



Deltek

Deltek Project Information Management

PIM 24.1 Release Notes

December 20, 2024

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Introduction

Welcome to Deltek PIM 24.1 Release Notes. These release notes contain a summary of the following:

- Pre-installation Information
- Known Issues
- Deprecated Features
- 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 24.1 Video

To see the new features in PIM 24.1, watch this video: [What's New in PIM v24.1](#).



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 24.1 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 23.0, 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 23.0, SQL Server 2012 & 2014 are no longer supported. If you are using these or prior versions of SQL Server, your site will be flagged as requiring a SQL 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, and Windows server 2012R2 as of October 2023. If you are planning to upgrade to PIM 24.0 or above, 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 and Windows 8 / 8.1 as of January 2023. 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 10 and 11 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, followed by SQL 2014 in July 2024. The next release of PIM will require you to upgrade SQL Server to a minimum of SQL 2016.

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 Framework 4.8 and .NET 8. If these are not already installed, you may be asked to install this version ahead of your PIM installation or upgrade.

Client Hardware Requirements

Display Resolution

For an enhanced user experience, we recommend a display resolution of 1440 x 900 or higher. With evolving device technology standards, we have raised the minimum resolution requirement to improve information display across PIM's various pages. To ensure optimal viewing, please consider updating devices for users still operating PCs with lower resolutions.

Upgrade Actions for System Administrators

System administrators should consider the following actions after an upgrade:

Azure Single Sign-On

- If you have implemented PIM's Azure Single Sign-On in version 22.0 without upgrading to PIM 23.0, you 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 required to add an extra security layer to the Azure authentication model. If you previously implemented Azure Single Sign-On in PIM 22.0 without upgrading to PIM 23.0, 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 login method works from PIM 23.0.

Email Flows (on-premises clients only)

- To futureproof your PIM system, consider your email provider construct and whether to implement against the new modernized mail flow features introduced in PIM 23.0.
- You can review our documentation on these changes and feature configuration on our Customer Care Knowledge Base site [here](#).
- For those interested in the wider position of PIM Email Management modernization, please see our [supporting DLZ material](#).

Edge Hybrid Mode

Project Accounting users that use Internet Explorer (IE) for PA functions that still require IE should consider implementing Hybrid Edge IE Mode upon upgrade. This future-proofs access as PIM leverages modern browser features that may not work in full IE. Hybrid Edge IE Mode provides a seamless experience with modern browsers, and means users get IE on-demand when required, and the modern Chromium experience when IE is not required.

For more information on how to implement Hybrid Edge IE Mode, please visit our [Support Services Knowledge Base article](#).

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 4.8 to be installed on client machines.

Local File Management

Local File Management (LFM) requires .NET 8.0. 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.

The LFM installer can be accessed on your upgraded PIM site here: Administration Zone > System Configuration > System Setup > Client Components.

Universal File Management

Universal File Management (UFM) requires .NET 8.0. 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) to connect the remote file server with PIM.

The UFM installer can be accessed on your upgraded PIM site here: Administration Zone > System Configuration > System Setup > Client Components.

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.

API Application

The API application now runs on .NET 8.0 on your PIM web server. This upgrade is included in the installation process and does not require any additional action.

Component	Notes	PIM Version of Last Update
Essential Components – Required on all client PCs		
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 8.0.	24.1
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 4.8.	22.0
Optional Components – Required only if specific modules are installed on a client PC		
AutoCAD Integrator Provides features for integration with AutoCAD.	Due to Autodesk's transition to .NET 8 in their 2025 software, PIM now provides two separate AutoCAD components. A 2024 and earlier version supports older framework versions, while a 2025 and later version is compatible with Autodesk 2025+ products. These components can be installed independently as needed and are available on the usual Client Component Admin page.	24.1
Revit Integrator Provides features for the integration with Revit.	Refer to the note for the AutoCAD Integrator above regarding Autodesk's .NET 8 compatibility updates.	24.1
MYOB API Ledger Connector Ledger connector functionality used if you integrate with MYOB with the available API functionality.		22.0
MYOB Ledger Connector Ledger connector functionality used if you integrate with MYOB without using the API.	MYOB have withdrawn support for their classic ledger offering. PIM clients should consider migration to MYOB's other ledger software or Xero.	19.1
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

Component	Notes	PIM Version of Last Update
Sage 200 Ledger Connector Ledge 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 8.0.	24.1

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.
Working Files	Replaced by Local File Management (LFM) component.
Excel Link	Replaced by new server-side Excel exporter.
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.

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 2015-2022 x64 to be installed on the server.

For information, see <https://docs.apryse.com/documentation/core/info/prerequisites/windows/>.

Mobile App Requirements

PIM 24.0 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 14 (this was iOS 12 in the previous release)
- Android 9.0 (this was Android 8.0 in the previous release)

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](#).

Known Issues

There are no known issues in this release.

For information on known issues in previous releases, see [Appendix C: Known Issues in Previous Releases](#).

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 24.1 Deprecated Features

Feature	Notes
Cache Servers	Any clients with the Cache Server SKU will have received a communication detailing the withdrawal of Cache Server support.

Planned Deprecated Features

The following features are planned for deprecation in future releases.

Feature	Notes
Hard Copy Scanner (Local SMTP email provider)	If you have Local SMTP enabled as your email provider, this feature is scheduled for deprecation in PIM 25.0.
Customer Customizations of Older Pages	If you use customized legacy pages, you are strongly advised to undertake customization reviews as part of the broader Optimization Workshop. Contact your Account Manager for more information.
Rasterex for Markup	PIM Viewer clients on older versions of PIM may still be using the legacy Rasterex service to apply mark-up. PIM Viewer clients upgrading from these versions will need to upgrade to PIM 24.1 before upgrading onwards to run their Rasterex mark-up through a conversion routine to our new technology.
Mail Vault	<p>The Mail Vault has been under sustaining support for several years now, allowing time for clients to seek alternatives. If you rely on Mail Vault for your business, you will need to consider the following options:</p> <ul style="list-style-type: none"> 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. <p>A move to an external provider of email journaling, such as Microsoft Exchange Office 365's Unified Hold feature.</p> <p>Mail Vault will be finally removed from PIM in 25.0.</p>
Legacy Working Files Component	The legacy WorkingFiles component code, replaced by LFM, will be removed from the PIM software in PIM 25.0.

Deprecated Features

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.
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	<p>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.</p> <ul style="list-style-type: none"> ▪ 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.
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.

Teams Integration

The Teams Integration feature transforms document sharing and collaboration by seamlessly connecting PIM with Microsoft Teams. Designed to enhance productivity, the integration ensures organizations can work efficiently while maintaining document integrity, security, and version control.

Seamless Document Sharing

The integration simplifies how teams share and collaborate on documents, enabling PIM document series to be shared directly to Teams channels with ease. This functionality ensures discussions remain centered on the most up-to-date documents, while PIM retains the full revision history for accountability and traceability.

Key highlights include:

- **Streamlined Sharing Process:** Share individual or multiple PIM documents to Teams with a few clicks via the new 'Share to Teams' button on the PIM toolbar.
- **Collaboration in Teams:** Automatically create Teams conversations around shared documents, including direct links to the documents for seamless navigation between Teams and PIM.
- **Visibility Indicators:** Shared documents are marked with a Teams icon in the Teams column. Clicking the icon opens a detailed view showing the Teams conversations where the document was shared, along with the date and time of sharing, the user who shared it, and a link to open the corresponding conversation in Teams.

Administrative Controls and Secure Configuration

Secure Communication via Entra App Registration

The PIM + Teams integration connects to your Microsoft Teams instance through Entra App Registration. This enables users to log in to Teams within PIM and enables PIM to post to Teams on their behalf, while adhering to each user's Teams security profile. Users' OAuth tokens are securely encrypted in the database, ensuring the protection of access and user data.

The integration's administrative setup process is detailed in the relevant admin help pages and is further supported by the Deltek PIM Teams Integration Administration Guide, available in our Support Service portal.

PIM's Role-based Access for Teams Conversations

The following new entity functions cover the Teams feature set:

- **Teams.Admin:** Enables users to manage integration setup, user permissions, and oversight of shared documents.
- **Teams.ShareDocument:** Enables users to share documents to Teams channels.

Enhanced Collaboration Experience

The Teams Integration fosters efficient workflows and ensures alignment with the most up-to-date project information:

- **Support Across Platforms:** Integration is available in both Smart and Classic PIM, providing a consistent and flexible experience for all users.
- **Teams Conversation Integration:** When accessing the Summary Details (Smart DMS) or Document Details Panel (Classic DMS) for a document shared to Teams, a new Teams tab/section displays existing conversations linked to the document. This section includes options to create a new conversation for the document or reply to an existing conversation, facilitating seamless collaboration directly from PIM.
- **Integration Indicators:** The DMS results list now includes a Teams icon to identify shared documents. This feature allows you to locate shares quickly and engage in related Teams conversations directly from PIM.
- **Streamlined Management:** The 'Share Document to a Teams Conversation' screen centralizes Teams conversation creation, simplifying the sharing workflows and enabling you to collaborate directly from PIM.
- **Access Notifications:** Clear warnings are displayed if a Team, channel, or conversation has restricted access or has been deleted, preventing disruptions to the workflow.

Benefits

- **Improved Collaboration:** Centralizes document sharing and discussions within Teams, minimizing the need to switch between applications.
- **Enhanced Security:** Respects PIM and Teams permissions to safeguard sensitive information.
- **Efficiency Gains:** Simplifies workflows by reducing the steps required to share and collaborate on documents, allowing teams to focus on decision-making and execution.

These enhancements make the Teams Integration feature a powerful addition to PIM, supporting secure, efficient, and collaborative document management.

Enhanced Security with Role-Based Permissions for Advanced Searches

Control over Advanced Search queries has been enhanced with the introduction of role-based permissions, providing more granular access management. This update enables administrators to restrict who can create, edit, or delete shared or default search definitions, while ensuring that users can securely save and manage their own searches.

To support this, two new roles are introduced:

- **AdvancedSearch.Admin:** Grants full access to all saving options, including the ability to create and modify Standard searches visible to other users.
- **AdvancedSearch.ManageStandard:** Allows users to save searches as Standard, but limits access to elevated administrative functions such as editing or deleting system-wide searches.

Users without these roles can only save searches to their **My Saved Searches**. The "Save As" options dynamically adjust based on the user's role, ensuring that unauthorized users cannot modify or delete shared or default searches. By default, both roles are assigned to members of the **F01 role**, but administrators can grant the **ManageStandard** role to trusted users without giving full administrative privileges.

Updated Social Media Links on Landing Page

The Landing Page's Google Search dashboard now defaults to Deltek's social media links, replacing the previous "UnionSquare" links. You also have the option to customize these links to your organization's social media handles. This update allows users to quickly navigate to relevant social media pages directly from your Landing Page.

New Features: Document Management

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

Enhanced User Experience with Auto-Search Toggle in the DLM Band

You can now disable auto-searching on the DLM band, providing a smoother user experience when working with large document projects. A new "Auto Search" toggle has been added to the DLM band's main ribbon, allowing you to control whether results are automatically updated when changes are made to groups or filters. This toggle state is saved as a user preference, offering you more control over your search process.

Direct Document Check-In from DMS Search Results Page

You can now check in a document directly from the DMS search results page in both Classic and Smart DMS modes, eliminating the need to navigate to the LFM page. The "Express Check-In" option is available under 'More options' for documents that have been checked out. This feature, available only when LFM is installed and configured, simplifies your workflow by reducing the number of steps needed to check-in a document.

Expanded Smart LFM Screen for Enhanced Record Viewing

The Smart LFM screen now expands to a larger size. This maximized view allows you to see more records at once, improving your workflow efficiency.

Enhanced Share Wizard for Large Files

To prevent issues when you share large files, the document share wizard now defaults to 'Download Link', bypassing the 'Max Basket for Email & Zip' limit set under Admin > DMS Configuration > Email Settings. This update also simplifies the sharing process by relocating certain fields to the initial step of the wizard.

New Renditions Column in Smart DMS Basket Mode

A Renditions column has been introduced to the Smart DMS Basket mode, offering functionality consistent with the existing Renditions column in Smart Drawing mode. This addition provides an at-a-glance view of document renditions for each document, and enables you to click on a rendition to open and view it directly. The column is fully customizable, enabling you to move, freeze, or unfreeze it to suit your workflow preferences, further enhancing workspace flexibility and usability.

Filter on Details for DMS and DLM Documents

A new filtering option in the Classic Search Builder enables you to refine search results in the Document Management System (DMS) and Document Lifecycle Management (DLM) by focusing exclusively on the content within the Details field.

New Features: Design Management

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

AutoCAD Connector Compatibility with AutoCAD 2025

To ensure continued integration with Autodesk's 2025 range of products, which have transitioned to .NET 8 in their 2025 release, we have developed a separate AutoCAD 2025+ client component to support their new development framework. This new AutoCAD 2025+ add-in is required for AutoCAD versions 2025 and higher. User working with AutoCAD 2022-2024 will continue to use the previous version of the add-in, which is built against Autodesk's legacy framework.

Both the new and legacy framework client components are available on the Client Components page in the Admin Zone.

Revit/DLM Integrator Compatibility with Revit 2025

To ensure continued integration with Autodesk's 2025 range of products, which have transitioned to .NET 8 in their 2025 release, we have developed a separate Revit 2025+ client component to support their new development framework. This new Revit 2025+ add-in is required for Revit versions 2025 and higher. User working with Revit 2022-2024 will continue to use the previous version of the add-in, which is built against Autodesk's legacy framework.

Both the new and legacy framework client components are available on the Client Components page in the Admin Zone.

New Features: Project Accounting

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

Porting Finance Lookup Editors to Modern Browsers

Various finance lookup editors have been updated to a modern browser platform, enabling administrators to configure essential items with improved efficiency and user experience. The various newly developed pages are added as menu items in the Project Accounting area of the Admin Zone, allowing the administrator to use the Admin Zone search to locate the required page / function more easily.

New Features: System Administration

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

Enhanced User Information in Manage API Access Page

The Manage API Access page now includes a new "Connected Users" tab under each OAuth ClientID. This tab provides detailed information about each PIM user logon, including their roles, token status, and connection timestamps. This additional layer of information allows PIM administrators to better monitor and manage API connections.

Enhanced UDC Configuration for System Administrators

PIM administrators now have access to a dedicated UDC Configuration page, accessed by navigating to **Admin Zone > Document Management > Configure UDC**. This feature enables administrators to define specific configuration values to optimize the performance of the UDC module, particularly for API synchronization of UDC documents.

For this release, the configuration page includes a setting for **Document Sync Batch Size**, allowing administrators to specify the maximum number of unmanaged documents PIM can receive from external sources in a single batch. This value can range between 100 and 10,000, providing greater control over synchronization efficiency and system performance.

New "Entered By" Filter in Action Management Tool

PIM administrators can now filter actions in the Action Management tool based on the user who entered them. This enables you to bulk change all actions created by a specific user, streamlining your workflow.

Enhanced Document Management

Bulk Publish Unmanaged Documents

PIM administrators can now bulk publish unmanaged documents into PIM from the Configure Unmanaged Source screen, streamlining the process of incorporating unmanaged documents into the document management system. The documents are processed and published as managed documents.

Note: Bulk publishing operates as a background process, meaning the PIM user's workstation does not need to remain online during the operation. However, the publishing of unmanaged documents is limited to those accessible by the UDC Prime Indexing user, not the user initiating the publishing action in PIM. Each folder to be published is processed in turn. Please contact Customer Care if you have any concerns about the speed of data importing.

Enhanced Pool Suggestions

The UDC Bulk Publisher offers a more comprehensive range of pool suggestions. All suggestions with the same confidence rating are displayed as possible matches, and previously used locations are included, even if they do not have initial matches. This enhancement simplifies your workflow, reducing the need to manually add pools for publishing.

Access-Aware Publishing

The UDC Bulk Publisher dynamically checks your write access to document pools before publishing. If a pool is suggested but you lack the necessary permissions to publish to it, the system clearly indicates this with a message. To prevent publishing failures, the **Publish Selected** button remains disabled until all selected rows are assigned to pools where you have the appropriate permissions.

Updates to Entity Function Roles

As part of this new feature, the entity function roles concerning Universal Document Control have been updated, and the following roles now exist:

- **UDC.Admin:** Specific role for UDC administrators and replaces previous DMS.Admin user role.
- **UDC.Map:** Enables users to map new project document sources.
- **UDC.BulkPublish:** Enable users to bulk publish unmanaged documents from the
- **UDC.Publish:** Enables users to publish unmanaged documents from the Configured Unmanaged Source screen.

Bulk Move DMS Documents to Recycle Pool

The Bulk Move Documents feature has been reinstated. This enables PIM administrators to bulk move DMS documents to the recycle pool, simplifying the process of rectifying users' mistakes. The feature is only available in SMART DMS and can be accessed by clicking the **Bulk Recycle** button in the Smart Information Zone and Documents bandset. This feature is only visible to members of the Dms.BulkRecycle entity function role.

Preserve Published User and Date when Moving Documents

As a PIM administrator, you can now correct the location of incorrectly published documents without affecting the publish user or date. This feature allows you to move hundreds of documents from one pool to another while preserving the published user and date, enabling efficient housekeeping of the DMS. The new toggle – **Preserve Published User and Date** – is available when you select to move documents in the DMS and is only visible to users with the Dms.Admin entity function role, ensuring secure and controlled use of this feature.

More Information

For additional details, see the following help topics:

- [Universal Control Bulk Publishing](#)
- [Bulk Publish Unmanaged Documents](#)

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 2098321

When you worked on a project in PIM and excluded a certain number scheme, the excluded scheme still appeared in the Available Schemes section under the DLM tab in the Administration section.

Defect 2145171

When you tried to upload Excel documents into the DMS system, and after checking out existing Excel files, when you attempted to check them in, the following error displayed: "Error 4653807: A problem occurred when processing a request to the server."

Defect 2145174

When you published an email using the Deltek PIM Outlook add-in, in rare cases, an error displayed.

Defect 2145175

When you completed, closed, or modified an action, and then refreshed the My Actions dashpart in your Personal Zone, the dashpart did not display the updates.

Defect 2145177

When you published files through LFM or via the File Upload feature, the status for documents was not displayed in the Document Status column when viewed through Smart View Drawing Mode. Instead, you had to view the summary details for a document to view the status.

Defect 2157795

When you edited a DLM placeholder and updated the originating organization via edit properties, the organization previously listed in the document attributes was removed.

Defect 2160432

When you clicked 'Add Files from Folder' in the Smart Superseder tab of a project without Local File Management (LFM) installed, you received the following error: "Byte array for GUID must be exactly 16 bytes long."

Defect 2162724

When you resized the Document Details Panel in DMS, the panel could be enlarged, but then prevented you from reducing its size. This resulted in the resize function remaining active even without holding down the left mouse button. This issue was observed in Chrome, Edge, and Edge in hybrid mode, but not in Edge in IE mode.

Defect 2166386

When you attempted to set up 2FA as a Teamwork user after migrating to the cloud, the generated 2FA code provided in the email did not work, and you received the following error: "That code was invalid, please try again." This issue occurred for both existing and new Teamwork users.

Defect 2169368

When you clicked 'Finish and Process Now' when issuing DLM documents, the issue number was missing from the email subject. This issue affected PIM 24 only.

Defect 2172904

When you attempted to export over 1,000 documents using the Document Export/Removal tool, the 'Yes, Proceed' button became unresponsive, and you could not complete the removal or export task.

Defect 2179168

When you published files and assigned actions, in some cases, the actions were not displayed on the Actions tab when you view the document properties of the published documents.

Defect 2179302

When you chose to issue documents via Email in PIM 24, the email did not contain document links.

Defect 2179931

When you configured and enabled Azure SMTP Client as the new email provider and set the smart host to smpt.office365.com, PIM continued to use the local SMTP config/server for outbound emails. This meant that when you tried to send an email through the DMS or assign an action, an error appeared on the latest queue job, and recipients did not receive the email.

Defect 2181813

When you performed an unfiltered DLM Placeholder search on a large-scale project with thousands of placeholders, and applied the Originating Organization grouping, the following error displayed: "An error occurred".

Defect 2182824

When you sent a DLM issue using the Finish and Process option, the file attachments were missing in the sent email.

Defect 2189713

When you issued DLM documents, and you included apostrophes in the email body, they were converted to â€™ in the received emails.

Defect 2195680

When you renamed a user role with an apostrophe or any unescaped character in its name, it caused an unexpected identifier console error, and the User Roles page was blank after a refresh.

Defect 2203832

When you published files to the incoming documents pool using LFM, and published those files using the Smart Superseder, in some cases, the document date did not display in the respective date column within the DMS.

Defect 2209229

When you attempted to export an Excel file from the DMS for a project or enquiry that had a comma in its name, the file exported with an invalid .file file extension, and you could not open it in Excel.

Defect 2212947

When you set up a large number of milestones for a project and navigated to the Milestones tab, a scrollbar did not appear to allow viewing of all milestones. This issue occurred even when the browser was resized to be shorter than the list. As a result, you were unable to scroll down to the bottom of the page.

Defect 2221603

When you used the Smart Superseder to add files from a folder, the search bar on the Local File Management (Smart Superseder Mode) window did not allow you to filter the list of files in the local directory.

Defect 2265105

When you attempted to share project documents, the contacts for the project did not auto-populate on the Send Email To screen as expected. This issue occurred in PIM 24.0.2.

Defect 2211776

When a user updated their DMS search preferences, it could overwrite other users' DMS search preferences.

Document Management

Defect: 2120434

When you clicked the **View Document** icon for an older version of an image file, the latest/current version displayed instead of the intended previous version. This issue was observed when the View Method was set to **Image** for image file types (e.g., JPEG, JPG, PNG) under **Admin > Document Management > DMS File Extensions**.

Defect: 2172132

When you started the LFM app with an incorrect base URL configured or other installation errors, the following misleading error message displayed: "Your Delttek LFM installation is out of date."

Defect: 2195979

When you tried to load the **Manage Sets** page via the Admin Zone or select **Available Sets** within a project, a timeout error could occur if thousands of DLM sets were configured and used in DLM schemes.

Defect: 2206919

When you attempted to publish documents via the **Smart Superseder**, changing the document title caused its status to change to **New**. As a result, the **Publish Selected** button was greyed out, and the tooltip displayed: "It is not possible to Supersede a Snapshot Publish document."

Defect: 2212535

When you added an originating organization to a placeholder created from Revit, the following error displayed: "Expression must evaluate to a node-set." This error prevented the addition of the originating organization to the placeholder.

Defect: 2211776

When a user updated their DMS search preferences, it could overwrite other users' DMS search preferences.

Universal Document Control

Defect: 2112789

When you renamed a network folder in a PIM project, the files remained under the old folder name in the unmanaged documents pool, even though the folder had been renamed. After refreshing the DMS page, both the old and new folder names displayed. The expected behavior was for the files to move to the folder with the new name.

Defect 2183347

When you added a file to a mapped network folder and synced to PIM, unmanaged files were not extracted in some cases, and an error about invalid characters appeared in the system logs.

Workflow

Defect: 2153633

When you viewed and replied to a contract management item, any text changes made in the Reply text field after two minutes from opening the window were removed upon resizing or moving the web browser window.

Defect: 2199141

When you removed a contract management item type via the workflow admin settings, it was still possible to create new contract management items of that type from a project.

Defect: 2213042

When you clicked email links for snag/punch list items or DLM approval tickets assigned to you as a Teamwork user, in some cases, the following error message displayed: "You do not currently have permission to access this area".

Defect: 2159166

When you created new contract management items with Disable Replies selected in the contract management admin settings, you were unable to add recipients for email sending. This issue occurred regardless of whether Recipients Not Required was selected or not.

Mobile Working

Defect: 1550183

When you viewed a custom form on an iPad and clicked on a question longer than 90 characters, the question was cut short in the top bar of the answers page. On an iPhone, the question disappeared completely after being clicked. This issue only occurred with iOS devices (versions 15.0 and 15.0.2) and did not affect Android devices.

Defect: 1588680

When you entered data into mandatory fields on a custom form via the mobile app, the labels for these fields inconsistently changed color. This behavior varied between iOS and Android devices and depended on the type of control in use.

Defect: 1626474

When you logged into the PIM Mobile Working iOS app for the first time and navigated to PIM Live Browsing, an unexpected login screen appeared. This occurred when you selected the "Exclude Emails" checkbox to search for documents, clicked on a document, and then clicked **View Document**. Instead of the document loading immediately, another login screen was displayed.

Defect: 2168268

When you attempted to submit a subform without filling in all required fields using the PIM Mobile Working app for iOS, the app crashed.

Defect: 2199200

When you attempted to take and submit photos via **Tools > Take Photo** on the PIM Mobile Working app for Android, despite completing all mandatory fields, the following error displayed: "Please complete all mandatory fields before submitting."

Defect: 2160458

When you renamed an existing workpackage on a project or enquiry's Workpackage band, the new name did not reflect in the Workpackage dropdown under the Snagging/Punch Lists band. As a result, snag/punch list items with the renamed workpackages could not be filtered, slowing down productivity when a large quantity of snag/punch list items existed for the project/enquiry.

Defect: 2220255

When you submitted a snag/punch list item for review, the notification email for outstanding snag/punch list items incorrectly CC'd only the Admin User, regardless of the assigned snag/punch list item reviewers for the project.

Defect: 2220962

When you issued snags/punch lists from a project entity and checked the summary of the corresponding snag/punch list email in the document management system (DMS), the project value incorrectly displayed as "???" under Attributes.

Defect: 2245755

When you received an email notification from a mobile custom form with an email distribution list enabled, clicking the link to download the documents resulted in the following error message: "You do not currently have permission to access this area."

Project Accounting

Defect: 2145165

When you linked different sources of entitlement to a single absence category in the Categories Management section under **Admin > Absence**, issues occurred if the entitlement sources had different providers, such as Hourly and Daily providers.

- If the contact entitlement was set to Daily, the absence booking changed to hours instead of days when edited.
- If the contact used an hourly entitlement and a common category name like "Holiday," it created a duplicate in the Category dropdown. This also resulted in incorrect hours being deducted on the display, not aligning with the hours set in WWS.

Defect: 2219321

When you attempted to sync the Timesheet Mobile App with the PIM site on an Android phone, an "Unable to Sync" error displayed if the workflow module was disabled or stopped.

Defect: 2246851

When you edited and then moved a resource plan that had at least six contacts assigned, a timeout could occur upon saving if the contacts had allocations or absences linked to other projects.

Defect: 2260877

When you edited the expense currency via the Manage Expenses function, the exchange rate was not updated upon submitting the timesheet. This issue occurred when the **Use Current Exchange Rate When Posting Expenses** option in the Project Accounting configuration was unticked, and the project was linked to an organization using a different currency.

Appendix A: Noteworthy Software Changes for Heritage Clients

Regarding various legacy Union Square features, the table below illustrates instances where we have removed outdated pages that are no longer compatible with the current standard product.

Area	Page	Reason	Removed in PIM Version
Replace Document by Email	Not applicable	Not compatible with the new SMTP Relay or Azure SMPT Client email providers Note: Only disabled if you enable either SMPT Relay or Azure SMTP Client as your email provider	24.0
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

Appendix A: Noteworthy Software Changes for Heritage Clients

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=stdvehicleexpiry /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	Not applicable	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 advanced “search definitions” in PIM have been relocated to the modern Xweb section of the site, specifically under the “search” folder. Customized versions of standard searches are expected to remain operational post-upgrade.

HTTP Security Headers

PIM 24.0 extends the following HTTP Security Headers as part of your PIM website to assist with your security posture:

- Permissions-Policy/Feature-Policy Header
- Referrer-Policy Header
- Strict-Transport-Security (HSTS) Header
- X-Content-Type-Options Header
- X-Frame-Options Handling
- Content-Security-Policy Header

In the past few releases of PIM, we have been preparing heritage clients for final transition to full HTTPS operation of their site. The new HSTS security header will finally force HTTPS for any external facing web requests, meaning there is a slight risk of aged custom integrations still requiring HTTP ceasing to function. We have managed forcing HTTPS over the last few releases by virtue of your site config that can be changed easily on upgrade. However, this latest change cements the move to HTTPS.

Appendix B: Deprecated Features in Previous Releases

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

PIM 24.0 Deprecated Features

Feature	Notes
Replace Document by Email	This feature is no longer available if you have enabled either of the new email providers – SMTP Relay or Azure SMTP Client. For clients still using the Local SMTP option, this feature is still available.
Hard Copy Scanner (SMTP Relay or Azure SMTP email providers only)	New scans under this feature are no longer available if you have enabled either of the new email providers – SMTP Relay or Azure SMTP Client. However, for clients still using the Local SMTP option, this feature remains accessible. Please note that this feature will be deprecated for all clients in PIM 25.0.

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.

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.

Feature	Notes
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.
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 – <code>math.random</code> – 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.

Appendix B: Deprecated Features in Previous Releases

Feature	Notes
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	<p>Rasterex is being replaced by Apyrse, (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.</p> <p>Support for Rasterex will end in June 2024. All current PIM Viewer users should ensure they are upgraded prior to this date.</p>

PIM 20.0 Deprecated Features

Feature	Notes
Custom Help Panel	<p>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.</p> <p>You can configure the system to use your own custom hosted help. For information, see the PIM 20.0 release notes.</p>
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.
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 Delttek 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	<p>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.</p> <p>iOS Download Link: Deltek PIM Timesheets App (Apple App Store)</p> <p>Android Download Link: Deltek PIM Timesheets App (Google Play)</p> <p>After installing the new Deltek PIM Timesheets App, you will be required to enter your PIM site URL, and your login credentials.</p>

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.

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

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.

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. This is fixed from version 24.1.

Previous Mandatory Entity Classifications No Longer Mandatory after Upgrading

After you upgraded, you should ensure that all previous mandatory classifications are still mandatory. If you found that some classifications were no longer mandatory, you were required to 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 used 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 was larger than 4GB, the process failed. If this occurred, you were required to split the documents into multiple batches. Alternatively, the preferred method for distributing large files was the DCS Distribute by Download feature.

Missing Contact Roles in DLM Approval Route Templates Organization Roles

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

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

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

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

When you added a row for a group in a stage in the Approval Route Groups page, or edited the settings for a row, you might have noticed a delay in performing the action. In some cases, this delay could cause a page refresh, which resulted in you losing any unsaved data.

Documents Missing in the Offline Documents Band in Some Projects

In some projects, offline mobile documents may have been missing in the Offline Documents band. Note that this did 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 contained many tabs, or display tabs with complex data structures, the pages could 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 allowed you to grant a user role with access to individual grid types, if a user role had been granted access to one security grid type, they had 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 that 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 accessed PIM via Mozilla Firefox, the text within the search boxes was not correctly aligned.

Issues with Workflow and Document Removal

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

- When you attempted to send a tender out that included a document that was removed, the tender failed to get sent.
- When you removed a document after it had been issued as part of a tender or used in DLM approvals, a non-intuitive error message displayed when you attempted 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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