs to grant rights to update the baseline in the master project.
- When updating the baseline in the master project, select the new option to "Update External Subproject Baselines".

The following changes have also been implemented:

- In the Baseline Access Control dialog box, the Update column name has been renamed and is now called Update in Project.
- Update in Master column was also added.
- In the Update Baseline dialog box, the new option Update External Subproject Baselines has been added.

For more information, see Creating, Copying, and Updating a Baseline (Chapter 16 Status Information) of the *Deltek 8.0 User Guide*

Renaming of Dialog Boxes

The word "Manage" was removed from the following dialog boxes:

- Calendars
- Holidays
- Skills
- Reporting Calendars
- Note Categories
- Symbols

- Summary Usage

Additionally, the Spread Curve dialog box is now called Spread Curves dialog box, and the Batch Global Edit dialog box is now called Batch Global Edits dialog box.

Windows Shortcuts/About Open Plan Professional Dialog Box

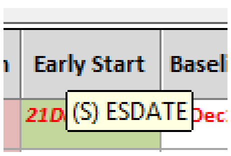
"Deltek" was added as a prefix for all Windows shortcuts (**Start » Deltek » Open Plan Professional 8.0 » Deltek Open Plan Professional 8.0** and Desktop shortcut), as well as the About Open Plan Professional dialog box.

Global View and Display Format

The Global View and Display Format drop-down lists in the Open Plan Explorer have been removed.

Spreadsheet View Column Headings

When the cursor hovers above a column heading, a new indicator of what type of column the data is stored in is displayed in the hover text. (Calculated field, filter user field etc.)



The values are:

- S-Standard
- C-Calculated
- F-Filter
- U-User Defined
- G-Global Edit

Security

The security model in the EPM SA has been reorganized to match the new ribbon menus. Existing groups and roles are maintained during the upgrade process.

New features that are controllable by security will default to being enabled for existing groups and roles. You may want to review your groups and roles after upgrading.

Add-Ins

To accommodate the way ribbon menus display options, there is a new capability to define groups of Add-Ins in the addins.dat file. This is optional. All add-ins that do not have a group defined will be placed in a default group.

To define groups of add-ins, insert the group name before the menu name separated by a colon. In the following example, the group Resource was added for Tool 4.

For example:

Tool4=**Resource**:Resource Selector;%SYSTEMDIR%\Sample Tools\OPXMLview\XMLResSel\ResSelFrame.htm %d %P %V

All add-ins with the same group will appear together in that group. They do not need to be listed sequentially in the AddIns.dat file.

Open Plan assigns shortcut keys to Add-Ins in the order the add-ins are loaded. So Tool1 will be assigned shortcut key Ctrl+1. While Open Plan will group the add-ins based on the new group name, the shortcut keys are still assigned based on the order in which the add-ins are loaded. You may want to consider the order in your addins.dat file.

The Open Plan Status Bar

The status bar now displays additional information about the project and/or view you are in.

The following information has been made available:

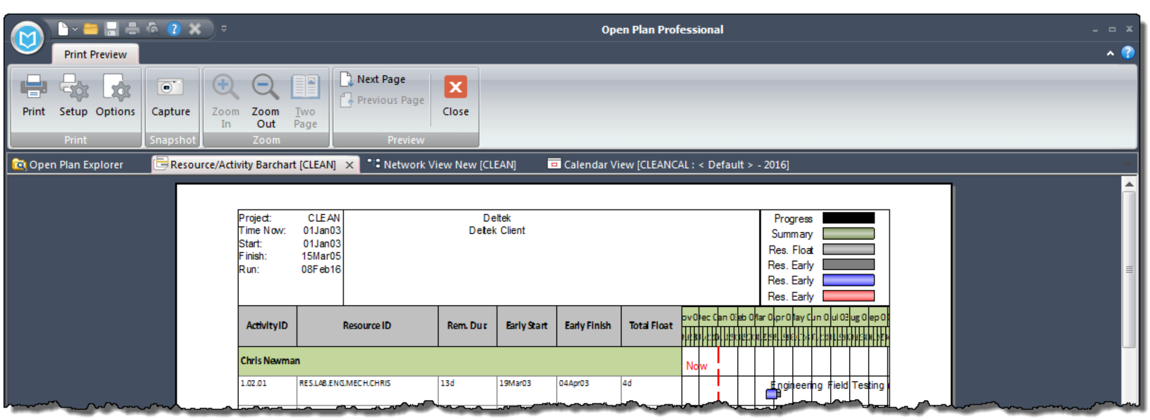
- Access Mode
- Time Now
- Auto time analysis status
- Baseline(s) selected
- Record count
- User currently logged in
- Data source

You can easily toggle on or off automatic calculation of time analysis by clicking the Auto-analyze option of the Schedule group from the Processes tab.

Print Preview Pane

Except in the Calendar view, you can now launch the Print Setup and the Print Options dialog boxes from the Print Preview pane across all views.

Only the Print Setup dialog box can be launched from the Calendar view Print Preview pane. The Calendar view does not have a Print Options dialog box.



- When invoked from the Print Preview pane, the Preview button will not be available on the Print Options dialog box.
- You are now able to select Landscape orientation for the Calendar view in the Print Setup dialog box.
- Changes that you make on the Print Setup and Print Options dialog boxes while on the Print Preview pane force the preview to automatically recalculate its layout.

Software Issues Resolved

Descriptions of Software Issues

You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. For the most part, these issues were addressed before this release through hot fixes, and the additional information was added to help you decide whether or not you needed to install the hot fixes.

When you install this release, you must install all fixes in the release; you cannot choose to install some and not others. Nevertheless, this additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

Other

Installation

Defect 487835: The Open Plan installation failed when installed to a network folder on a server in a different Windows domain.

Customers Impacted: This defect affects all users.

Workaround Before Fix: None.

Additional Notes: None.

Tools

Calculated Fields

Defect 519929: The Baseline calculated fields that use concatenation, for example **PRED_ACT_ID.B00~EVT** (to return the EVT field from the first baseline for the predecessor activity in a relationship spreadsheet), did not return correct results.

Customers Impacted: This defect affects all Open Plan users.

Workaround Before Fix: Set up a calculated field on the activity table (defined as **B00~EVT**) and then reference the calculated field in **GetPreds()** or **GetSuccs()**.

Additional Notes: None.

Known Issue

An error will occur when you run an export of crosstable data with Open Plan 8.0 demonstration data that utilizes the reporting calendar named FISCAL. The error occurs because the reporting calendar was not updated to add additional period dates to match the updated time now dates in the demonstration data.

Appendix A: For Additional Information

Customer Care Connect Site

The Deltek Customer Care Connect site 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 Customer Care Connect site 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 Connect Customer Forums
- 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 Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts for new Deltek releases and hot fixes
- Use Quick Chat to submit a question to a Customer Care analyst online

For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and Password.
3. Click Log In.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Available Documentation

Release notes and other guides are available for this release. You can download these documents in two ways.

Deltek Software Manager

The Documents tab in Deltek Software Manager lists all of the documents associated with a release and lets you download the ones that you want.

To download documents, complete the following steps:

1. On the Deltek Customer Care site, click the Product Downloads tab, then select **Launch Deltek Software Manager**.
2. When the Deltek Software Manager opens, highlight a release in the left pane.

> Do **not** enter a check next to the release name or click **Add to Download Queue**. If you do so, you will download the software as well as any documentation that you want.

3. Click the Documents tab to display a list of available documents for the release.
4. Select the documents that you want.
5. Click **View Download Queue** to see a list of documents that you selected.
6. Click **Download**.

Customer Care Site Enterprise Search

Use the search feature to find specific documents or to see a list of all documents associated with a release. Then open or download the ones that you want.

To download documents, complete the following steps:

1. On the Deltek Customer Care site, click **Enterprise Search**.
2. Select **Release Documentation** as the **Source**.
3. Perform one of the following actions:
   - To see a list of all available documentation for a release, enter the product and release number (for example, **Open Plan 8.0**) in the search field.
   - To find a specific document, enter a description of the document (for example, **Open Plan 8.0 release notes**) in the search field.
4. Click on the document, and then choose to open or save it.

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