Deltek Project Information Management

PIM 23.0 Release Notes

October 6, 2023

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Contents

Introduction

Welcome to Deltek PIM 23.0 Release Notes. These release notes contain a summary of the following:

- Summary of Key Features and Changes
- Pre-installation Information
- Known Issues
- Deprecated Features
- Major New Features and Enhancements
- Software Issues Resolved.

Important Note

This document contains important information about changes to the software and its components within the latest release of Deltek PIM. Deltek assumes that you have read and understood the information within this document before installing, upgrading, or working with the product.

Some of the features described in this document are only available in a standard installation and may not be available if you are using custom bands and entities.

Please review the Upgrade Actions for System Administrators for important post-upgrade tasks.

If you have any questions or concerns, you are advised to consult with your assigned Deltek account manager or consultant before proceeding with an upgrade. Alternatively, you can contact Customer Care through the Deltek Support Center.

What's New in PIM 23 Video

To see the new features in PIM 23.0, watch this video: What's New in PIM v23.0.

Pre-Installation Information

This section provides important pre-installation information, including hardware and software requirements.

Software Support

This section provides information about which versions of PIM are currently supported, and announcements relating to the support of third-party software.

PIM Software Support

For information on which versions Deltek support, please refer to the following link:

Customer Care Support Lifecycle: Deltek Project Information Management (PIM)

Details for all PIM versions from 19.1 to 23.0 are contained in the respective product documentation for those releases.

> **Note:** You may still log support cases against unsupported software versions. However, please note that if you are running a version of PIM prior to 19.1, to resolve any issues that arise, we may require you to upgrade to the latest version.

Withdrawal of Third-Party Software Support

As of PIM 19.1, SQL Server 2008R2 is no longer supported. If you are using this version of SQL Server, your site will be flagged as requiring an upgrade when you submit a PIM upgrade request.

Reminder of Third-party Server Software Support

Please be aware that Microsoft have withdrawn support for the server versions 2008 & 2008R2 as of January 2020. If you are planning to upgrade to PIM 21.0 and you are operating on one of these server versions, you will be required to upgrade your server. Please contact your Account Manager if you require a server migration.

Notice of Third-party Client Software Support

Please be aware that Microsoft have withdrawn support for the Windows 7 PC operating system as of January 2020. This means that PCs running this version will no longer receive security and framework updates. Owing to this, Deltek will limit any new client application development work to the currently supported versions of Windows 8 and 10 operating systems. We recommend that you review and update your client machines as a matter of urgency.

As of July 2022, SQL Server 2012 will be withdrawn from Microsoft support schedule. The next release of PIM will require you to upgrade SQL Server to a minimum of SQL 2014.

Mandatory SSRS Install to Receive PIM 20.0+ Upgrades

As part of our continuing product improvements, we are migrating our reporting in PIM into SSRS (SQL Server Reporting Services). From PIM 20.0 onwards, you will be required to make provisions for SQL Server Reporting Services in your PIM environment. Please contact your account manager for information on how best to achieve this. Deltek can provide a guide that walks you through the process, which is recommended for clients with a capable IT department. Alternatively, Deltek offers a chargeable infrastructure service to configure this for you.

Server Software Requirements

To upgrade to this version, your web server environment must be on at least .NET 4.8. If this is not already installed, you will be asked to install this version ahead of your PIM installation or upgrade.

Optional Server Components

Name	Purpose	Notes	PIM Version at Last Update (File Version)
PIM Viewer (Rasterex)	2D document mark-up	If you are an existing Rasterex license holder upgrading from a pre-2017 version of PIM, you will need to migrate to this new IIS server component. If you are on a post-2017 version of PIM, no action is required.	**19.2** (64R5B12)

Client Hardware Requirements

Display Resolution

To ensure the optimum user experience, the recommended display resolution is 1440 x 900 or higher.

Upgrade Actions for System Administrators

System administrators should consider the following actions after an upgrade:

Azure Single Sign-On:

- If you have already implemented PIM's new Azure Single Sign-On, you will need to add the following redirect URI to your existing Azure App registration, under the Authentication tab, for your PIM Single Sign-On entry:

  ```
  https://{Your_PIM_Site_URL}/XWeb/Security/IdentityProviderCallback.ashx?provider=Microsoft&applicationType=Identity
  ```

- The Secret ID is now a required to add an extra security layer to the Azure authentication model. If you previously implemented Azure Single Sign-On in PIM 22.0, you will need to revisit your Azure App registration to ensure a secret ID has been added under the Certificates & Secrets tab. If you don't have a secret ID registered, you will need to create one and then enter it into the corresponding field on the PIM Single Sign-On Configuration page in the Admin zone. This ensures the logon method works from PIM 23.0.

Email Flows:

- To futureproof your PIM system, consider your email construct and whether to implement against the new modernized mail flow features added in the 23.0 release.

Post-Installation Information

This section provides information on additional components that you install to enable specific functionality in the PIM software. Some components are optional and depend on whether a user of a machine utilizes a particular feature.

Upgrading PIM Components

If you are upgrading from a previous version, you may already have the latest versions of some of the PIM user machine components. To determine if you need to upgrade a particular component on client PCs, compare your previous version of PIM to the version listed in the table below for any components that you currently have installed. If your previous version of PIM precedes the version mentioned for a particular component, you will need to upgrade it to the latest version. Your version of PIM is displayed on the bottom-right of the PIM Administration Zone screen.

To download the components for group policy packaging or direct user installs, navigate to:

Administration Zone > **System Configuration** > **System Setup** > **Client Components**

Outlook Add-in

You must install the latest version of PIM before you install the Outlook Add-in component. In addition, the Outlook Add-in requires .NET 4.7.2 to be installed on client machines.

Local File Management

Local File Management (LFM) now requires .NET 7.0. If this is not already installed on a user's machine, the LFM installer will automatically install it. To install LFM, you are required to manually roll out the latest LFM client component to users' machines, either by Group Policy or by provisioning users with a link to the installer.

Universal File Management

Universal File Management (UFM) now requires .NET 7.0. If this is not already installed, the UFM installer will automatically install it. You must install the latest UFM component on all servers running UFM for Universal Document Control (UDC).

> **Attention:** The UFM component typically undergoes updates with each major release of PIM. It is important to guarantee that you obtain the most recent version and install it on every server running UFM. This ensures compatibility with the upgraded version of PIM.

Component	Notes	PIM Version of Last Update
Essential Components – Required on all client PCs		
Working Files Allows the DMS to interact with files in the workingfiles folder on a client PC.	This component has been removed from PIM 23.0. New users will now need to move to the cross-browser compatible Local File Management (LFM) component (see below).	19.0.1
Local File Management (LFM) Enables the management and publishing of local files in any modern browser.	This is a replacement for Working Files since it supports all modern browsers. **Requires .NET 7.0.**	22.0
Outlook Add-In Provides features that are integrated into Microsoft Outlook.	In addition to 32-bit, a 64-bit version is provided for 64-bit Outlook. **Requires .NET Framework 4.7.2.**	22.0
Excel Link Provides rapid export of lists from the system into MS Excel.	Only supported when running PIM in full Edge IE Mode. In other cases, server Excel output will be prepared.	19.0.1
Optional Components – Required only if specific modules are installed on a client PC		
AutoCAD Integrator Provides features for integration with AutoCAD.		22.0
Revit Integrator Provides features for the integration with Revit.		22.0
MYOB API Ledger Connector Ledger connector functionality used if you integrate with MYOB with the available API functionality.		20.0
MYOB Ledger Connector Ledger connector functionality used if you integrate with MYOB without using the API.	MYOB removed support for TLS1.0 on their live API. This version addresses this requirement, but it requires additional registry entries to be applied on client machines. You must request this from the PIM Customer Care team.	19.1

Component	Notes	PIM Version of Last Update
Sage 50 Ledger Connector Ledger connector functionality for integration with Sage 50 accounts.	Please see KB 91867 if you are planning to upgrade your version of Sage 50 accounts.	19.0.1
Sage 200 Ledger Connector Ledger connector functionality for integration with Sage 200 accounts.	Please see KB 92151 if you are planning to upgrade your version of Sage 200 accounts.	20.0
TAPI Provides telephony integration.		2015.0032
Universal File Management (UFM) Enables access to files stored on shared network drives without requiring them to be published to PIM.	Installed on each document server that you want to provide access to from PIM. **Requires .NET 7.0.**	23.0

Obsolete Components from PIM 2017 Onwards

The following components are obsolete and can therefore be removed from any machines.

Name	Notes
EML Opener	This component was used to view emails after they were stored in PIM. This process can now be handled natively by Microsoft Outlook. Both methods have some weaknesses in that there are some emails that they cannot convert.
Intranet Readiness Application	No longer used extensively by our customer care department.
Outlook Sync	Replaced by the Outlook Add-in.
Rasterex Client	In the 2017 version, this was replaced by HTML5 viewers for those clients who have purchased the universal viewer. This is natively supported in browsers and so the software installed on the client PC is no longer needed.

Mobile App Requirements

The previous PIM 22.0 release introduced new maintenance update versions of Android and iOS Timesheet & Expenses and PIM Mobile Working apps to bring them up to the latest operating system versions for both platforms.

As part of this maintenance update, the following minimum mobile operating system versions are required to update or install the latest mobile apps:

- Apple iOS 12 (this was iOS 10 in previous releases)
- Android 8.0 (this was Android 7.0 in previous releases)

If your device does not meet these requirements, you cannot update your mobile apps to the latest versions. The existing installed version will persist on your device, but it will not include the new features. In addition, backwards compatibility cannot be assured or supported if older app features are no longer viable with the newly upgraded PIM version. For information, see PIM Mobile App Minimum Device Requirements.

Apryse Requirements

Apryse, which replaced the Rasterex Viewer in PIM 20.1 as the internal 2D document viewer for collaborating on drawings, office documents, and PDF files, requires Microsoft Visual C++ Redistributable 2013 x86 to be installed on the server. For information, see https://docs.apryse.com/documentation/core/info/prerequisites/windows/.

Known Issues

This section provides a summary of all known issues in this release.

For information on known issues in previous releases, see Appendix C: Known Issues in Previous Releases.

Mailbox Alias Email Setting Only Applies to Certain Outbound Email Types

The new Mailbox Alias Email configuration setting will only apply to certain outbound emails. We are aiming to resolve this as part of the modernization of PIM's mail flows across the product.

Workflow Email Attachments Not Included Under New SMTP Relay and Azure SMTP Client Mail Providers

PIM's two new email flow providers, SMTP Relay and Azure SMTP Client, route all Workflow emails through PIM's new unified mail handler. However, a known issue prevents intended physical document attachments from being included in emails sent by either provider. If your organization is heavily dependent on Workflow modules, such as DLMA, SCT, Contract Management, or Mobile Working, it is recommended that you wait for the PIM 23.0.1 maintenance release for a fix before you implement either of these new providers.

Summary of Key Features and Changes

This section provides a summary of the key features and changes in this release.

Deprecated Features

The following features have been deprecated in this release:

- **HTTP Only**. From PIM 23.0, HTTPS is now forced, and you cannot access the site, including any custom parts, using the HTTP protocol.
- **Legacy Performance Ratings**. Performance Ratings was replaced by Team Evaluation in PIM 22.0.

For more information, see PIM 23.0 Deprecated Features.

New Features

General

Feature	Description
Action Improvements	The following feature enhancements have been made to actions: • More details included in emails relating to completed and reassigned actions. • See the entity records that actions were entered against via the Actions dashpart, and who actions have been passed to. • Search against text in the action details field in the advanced action search utility. • View document properties when you click document links in action records. • Action types now alphabetically ordered in the dropdown list. More information
Add Email Addresses to Organizations	Add email addresses to organizations, such as general and support email addresses. More information
Search for Contacts by Line Manager	Filter action search results by line manager when you run an advanced internal contact search. More information
Display System Usage Charts as Stacked Columns	System Usage Charts can now be displayed as Stacked Column charts, split into months, when an internal organisation is selected. More information

Document Management

Feature	Description
Publish Snapshots of Unmanaged Documents	Publish batches of snapshots of unmanaged files to PIM while you continue to work on them. More information
Smart Image Mode for Photos and Images	Focus on images in the new Image Mode, available in the Smart View of the DMS. You can also now view the metadata for images from within PIM. More information
Updated Force Check-in Utility	The Force Check-in utility now includes a Data Checked Out column and a user filter option. You can also now express check-in files from the Document Properties page. More information

PIM Teamwork

Feature	Description
Add Logos to Teamwork Emails	Add logos to Teamwork emails that get sent out. More information
New Teamwork-specific Dashparts	The following dashparts are now available for Teamwork users: ▪ Teamwork - My Snags/My Punch List Items ▪ Teamwork – My Observations ▪ Teamwork – My Bids/Tenders ▪ Teamwork – My Contract Management Items ▪ Teamwork – My Drawing Approvals. More information
Invite Link Expiry	Invites to join projects and enquiries now expire after 3 weeks. More information

Design Management

Feature	Description
Revit, AutoCAD 2024 Support	PIM now supports Revit 2024 and AutoCAD 2024.
Apryse Updated	Apryse has been updated to the latest version (formerly named PDFTron)

Project Accounting

Feature	Description
Filter by Project Owner in Outstanding T&M Lines Dashpart	A new Project Owner filter allows project managers to search for outstanding T&M lines by project owner. More information

Mobile Working

Feature	Description
Live PIM Browsing Improvements	Quickly find documents related to your projects or enquiries when you navigate to a project or enquiry record via the new Documents option. Several other improvements have been made, including: ▪ Filters now easier to select. ▪ Run blank searches for contacts, documents, and organizations. ▪ Advanced Filters button renamed to Doc Pools/Filter – it includes two tabs to switch between document pool filters and advanced filters. More information

Administration

Feature	Description
Bulk Manage Actions	Administrators can now bulk complete, reassign, and abandon actions using the new Manage Actions tool. More information
Modernized Outbound Mail Flow	Provisions for configuration for your outbound email provider directly in PIM. A new Email Configuration page consolidates global email settings, with the option to configure your email provider. More information
Manage Delegated Approval Tickets	Manage delegated approval tickets when delegated approvers are absent. More information
Enhanced Absence Reporting	Export data from the Manage Entitlements view to Excel. The Search Absence Entitlements report now allows you to filter, sort, and group by job category and department, and you can now select the operand when using the filters. More information

Feature	Description
Filter DMS Security Definitions	Filter the list of existing security definitions on the DMS Security Definitions page.

PIM Connector - Unionpoint Integrations

Feature	Description
Support for Deltek Unionpoint Access	Issue OAuth 2.0 client IDs for Unionpoint integration connections to access your site via the Unionpoint PIM. More information

Deprecated Features

This section provides a summary of all deprecated features in all versions of Deltek PIM, and any planned deprecated features in upcoming releases.

For information on deprecated features in previous releases, see Appendix B: Deprecated Features in Previous Releases .

PIM 23.0 Deprecated Features

Feature	Notes
HTTP Only	From PIM 23.0, you cannot access your site via the HTTP protocol, including any custom parts on your site that use it. You must now use the more secure HTTPS protocol.
Legacy Performance Ratings	Performance Ratings was replaced by the Team Evaluation module in PIM 22.0.

Planned Deprecated Features

The following features are planned for deprecation in future releases.

Feature	Notes
Customer Customizations of Older Pages	Clients with customized legacy pages are strongly advised to undertake customization reviews as part of the broader Optimization Workshop. Contact your Account Manager for more information.

The following features are under sustaining support until at least 22.0, but are planned for deprecation:

Feature	Notes
Asset Management	This module is not thought to be used anymore.
Request For Information	This refers to the old system and is now replaced by Contract Management.
Variations	This is now covered by Contract Management for non-Project Accounting systems.
Activity	This heritage module is not thought to be used anymore.
Hard Copy Scanner (Inbox)	Universal Document Control (UDC) will provide a partial replacement for this.
Sales Applications for Payments	This will be replaced by a tandem Sales Payment feature – consultancy will be required to aid this transition.

Feature	Notes
Purchase Invoice Line Approvals	Following the implementation of document-level approvals for purchase invoices in 20.0, we plan to deprecate the legacy purchase invoice line-level approval page in a future release.
Legacy MYOB Account Right Connector (ANZ)	Support for the legacy MYOB ODBC Account Right application will discontinue in a future release, as it is no longer being developed by MYOB. You are advised to investigate using alternative PIM connectors, such as MYOB's newer Account Right application, or Xero.
Silverlight Charting	Following removal of support for Microsoft's Silverlight control, deployed to support the legacy page viewer, charts using the Silverlight control will be removed in a future release as they rely on the deprecated Silverlight control. • Staff requirements • Fee Reporting • Revenue by Month • Key Performance Indicators • Actual and Forecast Finance Documents • Captive Fees • Overdue Invoices • Workstage Finances
Excel Deep-linking	This fringe function of Excel Web links to refresh data from other worksheets can no longer be supported due to the underlying reliance on IE only technology. **Note**: This should not be confused with Excel Web Queries that will continue to be supported.
Mail Vault	The Mail Vault is now under sustaining support. If you rely on Mail Vault for your business, you will need to consider the following options: • Greater enforcement of PIM's Outlook Add-in usage in your user base. The Outlook Add-in has recently benefitted from the introduction of Smart Email Publishing, which suggests locations for selected emails, and improves the general usability of the app. A move to an external provider of email journaling, such as Microsoft Exchange Office 365's Unified Hold feature.
AutoCAD-LT	This Autodesk product was not adopted by PIM Clients.

New Features: General

This section provides a summary of all new general features included in this release.

Action Management

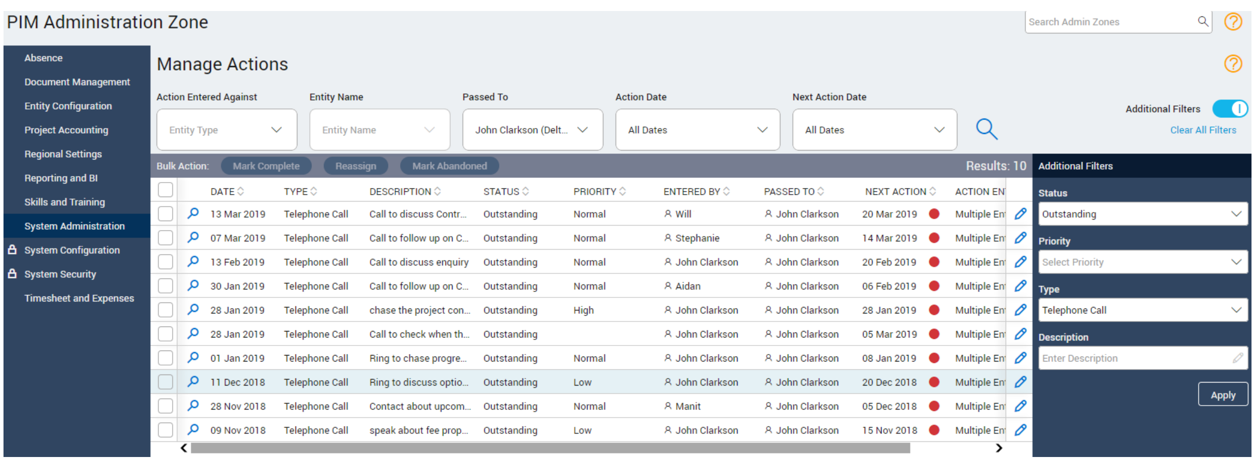
The following updates have been made to actions.

Bulk Manage Outstanding Actions

The Admin Zone now includes a new Manage Actions tool that allows administrators to bulk manage outstanding actions.

The Manage Actions tool has the following features:

- **Search filters**: Administrators can filter search results of outstanding actions by Action entered against, Passed to, Action date, Next action date, Status, Priority, Action type, and Description.
- **Bulk actions**: Administrators can bulk complete, reassign, or abandon actions.
- **Status column**: The Status column has been added to the actions bandset. This column shows the status of an action, such as outstanding, overdue, or abandoned.



The Manage Actions tool is a new way for administrators to manage outstanding Actions. It helps administrators to keep track of actions and ensure that actions are completed in a timely manner.

To use the Manage Actions tool, users require the Action.Admin entity function role.

Abandoned Actions

When an administrator abandons an action, they must provide a brief reason for doing so. This reason will be visible to users in the Abandoned Notes field when they view abandoned actions. Abandoned actions are also removed from users' dashparts and the Actions bandset on records.

The Completed On column on the Actions tab when you view documents in Classic DMS View has been renamed to Concluded On. This column now shows the date when an action was either completed or abandoned.

Improved Action Emails

The emails that users receive when actions have been completed or assigned to them now include additional action details. This means that recipients can instantly see the context without having to view the action record in PIM.

View More Details About Actions in the Actions Dashpart

When you view the Actions dashpart, you can now see the entity record that an action was entered against in the new Action Entered Against column. In addition, if an action has been passed to someone else, you can see who that person is in the new Passed To column.

Search Against Action Descriptions

You can now search against text within action descriptions when you use the advanced action search feature from the Activity Zone.

View Action Types in Alphabetical Order

When you create an action, the action type list is now alphabetically ordered.

Other General Updates

Add Email Addresses to Organizations

You can now add contact email addresses to organization records. For example, you can add a general contact email address or a support email address.

Search for Contacts by Line Manager

A new Line Manager search filter has been added when you run an advanced search for internal contacts. This filter allows users to search for contacts by their line manager. If a contact has multiple line managers, you can enter a comma-separated list of names.

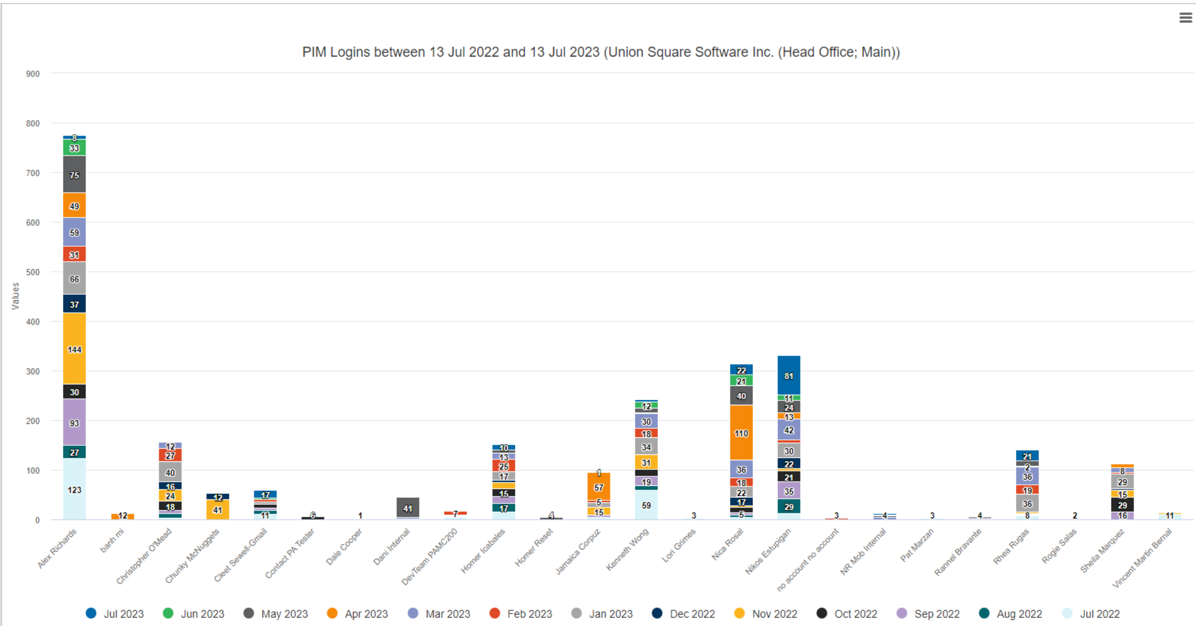
Line manager information can also be added to the reports. Note that the line manager filter does not support grouping when you edit the report output.

Clicking Document Links Now Displays the Document Properties Page

Previously, clicking a document link would immediately trigger a download, leading to the read history being updated and assumptions that the file is checked out. Document links now provide direct access to the Document Properties page of the latest revision, allowing you to preview document details and make informed decisions about whether to download the document or perform other actions, such as checking the document out for editing.

Display System Usage Charts as Stacked Columns

System Usage Charts can now be displayed as Stacked Column charts, split into months, when an internal organization is selected. All detail is included when you export the data, including all the monthly figures, so that you can drill down into the detail.



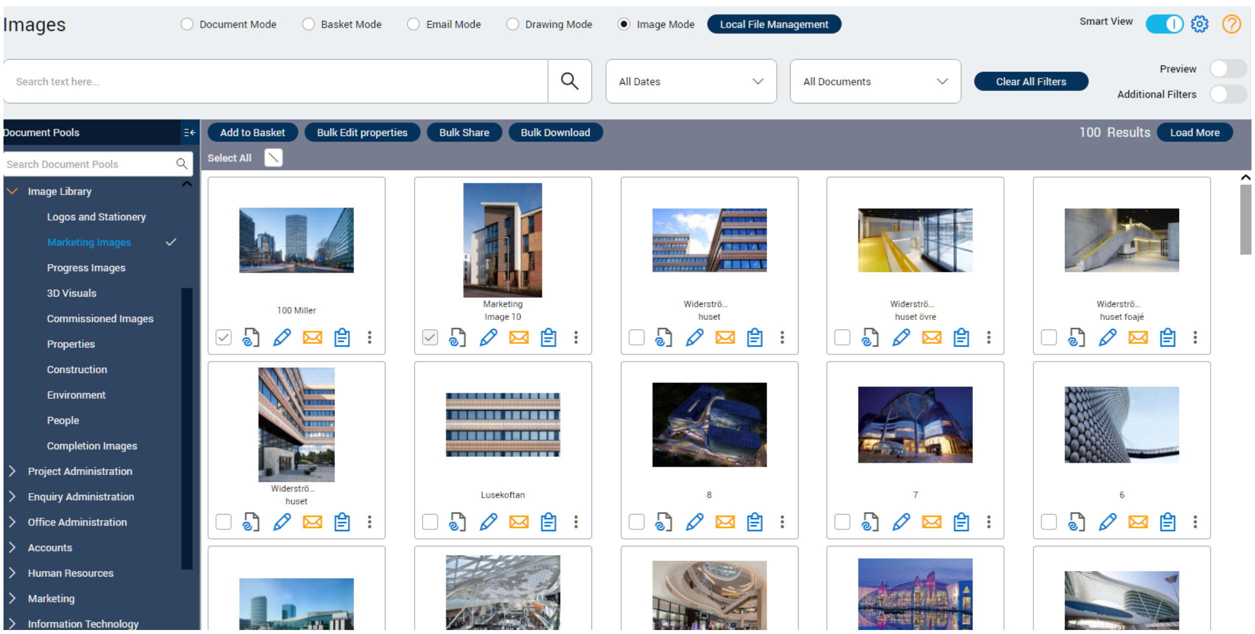
New Features: Document Management

This section provides a summary of all new document management features included in this release.

Smart Image Mode for Photos and Images

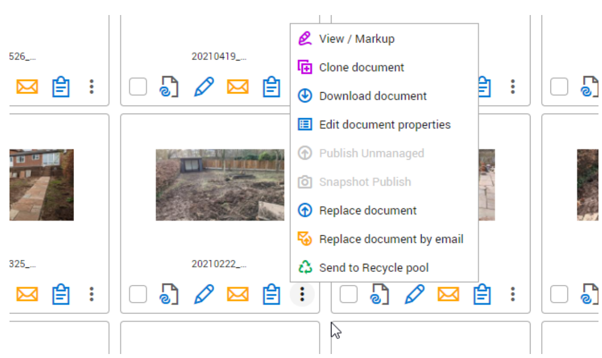
A new Image Mode is now available in Smart View, making it easier to review and manage your image files. This mode displays only image files, so you can quickly find the photos and images you are looking for. You can select images to add them to baskets, bulk edit properties, bulk share, and bulk download.

> **Note:** Image Mode is only available for images stored in the DMS. It does not include DLM images. Certain other file types where the primary rendition is not an image file, such as PDFs, will also display in Image Mode if those documents include renditions that are image files.



Access Image Options

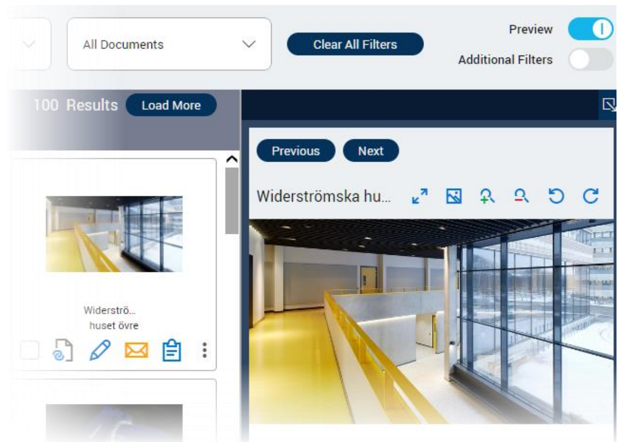
For each image, the full range of file options are available, including buttons to copy a link, check out, email, and view summary details.



Preview Images

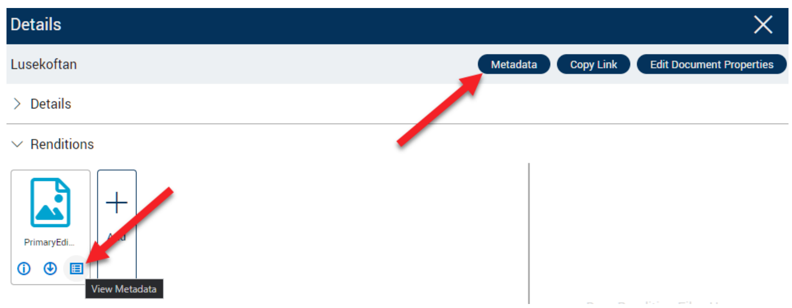
The Preview pane allows you to preview images and perform the following actions:

- **Scroll through images**: Use the Next and Previous buttons to scroll through the images in the current search view.
- **Rotate and zoom images**: Use the rotation and zoom controls to change the view of the image.
- **Resize images**: Resize the image to fit the window or display its actual size using the preset resizing options.
- **Pop out images**: Click the Pop Out button to open the image in the PIM Image Viewer for a larger view. In the PIM Image Viewer, you can scroll, rotate, and zoom the image to get a better look.



View Image Metadata

Image metadata can now be viewed in a popup window when viewing the summary details of image files in PIM. This includes metadata for associated renditions and is available in both Smart View and Class View of the document management system.



Improved Force Check-in Utility

Filter by User and See When Files Were Checked Out

The Force Check-in Admin Zone utility has been updated to include a new Date Checked Out column and a Filter User option.

- The Date Checked Out column shows the date and time when a document was checked out. This will only apply to documents checked out from PIM 23.0, as this information was not captured in previous releases.
- The Filter User option allows you to filter the list of documents by the user who checked them out. This can be useful if you want to see only the documents that have been checked out by a specific person.
- The Clear All Filters option allows you to clear all the filters that have been applied and view all documents that are checked out.

Express Check-in From the Document Properties Page

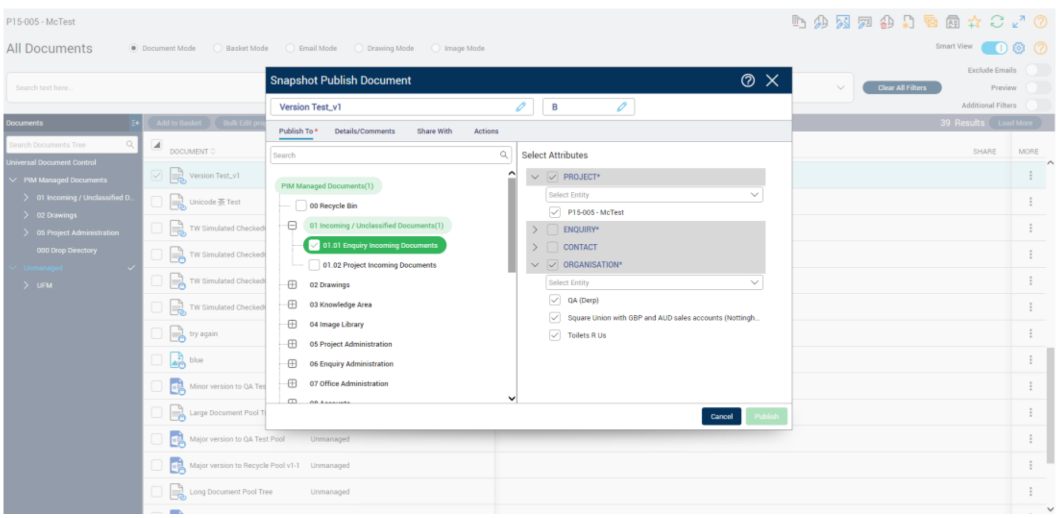
A new Express Check-in option is now available on the Document Properties page, making it easier to check in documents without having to navigate to the Local File Management page.

Universal Document Control

Publish Snapshots of Unmanaged Documents

With Universal Document Control (UDC), you can now publish snapshots of live network files to PIM while you continue to work on them. This allows you to take advantage of PIM's document management features, such as full version history, read history, and document transmittals, for your working documents.

When you publish a snapshot, it creates a read-only copy of the working file. The source file remains under your control in the original network location. Links to the source files are added to the summary details page of each snapshot for quick access. When you do a final publish of a source file, any snapshots that have been created are automatically removed.



You can use snapshots to:

- Share the latest updates of working files with your team to get their feedback.
- Import a batch of drawings into the Unclassified pool and then publish them to PIM using the Smart Bulk Superseder.
- Retain version history of working files stored outside of PIM.

Smart Superseder

View Incoming Documents

You can now view an incoming document on the Smart Superseder page by clicking its icon. Note that you must have sufficient PIM permissions on the incoming document pool to do so.

New Features: Design Management

Revit, AutoCAD, and Apryse Updates

Revit 2024 and AutoCAD 2024 are now supported.

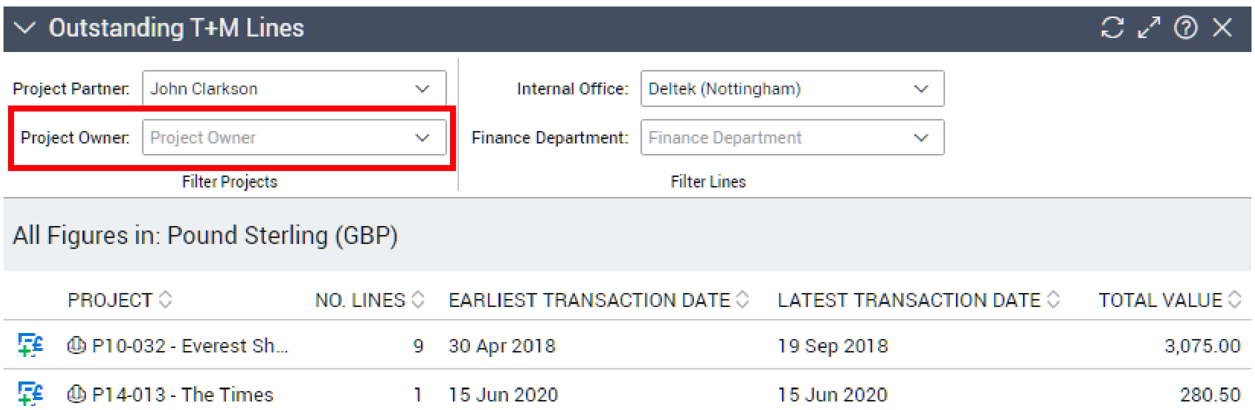
To ensure you have the latest features and bug fixes, Apryse has been updated to the latest release.

New Features: Project Accounting

This section provides a summary of all new project accounting features included in this release.

Filter by Project Owner in Outstanding T&M Lines Dashpart

A new Project Owner filter now allows project managers to search for outstanding T&M lines by project owner. The filter returns internal contacts added to projects in the role defined as Project Owner Contact Role in the project accounting config settings. When a project owner is selected, the results of the dashpart will be updated to show the project owner's projects with time and material charge lines that have yet to be added to an invoice. The dashpart has also been resized so that the column headers fit better.



New Features: Mobile Working

This section provides a summary of all new Mobile Working features included in this release.

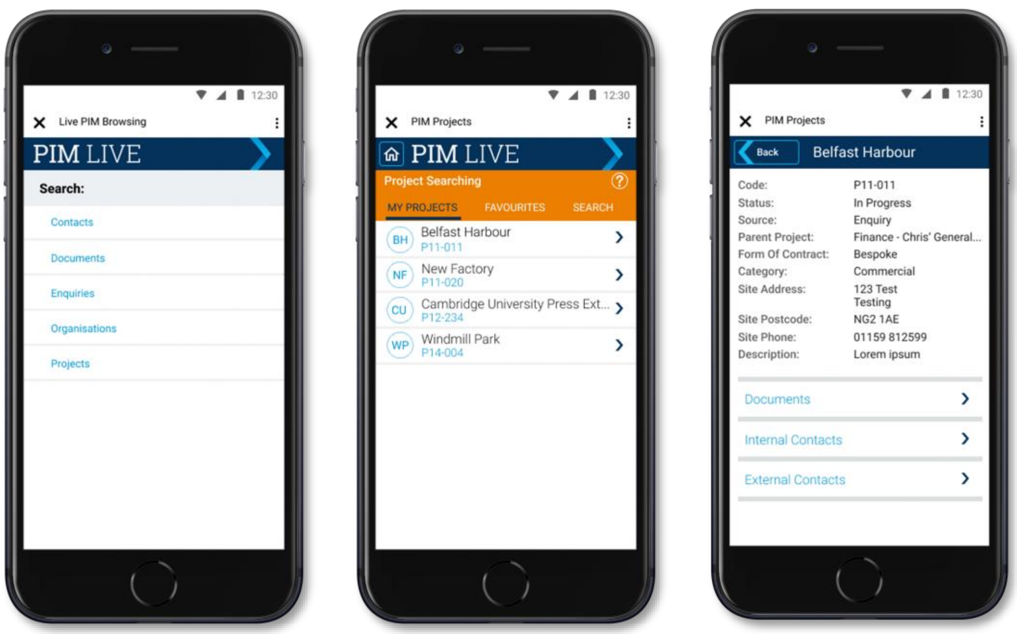
Improved Live PIM Browsing

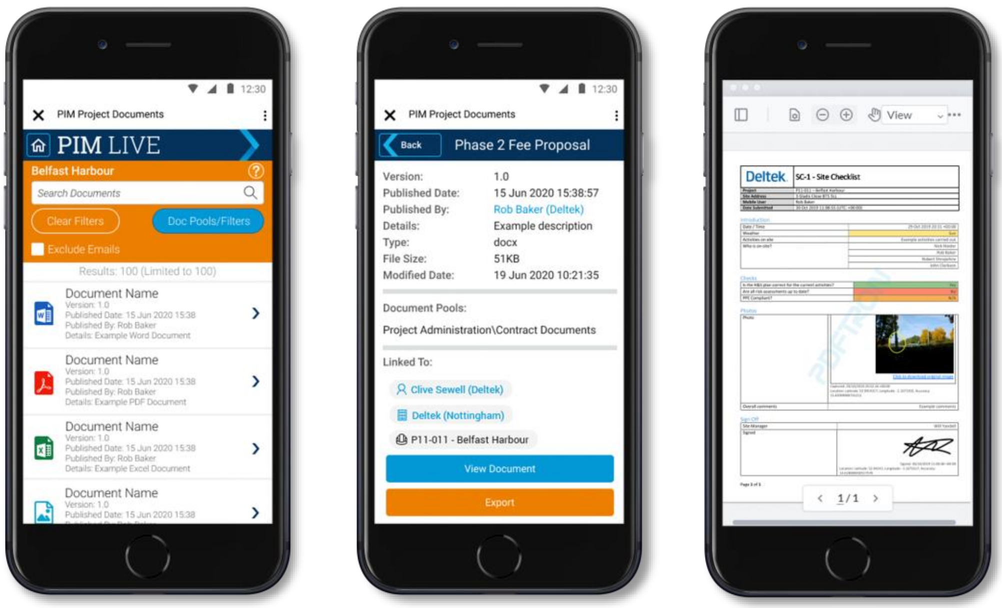
Several improvements have been made to Live PIM Browsing in the PIM Mobile Working app.

Search Documents and Contacts Linked to a Project or Enquiry

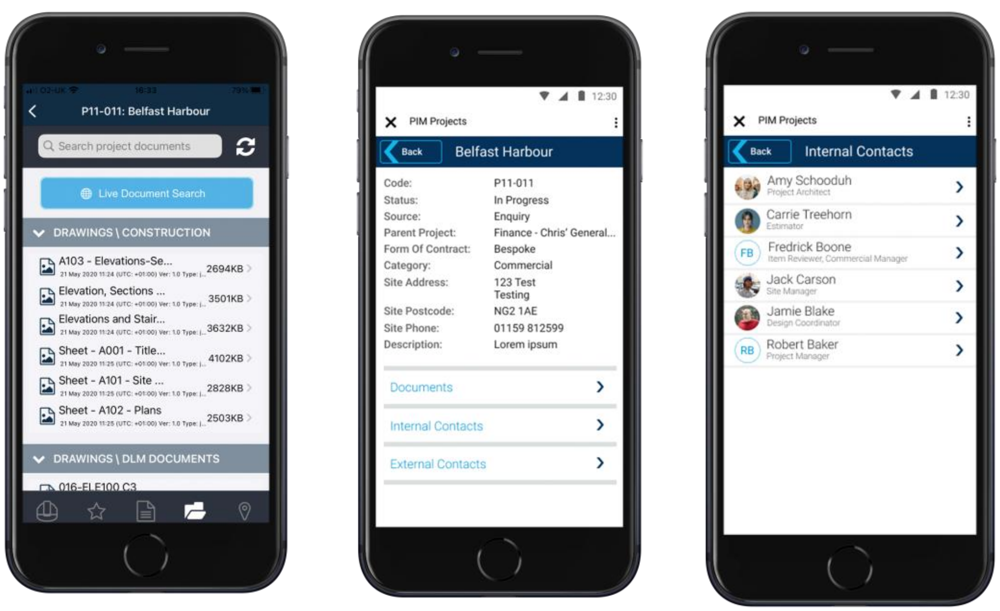
You can now search for project or enquiry records from within Live PIM Browsing. Simple selection from user assigned, favorites, or quick search helps you to quickly find the records that you are looking for.

Within a project or enquiry record you can then view linked contacts – internal and external – alongside performing an entity-centric document search. This saves time, as you no longer need to add those records as filters when you run a general search.





Outside of Live PIM Browsing, when you navigate to a project or enquiry record, you can now also easily access and search for live documents and contacts that are directly linked to the record you are within.



Other Updates

Several improvements have been made to the user experience, including:

- Advanced Filters are now easier to select and set.
- You can run blank searches when you search for contacts, documents, enquiries, organizations, and projects.
- The Advanced Filters button has been renamed to Doc Pools/Filters. The two existing tabs within have been reordered as to which opens first: Document Pools and Advanced Filters.

New Features: PIM Teamwork

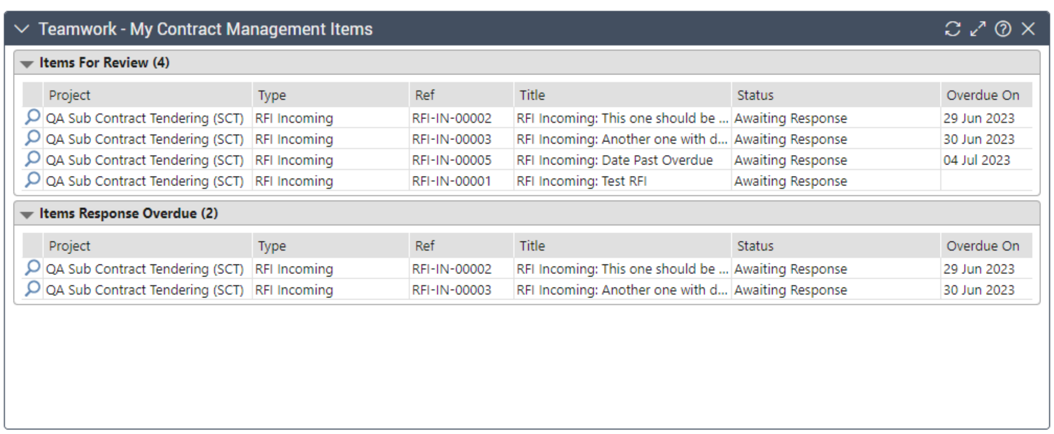
Teamwork has been extended to support existing PIM processes.

New Workflow Dashparts

To assist external users with managing their project workflow tasks, the following dashparts are now available to Teamwork users:

Dashpart	Description
Teamwork - My Snags **Teamwork - My Punch List Items**	Review and action assigned project defects (snags or punch list items)
Teamwork – My Observations	Review and action assigned project observations
Teamwork – My Bids/Tenders	Review and action assigned subcontracting items, including bids and tenders. See note below.
Teamwork – My Contract Management Items	Review and action assigned contract management items, such as RFIs and memos
Teamwork – My Drawing Approvals	Review and action assigned drawings that require approval

Users can click items within these dashparts to view more detail and action items, if required.



Notes: Some dashparts may not be available, depending on the modules you have installed.

Attention: The My Bids/Tenders dashpart will not display any bids or tenders that were issued before the upgrade to PIM 23.0. In this case, you should resend any open bids or tenders that involve Teamwork users so that they can access those items in the new dashpart.

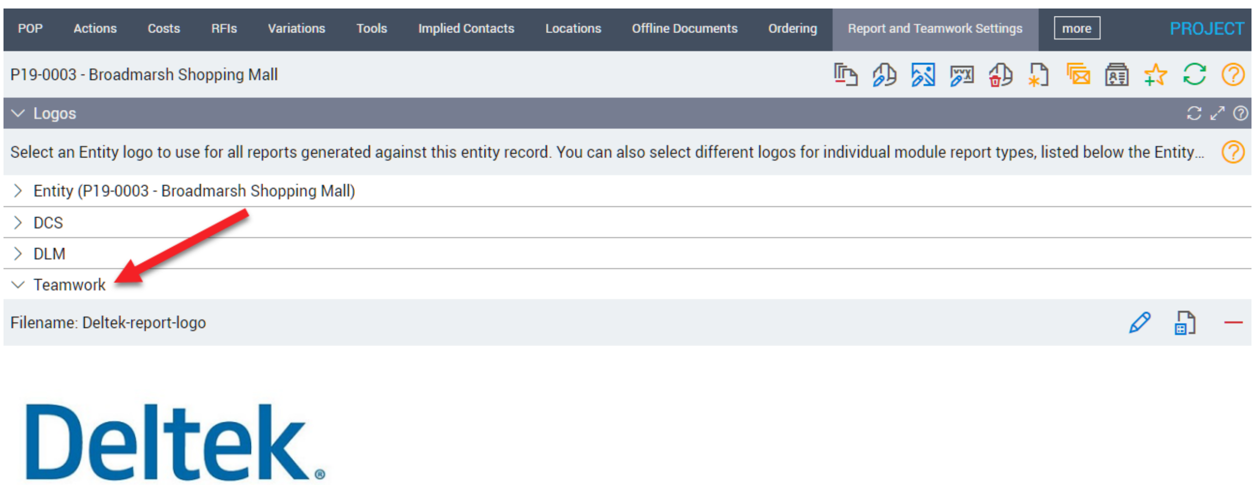
Favorites Dashpart Automatically Added

The Teamwork – My Favorites dashpart is now automatically added the Personal Zone of all external users. This dashpart is not mandatory, so Teamwork users can choose to hide it.

Add Your Corporate Logo to Teamwork Emails

You can now add a corporate logo to emails sent out to external Teamwork users via the Report and Teamwork Settings tab on a project or enquiry. The logo that is used is based on an automatic hierarchy, in the following order:

1. The logo assigned to the Teamwork module for the project or enquiry.
2. The general logo assigned to the project or enquiry.
3. The general logo assigned to the organization.
4. If no logo is set for any of the previous options, no logo is displayed.



A new global option has been added to the System Configuration > Teamwork Access > Global Configuration page to allow system admins to choose whether to include logos in emails sent from Teamwork.

Invitation Link Expiry

Teamwork invite links now expire after 3 weeks if the invitee does not accept the invitation. When an external user attempts to log in with an expired invite link, they are presented with the standard failed logon message. They will need to contact their project contact to request to be reinvited.

To easily identify Teamwork users with an expired invite, the following updates have been made:

- The Organizations and Contacts band on projects shows a warning icon next to the Invited Date for any invitations that have expired. You can choose to reinvite the contact using the Invite Teamwork Users option, or you can remove them.
- The Teamwork License tab on the Licenses page in the Administration Zone now shows pending Teamwork invites. You can filter the list of users by either pending or active Teamwork licenses using the new State filter. Any invitations that have expired will display a warning icon next to the Invited Date.

Administrators should follow up with the internal contact that invited the contact to discuss whether the contact should be reinvited or removed. To find out who invited a contact, click the contact's name to view their contact record and then click the History tab. On the History tab, click the project or enquiry and in the Organizations and Contacts section, hover over the ⚠ icon next to the Invited Date column to view the details.

New Features: System Administration

This section provides a summary of all new system administration features included in this release.

Modernized Outbound Mail Flow

Typically, if you are an on-premises client, our Infrastructure team will work with you to configure your PIM system's mail architecture using Microsoft's local SMTP service on your PIM web server.

PIM 23.0 introduces a new Email Configuration page that allows you to configure your email provider directly in PIM. You can choose to use server-to-server based SMTP Relay connectors or an Azure AD authenticated user mailbox. This new page consolidates all global email provider settings into a single location, making it easier to manage and update your email configuration.

Admin > System Configuration > PIM Configuration > Email Configuration

The following provider types are now available:

- **Local SMTP**. Local SMTP provider will be enabled for all sites at the point of upgrade and relates to the local SMTP service model used on PIM sites for many years. It allows you to configure an outbound SMTP server IP and port, with configuration of the eventual mail endpoint within the local SMTP server's settings.
- **Azure SMTP Client (NEW)**. Allows you to configure outbound email settings and authentication via Azure App Registration and dedicated user mailbox for your PIM system. You provide the Azure AD tenant ID, client ID, and secret before logging on as the mailbox user to generate an oAuth token. You can then provide your Azure AD Smart Host endpoint. Note that traffic is forced to port 587, encrypted under TS1.2, as this is a client user mailbox construct (this requires TLS1.2 channel to be open).
- **SMTP Relay (NEW)**. Allows you to configure outbound SMTP Server / O365 Smarthost directly in PIM, bypassing local SMTP instance, and it relies on server IP address rules within Exchange / O365 connectors for relay security. You need to provide the SMTP Smart Host endpoint and use the Test Email function to confirm the service is working. The port number is fixed on 25 (server-to-server port), encrypted under TLS 1.2 as a minimum (this requires TLS1.2 channel to be open).

Important Note: As indicated above, following your 23.0 upgrade you will continue to use the pre-existing Local SMTP mail provider and emails will continue to be sent in the same way they have since your PIM system was implemented. When you choose to move to one of the more modern provider types listed above (Azure SMTP Client or SMTP Relay), you will be forced to configure and test the chosen new method appropriately before enabling the new provider. Once the new provider is enabled the prior active provider will be disabled, preventing you from accidentally leaving the system without an active mail provider.

Once you move to either the new provider, the following changes to system behaviour will be enacted:

- A new UI rule will disable the defaultFrom email config field in the Workflow module, as all emails will be routed through the new single PIM mail provider.
- The anti-spoofing rules outlined below will become active.
- If you have moved to the "Azure SMTP Client" provider you will be prevented from changing the "Default From" value as this will now be defined by the logged-on mailbox, which will update the "default from" configuration key.

Benefits of the New Features

The new email configuration features provide several benefits, including:

- **All Email configuration in one place**: The new Global Email Settings page enables you to configure your email settings in one place.
- **Futureproofing:** The two new providers give alternatives to using Microsoft's ageing Local SMTP Server module, which offer outdated and unsupported authentication models, and will subsequently be phased out in future versions of Windows server and offer outdated / unsupported authentication models.
- **Improved security**:
    - The new Azure SMTP Client provider type provides a more secure way to authenticate PIM's mailbox
    - The SMTP Relay method relies on O365 Send Connector rules to only allow traffic from your PIM website, which may or may not already be in place for your existing Local SMTP server connection to Exchange / O365.
- **Easier management**: The new Mailbox Alias field makes it easier for recipients to identify PIM system emails in their inboxes.
- **Improved usability**: The new UI rules in the Email Provider configuration pages safely guide you through the change process so that you are not left without an active working mail connection.

For our detailed information on these new flows and how to configure them, refer to our Customer Care Knowledge Base Article.

Notes:

- Your existing local SMTP instance is still required to manage direct domain publishing if you do choose to move to one of the new providers. However, the delivery settings in your local SMTP server will be replaced with the newly configured and enabled provider.
- When you switch enabled mail providers, you should always use the **Send Test Email** feature to confirm that your configuration is working.
- After you have reviewed the Configuring Mail Flows guide, you can reach out to Deltek's Infrastructure Services team with any questions. The team can also assist you in moving to one of the new providers.

Improved Anti-Spoofing

To ensure that PIM's system-generated emails comply with modern mail practices and anti-spoofing checks, PIM has been updated to prevent spoofing by sending system-generated emails from a single default email "from" address. This address will be the PIM system mailbox, but with the following headers added:

- **Alias**: The contact's name of the logged-in user, or the "Alias" value entered in Email Configuration for the system mailbox (Admin > System Configuration > PIM Configuration > Email Configuration > Email Configuration).
- **Reply-To**: The contact's current email address so that the recipient can reply directly to the contact directly.

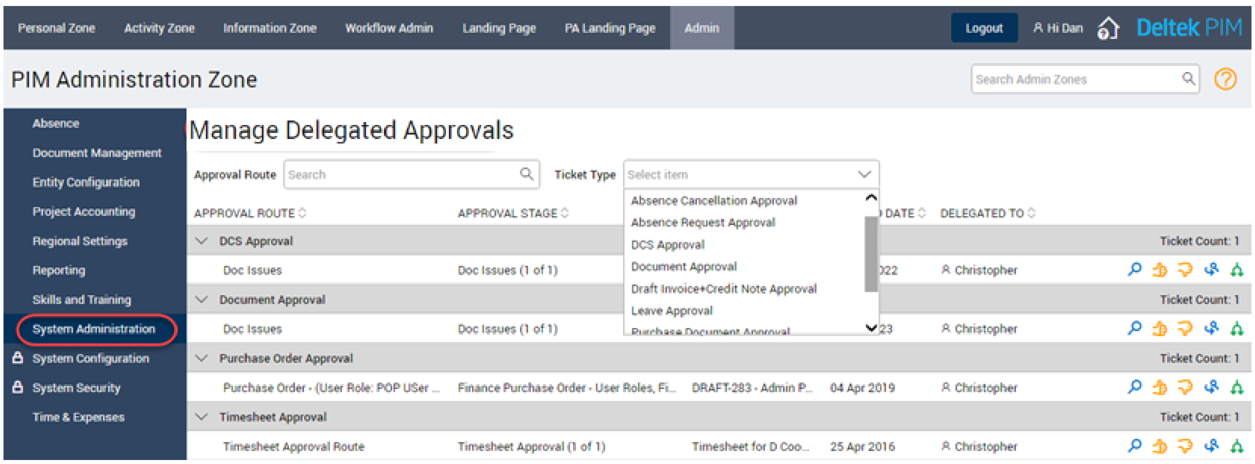
This includes emails sent from the PIM Workflow system.

Users can still select the desired reply-to-address when they compose emails via the PIM Email feature. Where an email is intended to be sent from the system and not a user, the above headers are not included, and emails are sent from the PIM mailbox address. An option in the O365 mail settings allows you to enter a mailbox alias, if required.

If the new connection method has not yet been implemented, PIM will continue to use the existing impersonate contact mailing methodology.

Manage Delegated Approval Tickets

A new admin feature, **Manage Delegated Approvals**, is now available in the System Administration > Approvals section. This feature allows system admins to handle blocked delegated approval tickets when delegated approvers are absent and the ticket blocked.



The new page provides the following options:

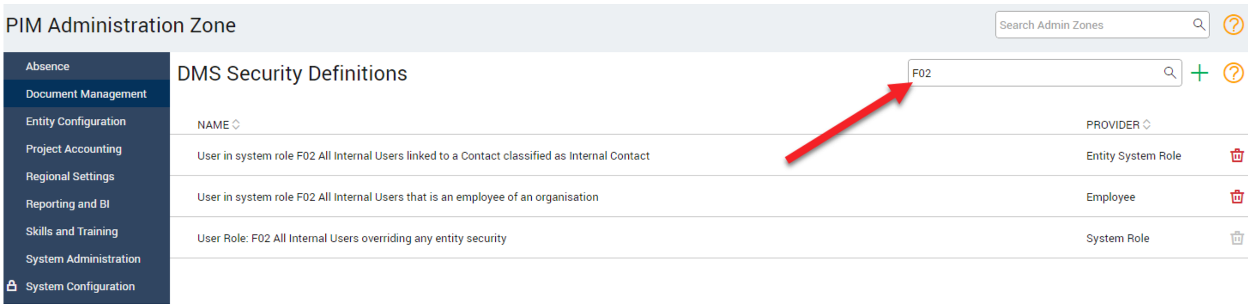
- **Filter by ticket type**.
- **Search for specific tickets**.
- **View a list of all pending delegated approval tickets**, grouped by ticket type so that you can easily see all pending tickets for a particular type of request.
- **View ticket information**: Approval Route Name, Approval Stage Name, Description, Date, Delegated To, and Actions.
- **Act on tickets**. You can view the ticket details and approval route, approve or reject tickets, and delegate tickets to new approvers.

When approving or rejecting delegated approval tickets, system admins must enter a reason. The ticket will then be moved to the next stage in the approval process, as per normal for the ticket type.

Users require the Approvals.Admin entity function role to access this page, which will be applied to the system admin user role by default on upgrade.

Filter DMS Security Definitions

To assist with managing DMS security definitions, you can now filter the list of existing security definitions on the DMS Security Definitions page.



Enhanced Absence Reporting

To make it easier for absence administrators to manage absence entitlements, the following updates have been made.

Export Entitlement Management Data to Excel

You can now export the data from the Manage Entitlements view to Excel for the purpose of reporting and record keeping.

Updated Search Absence Entitlements Reporting

The existing Search Absence Entitlements reporting page has been updated to include the following new features:

- Filter, sort, and group by job category and department.
- View total search results count at the top of the results set.
- Select the operand for the available filters.

New Features: Third-Party Application Integrations via Unionpoint PIM Connector

This section provides a summary of PIM's new integration management features included in this release.

PIM 23.0 introduces a new PIM API that integrates with Deltek's Unionpoint integration platform. This allows you to connect PIM's CRM and project management features with remote applications.

The new API Access Management page gives your system administrator control over who can access the API. They can issue OAuth client IDs to developers and share appropriate user credentials.

If you are interested in integrating your PIM system with Unionpoint, please contact your account or customer success manager.

For more information on Unionpoint, see https://education.deltek.com/web/UnionpointPortal/Unionpoint.

Deltek Unionpoint Integratons and PIM API Access

The new API Access Management page (Admin > System Configuration > API > Manage API Access) allows system administrators to issue OAuth 2.0 client IDs for Unionpoint integration connections to access your PIM site. By default, only members with the System Administrator role can access this page. You can grant access to other roles by assigning them the API.Admin entity function.

The expected API Access Management process is as follows:

1. A Unionpoint developer requests access to your PIM site for a specific integration and provides the appropriate redirect URI for their Unionpoint platform. (Redirect URIs may vary by region, so developers should check the appropriate URI for their region.)
2. The PIM system administrator creates a new API access record on the API Access Management page using the redirect URI provided by the Unionpoint developer. A client ID is automatically generated during this step.
3. The PIM system administrator creates a new user account with the appropriate user role rights. Alternatively, you can use an existing user account that has already been created for the integration purpose.
4. The PIM system administrator provides the user credentials and client ID to the Unionpoint developer.
5. The Unionpoint developer uses these details to authenticate the Unionpoint PIM Connector to establish a secure OAuth token-based connection to the PIM application.

Note: The API Access Management page is designed only for use with the Unionpoint PIM Connector. It does not apply to external or bespoke API connections. Any requirements to develop API integrations outside of Unionpoint need to be discussed with your Deltek account or custom success manager.

New Features: Deployment

This section provides a summary of all new deployment features included in this release.

Microsoft Windows Server 2016 or Higher Now Required for PIM Web Server

As communicated with your key Deltek contact ahead of the 23.0 PIM release, you are now required to run your PIM website on Windows Server 2016 or higher as the Windows 2012 Operating System is now out of support. You are advised to engage with your IT team, or one of our Customer Success representatives, if you require a server migration.

Microsoft SQL 2016 or Higher Now Required

When you install or self-upgrade, you are now required to have Microsoft SQL 2016 or higher installed to continue with the installation. A message displays if you do not meet the minimum SQL requirements when you attempt to install or upgrade to this version of PIM. If you do not have Microsoft SQL 2016, you are advised to engage with your IT team, or one of our Customer Success representatives.

Confirm CNG Passwords

When you install or self-upgrade, you are now required to confirm your CNG database encryption password so that you do not inadvertently skip this step and forget the password. This password is important as it is used to decrypt your database in the event of a server move.

Run Missing Prerequisites During Installation

When you install or self-upgrade, if any of the prerequisites are missing, you now have the option to launch the installers from within the main installer.

Deltek Client ID Requirement When Upgrading

When you upgrade, you are now required to enter your Deltek Client ID as part of the Deployment Admin Console's preparation steps. The change will allow us to better support your site. To obtain your Deltek Client ID, log into the Deltek Support Center and navigate to Settings > My Account > Support Plan tab. If you require help, please contact Deltek Customer Success.

Software Issues Resolved

Descriptions of Software Issues

This section includes all fixes in this release. Some of the descriptions might contain extra information, including ways to work around the defects. This additional information has been included in case you instituted some of the workarounds and can now stop using them by requesting an upgrade, or you simply want more background information about the defect repairs.

General

Defect 1950435

Description: When you ran a project search and included the Description field in the output, and then exported the results to Excel, if one or more projects had descriptions that spanned multiple lines, some rows in the Excel report might be merged or left blank.

Workaround: This issue only affects Chrome and the regular Edge browser. Use IE-compatible Edge browser instead.

Defect 1890853

Description: When you attempted to merge organizations, if both organizations had a contact linked that had the same name, a warning error displayed and you could not proceed with the merge.

Workaround: Supersede the duplicate user from the organization that you want to remove and add them to a temporary organization, and then proceed with the merge.

Defect 1989732

Description: When you shared a document by email from an entity record, such as a project or enquiry, the default filter source displayed contacts by organization instead of the actual entity record.

Workaround: Select the entity record from the Filter Source list.

Defect 2036024

Description: When you created PIM users with Azure AD accounts, those users were missing on the Contact User Role Membership page.

Defect 2036048

Description: When you conducted an organization search in the Activity Zone and exported the results to Excel, some classifications were absent in the output for organizations with numerous assigned classifications.

Design Management

Defect 1996139

Description: When you viewed the Versions subtab for placeholders on the DLM tab on a project, the document icon for the primary rendition was displayed in the Renditions column when it was already displayed in the Document column.

Defect 1946538

Description: When you dragged and dropped files onto the Assign Renditions tab on a project’s DLM tab, the size of each file displayed instead of the file name.

Defect 1965784

Description: When you edited the properties of a DLM placeholder, parts of the screen were hidden when you viewed PIM on a laptop screen.

Defect 1953079

Description: When you attempted to issue renditions from a project’s DLM placeholder, the DLM issue would not get sent.

Clients Affected: Clients that upgraded to versions 22.0.0 or 22.0.1.

Defect 1932389

Description: When you clicked a rendition in a DLM placeholder, it would download the wrong file.

Defect 1920130

Description: When you attempted to assign a rendition to a placeholder that had the latest version set to hidden, the new rendition would not get added.

Defect 1899261

Description: When you reviewed a document via the Review Documents for Approval screen, you could submit your review without selecting a comment status.

Defect 1920354

Description: When you submitted documents for approval, DLM approval reminders were being sent to users at midnight instead of at the same time as when the initial approval requests were originally sent.

Defect 1982228

Description: When you created a placeholder and selected a number scheme, if the Show Deadline Date and Show Required By Date options were enabled in the DLM configuration, those fields would display on the Setup Document Number step.

Document Management

Defect 1945578

Description: When you upgraded to PIM 22, the three-dot menu was missing for individual files, which meant that you did not have quick access to view and edit markup, clone, download, replace, and so on.

Workaround Before Fix: To replace a document, use the Edit Properties option.

Defect 1945900

Description: When you download or previewed a document, the document read count incremented against the publisher of the document instead of the user that downloaded or previewed it.

Defect 1952594

Description: When you uploaded files to the Smart Superseder that matched existing files, and you chose to upload them as new documents instead of adding them as new versions of the existing files, the filenames of the published documents would sometimes get changed to non-meaningful strings of characters.

Defect 1749934

Description: When you attempted to batch publish documents to a new pool that had a coding scheme on it, only one of the documents included the coding scheme.

Defect 1892266

Description: When you sent a published email to an internal contact, the internal contact could publish the same email, which resulted in a duplicate email.

Defect 1989685

Description: When you bulk edited documents to update the document date, if you first cleared the document date before you selected a new date, only one of the documents would get updated with the new date.

Workaround: Manually select a new date without first clearing the date field.

Defect 1931268

Description: When you created a new document and then renamed it in your workingfiles folder, if you published it via LFM, the old name was reflected on the Publish Document window. This could also result in multiple copies of a document being published to the document management system. In addition, when you attempted to check out a document that you had previously renamed before you published it, a database error message displayed.

Defect 1941472

Description: When you viewed emails in Email Mode in the DMS, emails that had inline or embedded images but no attachments displayed the attachment icon, even though they did not have any attachments.

Defect 1955533

Description: When you restored an archived document, it was still available in the Restored Archived Documents page, and you could restore it again.

Defect 1963510

Description: When you attempted to export documents from an entity record that had more than 1000 renditions, such as a project, some of the renditions would not get exported.

Defect 1629327

Description: When you created a new document from a PIM template in the Working Files dashpart or the DMS, there was a delay in loading the template, and in some cases, an error message displayed.

Defect 1918219

Description: When you attempted to map unmanaged folders to projects for Universal Document Control, if no entity code specifications had been set up in the system, the following error displayed: ‘A problem occurred when processing a request to the server’, and you could not map any folders.

Defect 2036046

Description: When you utilized the Smart Superseder to publish files and marked them as new, the published file names were altered to a numerical value instead of retaining the original file name.

Email Management

Defect 1980830, 1985452

Description: When you created an email and selected to attach files from PIM, when you previewed an email in the Document Picker window, the following error displayed: “You do not currently have permission to access this area. If you think you should have access please contact your PIM System Administrator or PIM Project Manager”.

Defect 1941922

Description: When you attempted to publish emails that had attachments, you could not manually type text in the location field to filter the list of available locations.

Workaround: Select a location from the list.

Defect 1945371

Description: When you published an email that had images with duplicate names, only one image was published out of all duplicates when you opted to publish attachments separately.

Workaround Before Fix: Rename the duplicate images before you publish them.

Defect 1906529

Description: When you sent an email to another site that used PIM and selected to publish it, the email incorrectly showed as published on the receiver’s site.

Defect 1915818

Description: When you entered text into the Details field when sending a new email, and then clicked Edit Properties on the generated email message, the information in the Details field was not retained.

Defect 1920422

Description: When you attempted to publish a new email, you could not add a new location or edit a recent location, as the New and Edit buttons did not work in the Recent Locations area.

Customers Impacted: Users of the 64-bit version of the PIM Outlook Add-in.

Defect 1935854

Description: When you attempted to add attachments to an email via the Add Attachments option on the Deltek PIM toolbar group, and then clicked Add Filter on the Deltek PIM Document Picker window, the following error displayed: “You do not currently have permission to access this area. If you think you should have access please contact your PIM System Administrator or PIM Project Manager”.

Defect 1923873

Description: When you attempted to publish a new email, you could not add a new location or edit a recent location, as the New and Edit buttons did not work in the Recent Locations area.

Customers Impacted: Users of the 64-bit version of the PIM Outlook Add-in.

Defect 1867054

Description: When you viewed emails that had attachments in Email Mode within the DMS, in some cases the attachment icon was missing.

Defect 2001665

Description: When you published emails from Outlook and then viewed the Sent Items folder, the published emails did not display a tick to indicate that they had been published to PIM.

Mobile Working and Custom Form Builder

Defect 1899262

Description: When you submitted a trade defect against a project, it could overwrite the title of the work package.

Defect 1892274

Description: When you sent forms and documents from the mobile app, it logged actions as Document Sent instead of Completed Action, and the Completed column displayed ‘No’.

Defect 1892233

Description: When you deleted a named section from a form through the Custom Form Builder, the section was still present on the mobile form.

Defect 1930203, 1945543

Description: When you deleted an unused category via the Administer Categories window in the Custom Form Builder, the item would reappear.

Project Accounting

Defect 1935737

Description: When you attempted to update the time allocated to a cell on a project resource plan, if the tooltip displayed above the cell, you could not click the cell to update it.

Workaround: Quickly click the cell before the tooltip displays or click View Tooltip on the toolbar to temporarily disable tooltips.

Defect 1892317

Description: When you created full payments for several lines on a purchase invoice and posted the payment, and then tried to create and post full payments for additional payments on the invoice, in some cases the Save button was disabled. This was due to a previous line that was posted as full payment having -0.01 as the remaining to pay value.

Workaround Before Fix: Pay the entire invoice in full to post all remaining payments. Note that the -0.01 value will remain on the invoice after posting.

Defect 1895891

Description: When you submitted and approved a purchase order or purchase invoice, in some cases, the status of purchase invoices would remain as Submitted for Approval, and the status of purchase orders would remain as Approved. This would also affect future cost downdating. Note that this issue was intermittent.

Defect 1905372

Description: When you edited the invoice forecast for all work stages from Accounting > Workstage Summary band on a project record, not all invoices were displayed when you clicked Show All.

Workaround Before Fix: Select From and To date filters to display all invoices.

Defect 1919473

Description: When you attempted to export projects to MYOB, you could receive an error message.

Workaround: Ignore the error message as the projects are still exported to MYOB.

Defect 1921207

Description: When you edited the finance settings on a project, the finance department field was not mandatory, despite it being set to mandatory in the project account settings.

Defect 1938627

Description: When you edited the invoice forecast for all workstages on a project and used the From Fee fill tool, some forecast lines displayed NaaN, and this prevented the settings from being saved.

Workaround: Remove the problem lines and then save.

Defect 1908158

Description: When you attempted to save a timesheet, in some cases it would fail if the timesheet had an absence item on it.

Defect 1948040

Description: When you ran certain reports from the Activity Zone, including Project Workstage Detail Search, Profits and Costs by Period, Cost Transaction, Timesheet with Costs and Charges, and Search Absence Items, you could not easily select filters as the filter boxes were not displayed correctly.

Workaround: Scroll to the right to access the filter options.

Defect 1949915

Description: When you created a purchase invoice from a purchase order that used an organization with a different currency from that of the project, the Purchase Invoice for Supplier band on the organization's POP tab displayed the project value, despite it having different currency exchange rates.

Defect 1960277

Description: When you exported an invoice with two invoice lines with the same amount to a ledger system, and then imported it back into PIM, the unpaid amount was double the actual amount.

Defect 1960595

Description: When you viewed the Related Projects band on the Accounting tab on a project, if many projects were listed, you could not scroll to view all related projects.

Defect 1979035

Description: When you attempted to move transactions from a workstage or variation to a different variation via the Search Transaction utility, the transactions were not moved.

Workaround: Use the Adjust Transaction tool under Activity Zone > PA > Processing.

Customers Affected: Clients that upgraded to PIM 22.0.2.

Defect 1983072

Description: When you exported projects to MYOB, the following error would sometimes display: ‘Encountered a communication error (https://secure.myob.com/oauth2/v1/authorize’.

Defect 1997101

Description: When you attempted to create a credit note from an invoice, if both the PIM site and your machine were set up to use Edge Hybrid Mode, you would receive a payload error.

Workflow

Defect 1945412

Description: When you added documents to workpackage groups for a project, the following error could display: ‘Server Error: An error occurred’.

Workaround Before Fix: Ignore the error message as the documents are still added to the workpackage groups.

Defect 1952201

Description: When you added duplicate entries for a document to a work package and then a new version of the document was created, the Add Documents option was greyed out on the Confirm Document Renditions to Add window when you attempted to update the document to the latest version. This meant that you could not proceed with issuing the tender.

Defect 1975182

Description: When you enabled contact management on a project before you enabled DLM, you could not enable approvals on the Manage Project Approval Settings page.

Workaround: Manually add missing DLM settings via Workflow Manager for the affected projects and enquiries.

Defect 1757503

Description: When you updated the approvers, completers, and file types lists for contact items on the Contract Administration Settings page on a project, it would time out if there were many items to update.

Defect 1892321

Description: When you viewed the resubmitted approvals, the ordering of approval tickets was based on approval status instead of approval reference.

Defect 1892323

Description: When you sent a tender chase overdue email to tenders, the reference was missing in the outgoing email.

Defect 1895904

Description: When you upgraded Workflow packages, if there were any issues with the upgrade, the Workflow Manager would continue to load indefinitely and not report any errors.

Workaround Before Fix: Correct any site configuration issues before you upgrade Workflow packages.

Defect 1901432

Description: When you generated an Excel report for contract management or subcontract tendering, if the project had a semicolon in its name, all text after the semicolon, including the file extension, would get removed from the file name of the report.

Workaround: Modify the file name after you download it.

Defect 1907446

Description: When a DLM document approval request was rejected twice, and then a resubmittal request made with the Latest Approval Only option selected, the landing page for the resubmittal request displayed an older resubmittal request in addition to the latest request.

Administration

Defect 1974105

Description: When you attempted to open an archived file, in some cases, a 404 error would display.

Defect 1922504

Description: When you set the password lifetime to 90 days, and the maximum number of password change skips to 0, users were prompted to change their password every time they attempted to log in.

Workaround: Set the maximum password change skips to 1.

Defect 1672660

Description: When you attempted to create a new DMS lookup configuration, such as an entity email document pool lookup, the Save button was disabled and the following message displayed when you hovered over the button: ‘Rendition type name must be unique’.

Defect 1896089, 1911366

Description: When the document archive job failed, the job would not get retried, and this resulted in documents not getting archived.

Deployment

Defect 1971104

Description: When you upgraded from 21.0.1 to 22.0.1, the upgrade tool encountered an error when it attempted to create a customized Yellowfin directory.

Workaround Before Fix: Manually create a customized Yellowfin folder under the XWeb directory.

Defect 1849057

Description: When you upgraded from PIM 2017 to 22.0.1, the upgrade tool encountered errors relating to missing columns in the Contact_History and User tables.

Appendix A: Noteworthy Software Changes for Legacy Clients

With reference to an array of legacy Union Square features the table below highlights where we have removed some legacy code pages that are no longer supportable as part of the current standard product.

Area	Page	Reason	Removed in PIM Version
Support Diagnostic Tools	/code/Legacy/Web/_Admin/diagnostics (all content) /code/Legacy/Web/_Admin/upgrader/PostUpgradeSteps/02-2013/FormAndSearchMerge/Forms/DataDefs (all content) /code/Legacy/Web/_Admin/upgrader/PostUpgradeSteps/02-2013/FormAndSearchMerge/Search (all content) /code/Legacy/Web/forms/DataDefs/stdDiagnostic.xml /code/Legacy/Web/forms/DataDefs/stdDiagnostic.xml /code/Legacy/Web/search/stdQueueLog.xml	No longer valid	22.0
Legacy JavaScript	/code/Legacy/Web/managedJS/workspace/Commands/Dlm/dlm.js /code/Legacy/Web/managedJS/workspace/Commands/Workflow/workflow.js /code/Legacy/Web/managedJS/workspace/DLM/configurator.js /code/Legacy/Web/managedJS/workspace/DLM/dlm.js /code/Legacy/Web/managedJS/workspace/UI/ServerControls/workflowDataSource.js /code/Legacy/Web/managedJS/workspace/workflow/workflow.js	No longer valid / replaced in Xweb	22.0

Area	Page	Reason	Removed in PIM Version
XML Search Designer	/code/Legacy/Web/_Admin/Modules/Searches.asp /code/Legacy/Web/_Admin/search_designer/designer.asp /code/Legacy/Web/_Admin/search_designer/module.asp /code/Legacy/Web/_Admin/search_designer/newField.asp /code/Legacy/Web/_Admin/search_designer/newSearch.asp	Not required. Search definitions may be designed in XML format.	22.0
XML Form Designer	/code/Legacy/Web/_Admin/Modules/Forms.asp /code/Legacy/Web/_Admin/search_designer (all content) /code/Legacy/Web/forms/datadef_designer_addNew.asp /code/Legacy/Web/forms/datadef_designer_defOptions.asp /code/Legacy/Web/forms/datadef_designer.asp /code/Legacy/Web/forms/Designer.asp /code/Legacy/Web/forms/finder_designer.asp /code/Legacy/Web/forms/form_module.asp /code/Legacy/Web/forms/form_properties.asp	Not required. Any remaining legacy XML Forms should have been ported to Xweb by now and designer is not required, as above.	22.0
Legacy Edit Contact Methods	/code/Legacy/Web/_Admin/edit_contact_methods.aspx	Replaced in Xweb	22.0
Heritage Diagnostic Tools	/code/Legacy/Web/_Admin/Tools (all content)	No longer valid or required	22.0
Legacy RFI Management	/code/Legacy/Web/Bands/RFI/add_rfi_1.asp /code/Legacy/Web/Bands/RFI/add_rfi_2.asp /code/Legacy/Web/unionjava/pupdate.js	This is now defunct	22.0

Area	Page	Reason	Removed in PIM Version
Deprecated Search Definitions	/XWeb/Search/Search.aspx?def=stdVehicleAssignmentRegister /XWeb/Search/Search.aspx?def=stdvehicleexpirys /XWeb/Search/Search.aspx?def=stdvehiclereplacement	Vehicle management is no longer considered "standard" as related to an informal module of Union Square. If you were using the standard vehicle search you may request the listed searches be applied to your custom content.	23.0
Excel Deep-Linking	N/A	The legacy Union Square feature to reference other Excel spreadsheets in the DMS relies on full IE mode and will not be redeveloped in the modern format.	23.0

Search Definitions Moved to Xweb

All PIM advanced "search definitions" have now been moved to reside in the modern Xweb part of the PIM site, under the appropriate module folder's "\search" folder. It is intended that any customized versions of standard searches will continue to work following the upgrade.

Appendix B: Deprecated Features in Previous Releases

This section provides information on features that were deprecated in previous releases.

PIM 22.0 Deprecated Features

Feature	Notes
Bulk Superseder	The Bulk Superseder feature, which was used to quickly supersede a batch of project documents with the latest revisions, has been replaced by the new Smart Superseder. The Smart Superseder feature is accessible as a tab on project records.
Merge SQL into Workflow documents	The ability to merge SQL data into Workflow document templates using the =sql() function has been removed.
Search and Form Designers	The developer pages to design legacy XML Search and Form definitions have been removed from the 22.0 code base. You may edit the definitions in any XML editor, such as Notepad.
PIM Search Folders in the Outlook Add-in	The PIM Search folders that were available in Outlook have been removed. You can search for emails using the new Search DMS feature that is available from the Deltek PIM group on the Outlook Home tab.

PIM 21.0 Deprecated Features

Feature	Notes
/m Smartphone Access	Access to the /m smartphone functionality is no longer available. This has been superseded with the Live PIM Browsing functionality within the PIM Mobile Working app.
Build Contact Usage Cache Data	This feature has been removed from the Activity Zone and has been replaced by the new System Usage Charts.
Contacts Usage Grid	This feature has been removed from the Activity Zone and has been replaced by the new System Usage Charts.

PIM 20.1 Deprecated Features

Feature	Notes
Support for legacy Admin components	20.1 delivers a significant re-write of the Admin Zone, which supersedes much of the legacy Admin architecture. For heritage Union Square software clients, refer to Appendix A in the 20.1 release notes.

Feature	Notes
Decision to Bid and Risk Register Workflow Packages	Support for the Decision to Bid and Risk Register workflow packages has now ended, and no further work will be undertaken.
Creation of Contract Management Item Groups	As of this release, you can no longer create additional item groups for use in contract management. When you install or upgrade to this release, the following standard groups are deployed: Instruction, Message, Report, Request, and Submittal. You can rename these groups, if required. Note: If you upgrade from a previous release, any non-standard groups that you created will still be available.
Workflow Random Number Function	The Workflow random number function – math.random – has been deprecated.
Render Engine for Custom Workflow Forms	All newly created Workflow forms default to the new UI Render Engine. This Render Engine should be used for all new forms that you create. As of PIM 21.0, Deltek will remove the ability to create new Workflow forms using the legacy old UI Render Engine.
System Password and Known IP Addresses Pages	The System Password and Known IP Addresses pages, which were available from the Activity Zone, have been deprecated, as they are no longer relevant.
PIM Viewer – Rasterex	Rasterex is being replaced by Apryse, (formerly PDFTron) as the PIM Viewer. This process is automatic and existing Rasterex markup will be automatically exported as a PDF file which will be published alongside the original file and will be related to the original. Any existing in-flight DLM Approvals will continue to use Rasterex until they are completed. New DLM Approvals will use the new viewer. Support for Rasterex will end in June 2024. All current PIM Viewer users should ensure they are upgraded prior to this date.

PIM 20.0 Deprecated Features

Feature	Notes
Custom Help Panel	The customizable help panel has been replaced by an online help system. This removes the ability to create your own custom help pages within the product. Should you wish to use your own help, a system setting is provided that allows you to redirect all help links to your own hosted help system. You can configure the system to use your own custom hosted help. For information, see the PIM 20.0 release notes.
Manage Notifications Option in Contract Management	The Manage Notifications option in the Contract Management band on projects and enquiries has been removed. This option allowed you to forcibly remove notifications that were orphaned. However, this option is now redundant.

Feature	Notes
Missing Contacts Band	The Missing Contacts band has been removed. You should now use the Missing Contacts Search to view missing contacts.

PIM 19.2 Deprecated Features

Feature	Notes
DMS Projections	DMS Projections are no longer available due to problems with third-party software, and Deltek no longer support this feature as of this release. If your server is configured for DMS Projections, then it will be removed as part of the upgrade.

PIM 19.1 Deprecated Features

Feature	Notes
PIM Skins Tab in Admin Zone	The PIM Skins tab has been removed from the Admin Zone. You should now contact your Account Manager to discuss any changes to your skin.
Outlook Sync Dashpart	The Outlook synchronization dashpart has been removed. You should use the synchronization functionality available through the Outlook Add-in.
Legacy Contact Photo Band	The contact photo band has been removed from the Contact record. Contact photos are now displayed in the General band.
Union Square Mobile Timesheets & Expenses App	The previous Union Square Mobile Timesheets & Expenses app has now been deprecated for use with PIM 19.1 and is replaced with a new Deltek branded version. Users must download the new Deltek branded app to fill out timesheet and expense data from a mobile device. **iOS Download Link:** Deltek PIM Timesheets App (Apple App Store) **Android Download Link:** Deltek PIM Timesheets App (Google Play) After installing the new Deltek PIM Timesheets App, you will be required to enter your PIM site URL, and your login credentials.

PIM 19.0 Deprecated Features

Feature	Notes
Editing Projects and Enquiries from Administer Screen	The Edit/Delete Projects and Edit/Delete Enquiry pages have been removed from **Activity Zone > Administer**. To edit a project or enquiry in the new cross-browser forms, you must now search for and open a project or enquiry record to edit it.

PIM 2017 Deprecated Features

Feature	Notes
LDP	For existing clients, support for the LDAP-provided address book will continue. However, for new applications and new clients, usage is prohibited, as the Outlook Add-in now provides an alternative.
Splash Screen	The temporary pop-up splash screen that required users to read and accept the terms and conditions before using the software was deprecated.
View as PDF	The View as PDF functionality in the Document Details area of the DMS, which allowed you to view documents in PDF format, was deprecated. This was available to clients that had purchased the universal viewer. The 2017 release provided an update to this viewer that allows users to output documents to PDF format.
Bulk Superseder (Bulk Revise)	The functionality provided by this band is now provided by the 'Assign External Renditions' feature in DLM. **Note** This feature was reinstated in PIM 19.0.
Legacy Workpackages in Document Issuing System	Support for legacy workpackages was removed from DCS. The new workpackages can now be assigned to DLM documents. To issue a specific workpackage, you filter the results in DLM, and issue the resulting set of documents.
Custom Logon Page	To ensure the secure logon to the PIM system, custom logon pages are no longer permitted. Any custom logon pages are replaced with the standard Deltek PIM logon page.

PIM 2016 Deprecated Features

Feature	Notes
Outlook IMAP Folders	Support for the legacy IMAP folders was deprecated, as the connector has not been supported since Outlook 2013, when Microsoft made their implementation asynchronous. You should migrate to the Outlook Add-in for publishing and searching emails.
DMS Search Screen	The old DMS Search screen was deprecated and was automatically replaced with a new main DMS page.
Drawing Manager Lite	Drawing Manager Lite was replaced by Document Lifecycle Manager (DLM). Please consult with your account manager to discuss migrating to DLM.
Legacy Work Packages Module	Support for the original subcontract tendering module (also known as Workpackages) was deprecated and replaced by the new Subcontract Tendering module.
Project Accounting Resource Planning	Resourcing by Grade was deprecated as it was not compatible with the Summary tables.

Feature	Notes
Other Workflow Apps	**Convert PDF to Image** – Functionality moved to core runtime and the app was retired. **Generate QR Code** – Functionality moved to core runtime and the app was retired. **Union Square Enterprise Integrator** – Installed automatically by App Upgrades toolset and the app was retired.

PIM 2015 Deprecated Features

Feature	Notes
Rasterex Conversion Pack	Support for direct conversion was deprecated. Service conversion was favored as it provided memory isolation to protect PIM from the intensive conversion process of Rasterex.

Appendix C: Known Issues in Previous Releases

This section provides information about known issues in previous releases.

Previous Mandatory Entity Classifications No Longer Mandatory after Upgrading

After you upgrade, you should ensure that all previous mandatory classifications are still mandatory. If you find that some classifications are no longer mandatory, you must re-enable their mandatory status in the Entity Class Classifications tab in the Manage Entity Lookups page. Within this page, you can also specify which entity classes allow users to select multiple classifications.

For more information on updating entity classifications, refer to the Manage Entity Dropdowns section in the 19.0.2 release notes.

Share by Download Feature in Workflow Fails if the Resulting Zipped File Is Over 4GB

When you use the Share by Download feature in Workflow to share a batch of documents from the document management system, if the zipped file that is created is larger than 4GB, the process fails. If this occurs, you should split the documents into multiple batches. Alternatively, the preferred method for distributing large files is the DCS Distribute by Download feature.

Missing Contact Roles in DLM Approval Route Templates Organization Roles

When you edit a stage in the Approval Route Templates Organization Roles screen, information is missing in the details listview for contact roles, even when you previously set a value. Additionally, if you click the Add button in the listview, it duplicates any previously saved items.

Create Routes and Manage Routes Icons Duplicated in Manage Project Approval Settings Screen

When you access the Manage Project Approval Settings page through the Manage Document Approvals screen, the Create Routes and Manage Routes icons are duplicated in some cases.

Slow Performance When You Add Rows and Edit Row Settings in the Manage Approval Route Groups Page

When you add a row for a group in a stage in the Approval Route Groups page, or edit the settings for a row, you might notice a delay in performing the action. In some cases, this delay can cause a page refresh, which results in you losing any unsaved data.

Documents Missing in the Offline Documents Band in Some Projects

In some projects, offline mobile documents may be missing in the Offline Documents band. Note that this does not affect your ability to offline a document or make it available for location markup.

Slow Performance Loading for Some Look-Up Editors

For the Manage Lookups pages that contain many tabs, or display tabs with complex data structures, the pages may take a few seconds to load.

Security Grids

In PIM 20.1, the legacy security grids have been separated into individual pages for each type, rather than a single page for all types. Although the new menu item security grid allows you to grant a user role with access to individual grid types, if a user role has been granted access to one security grid type, they will have access to all security grids. This rule will persist, as it is thought that a user role with sufficient rights to configure one security type should be responsible to configure all security types. By default, only user roles who had access to the single legacy security grid are granted access to all new security grid pages.

Firefox Displays Misaligned Text in Search Boxes

When you access PIM via Mozilla Firefox, the text within the search boxes is not correctly aligned.

Issues with Workflow and Document Removal

There are currently two known issues with the Document Removal feature and the Workflow module:

- When you attempt to send a tender out that includes a document that was removed, the tender will fail to get sent.
- When you remove a document after it has been issued as part of a tender or used in DLM approvals, a non-intuitive error message is displayed to users when they attempt to download the removed document.

Appendix D: 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
- 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.

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