

Deltek Project Information Management

PIM 22.0.1 Release Notes Hotfix 1

May 16, 2023

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This edition published May 2023.

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Introduction

Welcome to Deltek PIM 22.0 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.

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](#).

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:

- **Bulk Superseder**
- **Merge SQL into Workflow documents**
- **Embedded PIM Search Folders in the Outlook Add-in** (replaced by the new [Search DMS Feature](#)).

For more information, see [PIM 22.0 Deprecated Features](#).

New Features

General

Feature	Description
Team Evaluation	Measure the performance of all aspects of your internal and external project team using Team Evaluation. You deploy rating schemes for users to rate external entities, such as the performance of external organizations linked to projects. Performance data can be reviewed graphically. More information
Customize Your Search Results	Move and freeze columns in your search results, such as when you search for documents. More information
Enhanced Edge Browser Experience	Improved experience in Edge as you are now seamlessly transitioned between Edge modern browser mode and Internet Explorer mode regardless of what links you click. More information
PIM Teamwork	Invite external contacts to access project information and documents and upload their own documents. More information

Document and Email Management

Feature	Description
Document Snapshots	Publish the latest changes to documents as you maintain control while you continue to work on them. More information
Smart Superseder	Use the Smart Superseder to supersede batches of documents with files that you receive from external organizations. More information
View Markup on Previous Versions	View the markup on previous versions of documents and drawings when you view the version details in Smart View. More information
Preview Documents	Preview emails, images, PDFs, and ZIP files in the new Smart View Preview pane. More information
Download and Share Batches of Documents	Use the Bulk Download and Bulk Share options to download and share batches of documents More information
Manage Document Search Preferences	Set your document search preferences for managed and unmanaged documents. More information
Display More Documents in Search Results	Click Load More to display more results when you search for documents in Smart View. More information

Email Management

Feature	Description
Edit Recent Locations	Modify the publish locations and attributes of a recent location when you publish emails. More information
New Search DMS Feature	Outlook Add-In's embedded PIM Search folders have been replaced by a new Search DMS button on the Outlook toolbar that launches a new search page in your browser. More information

Summary of Key Features and Changes

Feature	Description
Classic View Available for Integrated Email Clients	Integrated email-only users can now access either Classic Mode or Smart View to search for documents. More information

Design Management

Feature	Description
Drawing Mode	Manage and review project drawings in Drawing Mode, available from the Information Zone and the Documents tab on projects. More information

Project Accounting

Feature	Description
View All Posted Sales and Purchase Documents	Click Show All on the Sales Documents and Purchase Invoices bands to view all documents. More information

Mobile Working

Feature	Description
Use DMS Picker to Select Offline Documents	The Offline Documents page is now cross-browser friendly. Use the DMS picker to select documents for offline access. More information

Administration

Feature	Description
Clone Bands	Clone existing bands on the Manage Bands page to save time. More information
New Document Pool Requirements Grid	Easily configure document pool requirements in the new Document Pool Requirements grid. More information
Single Sign-On with Azure Active Directory	Enable single-sign on to PIM if you use a cloud-based Microsoft Azure Active Directory identity provider. More information

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 21.0 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 current 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	<p>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.</p> <p>If you are on a post-2017 version of PIM, no action is required.</p>	19.2 (64R5B12)

Client Hardware Requirements

Display Resolution

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

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

Important Notes

- 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 (LFM) and Universal File Management (UFM) now require .NET 7.0. Both the LFM and UFM installers will install .NET 7.0 if it is not already installed.
 - To install Local File Management, 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.
 - To install Universal File Management, you are required to update all servers running UFM for Universal Document Control to the latest version of the UFM component.

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.	In addition to 32-bit, a 64-bit version is provided for users of 64-bit IE. Only supported in full Edge IE mode. This component has been replaced by 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

Component	Notes	PIM Version of Last Update
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
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

Component	Notes	PIM Version of Last Update
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.	22.0

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

PIM 22.0 introduces 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](#).

PDFTron Requirements

PDFTron, 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://www.pdftron.com/documentation/core/info/prerequisites/windows/>.

Known Issues

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

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.

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.

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.
Legacy Performance Ratings	PIM 22.0 sees the release of the new Team Evaluation module, which is a replacement for Performance Ratings
HTTP Only	Due to security concerns PIM 22.0 will update your site to use HTTPS as part of the upgrade. If your PIM environment, site or custom parts of your site rely on unsecured HTTP protocol the PIM application may be changed back to allow HTTP, via a Customer Care case. However , PIM 23.0 will force usage of HTTPS only, so you must take this as an opportunity to address the underlying cause for reliance on HTTP only.

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.

Deprecated Features

Feature	Notes
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.
Mail Vault	<p>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:</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>

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.

Feature	Notes
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.
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.

Deprecated Features

Feature	Notes
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	<p>Rasterex is being replaced by 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 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	<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)	<p>The functionality provided by this band is now provided by the 'Assign External Renditions' feature in DLM.</p> <p>Note This feature was reinstated in PIM 19.0.</p>
Legacy Workpackages in Document Issuing System	<p>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.</p>
Custom Logon Page	<p>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.</p>

PIM 2016 Deprecated Features

Feature	Notes
Outlook IMAP Folders	<p>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.</p>
DMS Search Screen	<p>The old DMS Search screen was deprecated and was automatically replaced with a new main DMS page.</p>
Drawing Manager Lite	<p>Drawing Manager Lite was replaced by Document Lifecycle Manager (DLM). Please consult with your account manager to discuss migrating to DLM.</p>
Legacy Work Packages Module	<p>Support for the original subcontract tendering module (also known as Workpackages) was deprecated and replaced by the new Subcontract Tendering module.</p>
Project Accounting Resource Planning	<p>Resourcing by Grade was deprecated as it was not compatible with the Summary tables.</p>
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.

New Features: General

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

Team Evaluation

Team Evaluation enables you to measure the performance of all aspects of your internal and external project team to ensure projects are delivered on time and within budget. Team Evaluation replaces and improves upon the previous Performance Ratings module, as multiple entities can now be rated in one go, which leads to more useful data being collected.

You deploy rating schemes for users to rate external entities. Rating schemes are usually set up to measure the performance of external organizations against projects, but you can also create schemes that measure the performance of contacts, enquiries, and projects.

Configure Team Evaluation

In the Team Evaluation configuration settings, you can specify how many ratings users can rate in a single session, the max number of search results to display when reviewing data, the number of calendar days in which to calculate average performances, and the lower and upper percentage thresholds.

You configure Team Evaluation via **Admin > Entity Configuration > Configure Team Evaluation**.

Create Rating Schemes

When you create a rating scheme, you define the entity type that the scheme measures against, and the entity type where users can launch the scheme from.

For each scheme, you define a series of star rating and multiple-choice questions for users to answer. Guidance can be provided to assist users with answering questions. For each question, you define a score weighting to define the importance of the question – this acts as a question multiplier when calculating the final performance score for an entity.

Team Evaluation

Edit Ratings Scheme

Add New Question Select Question Type +

Question 2 (Star Rating)

Question: Quality Edit Guidance

Weighted Score: 2 # ?

Question 3 (Star Rating)

Question: Safety Edit Guidance

Weighted Score: 3 # ?

Question 4 (Dropdown)

Question: Overall Opinion Edit Guidance

OPTIONS	SCORE
Excellent	9 #
Good	7 #
Average	5 #
Poor	3 #
Awful	1 #

Weighted Score: 1 # ? Include N/A response ☐

Scheme Details (Right Sidebar):

- Scheme Name: Supplier Assessment ✎
- Scheme Description: Monthly Supplier opinion
- Rating Type: Project
- Measured Type: Organisation
- Active: ☒
- User Roles for Ratings: Search Role ▼
- F02 All Internal Users

You create Team Evaluation schemes via **Admin > Entity Configuration > Team Evaluation Schemes**.

New Features: General

Rate Entities

Performance rating schemes are made available to users via the Team Evaluation tab on the record types that are configured for Team Evaluation. Depending on the configuration options, users can submit up to thirty ratings in one go.

Perform Ratings				
Supplier Assessment Monthly Supplier opinion		Date Performed 27 Feb 2023		
Add Organisation View Guidance		Submit		
ORGANISATION	Q1. TIMELINESS	Q2. QUALITY	Q3. SAFETY	Q4. OVERALL OPINION
3d Ltd. (Nottingham)	★★★★★	★★★★★	★★★★★	Good
A Tiles Ltd. (Birmingham)	★★★★★	★★★★★	★★★★★	Average
Ace Ltd. (Wednesbury)	★★★★★	★★★★★	★★★★★	Excellent
Deltek (Canada)	★★★★★	★★★★★	★★★★★	Select item
Deltek (Dubai)	★★★★★	★★★★★	★★★★★	Select item
Deltek (Nottingham)	★★★★★	★★★★★	★★★★★	Select item

Review Performance Data

You can review performance ratings from the Searching & Charting page on an individual entity, which is accessible from the entity's Team Evaluation tab. If you have the PerformanceRating.Admin entity function role you can also review and compare global performance ratings across multiple entities via the Admin Zone. When you want to focus on areas of interest, you can apply additional filters. For example, you can review the ratings for a single organization across all projects.

PIM Administration Zone									
Search Admin Zones									
Team Evaluation Searching & Charting									
Filter By: Supplier Assessment Project Launched From All Dates									
Launch Chart for: Scheme Rating Measured On									
DATE	SCH.	PERFORMED BY	RATING TYPE	LAUNCHED FROM	MEASURED TYPE	MEASURED ON	SCORE	OUT OF	%
02 Feb 2023	Supplie...	R. Clive	Project	P11-011 - Belfast Harbour	Organisation	Neway Steel Structures Ltd...	28	39	71.79
28 Nov 2022	Supplie...	R. Clive	Project	P11-011 - Belfast Harbour	Organisation	Neway Steel Structures Ltd...	36	39	92.31
20 Oct 2022	Supplie...	R. John Clarkson	Project	P17-001 - Queens Road St...	Organisation	Neway Steel Structures Ltd...	15	15	100
01 Aug 2022	Supplie...	R. Clive	Project	P14-004 - Windmill Park	Organisation	Neway Steel Structures Ltd...	9	15	60
01 Jul 2022	Supplie...	R. Clive	Project	P14-004 - Windmill Park	Organisation	Neway Steel Structures Ltd...	7	15	46.67
Results: 5									
Additional Filters									
Measured Type Organisation									
Measured On Neway Steel Structures Ltd (Sheffield)									
Percentage (Min) Enter Number									
Percentage (Max) Enter Number									
Apply									

New Features: General

Reporting and Charting

Charting options enable you to view the average performances over time by scheme, rating, or entity. You can also generate PDF reports for individual ratings.



View Average Performance Score on Records

The average performance score, based on pooled results, is displayed on the General tab on respective entity records.

General Documents Actions History Tools Performance Ratings Finance Team Evaluation

3d Ltd. (Nottingham)

Organisation Details - External

Branch: Nottingham
 Address: 8 Corporation Row
 Nottingham
 Post Code: NG5 5GL
 Legal Entity: Limited
 UTR Number: -

Alternative Names: -
 Phone Number: (01617)779303
 Fax Number: (01617)754578
 Web Address: www.3dLtd.com
 Last Updated: 15 Oct 2021
 Last Updated By: Matt

VAT Registration No: 595332996
 Company Registration No: 40952732
 Turnover: 865,000.00
 No of Employees: 2638
 No of Branches: 1
 Maximum Project Value: 250,000
 Minimum Project Value: 1,000

Fully Approved

Average Performance Score: 72%

Organisation UDF - External

Linked Orgs. and Contacts

Edit Ratings

You can edit and delete ratings that you have submitted. If you have the PerformanceRating.Admin entity function role you can also edit and delete ratings submitted by other users.

PIM Teamwork

You can now invite external contacts, such as architects and subcontractors, to collaborate on projects and enquiries. Teamwork users have limited access to PIM through the PIM Teamwork portal. Through this portal, external contacts can access project information, and preview, download, and add markup to project documents. Teamwork users can also upload the latest versions of their project files.

For information on PIM Teamwork module licensing, contact your Deltek account manager or customer success manager.

Configure PIM Teamwork

PIM administrators configure global Teamwork settings via **Admin > System Configuration > Teamwork Access**. The following configuration options are available:

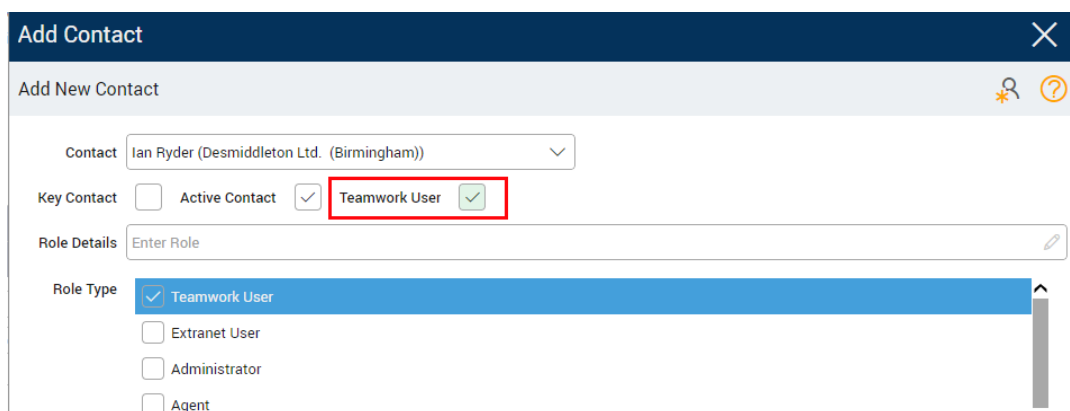
- Specify the allowed file types that external contacts can upload to PIM. A default list is configured to make getting started easier and quicker.
- Select the document pools that external users can upload documents to for projects and enquiries, based on assigned contact roles.
- Configure general global settings for external access, including the primary user and primary contact roles, the default document upload pools, file restrictions, options relating to external user licensing, and so on. You can also modify the email message that contacts receive when they are invited to participate on projects.

Project-level Settings

Some of the global settings can be overridden at the project level, including the number of files to display on the Teamwork Incoming Files page, and the document pools that specific contact roles upload files to.

Invite External Contacts

To enable external contacts to access a project or enquiry, you select the **Teamwork User** option when you add or edit the contact.



Add Contact

Add New Contact

Contact: Ian Ryder (Desmiddleton Ltd. (Birmingham))

Key Contact: ☐ Active Contact ☒ **Teamwork User** ☒

Role Details: Enter Role

Role Type: ☒ **Teamwork User**
☐ Extranet User
☐ Administrator
☐ Agent

Teamwork users receive an invitation via email. The first time an external contact is invited to collaborate on a project or enquiry, they are provided with a temporary password and a link to access the PIM Teamwork portal.

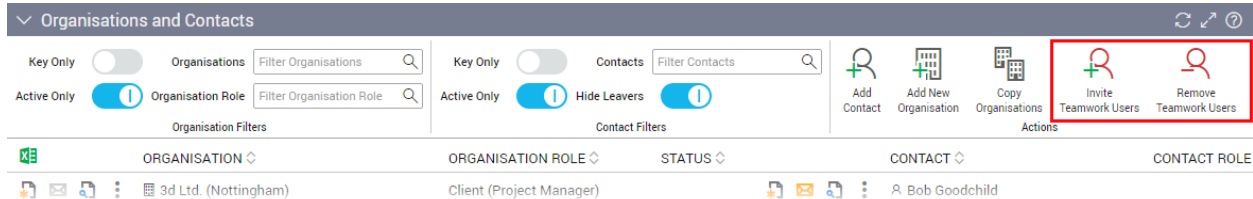
New Features: General

Teamwork Licensing

A new Teamwork license type exists. This license is automatically granted to users when they access an invitation. You can remove a Teamwork license from a user to revoke their access to all projects and enquiries they have access to.

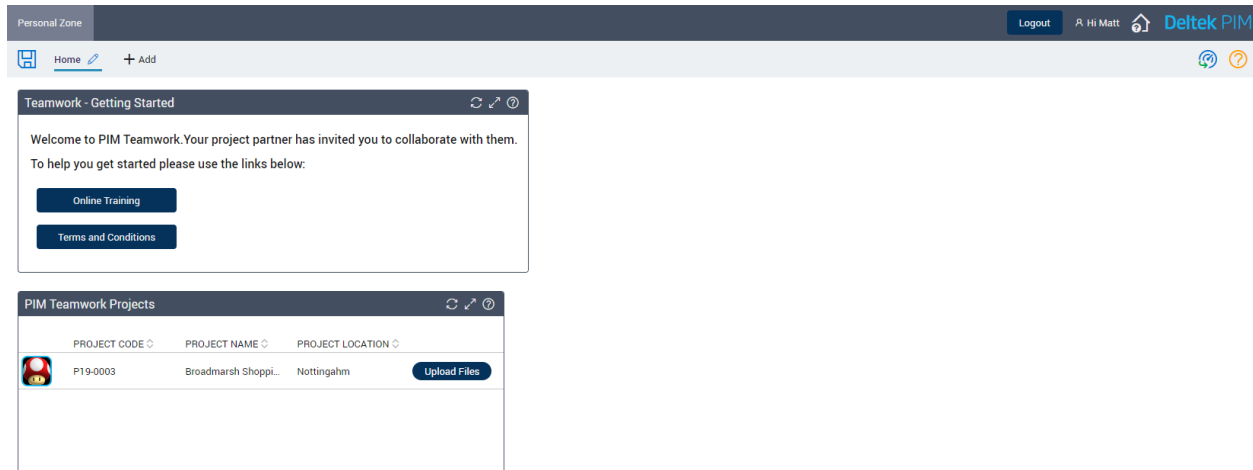
Manage Teamwork Users

You can resend invitations and remove existing Teamwork users directly from the toolbar on the Organizations and Contacts band on a project or enquiry.



PIM Teamwork Portal

When external contacts log in to PIM, they have access only to the Personal Zone. Teamwork users can access the projects and enquiries they have been invited to collaborate on. A Getting Started dashpart also provides Teamwork users with access to online training.



When users access an entity record, such as a project, the following tabs are available:

General

Teamwork users can view general information about a project or enquiry, such as the location, status, address, and description.

PIM Teamwork Documents

Teamwork users can search and view existing project documents via Smart View. They can manage documents in baskets, download documents, view summary details, and add markup.

New Features: General

PIM Teamwork File Upload

Teamwork users can upload and publish their own files to the project. When files are uploaded, the system attempts to use the filename to populate the title, revision, and details. If the system cannot retrieve this information from the title, or if the information is incorrect, users can manually enter or edit the information.

General PIM Teamwork Documents PIM Teamwork File Upload PROJECT					
P19-0003 - Broadmarsh Shopping Mall					
<div>Add Files Remove Files Publish</div>					
<div>Preliminary</div>					
FILES	TITLE*	REV*	DETAILS	STATUS	
<input checked="" type="checkbox"/> ABC-1234-0034 (1.0).pdf	ABC-1234-0034	1.0		Preliminary	
<input checked="" type="checkbox"/> E0002-LET-0002 Cafe Plan.docx	E0002-LET-0002 Cafe Plan			For Comment	
<input checked="" type="checkbox"/> 12304_B10_15_00-P1.pdf	12304_B10	15	00-P1	Preliminary	

Training for External Users

External users can access training and help for using the PIM Teamwork Portal using the following link:
<https://education.deltek.com/web/rsi/pim/pimteamwork/index.html>.

Manage Incoming Documents

If you are a project administrator or document controller, you can use the PIM Teamwork Incoming Files tab on a project to review the documents that have been received from external organizations.

GeneralDocumentsMilestonesDLM - Design MgtDocument IssuesPIM Teamwork Incoming FilesContract ManagementSmart SupersederTeam EvaluationMobile FormsMobile ReportsmorePROJECT

P19-0003 - Broadmarsh Shopping Mall

Teamwork Incoming Files

Search text here...

Select Organisation

Date From

Date To

Apply

Clear All Filters

Settings

Open in Smart Superseder9 Results

<input type="checkbox"/>		TITLE	REV	DETAILS	STATUS	UPLOADED BY	PROCESSED DATE	PROCESSED BY	LATEST
▼	<input type="checkbox"/>	Deltek							
▼	<input type="checkbox"/>	February 23, 2023							
		Toilet Block	1.4			John Clarkson			
▼	<input type="checkbox"/>	February 22, 2023							
		Toilet Block	1.1			John Clarkson			
▼	<input type="checkbox"/>	September 16, 2022							
		Car Park Plan V2	2			John Clarkson			
▼	<input type="checkbox"/>	September 13, 2022							
		P19-0004-30	1.0			John Clarkson			
>	<input type="checkbox"/>	Deltek							
>	<input type="checkbox"/>	Briggs Ltd.							

You can view individual documents and export the list of files to Excel. If many documents have been received for a project, you can search for files and apply one or more filters, including organization and received date range.

When you are ready to update existing project documents with the latest received files, you can send selected files from a single organization to the new [Smart Superseder](#).

Dynamic / Hybrid Edge IE Mode

Enhanced Edge / Edge IE Mode Browser User Experience

This release delivers beneficial adaptations within PIM targeting Microsoft's new session cookie-sharing capabilities for Edge's IE Mode. System administrators can now apply an extra layer of configuration behind group policies that control Edge's behavior when users click links that require Internet Explorer.

The result is a significantly improved user experience whereby users are seamlessly transitioned between Edge modern browser (Chromium) mode and Internet Explorer mode based on the links they click, with a single secure cookie automatically shared between the distinct browser sessions.

Deltek recommends the Edge browser, with the new Edge IE mode configuration, for sites or users that are reliant on the few remaining features that require Internet Explorer.

For information on how to implement this important change for your users and key usage cases please see our Customer Care Knowledge Base article: [How to configure Microsoft Edge Hybrid IE Mode](#). Alternatively, contact Deltek Customer Care.

Other General Updates

Customize your Search Result Views

You can now customize how search results are displayed.

Freeze Columns

Columns can be frozen in Smart View to keep an area visible when you scroll across.

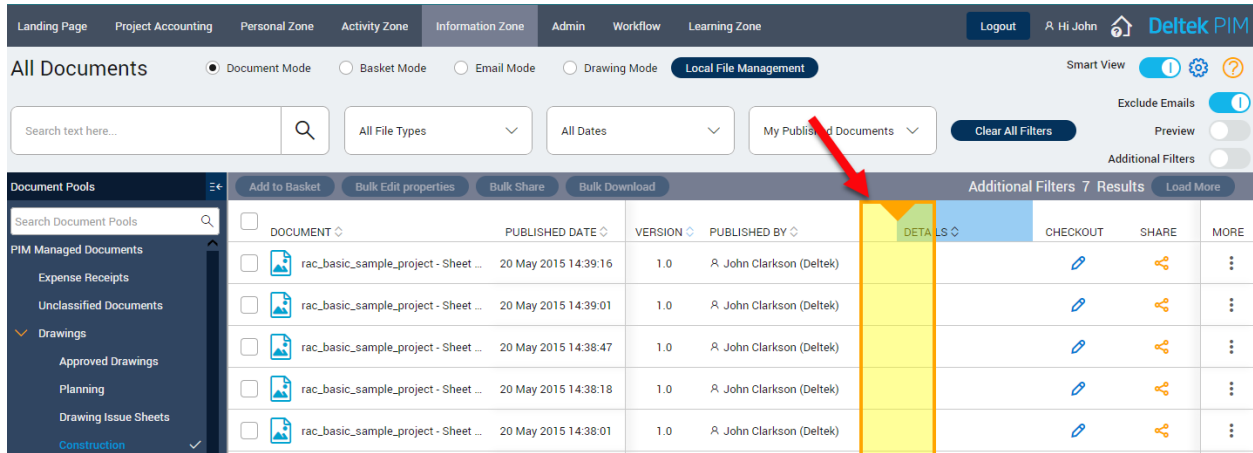
The screenshot displays the Deltek PIM interface. At the top, there's a navigation bar with tabs: Landing Page, Project Accounting, Personal Zone, Activity Zone, Information Zone, Admin, Workflow, and Learning Zone. Below this is a header for 'All Documents' with various filters and a search bar. The main content area shows a list of documents. A red arrow points to a gear icon in the 'VERSION' column header, indicating the option to freeze the column. The document list includes columns for DOCUMENT, VERSION, DETAILS, PUBLISHED DATE, PUBLISHED BY, and CHE.

DOCUMENT	VERSION	DETAILS	PUBLISHED DATE	PUBLISHED BY	CHE
Receipt - JC 27 Jul 20 - 02 Aug 2...	1.1	Expense Receipt	10 Dec 2020 14:48:41	John Clarkson (Delt...	
Receipt - JC 27 Jul 20 - 02 Aug 2...	1.0	Expense Receipt	30 Oct 2020 09:26:02	John Clarkson (Delt...	
Receipt - JC 16 Dec 19 - 22 Dec 1...	1.0	Expense Receipt	08 Feb 2022 12:42:44	John Clarkson (Delt...	
Receipt - JC 30 Dec 19 - 05 Jan 2...	1.0	Expense Receipt	08 Feb 2022 12:32:17	John Clarkson (Delt...	
Receipt - JC 09 Dec 19 - 15 Dec 1...	1.0	Expense Receipt	09 Sep 2021 16:55:33	John Clarkson (Delt...	

New Features: General

Move Columns

Columns can be reorganized in Smart View by clicking and dragging column headers to new positions.



Title Field on Contact Records Now Optional

When you add a contact, the Title field is now optional.

Search Contact Advanced Search Renamed to Search External Contacts

The Search Contact Advanced Search page, accessible from the Activity Zone, has been renamed to Search External Contacts. In addition, you can now choose to include or exclude superseded contacts in your search results.

New Features: Document Management

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

Publish Snapshots of Documents

You can now publish the latest changes to documents through the Local File Management window as you continue to work on them. When you publish document snapshots, the files remain checked out to you and under your control.

Express Snapshot Publish

Use Express Snapshot Publish to publish snapshots of documents that are already in PIM if you want to update the documents without modifying any of the publish details. This option is also available from the Actions menu for individual files.

Snapshot Publish

Use Snapshot Publish to publish snapshots of documents that you have yet to publish to PIM. This option requires you to specify the publish details as you would when you publish a document through the normal method. You can also use this feature to publish a snapshot of a document that is already in PIM if you also want to update any of the publish details, such as publish location(s), attributes, version, details, comments, and who it's shared with. You cannot publish snapshots to locations that are configured for approval.

Local File Management

Create From Template

Open Local Folder

Add Files

In PIM (3)

Undo Check-out

Express Check In

Express Snapshot Publish

	TITLE ^	VERS...	MODIFIED SINCE CHECK...	SIZE	MODIFIED DATE	ACTION...
<input checked="" type="checkbox"/>	2019-04-16 Minutes.docx	1.0	● No	810KB	17 Feb 2020	⋮
<input checked="" type="checkbox"/>	RFI-00009 Rock Wall.docx	1.1	● No	41KB	02 Jul 2020	⋮
<input type="checkbox"/>	Toilet Block.pdf	1.1	● No	464KB	07 Sep 2022	⋮

Not in PIM (26)

Remove Files

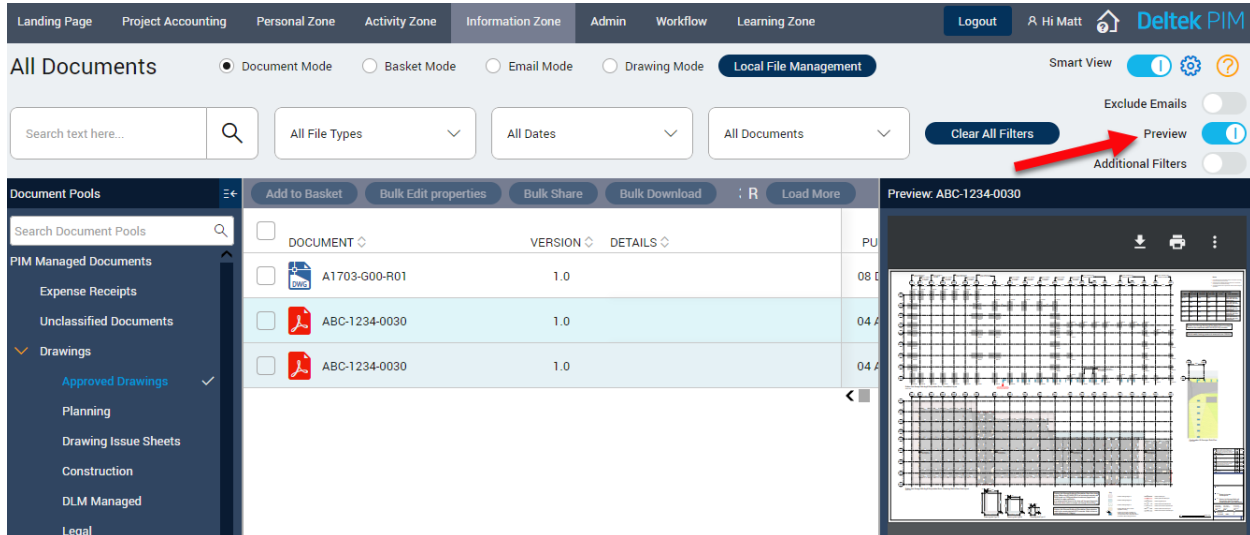
Publish Files

Snapshot Publish

	TITLE	SIZE	MODIFIED DATE	ACTION...
<input checked="" type="checkbox"/>	2019-04-17 Minutes.docx	810KB	31 May 2019	⋮
<input checked="" type="checkbox"/>	2019-04-24 Order.docx	96KB	31 May 2019	⋮
<input type="checkbox"/>	2020-Minutes-Week_06(1.0).docx	810KB	27 Sep 2021	⋮

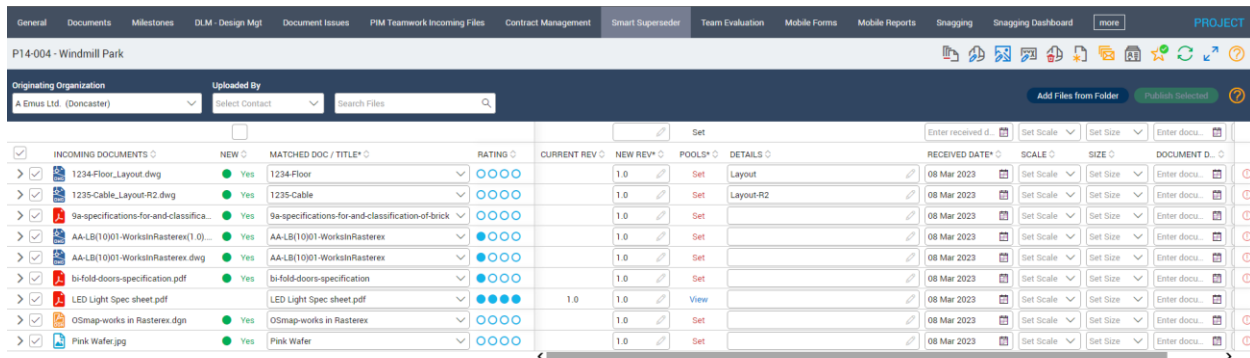
Preview Documents

A new option to preview emails, images, PDFs, and ZIP files is available in Smart View. You use the Preview toggle to display or hide the preview pane.



Supersede Batches of Project Documents

When you receive project files from external organizations, such as files received via PIM Teamwork, you can use the Smart Superseder to supersede batches of existing documents with the latest revisions. The Smart Superseder is available as a tab on project records.



Note: The Smart Superseder is used to replace non-DLM files only. For DLM files, you must continue to use the Assign Renditions feature via the project's DLM tab.


When you access the Smart Superseder, either manually or via the PIM Teamwork Incoming Files tab, you must first select the receiving organization. If many files are returned, you can filter by the contact that uploaded the files, and you can also search for files.

The Smart Superseder attempts to match incoming files with existing project documents. Each match is given a rating between 0 and 4. For each file, you can define or modify any of the document properties, including publish locations, revision number, details, received date, scale, size, document date, and

status. If a file is incorrectly matched, or if a match cannot be found, you can manually select a file to supersede, or you can upload the file as a new project document.

Local File Management Enhancements

View Markup on Previous Versions of Documents

You can now click  to view the markup on a previous version of a document or drawing when you view the version details in Smart View.

Details

P14-018-F4200-0052

Copy Link













Edit Document Properties

> Details

> Renditions

> Versions

Show Hidden Versions

TITLE	AUTHOR	PUBLISHED DATE	VERSION	VERSION COMMENTS	MARKUP
 P14-018-F4200-0052	 Matt Briggs (Deltak)	27 Feb 2023 20:28:23	1.2		
 P14-018-F4200-0052	 Matt Briggs (Deltak)	27 Feb 2023 20:25:11	1.1		
 P14-018-F4200-0052	 Matt Briggs (Deltak)	27 Feb 2023 20:23:55	1.1		
 P14-018-F4200-0052	 Matt Briggs (Deltak)	27 Feb 2023 20:20:46	1.0		

Publish Document Window Now Displays Attribute Fields Collapsed

For an improved user experience when you publish documents, all attribute types appear collapsed on the Publish Document window. You expand an attribute type heading when you want to assign an attribute.

Publish Document

2019-04-17 Minutes

1.0

Publish To *

Details/Comments

Share With

Actions

Search

Select Attributes

> PROJECT

> ENQUIRY

> PROPERTY

> CONTACT

> ORGANISATION*

Received Date

Select Received Date

PIM Managed Documents(1)

Incoming Document (Enquiries)

Recycle Bin

Expense Receipts

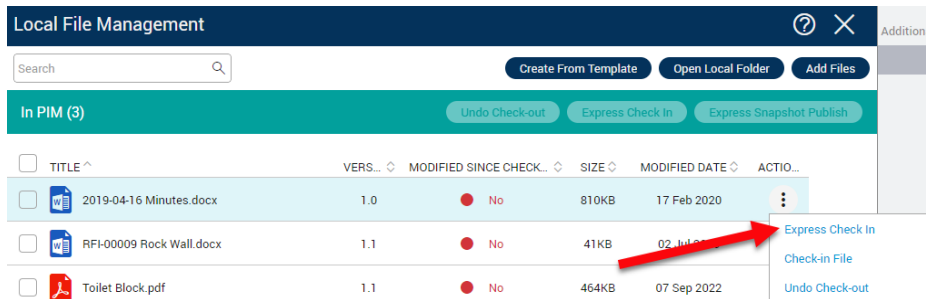
Unclassified Documents

Drawings(1)


Approved Drawings

Express Check-in Documents from the Actions Menu

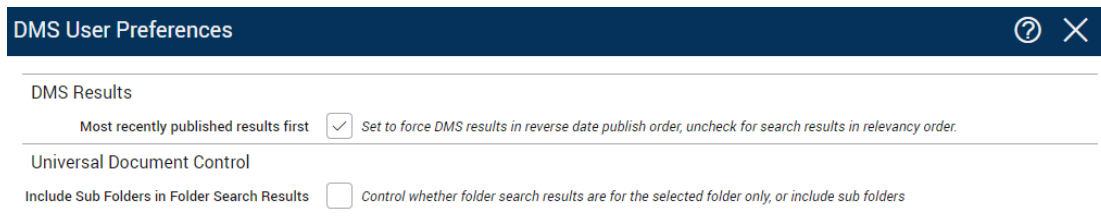
You can now check in a document using the Express Check In feature from the Actions menu.



Manage Your Document Search Preferences

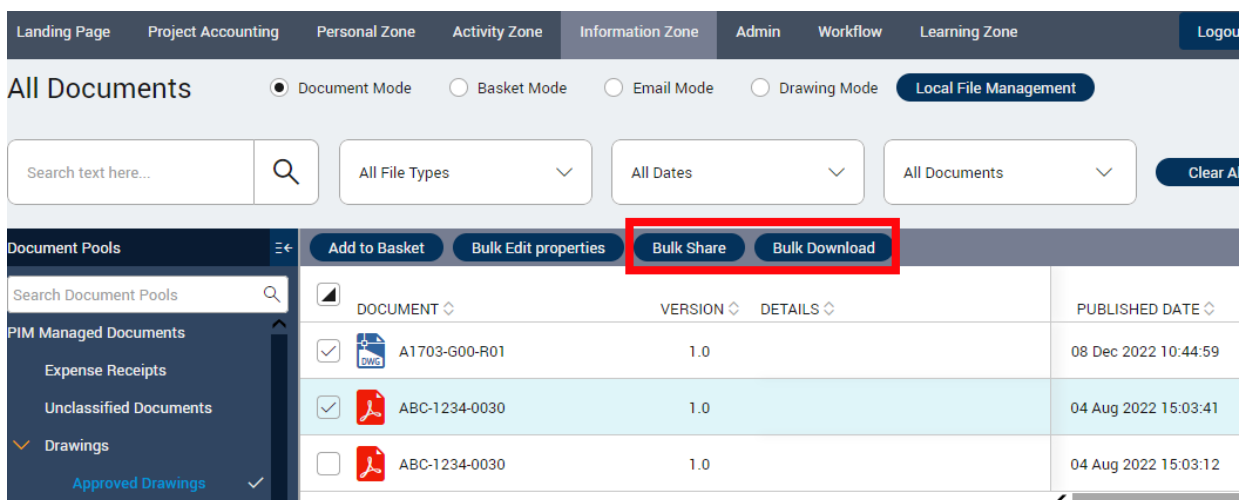
You can now set your document search preferences for the document management system. To access the search preferences, click  from the Information Zone or the Documents tab on entity records.

You can choose to display search results either by the most-recently-published documents or by relevancy. If you have projects that are configured for Universal Document Control, you can also choose whether to display the contents of subfolders when you click an unmanaged parent folder.



Download and Share Batches of Documents

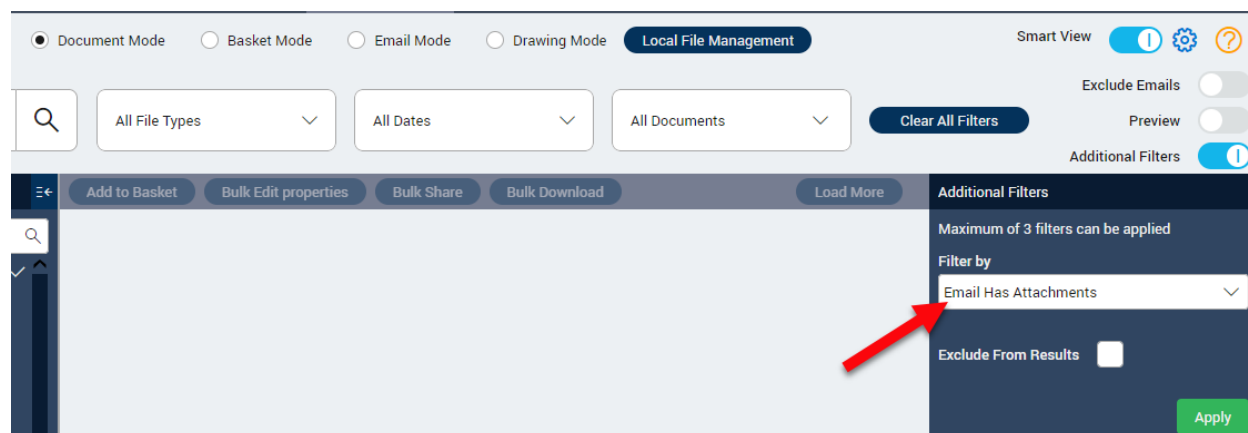
It is now easier to download and share batches of documents. When you select documents in Smart View, you can click the **Bulk Download** button to download copies to your PC, or the **Bulk Share** button to send download links or attachments to contacts via email.



Other Document Management Updates

Filter by Emails that Have Attachments

You can now filter document searches in Smart View to include or exclude emails that have attachments. The new Email Has Attachments option is available as an additional filter.



View Document Details in Search Results

To easily view the details of documents, a new Details column is available when you search for documents in Smart View.

Maintain Search Results When You Switch Between Document and Email Modes

When you switch between Document Mode and Email Mode in Smart View, your search and filter options are maintained and automatically applied so that you don't have to reapply them.

Display More Documents in Search Results

By default, when you search for documents in Smart View, the top 100 documents display in the results. To display more documents, you can now click the **Load More** button.

You can configure the maximum number of documents to display for the Load More option via **Admin > Document Management > DMS Configuration**.

Filter by File Type Includes Primary and Renditions

When you filter by a selected file type in Smart View, documents that have a primary or other rendition that match the selected file type are now included in results.

Titles of New Documents Default to the Name of Template Used

When you create a document from a template, the title of the new document defaults to the name of the template instead of leaving the title field blank.

Empty Unmanaged Document Folders Now Hidden from View

For projects configured for Universal Document Control, any mapped network folders that are empty do not appear in the list of folders in Smart View.

DLM Placeholders Now Display Primary Rendition Icon in Search Results

When you search for documents in Smart View, if a DLM document placeholder has renditions, the document will display the file type icon of the preferred primary rendition. If no rendition has been set as the preferred rendition, the file type icon for the first rendition that was uploaded is displayed.

New Features: Email Management

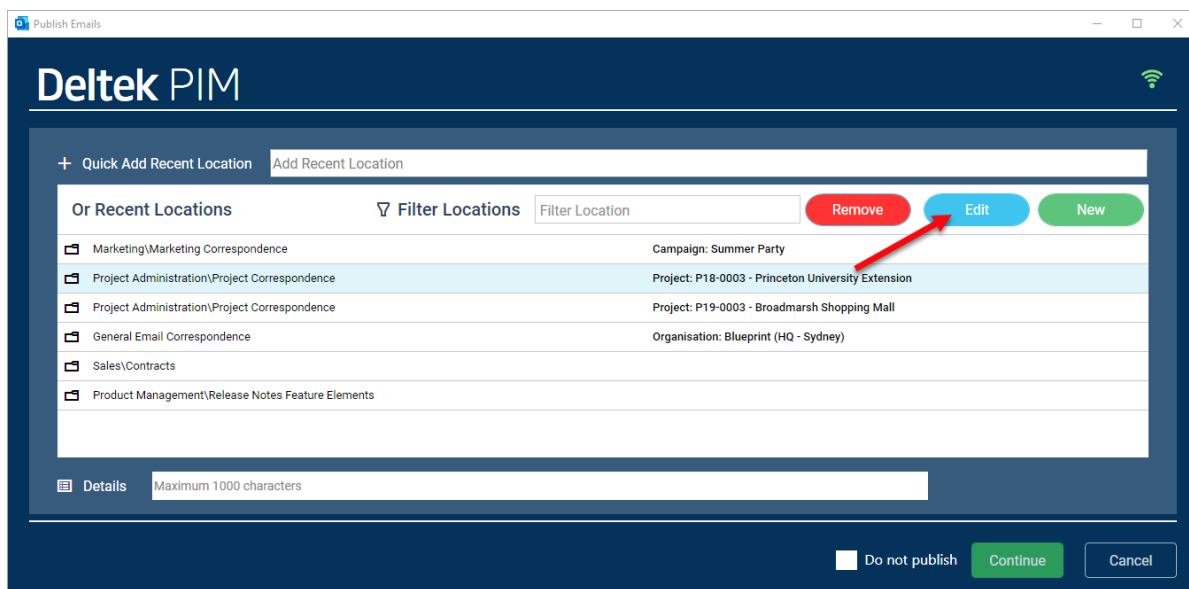
This section provides a summary of all new email management features included in this release.

Outlook Add-in Updates

Improvements have been made to the PIM Outlook Add-in.

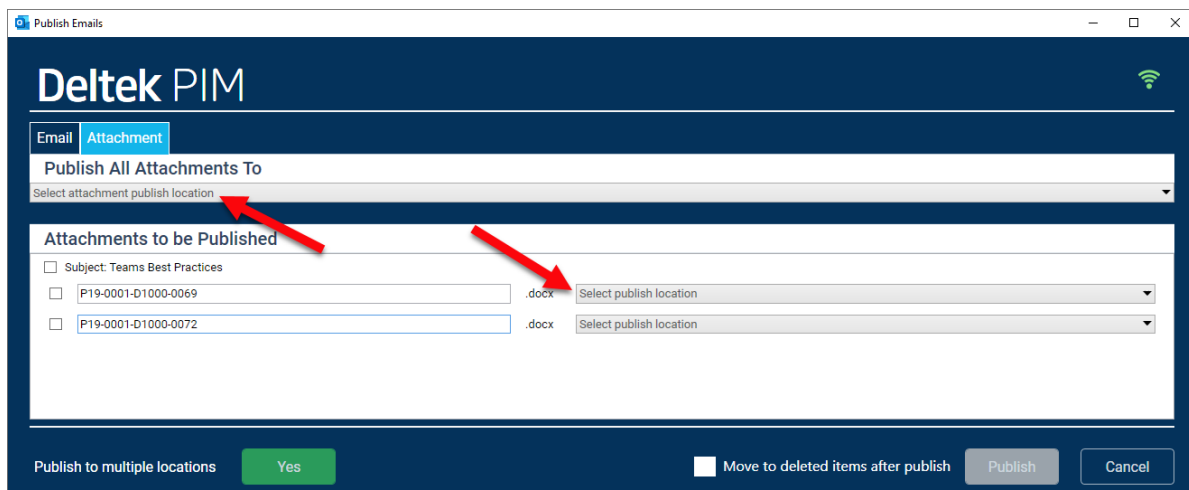
Edit Recent Locations Reinstated

When you publish emails in Outlook, the option to edit existing recent locations is available again. When you edit a recent location, you can change the publish locations and associated attributes.



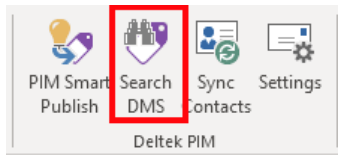
Improved Attachment Location Lists

To improve the user experience, when you publish email attachments, the lists that you use to select where to publish the attachments to are now more user friendly.



PIM Search Folders Replaced by New Search DMS Feature

The PIM Search folders and Outlook-embedded DMS view have been replaced by a new Search DMS button on the Deltek PIM toolbar group in Outlook.



This opens a new PIM DMS search page in your default browser, where you can search for documents in Classic View. The new DMS view provides a Quick Links panel to apply entity type filters corresponding to the old set of PIM Search Folders.

Once you have applied the 22.0 upgrade to your environment you may remove the following registry entries from your users' machines if explicitly added for use with PIM's Outlook Add-In:

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\14.0\Outlook\Security]
"EnableRoamingFolderHomepages"=dword:00000001
```

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\15.0\Outlook\Security]
"EnableRoamingFolderHomepages"=dword:00000001
```

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\16.0\Outlook\Security]
"EnableRoamingFolderHomepages"=dword:00000001
```

New Features: Integrated Email Management

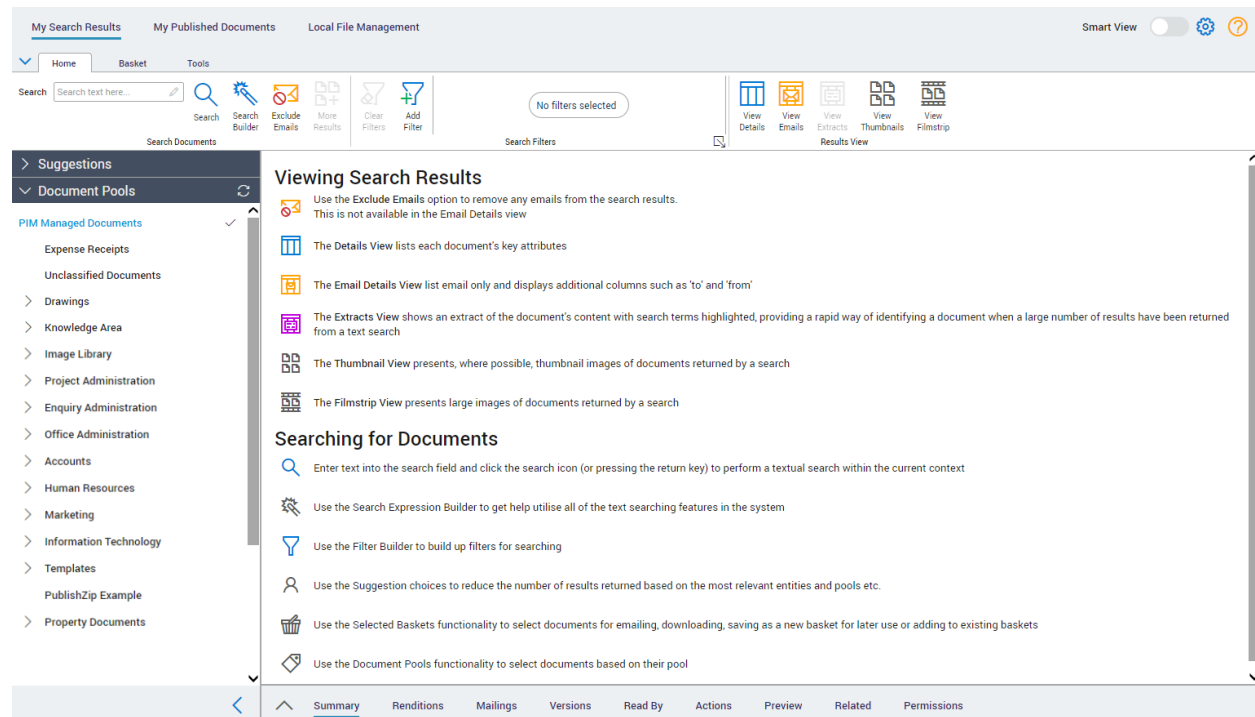
For Deltek ERP integrated PIM email management users only, the following new features are available:

Manage Document Pools

Users with the required DMS.Admin entity function/security level can now add, edit, and reorder document pools, and redefine the security settings.

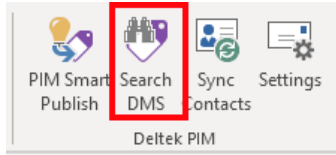
Search for Documents in Classic View

You can now switch between Smart View and Classic View using the **Smart View** toggle when you search for documents. Classic View offers additional advanced features, such as suggested filters, a search expression builder, and a selection of views optimized for viewing photographs.



PIM Search Folders Replaced by New Search DMS Feature

The PIM Search folders and Outlook-embedded DMS view have been replaced by a new Search DMS button on the Deltek PIM toolbar group in Outlook.



This opens a new PIM DMS search page in your default browser, where you can search for documents in Classic View. The new DMS view provides a Quick Links panel to apply entity type filters corresponding to the old set of PIM Search Folders.

Once you have applied the 22.0 upgrade to your environment you may remove the following registry entries from your users' machines if explicitly added for use with PIM's Outlook Add-In:

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\14.0\Outlook\Security]
"EnableRoamingFolderHomepages"=dword:00000001
```

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\15.0\Outlook\Security]
"EnableRoamingFolderHomepages"=dword:00000001
```

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\16.0\Outlook\Security]
"EnableRoamingFolderHomepages"=dword:00000001
```

Updates to Software

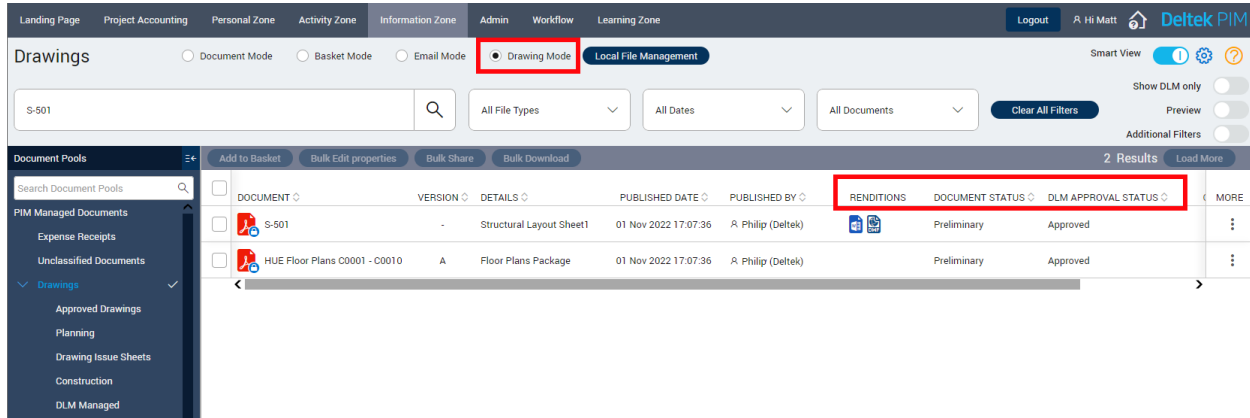
Option to Check Out Documents Removed

The option to check out documents that have been published as attachments has been removed from Smart View and disabled in Classic View. This is to prevent you from inadvertently checking documents out, since the option to check documents in is not available for the Integrated Email Management version of PIM.

New Features: Design Management

Drawing Mode

To assist you with managing project drawings, a new Drawing Mode is available in Smart View. This view provides additional columns that relate to the DLM – Renditions, Document Status, and DLM Approval Status. If you use the DLM to manage drawings, you can filter the results to show only DLM documents using the **Show DLM only** toggle.



Review Drawings

If a project is configured for DLM approvals, you select and send DLM documents for review from Smart View. A Review Drawings option is available on the Documents tab toolbar on projects when you search for documents in Drawing Mode. When you send drawings for review, you select the DLM approval route to use, and reviewers are notified via email with links to the approval tickets. Reviewers can add comments and markup, if enabled, and choose to approve or reject the documents.

Other Design Management Updates

DLM Placeholders Now Display the Primary Rendition Icon

When you view DLM placeholders on a project, if a document has renditions, the file type icon of the preferred primary rendition is displayed as the main placeholder icon. For other renditions present, the file type icons are displayed in the Renditions column. If no rendition has been set as the preferred rendition, the file type icon of the first rendition that was uploaded is displayed.

Issue Numbers in the Unprocessed Issues Dashpart Now Correctly Ordered

When you sort by issue number in the Unprocessed Issues dashpart, if all issues have a numeric issue number, the issues are now sorted in numerical order. For example, 1, 2, 9, 10, 15, 100 instead of 1, 10, 15, 100, 2, 9.

Revit, AutoCAD, and PDFTron Updates

Revit 2023 and AutoCAD 2023 are now supported. PDFTron 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.

View All Posted Sales and Purchase Documents on the Sales Documents and Purchase Invoices Bands

You can now display all current and historical sales and purchase documents using the **Show All** button on the Sales Documents and Purchase Invoice bands on project records.

The screenshot shows the 'Project Accounting' interface for project 'P14-004 - Windmill Park'. The 'Purchase Invoices' band is expanded, showing filters for 'All Figures in: Pound Sterling (GBP)', 'From: 28 Aug 2018', 'To: 28 Feb 2023', and 'Status: Status'. A red arrow points to the 'Show All' button. The band header includes columns for 'INVOICE NUMBER', 'DOCUMENT NUMBER', 'ORDER NUMBER', 'SUPPLIER', and 'DOCUMENT DATE'.

Modernized General Band on the Legacy Finance Document Page

The General band of finance documents has been modernized to improve the user experience.

The screenshot shows the 'General' band on the 'Legacy Finance Document Page' for 'INVOICE - 30 Apr 2018 - 1722 - Posted by John Clarkson'. The band is expanded, showing filters for 'All Figures in: Pound Sterling (GBP)'. The band content includes:

- Document Type: Sales Invoice
- Posted Date: 30 Apr 2018
- Posted By: John Clarkson
- Document Date: 30 Apr 2018
- Due Date: 30 Sep 2017
- Billing Organisation: Cinders Smith Ltd. (Hemel Hempstead)
- Billing Contact: -
- Prime Entity: P12-234 - Cambridge University Press Extension
- Reference: 1722
- Nett Value: 500.00
- Tax Value: 100.00
- Gross Value: 600.00
- Unpaid Value: -

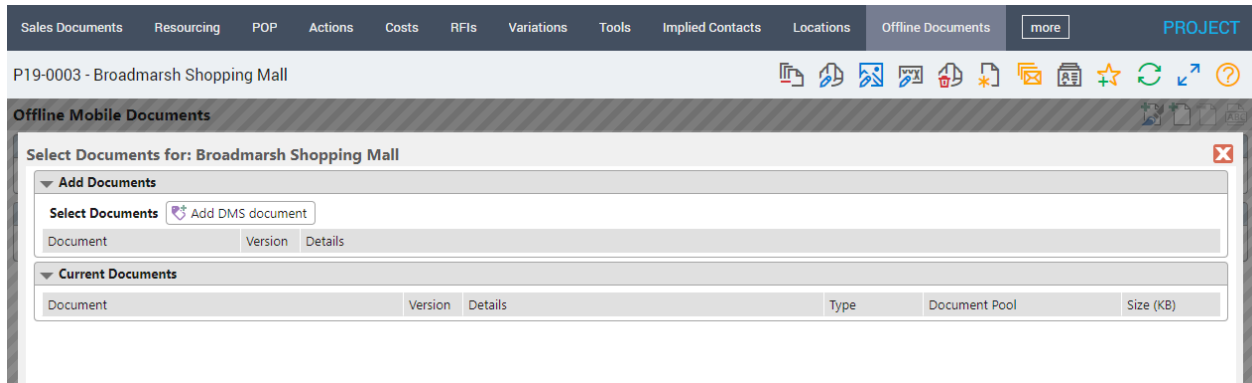
The band footer includes links for 'Notes' and 'Sales Payments'.

New Features: Mobile Working

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

Use the DMS Picker to Select Documents to Be Made Available Offline

The Offline Documents tab on project and enquiry records is now cross-browser friendly. This allows you to use the DMS picker to select documents that you want to make offline.



New Features: System Administration

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

Clone Record Bands

Existing bands can now be cloned to create new bands. This feature is available on the Manage Bands page in the Administration Zone. Existing security levels are cloned. However, to avoid duplication, the user role security is not cloned. You may now also edit band parameters, which is required for certain bands to function in the intended way. Note that you can only clone exclusive (full page) bands to tabs that have no other bands already present.

PIM Administration Zone Search Admin Zones

Absence
Document Management
Entity Configuration
Project Accounting
Regional Settings
Reporting and BI
Skills and Training
System Administration
System Configuration
System Security
Timesheet and Expenses

Manage Bands
Contact
Organisation
Project
Enquiry
Team
Opportunity
Variation
Campaign
Work Package Organisation
Skill Journal
Work Package
Asset
Vehicle

General Documents PIM Teamwork Documents Collaboration Milestones DLM - Design Mgt More

	NAME	SOURCE	PARAMETER	START COLLAPSED	IS EXCLUSIVE
	Project Detail	/Bands/Project/...		<input type="checkbox"/>	
	Classifications	/entity/classific...		<input checked="" type="checkbox"/>	
	Project UDF	/Bands/Project/...		<input checked="" type="checkbox"/>	
	Organisations and Contacts	/Bands/Entity/o...	1	<input type="checkbox"/>	
	Internal Organisation	/bands/Organis...		<input type="checkbox"/>	
	Internal Contacts	/Bands/Contact...		<input type="checkbox"/>	
	Child Projects	~/project/band...		<input type="checkbox"/>	
	Notes	/Bands/Entity/e...		<input checked="" type="checkbox"/>	
	Photographs	/bands/dms/ad...	104	<input type="checkbox"/>	
	PIM Teamwork Project Details	~/ThirdPartyAc...		<input type="checkbox"/>	

When you clone a band, you provide a name for the new band, and select which tab to add it to. You can also choose to start the band in collapsed mode and make it exclusive.

Clone Band

Source Band Project Detail
Source URL /Bands/Project/general.aspx
Name Cloned Band
Band Set General
Parameter Enter Parameter
Start Collapsed ☐
Is Exclusive ☐

Existing Security levels will be cloned.
Existing user role security will not be cloned, to avoid simple duplication.

Cancel Apply

New Document Pool Requirements Grid

To assist you with configuring document pool requirements, a new Document Pool Requirements grid is available via Admin > Document Management > Document Pool Management.

Note that updates via the grid will only affect the specific pool, without inheritance. If you wish to apply inherited requirements, you must use the DMS Pool Management page, which is accessible in the Administration Zone.

DMS Document Pool Requirements Grid

Legend 1=Displayed 2=Mandatory Search Column Labels

Search Row Labels

	Analysis Code	Application	Asset	Campaign	Community	Contact	Contract	Document	Drawing Set	Enquiry	Entity Workstages	Finance Analysis Code Group	Finance Company	Finance Department	Finance Document	Finance Nominal Group	Finance Purchase Account	Finance Purchase Invoice	Finance Purchase Order	Finance Purchase Order Type	Grade	Image Category	Nominal Account	Opportunity	Organisation	Originator	PET Workpackage	Project	Prop
Incoming Document (Enquiries)						1			2														2						
Expense Receipts					2																								
Unclassified Documents					1			1															2				2		
Drawings					1			1															2				1		
Drawings\Approved Drawings					1			1															2				1		
Drawings\Planning					1			1															2				1		
Drawings\Drawing Issue Sheets					1			1															2				1		
Drawings\Construction					1			1															2				1		

Pages Now Open as New Tabs

When you click a link that opens a new page, such as an entity record link, the page now opens in a new tab instead of a new window. You can choose to open pages as new windows by selecting the **Open Pages in Standalone Windows** option on the PIM Configuration page in the Administration Zone.

Updates to the DMS Configuration Settings

The following updates have been made to the DMS configuration settings.

The DLM Filename Format Setting is Now Available as a DMS Configuration Setting

The option to set the filename format for DLM documents has moved to the System Settings section on the DMS Configuration page

Set the Filename Delimiter When Users Download and Send Documents

You can now set the filename delimiter for ZIP files when users download and send documents. The new Filename Delimiter setting is available in the System Settings section on the DMS Configuration page.

Single Sign-On with Azure Active Directory

If you use the cloud-based Microsoft Azure Active Directory (AD) to manage your organization's Active Directory, you can now create an App Registration in Azure AD to enable single sign-on in PIM.

Deltak PIM for Project Information Management

USERNAME

Forgot your username?

Enter Username

PASSWORD

Forgot your password?

Enter password

Azure AD Log In

Windows Log In

Log In

The setup requires you to configure the Azure AD instance, and then register the PIM application against it. Once you have registered PIM against the Azure AD instance, you then use the App IDs issued by Azure to configure PIM via the new Single Sign-On configuration screen, available in the System Security settings within the Administration Zone.

PIM Administration Zone

Absence

Document Management

Entity Configuration

Project Accounting

Regional Settings

Reporting and BI

Skills and Training

System Administration

System Configuration

System Security

Timesheet and Expenses

Single Sign-On (SSO)

Identity Provider

Azure AD

Tenant ID

Enter text

Set this to set Tenant ID for Azure AD

Client ID

Enter text

Set this to set Client ID for Azure AD

Client Secret

Enter text

Set this to set Client Secret for Azure AD

User configuration

Configure Users

Click this to configure usernames for Azure AD users

Enable Azure AD Provider

☒

Set this to enable Azure AD login

Once you have enabled the integration you will then need to configure your PIM user records with the new SSO Username value matching their identity in Azure AD.

Please review our Customer Care Knowledge Base portal article [How to configure Single Sign-On with Azure Active Directory](#) for detailed guidance.

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 1695096

Description: When you added an action from a contact record and entered many words for the description, when you viewed the action, you could not see the full description due to the scroll bar not being present.

Workaround Before Fix: Edit the action to view the details.

Defect 1695978

Description: When you clicked a photo on the Photos band on a project record in Internet Explorer, the image appeared upside down in the Image Viewer.

Defect 1699568

Description: When you searched for projects from Activity Zone > Search Projects, the project's site address could be missing in the search results, or it would display the site address of an enquiry if the enquiry had the same ID as the project.

Defect 1708407

Description: When you entered many words for the description on an enquiry, some of the text went off the screen and could not be read.

Workaround Before Fix: Zoom out on the page. Note that in some cases, this will make the text too small to read.

Defect 1709050

Description: When you viewed the Landing Page, it could take some time to display the latest news and key articles.

Defect 1746198

Description: When you copied the contact list from one entity to another, if the destination entity did not have the contact role ID configured on it, the contact roles would still get copied over.

Workaround Before Fix: Use the Edit Role function to manually update contact roles on the destination entity.

Defect 1748885

Description: When you attempted to remove a top-level classification via the Classifications band on an entity record, if the classification did not have any child classifications assigned to it, it would not get removed.

Workaround Before Fix: Launch and edit classifications from an edit entity band.

Defect 1755039

Description: When you highlighted text in the Entity Quick Search dashpart, it was difficult to read the text.

Customers Impacted: PIM 21.x clients.

Defect 1762044

Description: When you edited a project and added an address, it would not save the address.

Defect 1765261

Description: When you clicked to open an internal organization from a project record, the UTR Number was not visible on the Organization Details – Internal band.

Customers Impacted: All UK clients that upgraded from 20.1.4 to 21.0.2.

Defect 1814988

Description: When you attempted to add the My Finance Alert dashpart to the Personal Zone, it would not load.

Defect 1829901

Description: When you ran certain searches that had a Run Report option, the report would fail to generate, and an error displayed.

Defect 1836951

Description: When you removed all documents from a project and then attempted to delete the project, a message would state that one or more documents are still associated, and you were prevented from deleting it.

Defect 1837306

Description: When you searched for project milestones and added Notes and Sign Off Notes columns to the search results, the text notes and sign off notes text was truncated to 30 characters in the results view, and when you exported the results to Excel.

Workaround Before Fix: To view the information in full, navigate to the Milestones tab on the project record.

Defect 1849032

Description: When you created UDF fields for internal and external contacts, the text was missing from the UDF fields on the actual contact records.

Defect 1681827

Description: When you searched for documents against a project, and filtered by project and then document pool, it did not retrieve the correct results.

Defect 1815691

Description: When you set the project or enquiry code, you were not prevented from using the same code that existed on another enquiry or project.

Defect 1670351

Description: After you upgraded to PIM 21.0, the image on the Landing Page was missing.

Defect 1870022

Description: When you edited an organization on an integrated site, some fields were missing from the edit form.

Absence

Defect 1850866

Description: When you added accrued daily entitlement to a contact with values that had 4 decimal places, the accrued amount was incorrectly rounded up or down, which could result in time accumulating to tip over into half or full bookable days over time.

Defect 1708356

Description: When you deleted an absence request from the Absence Details window, the approval ticket would remain in the Approvals dashpart with an error displayed.

Workaround Before Fix: Either reject the approval ticket from the Approvals dashpart or cancel the absence directly from the Absence band on the contact record without opening the Absence Details window.

Design Management

Defect 1649943

Description: When you submitted many items through the DLM approval workflow simultaneously, it could cause the process to time out and the approval process would fail.

Defect 1673266

Description: When you viewed the approval ticket for a document undergoing approval, the review information on the Approval Documents tab would display twice.

Defect 1673267

Description: When you sent multiple placeholders for approval and then viewed the approval ticket, when you switched to view a second document and then returned to the first document, the Review button was missing.

Workaround Before Fix: Refresh the page to display the Review button again.

Defect 1740110

Description: When you attempted to add renditions to a placeholder that had already been approved, you received a payload error.

Workaround Before Fix: Ignore the error, as renditions are still successfully added.

Defect 1764472

Description: When you viewed the issue summary of a previous document revision, it would display the issue summary for the latest revision instead.

Defect 1860397

Description: When you assigned historical renditions to a placeholder, the issue dates for those renditions did not display on the Versions tab. In some cases, the information was also not displayed on the main page of the placeholder, and the View icon was not enabled.

Defect 1629210

Description: When you reset an approved placeholder and sent it for approval again, when you clicked Add Markup in the email, you could not add markup as the document was set to view only.

Defect 1651018

Description: When you sent a DLM document for approval, if one or more commenters had previously been removed from the project or left the company, some or all of the remaining commenters did not receive a notification.

Workaround Before Fix: Either restart the approval route, or complete the approval route, and then resend the documents for approval.

Defect 1720250

Description: When you reviewed documents that were under approval, the dropdown icon for selecting a comment status was misaligned.

Defect 1742496

Description: When you generated the DLM Issue report, if the report was configured to use the Document Issue Sheet Crosstab report type, the latest statuses of the placeholder documents were not reflected in the report when the status of the placeholder was changed.

Defect 1766339

Description: When you exported a rendition from the Revit integrator, the document looked slightly different to the version created by the Revit PDF Export feature.

Defect 1671011

Description: When you created a DLM issue, the option to use bullet points in the email message did not work.

Workaround Before Fix: Use numbered lists instead.

Defect 1767711

Description: When you upgraded to PIM 21.0.3, previously marked-up documents were missing from approval tickets.

Defect 1821693

Description: When you updated the status of a DLM placeholder document that had a BIM status defined, the BIM status would not get copied to the next version of the document after the item was approved.

Workaround Before Fix: Manually select the BIM status on subsequent versions.

Defect 1825806

Description: When you resubmitted a DLM approval request to another contact, you could only select external contact roles from the Resubmit Contact Role list.

Defect 1836764

Description: When you submitted a DLM item for approval, if the approval route had multiple stages, comments that approvers submitted would not get retained.

Defect 1836960

Description: When you added a comment on behalf of another user to a DLM item undergoing approval, it did not update the approval status, and commented items still appeared on the Not Commented tab.

Document Management

Defect 1729088

Description: When you checked out a document that was published against one project, and then you did an express check-in from another project, it would publish the document against both projects.

Workaround Before Fix: Publish documents using the standard check-in functionality.

Defect 1835451

Description: When you attempted to publish a file over 100MB via Local File Management, it would fail.

Defect 1608524

Description: When you created a basket and opted to show it in the Baskets dashpart, if you then selected to hide it, it did not automatically remove it from the dashpart.

Workaround Before Fix: Refresh the Baskets dashpart.

Defect 1697290

Description: When you published a document through Local File Management and selected to share the document with other users via email, the Mailings tab on the document did not display the details of the email that was sent.

Defect 1757476

Description: When you filtered the search results in the DMS by ZIP Archives, a generic document icon displayed for all ZIP archives instead of the standard ZIP icon.

Customers Impacted: All clients on version 21.0.

Defect 1620908

Description: When you checked in a document through Local File Management and selected to share the document, the subject line would be blank on the Share With tab.

Customers Impacted: All 21.0 clients.

Workaround Before Fix: Copy and paste the subject from the header.

Defect 1762190

Description: When you previewed an email in the document management system, part of the email thread was missing from the view.

Defect 1629445

Description: When you updated a document from a document pool that was configured for subscriptions, and then checked it back in, you would receive an email notification that the document had been updated.

Defect 1638894

Description: When you viewed the Photos tab on a project in Internet Explorer, the photos were displayed vertically instead of horizontally.

Workaround Before Fix: Use a different browser.

Defect 1677297

Description: When you created a document from a template, if you had a coding scheme configured, the Coding Scheme tab was missing from the Create Document window.

Defect 1679863

Description: You were able to edit documents that you did not have write access to if you used the Bulk Edit Properties feature on a basket.

Email Management

Defect 1713933

Description: When you attempted to publish an email, after you selected the publish attributes and then clicked Edit Properties on the Email Body step, the location(s) you selected were not displayed.

Workaround Before Fix: Manually select the location(s) again.

Defect 1746772

Description: When you sent an email through the PIM Outlook Add-in and selected to delay the delivery, the email would not get sent on the first attempt.

Workaround Before Fix: Send the email again with the same delay as it is only the first attempt that fails.

Defect 1750622

Description: When you selected an email in Outlook and clicked the PIM Smart Publish button, in some cases there could be a delay in opening the Smart Email Publisher window.

Defect 1756712

Description: When you published an email, if you filtered by location and selected a filtered location to publish to, the location would not appear at the top of the recent locations when you published subsequent emails.

Workaround Before Fix: Filter by location again in subsequent sessions, or manually search for the location from the Quick Add Recent Location field.

Defect 1759732

Description: When you opened an email attachment (.msg) from an email in Outlook, a Deltek PIM Add-in error message displayed.

Customers Impacted: Clients on version 20.1.5 and later.

Defect 1759782

Description: When you published emails through the PIM Outlook Add-in, you could not select text associated with check boxes to select the actual option. Instead, you had to click the check box directly to enable an option.

Workaround Before Fix: Select the check box to select the required option.

Defect 1766458

Description: When you published an email, if you entered text in the Filter Location field, and then clicked New to enter a new location, the new location would not appear in the list of recent locations after it was created.

Workaround Before Fix: Clear the text from the Filter Location field before you add a new location.

Defect 1813608

Description: When you created a new email and selected Do not Publish, if you then clicked Edit Properties from the Deltek PIM toolbar group on the actual email, a Deltek PIM Add-in error displayed.

Workaround: Create a new email but do not select Do not Publish.

Defect 1826956

Description: When you published an email through the PIM Outlook Add-in, you could choose to publish emails to the Recycle Bin.

Workaround Before Fix: Don't select the Recycle Bin when you publish emails.

Defect 1831195

Description: When you published a reply to an email, when you printed the email, it displayed the originalItemMapiKey information.

Defect 1728218

Description: When you created a new email and selected to publish it against an entity record, the entity code was missing in the subject of the email.

Customers Impacted: PIM 21.x clients.

Workaround: Set the New Email Subject Line Settings option to Entity Name and Code via Admin > Document Management > Configure Outlook Add In.

Defect 1731550

Description: When you selected the Outbox folder in Outlook and then clicked New Email, if you then selected the Do not publish option, the email would remain in the Outbox and not get sent.

Workaround: Ensure the Inbox is selected when you create a new email.

Defect 1761791

Description: When you attempted to publish an email from the Outlook data file (.pst), an error displayed, and the email would not get published.

Defect 1632891

Description: When you published a new email from Outlook and selected to encrypt it, you received an error and the email did not get published.

Workaround Before Fix: Publish emails unencrypted.

Defect 1654868

Description: When you had document pools configured for 'sending only', they did not appear as publish locations when you published emails.

Defect 1684138

Description: When you attempted to publish an email that had an attachment file type that was not permitted in PIM, the email did not publish, and the following error displayed: "An error has occurred. If this persists please contact a system administrator".

Mobile Working

Defect 1731595

Description: When a project that you were linked to was deleted, you could still see the project in the PIM Mobile Working app.

Customers Affected: All PIM mobile users.

Defect 1705147

Description: When you had a considerable number of custom forms, if you viewed the Global Custom Form Reporting, accessed from the Activity Zone, the page could time out.

Workaround Before Fix: Add executionTimeout="300" for Workflow in the Web.config file to increase the time to 5 minutes.

Defect 1603041

Description: When you created new work packages for tendering and then viewed the Snagging tab on a project, some of the work packages were missing from the dropdown list.

Workaround Before Fix: Enable the work package group for tendering, and then enable the missing work packages.

Defect 1613013

Description: When you submitted a form that had a photo capture field via the PIM Mobile Working app, if you uploaded a photo to this field, and then ran an Excel report from the Global Custom Form Reporting page in the PIM Web interface, the form was not included in the report.

Defect 1897673

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

Project Accounting

Defect 1694550

Description: When you reopened an approved timesheet and posted an expense again, both expenses were reflected in the Cost to Date drilldown.

Defect 1704165

Description: When you attempted to post an invoice to a third-party ledger system, the export failed if the billing organization did not have a primary address specified.

Workaround Before Fix: Add a primary address to the respective billing organization. Alternatively, you can do a manual export of the affected invoices.

Defect 1705529

Description: When you created purchase invoices using order lines, you could select a tax code that was not applicable to purchase invoices. This would cause errors when you exported the purchase invoices to a third-party ledger system.

Workaround Before Fix: Manually modify the tax code before you save the purchase invoice.

Defect 1709968

Description: When you viewed the Forecast Revenue by Work Stage band on a project, in some cases, the Total Forecasted Value was incorrectly rounded off.

Defect 1717593

Description: When you exported a purchase document to a third-party ledger system, the line notes from the purchase order were not included in the export details.

Defect 1721461

Description: When you attempted to view the timesheet admin details for a contact, in some cases it could time out and an error displayed.

Workaround Before Fix: Manually change the date range so that it doesn't load timesheet data from 2011.

Defect 1730908

Description: When you edited the invoice forecast for all workstages and entered a value, if you used the TAB key to move to the next cell, it would shift the values to the left between cells, values would shift left to the previous months.

Workaround Before Fix: use the mouse to select the cells that you want to enter values in.

Defect 1739949

Description: When you edited the finance settings on a project, you could not view all the available settings.

Workaround Before Fix: Zoom in/out to access the scroll bar and other fields.

Defect 1744258

Description: When you attempted to configure project accounting via the Administration Zone, in some cases, an error displayed, and you could not access the page. This happened if the contact role was linked to many entity classes.

Workaround Before Fix: Rename the contact role temporarily to access the Configure Project Accounting page.

Defect 1745850

Description: When you attempted to submit a purchase invoice, in some cases the submit button was disabled due to rounding issues.

Defect 1772684

Description: When you grouped positive T + M lines with negative fixed fee lines in a sales invoice, the following error displayed when you attempted to export it to Sage50: "Export failed for the following reason: 44: Unable to post a zero-value transaction".

Defect 1824106

Description: When you created a purchase invoice that contained purchase items with no set nominal codes for chargeable, and then ran a search for purchase documents, an error displayed.

Workaround Before Fix: Add nominal codes to the purchase items instead.

Defect 1841539

Description: When you edited the finance settings for a project, if you set a workstage to applicable, and then you reset it to applicable before saving, an error displayed.

Workaround Before Fix: When you change the status of a workstage, save the change before you change it again.

Defect 1846529

Description: When you created a finance document from a draft invoice via the Draft Invoices dashpart, the Finance Document Output window displayed at half the size if your browser was set to open links as new windows.

Workaround Before Fix: Manually resize or maximize the window or add the dashpart as a menu item.

Defect 1847147

Description: When you imported data from Xero, if you had more accounts in Xero than the maximum permitted by PIM (as set in the Web config key: LedgerSystemMaximumNumberOfRecordsPerPage), some of the data would not get imported into PIM.

Workaround Before Fix: Increase the value of the LedgerSystemMaximumNumberOfRecordsPerPage in Web.config.

Defect 1853036

Description: When you viewed the sales history for an organization, you could not view all rows if there were many items linked to the organization due to a missing scrollbar.

Defect 1860392

Description: When you posted a VAT-only purchase credit note against a zero-value purchase invoice, it did not display on the POP tab for the supplier, and it was missing when you exported purchase document data.

Workaround Before Fix: Credit the VAP adjustment as an ad hoc purchase item to the credit. You may wish to create a tax credit purchase item with appropriate nominal codes to assign the value.

Defect 1864417

Description: When you exported sales invoices that had external references to Sage 200, the external references were missing in Sage 200.

Defect 1605908

Description: When you viewed the Resource Planner (Overall Resource Plan) and chose to filter by community, it was possible to select a non-global community.

Defect 1608583

Description: When you created a standalone credit note against a project, when you viewed the project on the Fee Forecast page, a warning sign displayed against it, and you could not add any new forecasts.

Defect 1609884

Description: When you view the Key Performance Indicators page, you could only select to view data up to the year 2020.

Defect 1614822

Description: When you approved a timesheet against a project that had expense lines linked to variations, the expense values were not reflected in the unpaid total value on the Variations band.

Defect 1630345

Description: When you added a purchase credit note to a project, if the credit rate value equaled the nett value, you received a 500 – Internal server error.

Defect 1646289

Description: After you upgraded to PIM 21.0, in some cases, multiple instances of invoices and expenses could get created in the Xero ledger system when you exported the sales data.

Workaround Before Fix: Ensure you only have one address set for the project's billing organization.

Defect 1653421

Description: After you upgraded to PIM 21.0, when you exported expenses to Sage 200, the following error would display: "Export failed for the following reason: Cannot set the value of the Field (.SecondReferenceNo) to AC – Expenses w/c <DD MM YYYY>".

Defect 1653424

Description: After you upgraded to PIM 21.0, when you exported sales invoices to Sage 50, the following error displayed: "Invalid index specified for item retrieval".

Defect 1670924

Description: When you edited the invoice forecast for all workstages on a project and added several forecast lines for the first available month, and then added another forecast line to another month before saving, only the first line was retained and reflected in the Total Forecast.

Workaround Before Fix: Save the changes after you add forecast lines to a month before you add forecast lines to a different month.

Defect 1671584

Description: When you opened the PA Landing Page, you could select obsolete departments from the Finance Department list.

Defect 1676505

Description: When you wrote off or adjusted lines on a timesheet that was configured to be chargeable for T+M, the WIP Report Fee_Earned and Time Charge to Date values were not equal.

Defect 1678073

Description: When you filtered out a line manager on the Absence Matrix, it did not return any results.

Defect 1685364

Description: When you set the Export Invoices with Transaction Date of field on the Manage Expenses page for a transaction, the transaction date was not included when you exported the data to Sage.50.

Defect 1656312

Description: When you attempted to publish sales data from the Finance Document Output page, if the custom finance report was configured with the entity link SP and to automatically publish to a selected location, an Error 500 message displayed.

Customers Impacted: All SaaS users.

Workaround Before Fix: Use the Preview button to generate the report and manually publish the report against the chosen document pool.

Workflow Runtime

Defect 1726481

Description: When you sent an email to tenderers from the Tenders tab on a project using the Contact Tenderers feature, if your system was configured to use the standard Free Text Tender Email Template, the names of the sender and recipient was missing on the email that was sent out.

Workaround Before Fix: Select a different standard template for free text.

Defect 1729886

Description: After you upgraded and clicked Configure SCT via the Package Upgrades tab on the Workflow Admin page, the SCT Configuration page did not display.

Defect 1731533

Description: When you enabled a workpackage for tendering, it did not automatically populate the form with the default values defined for the associated workpackage group.

Defect 1736070

Description: When you sent a tender to a contact belonging to an external organization, when the contact clicked the link in the email they received, it displayed the following error: "You do not have permission to perform this action".

Defect 1741845

Description: When you attempted to add tender documents to an enquiry, a server error message displayed.

Workaround Before Fix: Refresh the page to see that the documents have been added, despite the error message.

Defect 1763935

Description: When you sent tender emails to tenderers on a project, in some cases the emails would not get sent out.

Workaround Before Fix: Restart the Workflow service. If there are locks upon restarting, unlock them via Workflow Manager.

Defect 1817329

Description: When you received a system-generated email from PIM Workflow, in some cases, the following error displayed when you clicked the link in the email: “You do not have permissions to perform this action”.

Defect 1818146

Description: When you submitted contact management items that used characters from control sets within the details, i.e., characters that do not represent a written symbol, when you conducted a contract management item search from Activity Zone > CM Item Search, the following error displayed: “Illegal xml character”.

Defect 1823303

Description: When you clicked a link to open the DLM landing page from a DLM approval request email, and then added comments, the comments did not automatically update on the approval landing page.

Workaround Before Fix: Refresh the DLMA landing page to update the view.

Defect 1823303

Description: When you managed the DLM approval routes on a project, the Remove Rejected Documents On Completion column displayed Select a value, even when there were already values set for this.

Workaround Before Fix: Try refreshing the page multiple times. Note that in some cases, this does work.

Defect 1602299

Description: When you add DMS files to a CM item, you could attach a u2PLH file.

Workaround Before Fix: Ensure that you click Select Renditions to select a valid rendition from the u2PLH file.

Defect 1603041

Description: When you managed document approvals for a project, duplicate buttons existed for Manage Routes and Create Routes.

Customers Impacted: All SaaS clients.

ERP Integration

Defect 1635974

Description: When you pushed data from Vision or Vantagepoint to PIM, if the phone number field contained long character lengths, you would receive errors.

Administration

Defect 1652142

Description: When you updated the access type on a security definition for a document pool, it would also update the access rights for all other pools that used the same security definition.

Defect 1695782

Description: When you updated the New Email Subject Line Settings option on the Outlook Add In Configuration page, the PIM site could go down.

Defect 1553032

Description: When you modified, added, or deleted a security definition for a document pool, the changes would not get applied.

Deployment

Defect 1707598

Description: When you ran the DAT in an upgrade, you could receive an error relating to the Approval_Stage script in some cases.

Workaround Before Fix: Update the approval team name that corresponds to the global ID.

Defect 1730615

Description: When you upgraded to PIM 21, if you used custom XWeb skins, it could take the PIM site down with a 404 error.

Workaround Before Fix: Change the web_config skin value to Standard. Alternatively, copy the custom skin back to the XWeb/Skins folder after the upgrade.

Defect 1730615

Description: When you ran an upgrade, the Update existing site option could be unavailable if one or more sites were configured in IIS before the PIM site. This meant that you could not progress with the upgrade.

Defect 1671255

Description: When you ran the upgrade tool from DAC, the following error could display if you had the Project Accounting module enabled: "Failed to update legacy PA Workstages band – One or more errors occurred."

Defect 1914966

Description: When you ran an upgrade and attempted to log in as the administrator, it could return a 500 error due to a timeout, and this would prevent you from continuing with the upgrade.

Customers Impacted: Clients upgrading to 21.0.3 with universal document control implemented.

Appendix A: Release Notes for Maintenance Release 22.0.1

Welcome to the Deltek PIM MR Release Notes.

Changes to Software

This section includes all changes to the software in this release.

Favorites Dashpart Available for Teamwork Users

Teamwork users can now add the Favorites dashpart to their Personal Zone. This is especially useful for external contacts that are involved in many projects.

Additional Information Fields Now Editable for Organizations

You can now update the financial year end, date account opened, date established, and CIS expiry date values under Additional Info when you edit an organization.

Software Issues Resolved

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 1892825

Description: When you entered data in editable grids, such as when editing project accounting work stage values or when using the Smart Superseder functionality, when you clicked in an additional cell to add data, the cursor would lose focus.

Workaround Before Fix: Click in another cell and then click back in the cell to edit it.

Defect 1914924

Description: When you superseded a contact that was part of a community, the contact would still appear as an active contact on the Contacts band on the community record.

Defect 1813454

Description: When you applied a custom skin, in some cases, options on some entity bands were not available, such as refresh, pop-out, and help.

Defect 1871428

Description: When you edited an organization, classifications that were configured were missing in some cases, and this resulted in you not being able to save any changes to the organization record.

Customers Impacted: Clients on 21.0.4 and later.

Defect 1867078

Description: When you logged in and accessed the landing page, a timeout error could display.

Customers Impacted: Clients that upgraded to version 21.0.4.

Design Management

Defect 1892853

Description: When you attempted to download a document that was sent to you for approval, if the document had since been removed from the system, a different file would get downloaded instead.

Defect 1898399

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

Defect 1905337

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.

Defect 1905645

Description: When you viewed the comments from the resubmittal landing page, in certain cases, only one comment was displayed.

Workaround Before Fix: Click on items individually to view the comments.

Defect 1875239

Description: When you viewed the Resubmittal Overdue landing page, the order of items was sorted by approval status rather than approval reference.

Document Management

Defect 1907793

Description: When you added values to any field for a rendition type via the DMS Lookup editor, it would corrupt the underlying XML.

Defect 1697668

Description: When you bulk edited the properties of selected documents, any documents that were not available for editing were not listed in the Documents that are not editable by DMS pane.

Defect 1871698

Description: When you sent a published email to an internal contact, the contact was able to publish the email again. This resulted in duplicate emails in PIM.

Defect 1877896

Description: When you created a document from a template in either Edge or Chrome, if Local File Management or Working Files was not running, the file created was a blank Word template (.dotx) file.

Email Management

Defect 1906618

Description: When you published a new email and entered some details, and then clicked Edit Properties on the email, the Details field was blank.

Workflow Runtime

Defect 1892850

Description: When you removed documents that were part of an existing tender package, the package would fail to send.

Defect 1892852

Description: When you attempted to download a tender document from the PIM Tender landing page, if the document had since been removed from the system, a different file would get downloaded instead.

Defect 1899227

Description: When you generated a 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.

Defect 1865868

Description: When you configured the Configure Share by Download option under Workflow Admin > Package Upgrades, in some cases, an error displayed, and you were unable to complete the configuration.

Defect 1877235

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 any Workflow packages.

Defect 1884701

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

Mobile Working

Defect 1897673

Description: When you created a snag for a project via the PIM Mobile Working app, it could overwrite the name of the work package on the Allocate Workpackage Group window.

Defect 1892120

Description: When you added a location to a project that had not previously had a location defined, the location failed to save.

Workaround Before Fix: Add the location twice to save it to the project.

Defect 1897216

Description: When you managed location groups for a project, it was possible to add a blank location group, and this would result in an error message.

Defect 1848863

Description: When you edited a custom form through the Custom Form Builder, you could not delete sections.

Defect 1894585

Description: When you accessed the Custom Form Builder Manager, if you were not a Workflow administrator, a blank Security button was displayed on the toolbar.

Defect 1848515

Description: When you submitted a form or document using the PIM Mobile Working app, the system would log an action with a status of Document Sent rather than Completed Action. When you searched for the action via the Activity Zone, the action displayed No in the Completed column, and the Date Completed field was empty.

Absence

Defect 1892808

Description: When you edited an absence booking for a contact, you could book more days than the remaining entitlement amount for the contact.

Customers Impacted: Clients using 20.1 and later.

Defect 1697141

Description: As a level 1 security user, you could edit past absence via the Absence dashpart and the Absence Matrix.

Project Accounting

Defect 1892150

Description: When you viewed certain grids linked to project accounting, such as the Workstage Summary band on project records, numerical cells that had alerts on them were incorrectly aligned to the left.

Defect 1725726

Description: When you edited a credit note a second time, or posted a credit note after editing it, if the initial invoice included at least one T+M line, you would receive a 500 error.

Defect 1870897

Description: When you searched for cost transactions from the Activity Zone and generated a Cost Transactions report, the following error could display: 'The Search Framework was unable to generate a PDF report for the given criteria and output settings. A common reason for this is Unicode characters being present in the search results'.

Defect 1871767

Description: When you attempted to filter by classification on the Global Resource Plan, the list was empty.

Defect 1874513

Description: When you imported data from Xero, if the Xero organization had more contacts than the value set for the Webconfig.key LedgerSystemMaximumNumberOfRecordsPerPage (the default is 100), not all data would get imported into PIM.

Defect 1877721

Description: When you edited the currency exchange rate, purchase orders that used the previous exchange rate would get updated to use the new rate.

Defect 1877783

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 1899367

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

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

Defect 1907469

Description: When you attempted to email a posted sales document, after adding information to the email body, you could not proceed to the next stage, and so the email would not get sent.

Defect 1907972

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

ERP Integrations

Defect 1870022

Description: When you edited an organization, some fields were missing from the form.

Administration

Defect 1905804

Description: When you attempted to archive documents through the Administration Zone, the following error displayed: 'The config key dms.canArchiveExportRoleID must be set to define who is allowed to use the archiver. You do not have a scratch area set, and there is no default area'.

Defect 1905813

Description: When you attempted to create entries that used the DMS lookup configuration, in some cases the save button was disabled, and the following tooltip displayed on the save button: 'Rendition type name must be unique'.

Defect 1896089

Description: When the document archive job failed, the job would not get retried and therefore documents in the queue would not get archived.

Appendix B: Release Notes for 22.0.1 Hotfix 1

Released: 16th May 2023

Release Name: Deltek PIM 22.0.1 Hotfix #01

Software Issues Resolved

The following software issue has been fixed in this hotfix release.

Email Management

Defect 1933211

Description: When you published a new or existing email from Outlook using PIM Smart Publish, you could not edit a recent location or add a new location.

Customers Impacted: All clients that use the 64-bit version of the PIM Outlook Add-in.

Appendix C: Noteworthy Software Changes for Legacy Clients

As part of the 22.0 release, we have removed some background legacy code pages that would not have been subject to customization.

Area	Page	Reason
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
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
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.

Appendix C: Noteworthy Software Changes for Legacy Clients

Area	Page	Reason
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.
Legacy Edit Contact Methods	/code/Legacy/Web/_Admin/edit_contact_methods.aspx	Replaced in Xweb
Heritage Diagnostic Tools	/code/Legacy/Web/_Admin/Tools (all content)	No longer valid or required
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	Defunct

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.

About Deltek

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