



Deltek

Deltek Open Plan® 8.5

Release Notes

December 1, 2020

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Overview

The Deltek Open Plan 8.5 Release Notes contain a summary of the following:

- Pre-Installation Information
- New Features and Enhancements
- Database Changes
- Software Issues Resolved

Upgrade from an Earlier Version of Open Plan

When upgrading from an earlier version of Open Plan, you must install Open Plan 8.5 in a new folder rather than attempting to overwrite/upgrade an existing Open Plan installation. Open Plan supports concurrent installations with previous versions of Open Plan, provided that:

- The user has Administrator rights (This is necessary to enable Open Plan to update OLE Automation Server registration when different versions are used.)
- The two versions do not share the same database
- The two versions are installed to different folders

If you are using a server and workstation installation, it is necessary to perform a new Workstation installation for users that access Open Plan from a shared server installation. The Workstation setup application is available in the Workstation Setup folder of the server installation folder.

Attention: For more information about upgrading, see *Upgrade from Earlier Versions of Open Plan* in the Deltek Open Plan Installation Guide.

Pre-Installation Information

Software Requirements

The supported minimum software requirements for a complete installation of Deltek Open Plan are listed below.

Attention: For a complete list of the recommended minimum software requirements, see the *Deltek Product Support Compatibility Matrix* document that you can download from the [Deltek Customer Care Connect site](#).

Supported Deployment Technology

Note: Supported versions are the current actively tested versions of technologies used to deploy Open Plan. Except for the Deltek Integrated Products, these technologies are not directly supported by Deltek. Changes to these technologies occur at the discretion of the individual technology vendors.

Supported Deployment Technology	
Operating System	<ul style="list-style-type: none"> ▪ Windows Server 2012 R2 ▪ Windows Server 2016 ▪ Windows Server 2019 ▪ Windows 8.1 ▪ Windows 10
Citrix	<ul style="list-style-type: none"> ▪ XenApp 7.* (Windows Server 2012 R2) ▪ XenApp 7.* (Windows Server 2016) ▪ Citrix Virtual Apps and Desktop 7 (Windows Server 2019)
VMWare Horizon	<ul style="list-style-type: none"> ▪ VMWare Horizon 7
Database Platform	<p>Microsoft SQL Server</p> <ul style="list-style-type: none"> ▪ SQL Server 2016 ▪ SQL Server 2017 (also supported on Linux and Unix) ▪ SQL Server 2019 (also supported on Linux and Unix) ▪ SQL Server Express 2016 ▪ SQL Server Express 2017 ▪ SQL Server Express 2019 <p>Oracle</p> <ul style="list-style-type: none"> ▪ Oracle 12.2 ▪ Oracle 18.3

Supported Deployment Technology	
	<ul style="list-style-type: none"> ▪ Oracle 19.3 <p>Oracle is supported on Linux, Unix, and Exadata</p> <p>Microsoft Access</p> <ul style="list-style-type: none"> ▪ Microsoft Access 2013 ▪ Microsoft Access 2016 ▪ Microsoft Access 2019
Database Driver	<p>Open Plan supports Access, Oracle, and SQL Server databases through an OLEDB 2.1 compliant provider. The data source providers to use for each database type are listed below.</p> <ul style="list-style-type: none"> ▪ Oracle Provider for OLE DB ▪ MS SQL Server 2012 Native Client, version 11.4.7001.0 or higher ▪ MS OLE DB Driver for SQL Server, version 18.2.2.0 or higher ▪ Microsoft OLE DB Provider for Jet ▪ Microsoft Office 12.0 Access Database Engine OLEDB Provider ▪ Microsoft Office 15.0 Access Database Engine OLEDB Provider ▪ Microsoft Office 16.0 Access Database Engine OLEDB Provider <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Note: The 64-bit version of Open Plan requires the 64-bit version of the Microsoft Access Database Engine.</p> <p>The 64-bit Microsoft Access Database Engine can be obtained from the Microsoft Download Center at the following location: https://www.microsoft.com/en-us/download/details.aspx?id=13255.</p> </div>
Scheduling Tools	<p>Microsoft Project Standard</p> <ul style="list-style-type: none"> ▪ Microsoft Project Standard 2013 SP1 (Nov 10, 2015 update) ▪ Microsoft Project Standard 2016 ▪ Microsoft Project Standard 2019 <p>Microsoft Project Professional</p> <ul style="list-style-type: none"> ▪ Microsoft Project Professional 2013 SP1 (Nov 10, 2015 update) ▪ Microsoft Project Professional 2016 ▪ Microsoft Project Professional 2019

Supported Deployment Technology	
	<p>Microsoft Project Server</p> <ul style="list-style-type: none"> ▪ Microsoft Project Server 2013 SP1 (with update applied from KB 3115456) ▪ Microsoft Project Server 2016 SP1 (with update applied from KB 4461598) ▪ Microsoft Project Server 2019 <p>Oracle Primavera</p> <ul style="list-style-type: none"> ▪ Primavera P6 8.4 ▪ Primavera P6 17.12 ▪ Primavera P6 18.8 ▪ Primavera P6 19.2 <p>Kidasa</p> <ul style="list-style-type: none"> ▪ Kidasa Milestones 2017 ▪ Kidasa Milestones 2019
Deltek Integrated Products	<p>The versions listed below are the minimum supported versions. Subsequent cumulative update (CU) releases within the listed major/minor release will be supported unless otherwise noted in the <i>Technology No Longer Supported with this Release</i> table. Subsequent major/minor releases are not supported.</p> <p>Deltek Cobra</p> <ul style="list-style-type: none"> ▪ Cobra 8.2 ▪ Cobra 8.3 ▪ Cobra 8.4 <p>When Cobra 8.4 is released, check Cobra 8.4 Compatibility Matrix.</p> <p>Deltek Acumen</p> <ul style="list-style-type: none"> ▪ Acumen 8.5 ▪ Acumen 8.6 ▪ Acumen 8.7 <p>When Acumen 8.7 is released, check Acumen 8.7 Compatibility Matrix.</p> <p>Deltek PM Compass</p> <ul style="list-style-type: none"> ▪ PM Compass 8.2 <p>When PM Compass 8.2 is released, check PM Compass 8.2 Compatibility Matrix.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Note: If you are integrating with PM Compass, you must use the 32-bit version of Open Plan.</p> </div> <p>Deltek wInsight Analytics</p>

Supported Deployment Technology	
	<ul style="list-style-type: none"> ▪ wInsight Analytics 8.2 ▪ wInsight Analytics 8.3
Embedded Technology	<ul style="list-style-type: none"> ▪ Visual C++ 2013 Redistributable Package (x86) ▪ Visual C++ 2017 Redistributable Package (x86)
.NET Framework	<ul style="list-style-type: none"> ▪ Microsoft .NET Framework 4.5.2 ▪ Microsoft .NET Framework 4.6 ▪ Microsoft .NET Framework 4.6.1 ▪ Microsoft .NET Framework 4.6.2 ▪ Microsoft .NET Framework 4.7 ▪ Microsoft .NET Framework 4.7.1 ▪ Microsoft .NET Framework 4.7.2 ▪ Microsoft .NET Framework 4.8

Compatible Deployment Technology

Note: Compatible versions are the recent previously supported and tested technologies used to deploy Open Plan. These are not actively being tested but are believed to be compatible with Open Plan. Deltek does not recommend these technologies for new deployments but will make its best effort to answer questions concerning these technologies. These technologies may not be available for troubleshooting at Deltek.

Compatible Deployment Technology	
Database Platform	<p>Microsoft SQL Server</p> <ul style="list-style-type: none"> ▪ SQL Server 2014 ▪ SQL Server Express 2014 <p>Oracle</p> <ul style="list-style-type: none"> ▪ Oracle 11.2 <p>Microsoft Access</p> <ul style="list-style-type: none"> ▪ MS Access 2010
Citrix	<ul style="list-style-type: none"> ▪ XenApp 7.* (Windows Server 2012)
Scheduling Tool	<p>Oracle Primavera</p> <ul style="list-style-type: none"> ▪ P6 15.2 ▪ P6 16.2 <p>Kidasa</p> <ul style="list-style-type: none"> ▪ Kidasa Milestones 2015

Custom Programming

Before you upgrade:

- 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 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 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.

Note: The Deltek 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.

Running Custom Applications That Use Open Plan Automation

Custom applications that use Open Plan Automation work with both 32-bit and 64-bit versions of Open Plan with the following conditions:

- A 32-bit custom application first tries to connect to a 32-bit version of Open Plan. If the 32-bit version of Open Plan is not available, the application connects to the 64-bit version of Open Plan. If both 32-bit and 64-bit versions of Open Plan are installed on the same computer, a 32-bit custom application will only work on the 32-bit version of Open Plan.
- A 64-bit custom application first tries to connect to a 64-bit version of Open Plan. If the 64-bit version of Open Plan is not available, the application connects to the 32-bit version of Open Plan. If both 32-bit and 64-bit versions of Open Plan are installed on the same computer, a 64-bit custom application will only work on the 64-bit version of Open Plan.

Note: Deltek recommends that you only install one version of Open Plan on a machine if you plan to use custom applications that use Open Plan Automation.

New Features and Enhancements

Set the Level of Resource Assignment Data you want to Include in Microsoft Project Import or Export

Imports

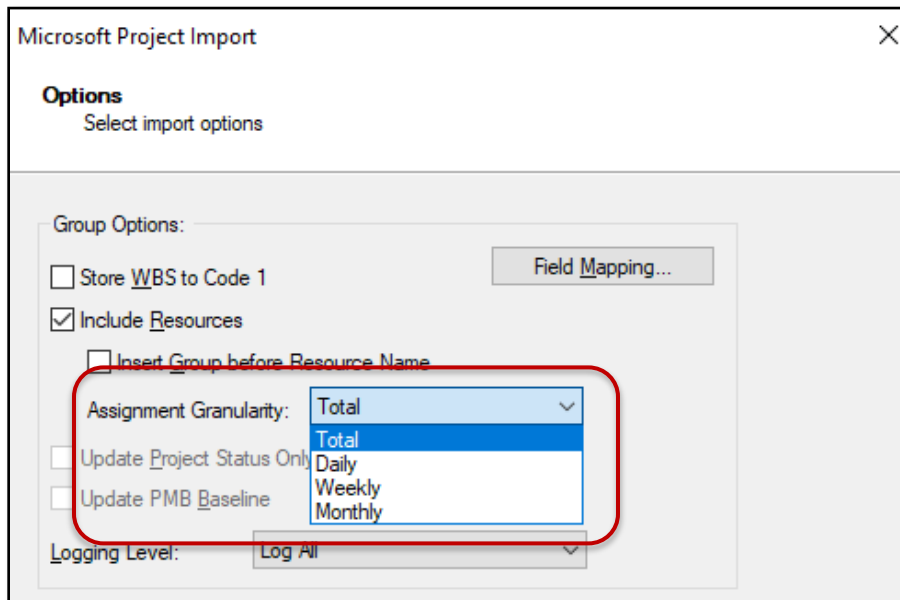
You can use the Microsoft Project Import Wizard Options page to set the parameters for your Open Plan project imports or Open Plan file updates. Use the **Assignment Granularity** option to specify the time period to use to calculate the resource assignment data you want to examine in the import.

In addition to **Daily** and **Single Period** (renamed to **Total**), the **Assignment Granularity** drop-down list now includes the following options:

- **Weekly:** Use this option when you want Open Plan to import weekly time-phased records from MSP.
- **Monthly:** Use this option when you want Open Plan to import monthly time-phased records from MSP.

Single Period is renamed to **Total** and is used in cases where resources are applied as totals in MSP and not manually time-phased. The generation of OP assignments and baseline usage records from time-scaled records may cause unacceptable import times for a large project. With this option, Open Plan generates one OP assignment for each MSP assignment, using the total level for the assignment and spreading it linearly over the owner activity's duration.

The finer the granularity, the more accurate the data; however, time-phased granularity also increases the processing time. If the granularity is too fine, MSP may not be able to generate the data and may even display an error.



Exports

You can use the new **Assignment Granularity** option to control resource assignment granularity and time-phased values you want to include in your export.

The new field is enabled when the following are true:

- The project is not being exported to Project Server
- The **Export Resources** option is selected
- The **MSPRIF Compatibility** option is disabled

When the above conditions are not met, the field is set to **Total** and disabled.

The **Assignment Granularity** drop-down menu is available on the Microsoft Project Export Wizard Options page and provides the following time-phased options:

- **Total**: Use this option when resources are applied as totals in MSP and not manually time-phased. The generation of OP assignments from time-phased records may cause unacceptable export times for a large project. When you use this option, the total work is spread evenly over the task's duration without regard for offsets and periods. There is no timephasing performed in MSP and the export requires much less processing time.

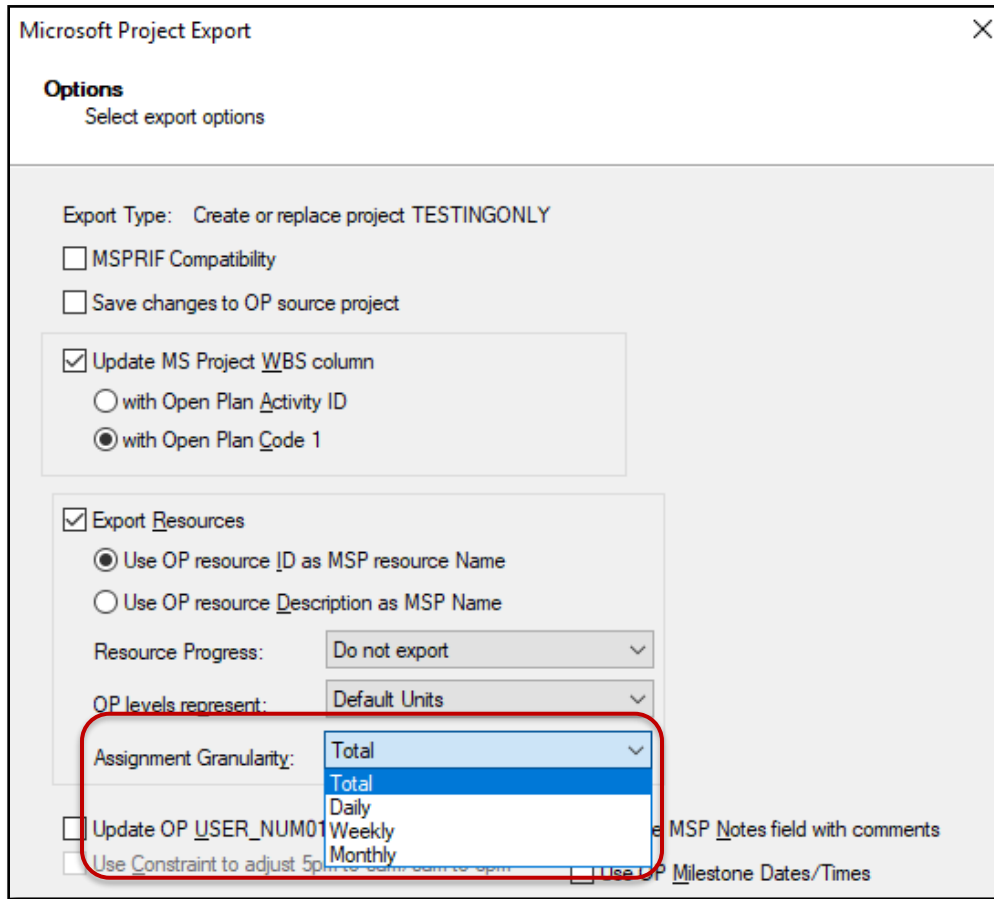
If you manually time-phased in Open Plan and want to maintain that level of granularity in MSP, you should select one of the other options.

- **Daily**: Use this option when you want Open Plan to generate and export daily time-phased records to MSP to model the original records accurately.
- **Weekly**: Use this option when you want Open Plan to generate and export weekly time-phased records to MSP.
- **Monthly**: Use this option when you want Open Plan to generate and export monthly time-phased records to MSP.

Open Plan sets the default granularity to Total. The finer the granularity, the more accurate the data; however, time-phased granularity also increases processing time as Open Plan needs to create individual time-phased records for each work period.

Using a coarser granularity (for example, weekly instead of daily) allows the resource assignment export to complete successfully and with less processing time even though it may be slightly less accurate (that is, the level will spread evenly across a given week and will not show daily fluctuations).

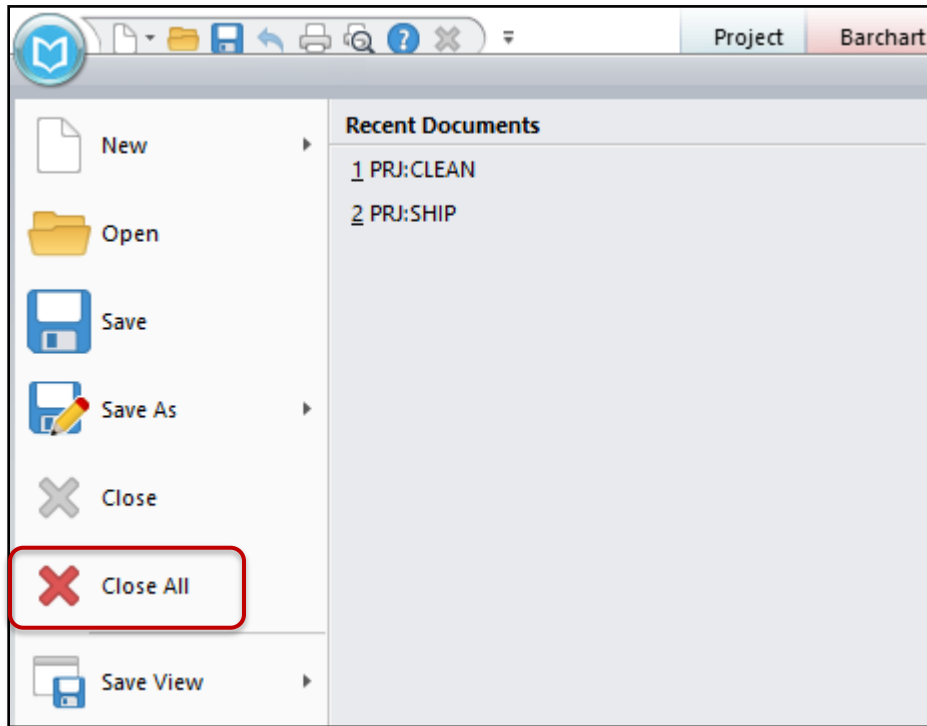
When timephasing is requested for large projects containing tasks with extended durations (for example, when a task duration spans more than a few weeks) and you select a **Daily** granularity, MSP may fail during the process and the integration log might contain an error, for example, "An exception occurred in ExportCalendarDetailMSP: No more threads can be created in the system." If you experience this behavior, Delttek recommends using a coarser assignment granularity.



Close All Files at the Same Time

Use the new **Close All** feature to close all projects, ancillary files, and dialog boxes at the same time instead of having to close each one separately.

To close all open projects, ancillary files, and dialog boxes, click **File » Close All**. If you have unsaved changes, a message prompts you to save your changes. After closing everything, the Open Plan Explorer view displays.



Time-Phased Reporting by Activity Count and Value

Open Plan includes time-phased schedule progress charts that you can use to report by activity count or values. You can use these charts to view, for example, early/late activity completion curves with actuals as well as time-phased task completions vs baseline plan.

Open Plan includes the following time-phased sample views:

- **TP Completions** to report by activity count. Activity counts are charts based on aggregating counts of activities on various dates. For example, the number of activities planned to finish by Baseline Finish date versus the Actual Finish date.
- **TP Cash Flow** to report by activity value. A value chart is the aggregated value of a specified field over a date range.

TP Completions: Reporting by Activity Count

The chart displays cumulative (s-curve) or period (histogram) data for a project plotted against time and is used to track the progress of a project. The data in the charts can count activities over time based on any date fields.

You can view the number of activities that are planned to finish (Baseline) versus the activities that were scheduled to finish (Actual/Early/Late Finish) within a certain date period.

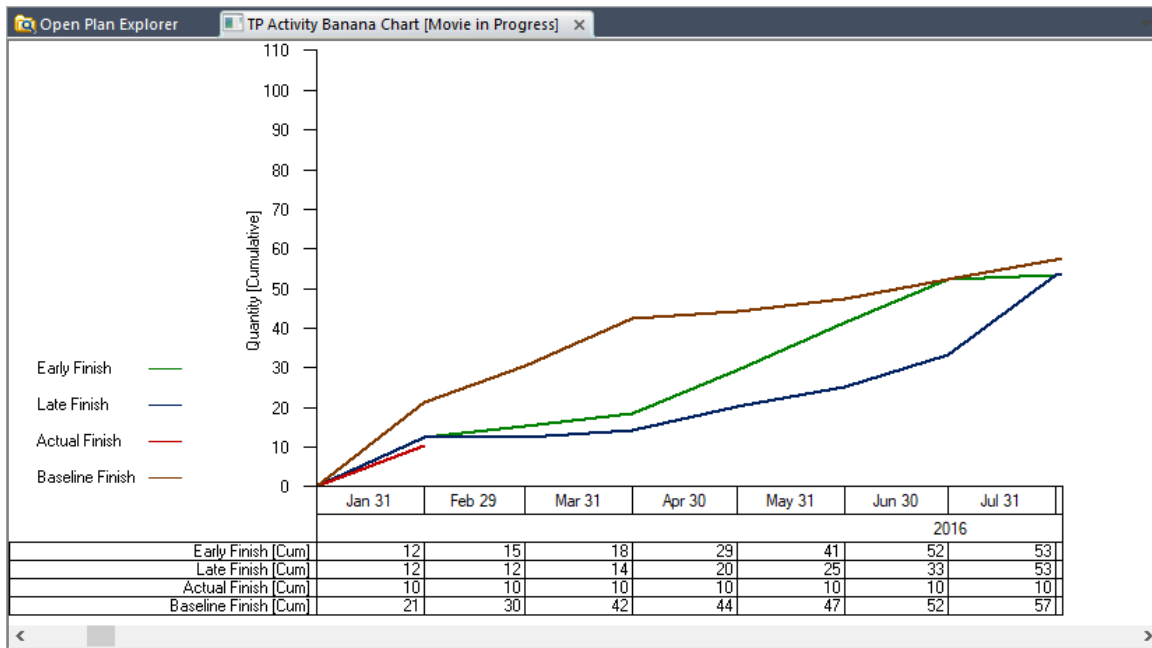
In the example below, there are 21 activities in January planned for completion (Baseline Finish Cum); however, only 10 were completed (Actual Finish Cum). The early and late lines represent the range of possibilities that the project can expect if it is to be completed on time.

Having the ability to see these trends allows you to mitigate early on in the project cycle.

By default this chart filters out summary activities. You can use activity filters to include or exclude activities to report on.

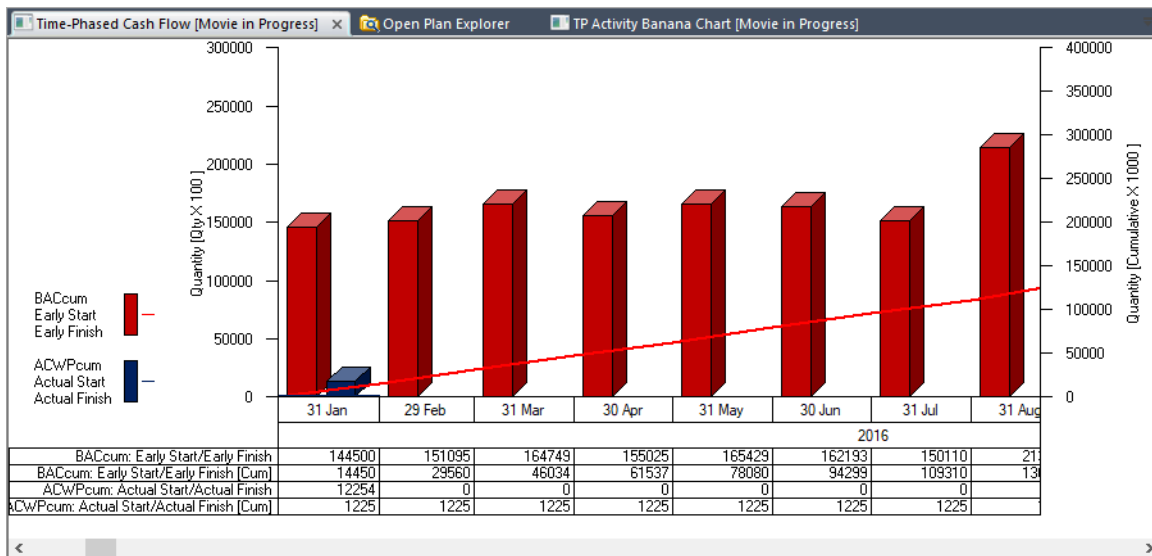
New Features and Enhancements

This reporting also supports the concept of Earned Schedule reporting. The count of baseline finish dates represents the BCWS Schedule and the actual finish dates represent the BCWP values.



TP Cash Flow: Reporting by Activity Value

Use this chart to view, for example, the budget at complete spread between the early start and early finish. In addition, you can use user-defined values. You might want to use it to look at cash flow— what you are planning to spend versus what you actually spent - at the WBS level or the total project level. You could use a user-defined field to view the monthly and cumulative values.

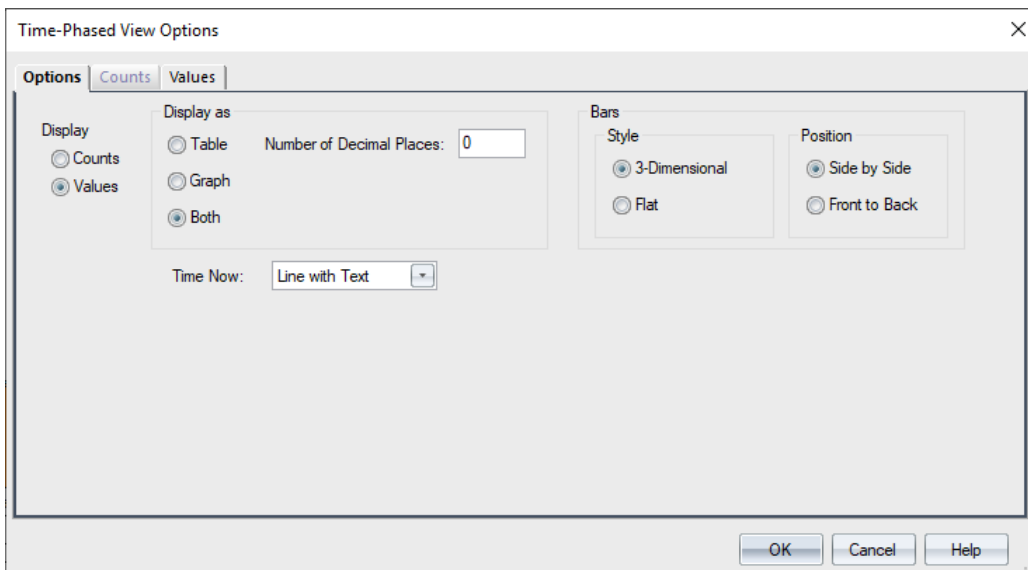


Time-Phased View Options Dialog Box

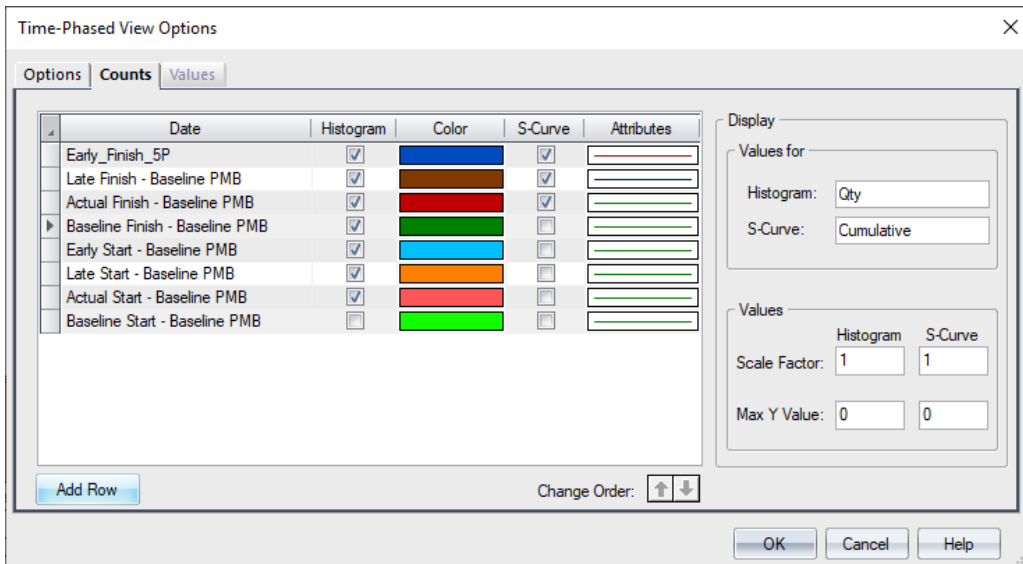
Use the Time-Phased View Options dialog box to set the time-phased view parameters.

New Features and Enhancements

- **Options tab** — Use this tab to specify whether to display the data by count or value and specify how the view displays.

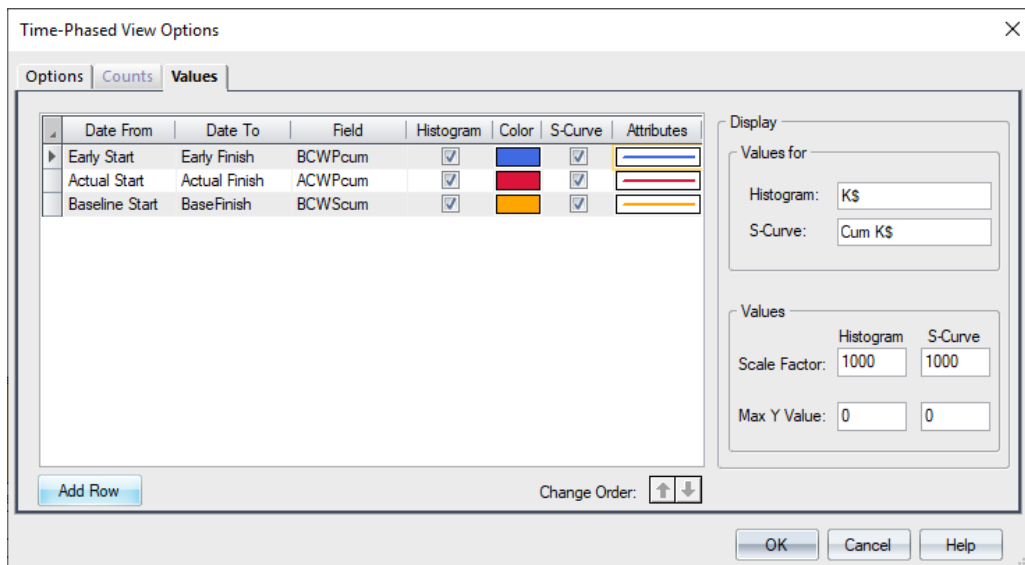


- **Counts tab** — Use this tab to select the attributes that you want to use when you display the activities by count.



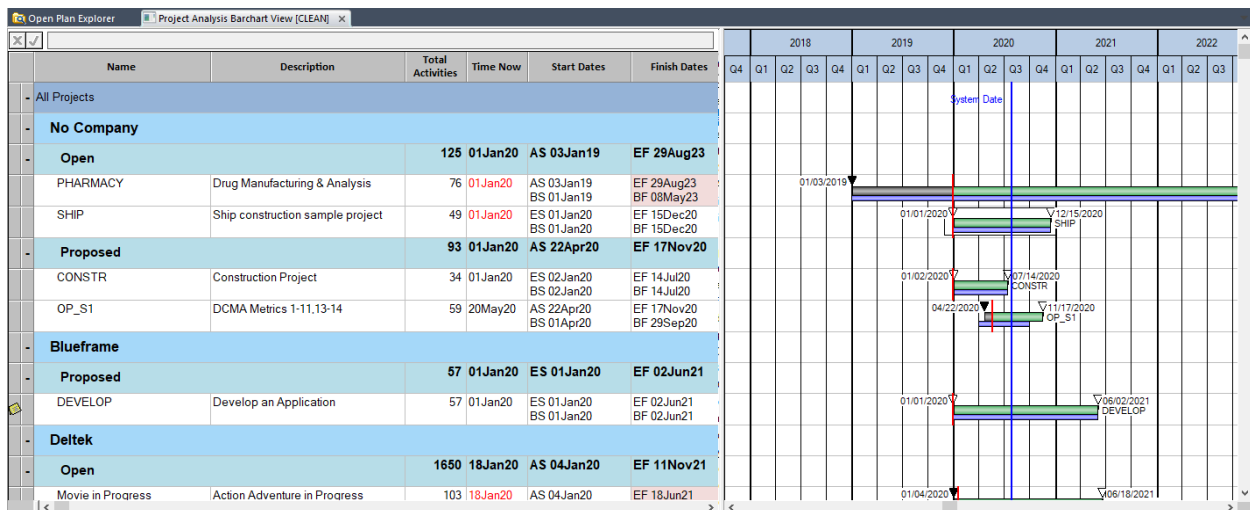
New Features and Enhancements

- **Values tab** — Use this tab to select the **From** and **To** dates and the field to spread across those dates.



Project Analysis Barchart View

The new Project Analysis Barchart view is a hierarchical arrangement of projects with spreadsheet and barchart components.



You can include Time Now on the barchart as a solid line for each project. You can also add a line to indicate the System Date. Use the Project Barchart Preferences dialog box to specify the Time Now and System Date display preferences (right-click on the barchart and click **Preferences**).

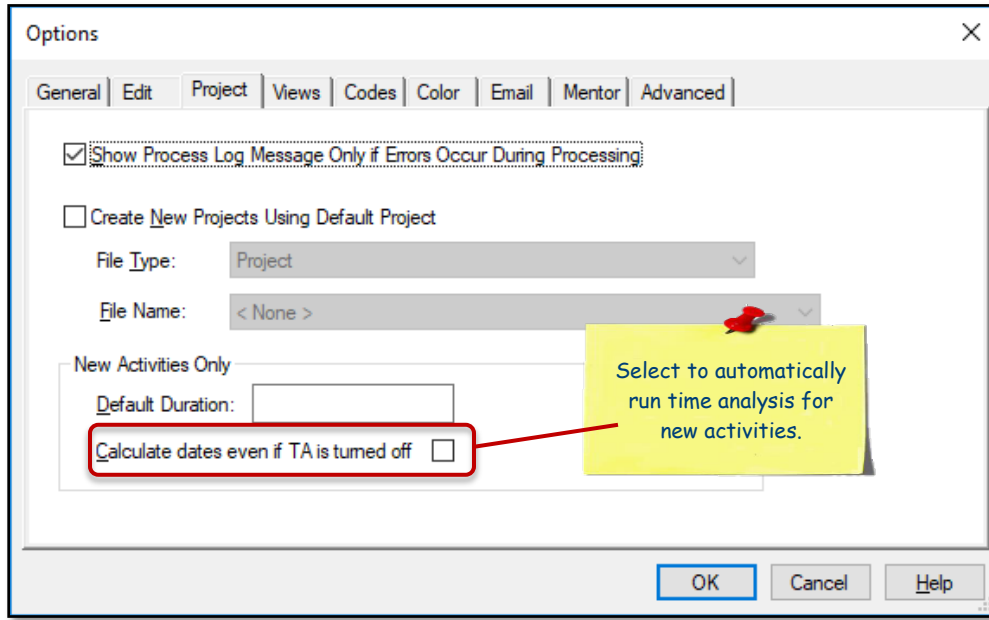
Right-click on the spreadsheet and select Preferences to display the Spreadsheet Preferences dialog box where you can select grouping and color options. The Outlining and Define Link tabs are not available in this view.

Note: For more information about this view, see the Open Plan 8.5 online help ([Views and Reports » Barchart View » Project Analysis Barchart View](#))

Automatically Run Time Analysis for New Activities

You can now set Open Plan to automatically run Time Analysis when you create new activities. Open Plan calculates the dates using a start date of Time Now and adds an activity bar to the Gantt chart.

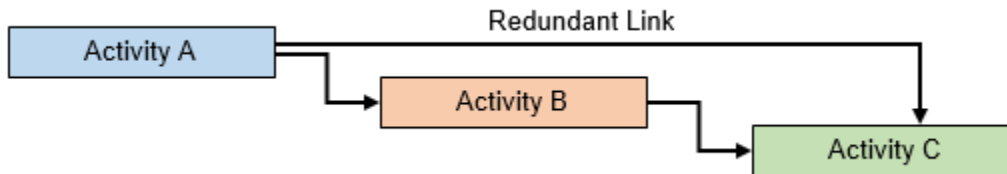
You can find this feature on the Project tab of the Options dialog box (File » Preferences » Application).



Note: For steps, see *Automatically Run Time Analysis for New Activities* in the Open Plan online help (Working with Projects » Project Analysis » Time Analysis » Related Procedures).

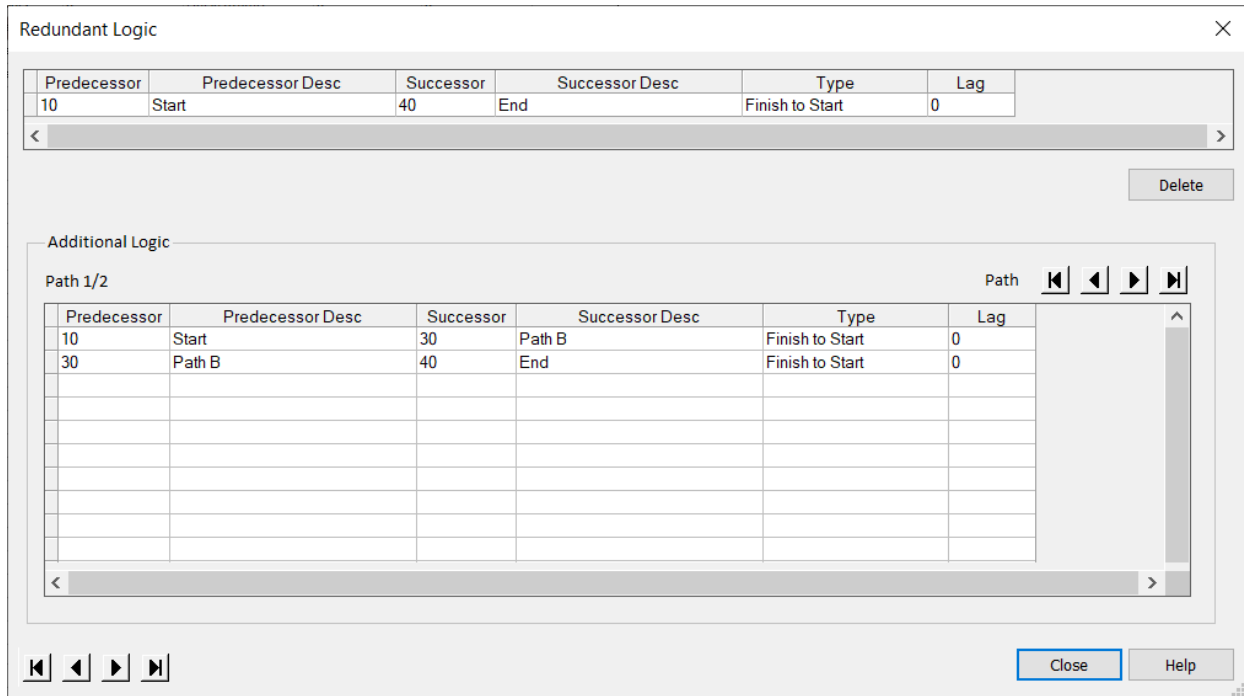
Activity Redundancy Analysis

A redundant link occurs when, in addition to the link in question, there is a more detailed logic link between the same two activities. For example, a link from Activity A to Activity C is made redundant by an existing link from Activity A to Activity B and another one from Activity B to Activity C.



The new Redundancy Analysis feature in Open Plan checks the entire schedule and sets a flag on relationships that are redundant. After you run the process, Open Plan displays the Relationship Spreadsheet view where the new Redundant Flag column indicates the redundant relationships. If needed, you can filter on this flag.

You can right-click in the view and select **Redundant Logic** to display the Redundant Logic dialog box. The top grid includes the redundant relationship that was identified by the analysis and the bottom grid includes the relationships that make that relationship redundant. Click **Delete** to delete the relationship. You cannot edit or change relationships in this grid.



To run the analysis, navigate to the Processes tab and click **Redundancy Analysis** in the Tools menu group.

Set the Default Duration for New Activities

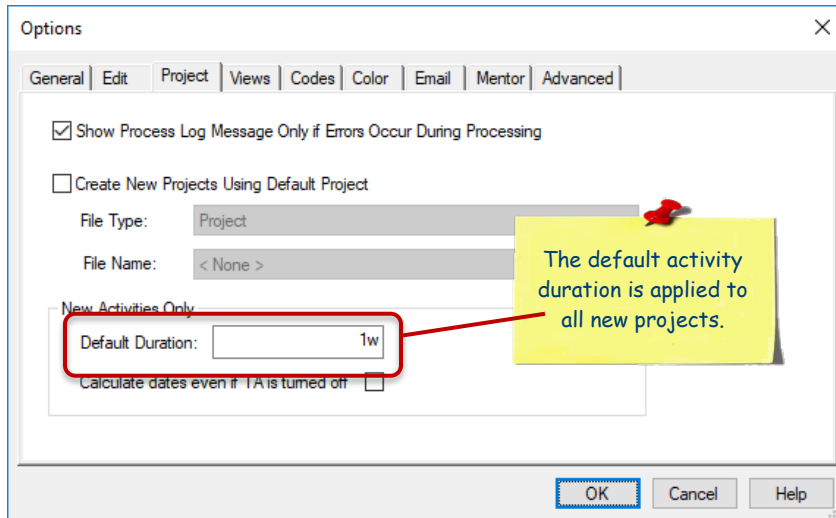
You can now specify a default activity duration at the system and/or project level.

Set the Default Activity Duration at the System Level

Set the default activity duration at the system level so that all new projects default to this value. You can enter a number in the **Default Duration** field on the Options dialog box Project tab with or without a unit (for example **1w** for 1 week). If you don't include a unit, Open Plan assumes that the unit is **Days**.

Open Plan populates the **Default Activity Duration** field on the Project Properties Preferences tab with this value when you create a new project.

New Features and Enhancements



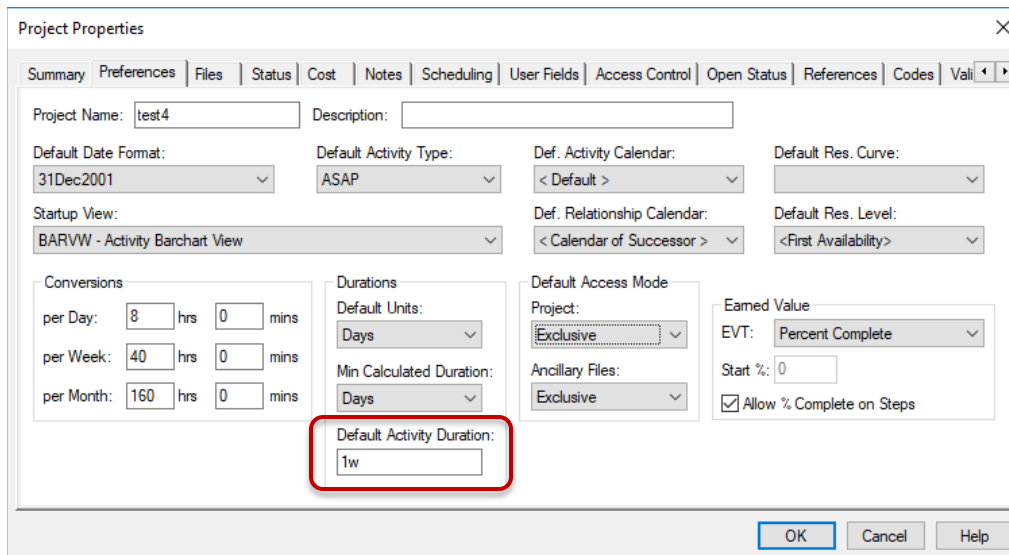
Set the Default Activity Duration at the Project Level

Although you can set the default activity duration at the system level, this is for new projects. There may be times when you need to change it for a specific project.

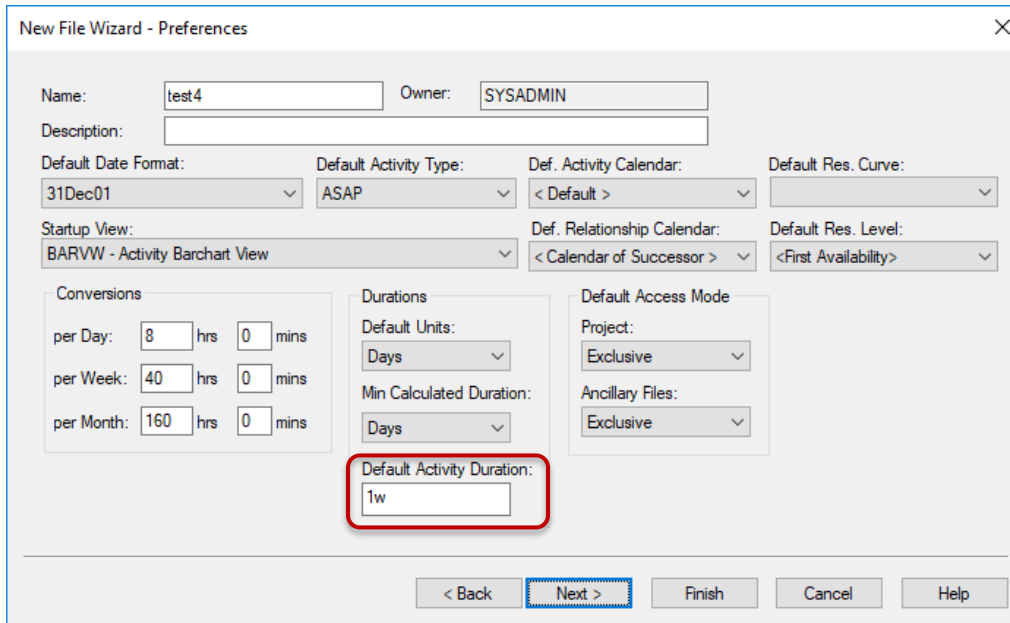
You can specify the default activity duration for an existing project in the **Default Activity Duration** field on the Project Properties Preferences tab. For a new project, you can change the default activity duration in the **Default Activity Duration** field on the New File Wizard – Preferences page.

The **Default Activity Duration** fields in Project Properties and the New File Wizard initially get their value from the **Default Duration** field on the Options dialog box; however, when you overwrite the value, all activities created after the value is changed default to the new value. You can enter a number with a unit (for example **1w** for 1 week) or you can enter a number without a unit. If you don't include a unit, Open Plan assumes that the unit is **Days**.

Project Properties



New File Wizard



Move Activities From One External Subproject to Another

Open Plan now allows you to move activities from one external subproject to another, or from an external project to a master project. You typically need to do this when activities have changed or you have additional planners and need to split up the work. Moving activities maintains relationships from the activities you move to other activities.

You can move activities when all of the following are true:

- The activity table is the driving table for the view.
- The master project contains one or more open external subprojects.
- The master project and its external subprojects are open in Exclusive mode or you (the current user) have used a shared-mode lock.

In the Spreadsheet view, select the activities that you want to move, right-click, and select **Move Activities...** on the context menu.

New Features and Enhancements

Activity ID	Activity Desc.	Duration	Activity Type	Ea
M1		4d	Subproject	01M 06M
M1.1		4d	ASAP	01M 06M
M2	Successor of M1	2d	ASAP	07M 08M
SUB1		9d	External Subproject	01M 12M
SUB1.A	Successor of M1	5d	AS	

Edit Activity...	
Activity Information...	F5
Allocation	
Progress...	
Link / Unlink Activities	Ctrl+F2
Move Activities...	
Add Relationships...	
Schedule Driver Analysis...	Ctrl+F3

Select to move activities to a different subproject.

The Target External Subproject group on the left displays the master project and a hierarchical list of open external subprojects. Open Plan excludes the source external subproject(s) or master project for the selected activities from this list.

After you select a project, the Target Parent Activity group on the right displays the subprojects activities within the selected external subproject, excluding any projects/activities that are parents of the source activities.

You can either select the subproject under which you want to move the activities or select **<None>** to move and place the activities as the topmost children of the selected project on the left.

When you select **Move Baseline Activities and Usage** Open Plan copies the baseline activities and usage records when their corresponding activities are moved. Open Plan does not delete the previous baseline activity records as those records are vital to preserving baseline history. That baseline activity record displays with an Activity ID value of "ID Unavailable" since the original activity to which it points no longer exists. Similarly, baseline usage records related to the old baseline activity record are not deleted (and are in fact still valid since the old baseline activity record has not been deleted). In the baseline usage spreadsheet, Open Plan displays the baseline usage records that point to the old name of the baseline activity ID as well as the new (copied) baseline usage records that point to the new (moved) baseline activity record.

New Features and Enhancements

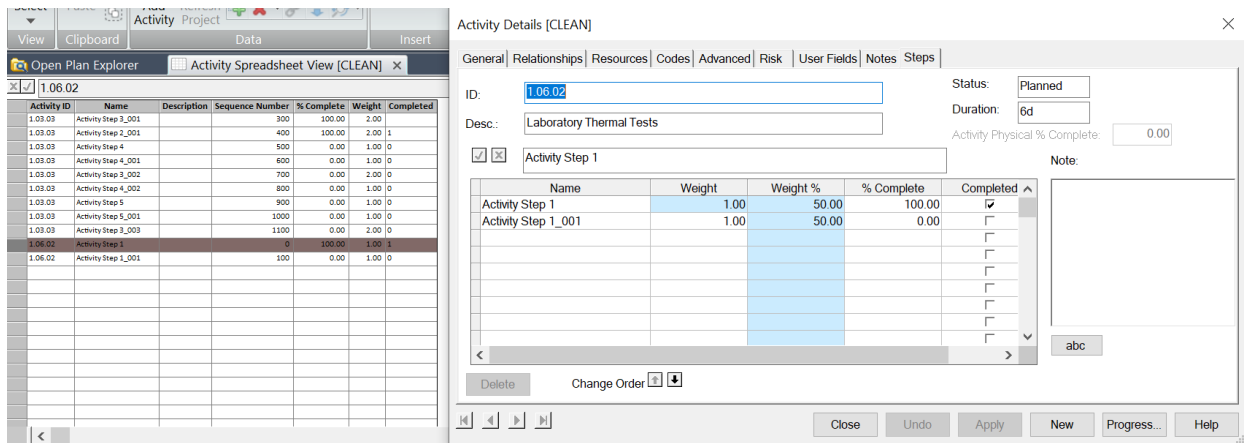
The **Move Baseline Activities and Usage** option is enabled when you have update baseline rights and there are baselines available on the project.

If you want to remove the old baseline records, update the baseline choosing the option to **Delete All Activities No Longer in Current Project**.

Create and Update Activity Steps in a Spreadsheet View

Open Plan now allows you to create, edit, delete, copy and paste activity steps into a Spreadsheet View of a project provided that the required key fields (such as **Activity ID** and **Name**) exist. This enhancement allows you to update steps to an existing project that has a large number of activities with multiple steps efficiently. In the previous version, Activity Steps in a Spreadsheet View were read-only.

Moreover, the displayed details in the Spreadsheet View and in the grid on the Steps tab of both the Activity Details and Activity Progress dialog boxes are in sync with one another other.



- When you select an activity in the spreadsheet, the steps associated with that activity display in the grid. Selecting another activity in the spreadsheet updates the displayed steps in the grid accordingly.
- When you update an activity step in the spreadsheet, the displayed data in the grid also updates, and vice versa. For example, adding a step in the spreadsheet also adds the step in the grid or updating the **% Complete** value and applying the change in the grid also updates its corresponding column in the spreadsheet.

Note: When copying an existing step, the pasted step uses the original activity name plus an underscore (_) and a three-digit number appended to it. For example, copying **Activity Step 2** adds **Activity Step 2_001**.

Resizable Dialog Boxes

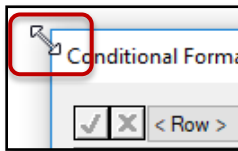
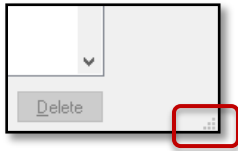
The following Open Plan dialog boxes are now resizable:

- **Conditional Formatting dialog box:** On the View tab, click **Conditional Formatting** in the Table menu group in spreadsheet view or click **Conditional Formatting** in the Network menu group in network view.
- **Title Blocks dialog box:** On the View tab, click **Title Blocks** in the Printing menu group.
- **Histogram Preferences dialog box:** On the View tab, click **Preferences** in the Histogram menu group in barchart view or click **Preferences** in the General menu group in histogram view.

New Features and Enhancements

- **Time-Phased View Options dialog box:** When you are in the Time-Phased Completions or Cash Flow view, right-click in the view and click **Preferences**.

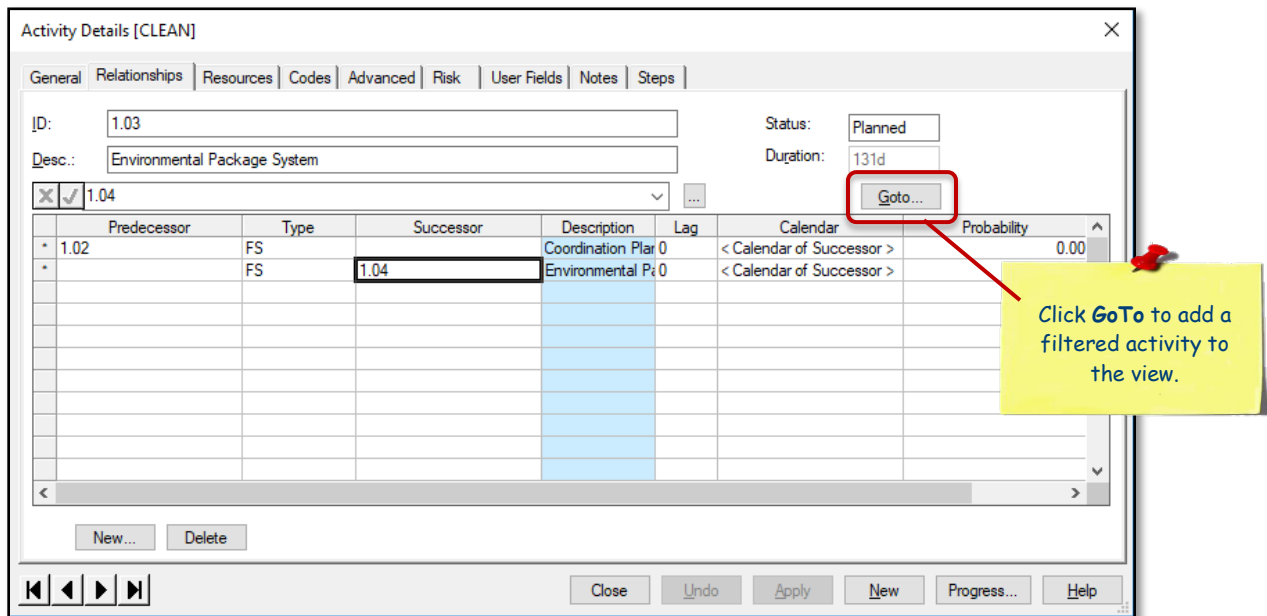
A grabber pad in the bottom right corner of a dialog box indicates that the dialog box is resizable. Click and drag the sides of the dialog box to resize.



GoTo Enhancement

The GoTo option now allows you to display an activity that is hidden from a view by a filter. Previously, this option only worked for activities that were not filtered out.

For more information and steps, see *Display a Filtered Activity in a View* in the Open Plan online help.



Grouping Hierarchical Structure Enhancements

Open Plan has always supported grouping (sub-sectioning) by codes. Version 8.5 includes the following enhancements relating to grouping on hierarchical structures:

When you assign a hierarchy code file on the Spreadsheet Preferences Grouping tab with **Break Level = 0**, Open Plan now automatically indents the hierarchy structure in the spreadsheet and color codes the levels as follows:

New Features and Enhancements

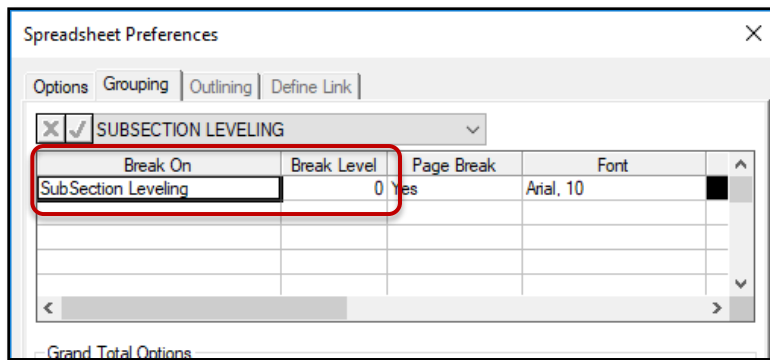
- Levels 1 through 5 = Blue
- Levels 6 through 10 = Green
- Levels 11 through 15 = Gold
- Levels 16 through 20 = Purple

The colors repeat after level 20.

A view can include up to 40 indented levels in a hierarchy.

The advantage of doing it this way is that you don't have to manually enter each level of the hierarchy into the Grouping tab grid. When you use **Break Level = 0**, Open Plan automatically aligns and colors each level in the view.

Although you cannot select colors when you use **Break Level = 0**, you can still manually select colors when you use any other Break Level.



Activity ID	Activity Desc.	Duration	Early Start	Early Finish	Total Float	Computed Status
Top Level						
ACT_!	Top Level	0	01Jan20	05May20	0	Planned
Activity A						
ACT_A	Activity A	10d	01Jan20	14Jan20	90d	Planned
Activity B						
ACT_B	Activity B	20d	01Jan20	27Jan20	80d	Planned
Activity C						
ACT_	Activity C	30d	01Jan20	06Feb20	70d	Planned
Activity D						
AC	Activity D	40d	01Jan20	19Feb20	60d	Planned
Activity E						
	Activity E	50d	01Jan20	03Mar20	50d	Planned
Activity F						
	Activity F	60d	01Jan20	16Mar20	40d	Planned

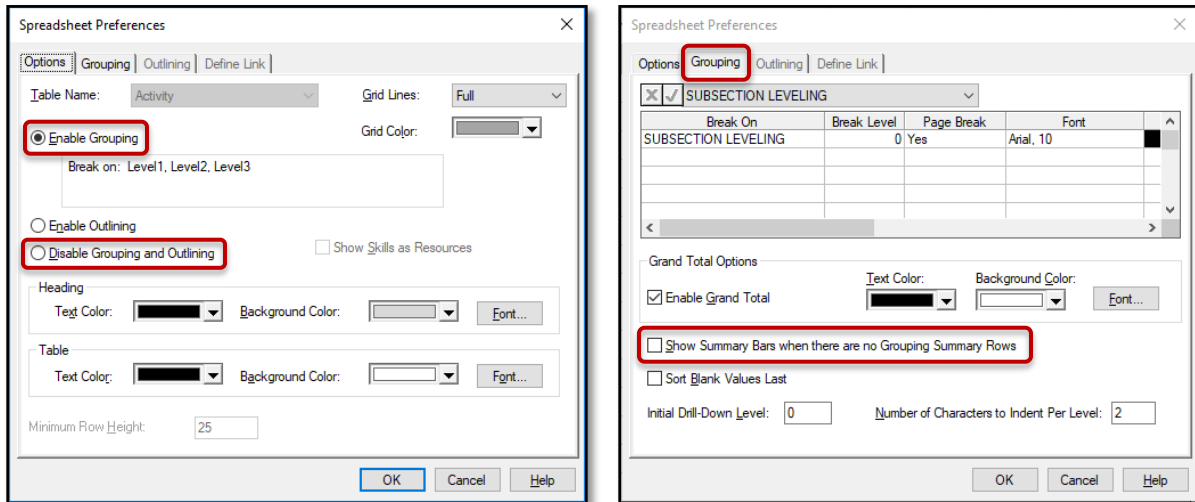
Renamed Tabs and Options

On the Spreadsheet Preferences dialog box:

- The Subsections tab is renamed to Grouping tab.

New Features and Enhancements

- The **Enable Subsection** radio button on the Options tab is renamed to **Enable Grouping**.
- The **Disable Subsection and Outlining** radio button on the Options tab is renamed to **Disable Grouping and Outlining**.
- The **Show Summary Bars when there are no Subsection Summary Rows** option on the Subsection tab (now Grouping tab) is renamed to **Show Summary Bars when there are no Grouping Summary Rows**.



Delete Projects Using Internal or Multi-Instance Batch

Over time, in a large user environment, the list of projects can grow very large. Users might create several copies of their projects (What Ifs, Month End Copies, SRAs, etc.) that do not need to be retained long-term. It can be very time-consuming for Administrators to manually delete these projects and can also open up the possibility of unintentionally deleting an in-use project.

Open Plan now allows you to delete projects using internal or multi-instance batches.

DROPPROJECT

Syntax: DROPPROJECT [ProjectName] [ProjectName...]

Description: This command deletes one or more projects. Ancillary files are not affected. If multiple projects are referenced and an error occurs, the process is aborted and the remaining projects are not deleted.

Valid Parameters are:

ProjectName - Name of project to delete, for example, CLEAN.

Example:

```
DROPPROJECT CLEAN CONSTR MOVIE SHIP
```

Note: The above information is also located in the Open Plan Batch Processor Guide.

IPMDR Renamed to IPMDAR

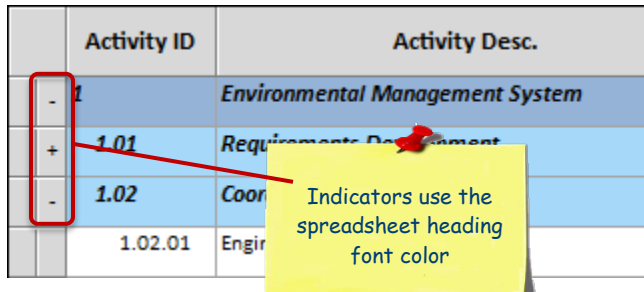
The Department of Defense contractor reporting format IPMDR is renamed to Integrated Program Management Data Analysis Report (IPMDAR).

Expand and Collapse (+/-) Indicator Color Enhancement

Previously, when you changed the background color of the row and column headers to a dark color in Spreadsheet Preferences, the expand and collapse indicators (+/-) became almost invisible.

The expand and collapse indicators now use the font color that is assigned to the spreadsheet heading text.

	Activity ID	Activity Desc.
-	1	Environmental Management System
+	1.01	Requirements Development
-	1.02	Coordination
	1.02.01	Engineering



Performance Improvements

Large Multi-Project Notes

Performance has been improved when backing up multi-projects that include a large number of notes.

Upgrade Scripts Unicode Setting

The default setting in the upgrade scripts has changed to enable the Unicode option by default.

Note: For more information about upgrading, see *Upgrade from Earlier Versions of Open Plan* in the Deltek Open Plan Installation Guide.

Ability to Not Concatenate the Control Account ID and Work Package ID When Exporting an IPMDAR File

A new System Preferences option called **USEUNIQUEWPCOSTDATAPROCESS** allows you to enable or disable concatenation of Control Account key fields and the Work Package ID when creating an Integrated Program Management Data and Analysis Report (IPMDAR) file during the Schedule Data Export process.

- If **USEUNIQUEWPCOSTDATAPROCESS** is not present or is set to **0**, Open Plan performs concatenation of CA ID and the WP ID when exporting to IPMDAR format. This is the default value.
Example: WorkPackageID: "1.1.1.2 / 1420 / 01"
- If **USEUNIQUEWPCOSTDATAPROCESS** is set to **1**, Open Plan does not perform concatenation of CA ID and the WP ID when exporting to IPMDAR format.
Example: WorkPackageID: "01"

Ability to Use a Local Folder for Creating or Restoring a Backup File

A new User Preference option called **UseLocalFileForBackup** allows you to enable or disable the use of a local folder in creating or restoring a backup file.

- If **UseLocalFileForBackup** is set to **0**, Open Plan creates a backup file in the original location that you have specified and reads the backup file directly from the original location when restoring. This is the default value.
- If **UseLocalFileForBackup** is set to **1**:
 - For backup, if Open Plan determines that the original target folder is on a network drive, it creates the backup file first on your local drive. Then, it copies the backup file to the target location, replacing the existing backup file (if applicable) with the newly created file.
 - For restore, if Open Plan determines that the original folder containing the backup is on a network drive, it copies the file from the network drive and saves it into a temporary folder on your local drive, where it reads that file.

Sources for Critical Path and Driving Path Fields

You can now select the sources for **Critical Path Field** and **Driving Path Field** on the IPMDAR Configure Activity Fields dialog box. These fields are mapped to specific files or user-defined fields (UDFs) that contain the appropriate information for each Activity ID.

Note: The options for these two new fields include numeric UDFs (whose value is 0 or 1), text UDFs (whose value is true, 1, 0, or false), and filters. For **Critical Path Field**, it also accepts the following values: Critical, Not Critical, Controlling Critical, and Most Critical.

The screenshot shows the 'IPMDAR Configure Activity Fields' dialog box. It contains a table with two columns: 'Field' and 'Source'. The 'Critical Path Field' and 'Driving Path Field' rows are highlighted with red boxes. Two yellow callout boxes provide additional information:

- Callout 1:** You cannot leave **Critical Path Field** blank. It displays **Critical Flag** by default.
- Callout 2:** **Driving Path Field** is optional. It displays **<None>** by default.

Field	Source
Task Subtype: <i>(SVT; SMT; CMT; RMT)</i>	< None >
Task Planning Level <i>(SLPP; CA; PP; WP; ACT)</i>	< Default >
WBS Id	< None >
OBS Id	< None >
Control Account Id	< None >
Work Package Id	< None >
Integrated Master Plan Id	< None >
SOW Reference	< None >
Subcontractor Reference / Id	< None >
Earned Value Technique	EVT
Critical Path Field	Critical Flag
Driving Path Field	< None >

Buttons: OK, Cancel, Help

Software Issues Resolved

Add-Ins » Resource Management Wallchart

Defect 1373740

Description: When you opened the Resource Management Wall Chart add-in tool from any barchart views for a project, the default dates on the Wall Chart Options dialog box would always be in the US format (M-D-Y) regardless of the default date format set in the computer you were using (for example, D-M-Y).

Customers Impacted: Open Plan customers who were not using the D-M-Y format by default.

Workaround Before Fix: Enter dates in D-M-Y format.

Edit » Activity Progress

Defect 1326897

Description: When the system preference **AllowEditPPC** was set to **1** (enabled) and the EVT type was not **Steps**, you could not edit the **Activity Physical % Complete** field on the Resources tab of the Progress dialog box.

Customers Impacted: Open Plan customers editing **Activity Physical % Complete**.

Workaround Before Fix: None.

Defect 1280067

Description: When activities using certain EVT types had **Actual Finish** date that was equal to or later than Time Now, Open Plan would set the activity PPC column to **0** instead of **100%** even after you ran Time Analysis with the **Observe Actual Future Dates** option selected.

Customers Impacted: Open Plan customers using the **Observe Actual Future Dates** option.

Workaround Before Fix: Set the system preference **AllowEditPPC** to **1** and then set the PPC values to **100%** manually.

Defect 463319

Description: When you entered an **Actual Finish** date on the **Activity Progress** dialog box, pressing Tab on your keyboard would select the **Complete** option. Pressing **Enter** or clicking any other fields would clear the selected option.

Customers Impacted: All Open Plan customers.

Workaround Before Fix: None.

File » Backup - Restore

Defect 1348826

Description: When the project you were trying to back up contained invalid baseline dates, the backup process failed.

Customers Impacted: Open Plan customers backing up a project with invalid dates.

Workaround Before Fix: Correct the invalid dates.

Defect 1226190

Description: When you restored a .bk3 file where **Activity Description** length was longer than the database maximum limit for that field, Open Plan did not populate the **Activity Description** field.

Customers Impacted: All Open Plan customers with **Activity Description** longer than the database maximum field limit.

Workaround Before Fix: None.

Edit » Cut – Copy - Paste

Defect 1145587

Description: When you copied a number of rows from a tool outside of Open Plan and tried to paste them, Open Plan pasted all rows except for the last one. For example, when you copied rows 01 through 03, it only pasted rows 01 and 02.

Customers Impacted: All Open Plan customers.

Workaround Before Fix: Copy and paste an extra row.

Edit » Resource Details

Defect 1285793

Description: When you selected a project for which a resource would be reserved on the Resource Details dialog box, saved the change, and opened the dialog box again, Open Plan did not save the selected project.

Customers Impacted: Open Plan customers reserving a resource for a project.

Workaround Before Fix: None.

File » Import – Export » MS Project

Defect 1324809

Description: When you imported a file that contained hours per day, hours per week, or days per month with fractional values from Microsoft Project (MS Project), Open Plan did not import the values correctly. For example, 7.5 hours per day displayed as 8.0 hours instead of 7 hours 30 minutes.

Customers Impacted: Open Plan users importing file containing work unit with fractional values from MS Project.

Workaround Before Fix: After import, change the default units manually on the Project Properties dialog box.

Defect 1368174

Description: When you exported a project that contained hours per day with minutes value greater than 0, (for example 7 hrs 30 mins), Open Plan did not export the time units to MS Project correctly.

Customers Impacted: Open Plan customers exporting projects with partial time units to MS Project.

Workaround Before Fix: After export, adjust time units manually in MS Project following export.

Defect 1255088

Description: When you imported a file from MS Project, Open Plan did not import calendar exceptions, such as holidays and extra work days.

Customers Impacted: Open Plan customers importing files from MS Project.

Workaround Before Fix: None.

File » Manage Files » Owner and Access Rights

Defect 1243805

Description: When you reassigned or changed the owner of all objects using the **Change Owner** option on the Change Ownership and Access Rights dialog box, Open Plan did not immediately reflect the change in ownership for the Batch Global Edits, Filters, Global Edits, and Sorts objects to the new owner.

Customers Impacted: Open Plan customers reassigning or changing the owner of objects using the **Change Owner** button on the Ownership and Access rights dialog box.

Workaround Before Fix: Take the following actions:

1. Exit Open Plan, and log on again.
2. Access the Change Access Rights dialog box to see the changes were made.

File » Preferences

Defect 1321956

Description: When you tried to add a logo on the Symbols dialog box, you encountered an error message.

Customers Impacted: Open Plan customers adding logos.

Workaround Before Fix: None.

File » Shared Mode

Defect 1335765

Description: When you opened a master project in Shared mode, and another user has one of the external subprojects opened shared and locked, you might encounter several issues, such as the following:

- Still allowed to edit activities, assignments, relationships, steps, and related details that belonged to the locked subproject. .
- Not get a notification when User2 made changes to and unlocked the project.
- Unable to view all changes that User2 made during the lock following a refresh.

Customers Impacted: Open Plan customers opening projects in Shared mode.

Workaround Before Fix: None.

Defect 1375136

Description: When you opened a project in Shared mode and deleted an activity or other related record, the **LASTUPDATE** field did not change.

Customers Impacted: Open Plan customers working on a project in Shared mode.

Workaround Before Fix: Close the project and open it again.

Project » Multi-Project

Defect 1235003

Description: When you opened a project, sometimes Open Plan would report that it could not resolve field. You would see the error, which was related to fields that could not be resolved, in the opwin.log.

Customers Impacted: All Open Plan customers.

Workaround Before Fix: None.

Project » Resource Scheduling

Defect 427754

Description: When you tried to run Resource Scheduling, Open Plan crashed unexpectedly.

Customers Impacted: Open Plan customers running Resource Scheduling.

Workaround Before Fix: None.

Defect 866397

Description: After you ran Resource Scheduling, the **Used** value did not match the **Level** value on the Activity Resource Allocation dialog box.

Customers Impacted: Open Plan customers running Resource Scheduling.

Workaround Before Fix: None.

Defect 1169214

Description: When you assigned a resource to an activity and then ran resource-limited Resource Scheduling with the **Hard Zeros** option selected, Open Plan still scheduled an activity for a period when the resource was not available.

Customers Impacted: Open Plan customers running resource-limited Resource Scheduling with **Hard Zeros** selected.

Workaround Before Fix: None.

Defect 1169735

Description: When you ran a resource-limited Resource Scheduling and the resource assigned was based on Skills, Open Plan displayed incorrect schedule dates.

Customers Impacted: Open Plan users running Resource Scheduling with skills.

Workaround Before Fix: None.

Project » Schedule Driver Analysis

Defect 845348

Description: When the role assigned to you had the **Time Analysis** item set to disabled in EPM Security Administrator (EPM SA) and you ran Schedule Driver Analysis, Open Plan would display incorrect results.

Customers Impacted: Open Plan customers running Schedule Driver Analysis and whose role has **Time Analysis** disabled in EPM SA.

Workaround Before Fix: In EPM SA, enable **Processes » Time Analysis** on the Open Plan Professional tab of the Roles Details form.

Defect 1224691

Description: When you ran Schedule Driver Analysis before Time Analysis on a large project, Open Plan took a long time to complete the Schedule Driver Analysis process.

Customers Impacted: Open Plan customers running Schedule Driver Analysis on large projects.

Workaround Before Fix: Run Time Analysis first before Schedule Driver Analysis.

Project » Time Analysis

Defect 1262836

Description: When the role assigned to you had the **Time Analysis** item set to disabled in EPM SA, Open Plan still allowed you to select the **Time Analysis** option on the Risk Analysis and Cost Calculation dialog boxes.

Customers Impacted: Open Plan customers whose role has **Time Analysis** disabled in EPM SA.

Workaround Before Fix: None.

Additional Notes: When you try to run other processes with **Time Analysis** selected, an error message displays in the log file.

Tools » Calculated Fields

Defect 339797

Description: When you rounded negative numbers, Open Plan displayed incorrect results. For example, it rounded **-4.3** to **-3** instead of **-4**.

Customers Impacted: All Open Plan customers.

Workaround Before Fix: None.

Views

Defect 1283880

Description: When you right-click a relationship in the relationship spreadsheet, the **Edit Relationship** option did not display on the context menu.

Customers Impacted: Open Plan customers editing relationships.

Workaround Before Fix: None.

Views » Barchart View » Bar Sets

Defect 372811

Description: When you tried to open a project using a view with a custom bar set, you encountered an error message.

Customers Impacted: Open Plan customers opening a project using a view with a custom bar set.

Workaround Before Fix: None.

Views » Barchart View

Defect 1341489

Description: When you clicked a cell in the spreadsheet part of a Barchart view while the Steps tab on the Activity Progress dialog box was active, Open Plan could not set the focus on the selected cell.

Customers Impacted: Open Plan customers using the Steps tab on the Activity Progress dialog box in a Barchart view.

Workaround Before Fix: None.

Views » Code Views

Defect 1343716

Description: When you opened a code spreadsheet, the child rows used the default font, foreground, and background colors specified for outline rows.

Customers Impacted: All Open Plan customers.

Workaround Before Fix: Use conditional formatting to override the font and color settings for child rows.

View » Conditional Formatting

Defect 1198093

Description: When the role assigned to you had the **Conditional Formatting** item set to disabled in EPM SA, you could still view and select the **Conditional Formatting** option in Open Plan.

Customers Impacted: All Open Plan customers.

Workaround Before Fix: None.

Views » Histogram View

Defect 987132

Description: When you applied a filter to a project in a Histogram view (HISTVW), the Status bar displayed **<no filter>** instead of the applied filter.

Customers Impacted: Open Plan customers using filter for a project in a Histogram view.

Workaround Before Fix: None.

Views » Spreadsheet View

Defect 1279210

Description: When an activity had **Actual Finish** date on the Activity Progress dialog box, you could still modify the Physical % Complete column in a spreadsheet view.

Customers Impacted: All Open Plan customers.

Workaround Before Fix: None.

Database Changes

This section includes the changes made to the database for this release.

Tables

New Tables

Table Name	Description
None	

Modified Tables

Table Name	Description
None	

Removed Tables

Table Name
None

Columns

New Columns in Existing Tables

Table Name	Column Name	Data Type	Description
OPP_PRJ	ESDATE	DATE	The early start date for a project.
OPP_PRJ	DEFACTDUR	DURATION	The default duration assigned to a new activity in a project
OPP_PRJ	LSDATE	DATE	The late start date for a project.
OPP_PRJ	SSDATE	DATE	The schedule start date for a project.

Changes to Existing Columns

Table Name	Column Name	Notes
None		

Removed Columns

Table Name	Column Name	Data Type
None		

Objects

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

New Objects

Object Name	Object Type
None	

Modified Objects

Object Name	Object Type
None	

Deleted Objects

Object Name	Object Type
None	

Data

This section includes changes to data applied by scripts.

Data Change
None

Appendix A: For Additional Information

Deltek Support Center

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

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

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

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

Access Deltek Support Center

To access the Deltek Support Center:

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

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

Available Documentation for this Release

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

Document Name	Description
Deltek Open Plan Batch Processor Guide	This document contains information about running the Open Plan multi-instance batch processor.
Deltek Open Plan Developer's Guide	This document is meant to serve as a reference manual for more technical topics in Open Plan.
Deltek Open Plan Guided Tour	This document introduces you to the basic Open Plan operations using sample project data that comes with your installation.
Deltek Open Plan Installation Guide	This document is meant to serve as a guideline for hardware and software requirements and provide your firm's IT department with information about the technical deployment architecture.
Deltek Open Plan Milestone Professional Interface Add-In Module	This document is meant to serve as a guideline for using the Milestones Link tool.
Deltek Open Plan Technical Overview and System Requirements	This document is meant to serve as a guideline for hardware and software requirements and provide your firm's IT department with information about the technical deployment architecture.

About Deltek

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