

Deltek PIM

PIM 26.0 Release Notes

May 8, 2026



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Introduction

Welcome to Deltek PIM 26.0 Release Notes. These release notes contain a summary of the following:

- Pre-installation Information
- Known Issues
- Deprecated Features
- New Features and Enhancements
- Software Issues Resolved.

Important Note

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

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

Please review the [Upgrade Actions for System Administrators](#) for important post-upgrade tasks.

Cookie Consent Prompt on Upgrade

After upgrading, all users will see a new Cookie Consent screen on first login. This supports data privacy compliance and gives users control over Functional and Analytical cookies.

What's New in PIM 26.0

To see the new feature highlights in PIM 26.0, see: [PIM Release Highlights](#).

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 19.0 to 25.1 are contained in the respective product documentation for those releases.

Note: You may still log support cases against unsupported software versions. However, please note that if you are running a version of PIM prior to 25.0, we may require you to upgrade to the latest version to resolve any issues that arise.

Withdrawal of Third-Party Software Support

As of PIM 23.0, SQL Server 2012 & 2014 are no longer supported. If you are using these or prior versions of SQL Server, your site will be flagged as requiring a SQL upgrade when you submit a PIM upgrade request.

Reminder of Third-party Server Software Support

Please be aware that Microsoft has withdrawn support for the server versions 2008 & 2008R2 as of January 2020, and Windows server 2012R2 as of October 2023. If you are planning to upgrade to PIM 24.0 or above, and you are operating on one of these server versions, you will be required to upgrade your server. Please contact your Account Manager if you require a server migration.

Notice of Third-party Client Software Support

Please be aware that Microsoft has withdrawn support for the Windows 7 PC operating system as of January 2020, Windows 8 / 8.1 as of January 2023 and Windows 10 as of October 2025. This means that PCs running these versions 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 11 operating system. We recommend that you review and update your client machines as a matter of urgency.

As of July 2022, SQL Server 2012 will be withdrawn from Microsoft support schedule, followed by SQL 2014 in July 2024. The next release of PIM will require you to upgrade SQL Server to a minimum of SQL 2016.

Mandatory SSRS Install to Receive PIM 20.0+ Upgrades

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

Server Software Requirements

To upgrade to this version, your web server environment must be on at least .NET Framework 4.8 and .NET 10. If these are not installed yet, you may be asked to install these versions ahead of your PIM installation or upgrade.

Client Hardware Requirements

Display Resolution

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

Upgrade Actions for System Administrators

System administrators should consider the following actions after an upgrade:

Entra (formerly Azure) Single Sign-On Redirect URL Update

- If you have implemented PIM's Azure Single Sign-On in version 22.0 without upgrading to PIM 23.0, you need to add the following redirect URI to your existing Azure App registration, under the Authentication tab, for your PIM Single Sign-On entry:
`https://{Your_PIM_Site_URL}/XWeb/Security/IdentityProviderCallback.ashx?provider=Microsoft&applicationType=Identity`
- The Secret ID is now required to add an extra security layer to the Azure authentication model. If you previously implemented Azure Single Sign-On in PIM 22.0 without upgrading to PIM 23.0, you will need to revisit your Azure App registration to ensure a secret ID has been added under the Certificates & Secrets tab. If you do not have a secret ID registered, you will need to create one and then enter it into the corresponding field on the PIM Single Sign-On Configuration page in the Admin zone. This ensures the logon method works from PIM 23.0.

PIM for Outlook & Entra SSO

- PIM 25.0 released the new PIM for Outlook application for use with Microsoft's New Outlook application. This requires an Entra App Registration to integrate your PIM system with your users' O365 mailboxes. To ensure a smooth rollout, we recommend implementing PIM's Entra Single Sign-On solution ahead of rolling out the new PIM for Outlook application so that your users benefit from the seamless authentication model. For more information, see the [New Features: Email Management](#) section of the PIM 25.0 Release Notes.

Email Flows (on-premises clients only)

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

Edge Hybrid Mode

Project Accounting clients that use full Edge Internet Explorer (IE) mode across the whole PIM website to satisfy PA functions that still require IE must implement Hybrid Edge IE Mode upon upgrade to be supported for the wider site's modern browser functions. This future-proofs access as PIM leverages modern browser features that may not work in full IE. Hybrid Edge IE Mode provides a seamless experience with modern browsers, and means users get IE on-demand when required, and the modern Chromium experience when IE is not required.

For more information on how to implement Hybrid Edge IE Mode, refer to the [PIM Microsoft Edge Hybrid Internet Explorer Mode Overview](#) guide.

Post-Installation Information

After installing PIM 26.0, you may need to install or upgrade additional client components to enable specific functionality. This section guides you through the process.

Accessing Client Components

All client components can be downloaded from: **Administration Zone > System Configuration > System Setup > Client Components**.

Component Categories

Essential Components

Must be installed on all client PCs that access PIM:

- **Local File Management (LFM)**
Note: Not required for Email Management-only deployments.
- **PIM for Outlook or Outlook Add-In (Classic)**
Note: Users may use either Outlook add-in component, dependent on their Outlook client (Classic Outlook or New Outlook). We recommend you review the [PIM for Outlook Administration Guide](#) for instructions on setting up the new PIM for Outlook application for users moving to New Outlook.

Optional Components

Only required if you use the corresponding feature or integration:

- **Universal File Management (UFM)**
- **AutoCAD Integrator**
- **Revit Integrator**
- **MYOB API Ledger Connector**
- **MYOB Ledger Connector**
- **Sage 50 Ledger Connector**
- **Sage 200 Ledger Connector**

Upgrade Requirements

Use the table below to determine whether you need to update a component when upgrading to PIM 26.0. Your version of PIM is displayed on the bottom-right of the PIM Administration Zone and Activity Zone screens.

Note: When the table indicates that an upgrade is required, download and install the latest version of the component from *Administration Zone > System Configuration > System Setup > Client Components*. Version numbers are not shown in the download area—the system always provides the latest release.

Essential Components

Component	Notes	Update Required? (If Yes, install the latest component from the Client Components area)
Essential Components – Required on all client PCs		
<p>Local File Management (LFM)</p> <p>Enables users to manage and publish local files in any modern browser.</p>	<p>Replacement for Working Files which supports all modern browsers.</p> <p>Not applicable for Email Management-only deployments.</p> <p>Requires .NET 10.0.</p> <p>See Installation Notes.</p>	<p>Yes, new .NET package required.</p>
Email Management for Outlook:		
<p>PIM for Outlook</p> <p>Modern Outlook experience for email filing and search.</p>	<p>Recommended successor to the classic Outlook Add-In.</p>	<p>No, if upgrading from PIM 25.0 as the component will upgrade automatically.</p> <p>If upgrading to 25.1 from 24.1 or earlier, you will first need to configure and deploy PIM for Outlook in the first instance.</p>

<p>Outlook Add-In (Classic)</p> <p>Provides integration with Microsoft Outlook.</p>	<p>Integration with Microsoft Outlook (32-bit and 64-bit). Superseded by PIM for Outlook; keep only where you are not yet migrating or need functionality not yet moved.</p> <p>Requires .NET Framework 4.8.</p> <p>See Installation Notes.</p>	<p>Yes, if you upgrade from 24.1 or earlier. Users moving to PIM for Outlook must be upgraded to run the one-time migration (via the Migrate button), which transfers labels and settings to the new PIM for Outlook Add-In before fully switching over.</p> <p>For information on deploying and migrating to the new PIM for Outlook, see the following guides: PIM for Outlook Administration Setup Guide and PIM for Outlook Quick Start Guide.</p>
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Optional Components

Component	Notes	Update Required? (If Yes, install the latest component from the Client Components area)
<p>Optional Components – Required only if specific modules are installed on a client PC</p>		
<p>Universal File Management (UFM)</p> <p>Enables access to files stored on shared network drives without requiring them to be published to PIM.</p>	<p>Installed on each document server that you want to provide access to from PIM.</p> <p>Requires .NET 10.0.</p> <p>See Installation Notes.</p>	<p>Yes, new .NET package required.</p>
<p>AutoCAD DLM Integrator (2024 and Earlier)</p> <p>Enables integration with Autodesk AutoCAD 2024 and prior releases.</p>	<p>Provides features for integration with AutoCAD 2024 and earlier. Supports legacy .NET frameworks for Autodesk 2024 and prior versions. Install only if you're using compatible versions of AutoCAD.</p>	<p>Yes, if upgrading from PIM 24.0.2 or earlier (version may vary by AutoCAD release).</p> <p>No, if upgrading from PIM 24.1.0 or later</p>

<p>AutoCAD DLM Integrator (2025 and Later)</p> <p>Enables integration with Autodesk AutoCAD 2025 and later releases.</p>	<p>Supports Autodesk 2025+ products that require .NET 8. Provided as a separate component due to Autodesk’s architectural changes.</p>	<p>Yes, if upgrading from PIM 24.0.2, and working on AutoCAD 2026.</p>
<p>Revit DLM Integrator (2024 and Earlier)</p> <p>Enables integration with Autodesk Revit 2024 and earlier releases.</p>	<p>Supports older framework versions compatible with Autodesk 2024 and prior.</p>	<p>Yes, if using Revit Integrator for 2024 projects and upgrading from PIM 24.0.2 or earlier.</p> <p>No, if using Revit Integrator for 2024 projects and upgrading from PIM 24.1 or later</p>
<p>Revit DLM Integrator (2025 and Later)</p> <p>Enables integration with Autodesk Revit 2025 and future releases.</p>	<p>Supports Autodesk 2025+ products that require .NET 8. Provided as a separate component due to Autodesk’s architectural changes.</p>	<p>Yes, if using Revit Integrator for 2026 projects and upgrading from PIM 24.1.</p>
<p>MYOB API Ledger Connector</p> <p>Enables ledger integration with MYOB through the supported API.</p>		<p>Yes, if MYOB API Live (Cloud) and upgrading from earlier than PIM 25.1.</p>
<p>MYOB Ledger Connector</p> <p>Enables ledger integration with MYOB in environments where the API is not used.</p>	<p>MYOB have withdrawn support for their classic ledger offering. PIM clients should consider migrating to MYOB’s other ledger software or Xero.</p>	<p>N/A</p>

<p>Sage 50 Ledger Connector</p> <p>Enables ledger integration with Sage 50 Accounts.</p>	<p>See KB 91867 if you are planning to upgrade your version of Sage 50 accounts.</p>	<p>Yes, if upgrading from PIM 19.0.0 or earlier.</p> <p>No, if upgrading from PIM 19.0.1 or later</p>
<p>Sage 200 Ledger Connector</p> <p>Enables ledger integration with Sage 200 Accounts.</p>	<p>See KB 92151 if you are planning to upgrade your version of Sage 200 accounts.</p>	<p>Yes, if upgrading from PIM 19.x or earlier.</p> <p>No, if upgrading from PIM 20.0 or later</p>
<p>TAPI</p> <p>Enables telephony integration.</p>	<p>Last updated in PIM 2015.</p> <p>No update required unless reinstalling.</p>	<p>N/A</p>

Installation Notes

Traditional Outlook Add-in

- **Important:** Install the latest version of PIM before installing the traditional PIM Outlook Add-in component.
- Requires .NET 4.8 on client machines.
- See the [New Features: Email Management](#) section in the PIM 25.0 release notes for guidance on choosing between the traditional and new PIM for Outlook add-ins.

Local File Management (LFM)

- Deploy manually via Group Policy or by supplying an installer link to users.
- .NET 10.0 will install automatically on users' machines if not present.

Universal File Management (UFM)

- **Critical:** Must be updated on ALL servers running UFM to maintain compatibility with the latest version of PIM.
- Required for Universal Document Control (UDC) to connect remote file servers with PIM.
- Requires .NET 10.0 (installer adds if not present).

API Application

- Now runs on .NET 10.0.
- **No action required** – automatically upgraded during PIM installation / upgrade.

Obsolete Components

The following components have been obsolete since PIM 2017 and can be removed from any machines if present.

Component	Replacement	Action Required
EML Opener	Native Microsoft Outlook This component was used to view emails after they were stored in PIM	Remove from client machines
Intranet Readiness Application	No longer used	Remove from client machines
Outlook Sync	Outlook Add-in	Remove and install Outlook Add-in
Working Files	Local File Management (LFM)	Remove and install LFM
Excel Link	Server-side Excel exporter	Remove from client machines
Rasterex Client	HTML5 viewers (2017) / Apyrse (20.1+)	Uninstall and follow upgrade requirements below

Rasterex Upgrade Requirements

Important for Rasterex Users:

- PIM 25.0 completely removed all Rasterex code, including mark-up conversion routines.
- **If upgrading from PIM 20.0 or earlier**, you must first upgrade to PIM 24.1 before upgrading to 25.1 to ensure mark-ups are converted.
- **Contact Deltek Support** if this applies to your installation.

Apyrse Viewer Requirements

- Apyrse replaced the Rasterex Viewer in **PIM 20.1** as the internal 2D document viewer for collaborating on drawings, office documents, and PDF files.
- Apyrse requires the following on the server:
 - Microsoft Visual C++ Redistributable 2015-2022 x64 installed on the server
- For detailed requirements, visit: <https://docs.apyrse.com/documentation/core/info/prerequisites/windows/>

Mobile App Requirements

PIM 26.0 introduced new maintenance update versions of Android and iOS Timesheet & Expenses and PIM Mobile Working apps to bring them up to the latest operating system versions for both platforms.

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

- Apple iOS 16 (this was iOS 15 in the previous release).
- Android 12.0 (this was Android 10.0 / 11.0 in the previous release).

Important: Devices not meeting these requirements:

- Cannot install or update to the latest mobile app versions.
- Will retain existing app versions but miss new features.
- May experience compatibility issues with the upgraded PIM system.
- For complete device requirements, see: [PIM Mobile App Minimum Device Requirements](#).

Known Issues

The following are known issues in the current release.

New PIM for Outlook

Email Publishes Even When Sending Fails

When you send an email using PIM for Outlook, the email is published to PIM even if sending fails. The system also does not recognize it as published, though duplicate publishing doesn't occur.

Workaround: Manually send the incorrectly published email to the recycle pool.

Slow Response When Sending Emails with PIM for Outlook

When you send emails via PIM for Outlook in the desktop app or Edge browser, you may see a delay, and the following message displays: "PIM for Outlook is taking longer than expected. PIM for Outlook is processing messages."

Note: Notify Customer Care if this is a recurrent problem in your environment.

Clicking Continue Multiple Times on Document Attribute Selection Screen Freezes Page

Clicking **Continue** multiple times on the document attribute selection screen in PIM for Outlook can cause an error that freezes the page and prevents it from closing.

Workaround: Click the Continue button once, then wait for the process to complete. Avoid clicking it multiple times, even if there is a delay.

Emails Not Moved to Deleted Items After Publishing

When you "Publish on Reply" to an email using PIM for Outlook with the "Move to Deleted Items after publish" setting enabled, the original email sometimes remains in the Inbox instead of being moved.

Workaround: Manually delete the email.

Searches Fail After Publishing Emails with Invalid Characters

Publishing emails that include uncommon invalid XML characters in the subject line can cause future DMS searches to fail.

Workaround: Contact Customer Care for assistance with addressing the issue.

Cannot Publish New or Draft Emails in Classic Outlook

If you create or open a draft email in Classic Outlook and try to publish it to PIM using PIM for Outlook, the action fails, and a message states the email cannot be published at this time.

Note: PIM for Outlook is not supported for use with Classic Outlook. Advise users to either use Classic Outlook and the traditional COM Outlook add-in, or move to New Outlook and use PIM for Outlook.

Initial PIM API Call Causes Delay

If the PIM API has been idle and terminated, the first request after restarting may take 10–13 seconds to respond. Following calls are fast once the API is running, triggered by the first user request of the day.

Warning When Publishing Multiple Emails

When you attempt to publish a batch of four or more emails from PIM for Outlook side-bar app, a Microsoft platform limitation may be exceeded, and this triggers the following warning:

"Some item(s) are not emails and will be deselected."

Workaround: To avoid this issue, publish emails in batches of three or fewer, or consider using PIM For Outlook Auto Publish Folders, released in this version (26.0).

Bulk Emails Not Published to PIM When Using SMTP Relay Without IIS6 SMTP

When using the SMTP Relay email provider with the 'Copy to DMS' option enabled, bulk emails are not published to PIM if the IIS6 SMTP Virtual Server is turned off.

Workaround: If carbon copy publishes are a business-critical feature, revert to local SMTP and contact Customer Care to report the problem.

Known Issues in Previous Releases

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

Deprecated Features

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

For information on deprecated features in previous releases, see [Appendix B: Deprecated Features in Previous Releases](#).

PIM 25.0 Deprecated Features

Feature	Notes
Rasterex for Markup & Conversion	PIM Viewer clients on older versions of PIM may still be using the legacy Rasterex service for markups. To ensure compatibility, clients upgrading from these versions must first upgrade to PIM 24.1 before proceeding to later versions. This step runs a conversion routine that migrates Rasterex markups to the new markup technology.

PIM 24.1 Deprecated Features

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

Planned Deprecated Features

The following features are currently under sustaining support and are planned for deprecation in future releases. Clients are advised to review their usage of these features and begin transition planning where applicable.

Feature	Notes
Legacy Archiver	The legacy IE-only document archiver, designed to allow admins to manage storage on physical servers with limited physical drive capacities, will be retired in 25.1. Clients are advised to explore their retention policies on key pools via Pool Management tools, or use the Document Export and Removal tools for ad-hoc entity-based removals.
TAPI Support	The legacy IE-only TAPI client component and support will be removed in 25.1. The modern part of the website implements a replacement telephony integration which makes TAPI obsolete.

Hard Copy Scanner (Local SMTP email provider)	Support for this feature will be deprecated once support for localSMTP mail provider is removed from the software in a future release. Universal Document Control (UDC) will provide a partial replacement for this.
Customer Customizations of Older Pages	If you use customized legacy pages, you are strongly advised to undertake customization reviews as part of the broader Optimization Workshop. Contact your Account Manager for more information.
Mail Vault	<p>The Mail Vault has been under sustaining support for several years now, allowing time for clients to seek alternatives. If you rely on Mail Vault for your business, you will need to consider the following options:</p> <ul style="list-style-type: none"> Greater enforcement of PIM's Outlook Add-in usage in your user base. The Outlook Add-in has recently benefitted from the introduction of Smart Email Publishing, which suggests locations for selected emails, and improves the general usability of the app. <p>A move to an external provider of email journaling, such as Microsoft Exchange Office 365's Unified Hold feature.</p> <p>Mail Vault will be removed in a future release of PIM.</p>
Legacy Working Files Component	The legacy WorkingFiles component code, replaced by LFM, has been removed from PIM's client components in PIM 24.0 and will finally be retired in a future PIM release.
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.
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.

<p>Legacy MYOB Account Right Connector (ANZ)</p>	<p>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.</p>
<p>Silverlight Charting</p>	<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
<p>Excel Deep-linking</p>	<p>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.</p>
<p>AutoCAD-LT</p>	<p>This Autodesk product was not adopted by PIM Clients.</p>

New Features: General

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

Projects

View Completed Projects and Enhance Project Visibility

Access both active and completed projects from the Projects dashpart using a new “Include Completed Projects” toggle. The toggle is off by default to maintain existing behaviour and can be enabled to display all projects where you are an internal contact.

Additional columns for Status and Planned Completion date provide greater visibility into project progress, with sorting options to help you organize and review your project list more effectively.

Security

Enhanced protection with Content Security Policy (CSP)

Your site security has been strengthened with extended HTTP header protection, now including support for the Content Security Policy (CSP) header. This enhancement helps protect against cross-site scripting (XSS) attacks by controlling how content is loaded and executed, improving overall system security.

Important considerations:

- CSP is not applied to legacy pages or the Workflow site.
- If the **Enable JS Content in PDFs** security setting is enabled, the CSP header will not be applied to PIM Viewer pages due to compatibility limitations.

New Features: Email Management

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

PIM for Outlook Auto-Publish Folders

PIM 26.0 introduces a powerful new auto-publish folders feature to PIM for Outlook, enabling new bulk publishing capabilities and support for publishing from mobile devices. These folders are configured in PIM and added to your mailbox, enabling you to publish emails automatically by placing them into the appropriate location.

PIM for Outlook now uses a background publishing model. Emails submitted for publishing—either from the side panel or by being placed into auto-publish folders—are queued and assigned a Pending status while processing, providing great flexibility and a more consistent publishing experience across devices.

Learn more about PIM for Outlook Auto-Publish folders from the following resources:

- Support Service Knowledge Base - [PIM for Outlook Auto Publish User Guide](#)
- Watch the [PIM for Outlook Auto Publish demonstration](#)

Centralized PIM for Outlook Settings

Access your PIM for Outlook contact sync settings from a single, dedicated dashpart. The existing “Sync Contacts to Outlook” functionality has been consolidated into a tab within the new “PIM for Outlook” dashpart, making it easier to locate and manage your sync preferences. Existing configuration and security settings are retained.

Automate Publishing using Managed Outlook Folders

Reduce manual effort by automatically publishing emails from folders configured within a dedicated PIM-managed structure. You can assign publish locations for emails **and** attachments at the folder level, ensuring content is processed in the background and consistently filed.

This feature introduces a new **Outlook.AutoPublish** entity function, allowing administrators to control which users can configure and use automated publishing.

Track Publishing Progress with Outlook Categories

Stay informed of publishing progress with automatic status indicators. Emails are marked with a “PIM Pending” category while queued for publishing and updated upon completion, helping you quickly identify their status.

Manage Publish Locations within the PIM for Outlook Dashpart

Create, edit, and organize publish locations directly from the PIM for Outlook dashpart. A dedicated management interface allows you to define locations using pools and entities, reuse existing configurations, and quickly find locations using search and sorting.

Publish locations created here are immediately available in the side bar app and when configuring automated publishing folders. Locations that are currently in use cannot be deleted, helping protect active publishing configurations.

Prevent Unintended Changes to Shared Publish Locations

Avoid accidental disruption to automated publishing workflows. When editing a publish location that is already used by another folder, you will receive a warning before applying changes, ensuring you understand the impact across all affected folders.

View and Manage Publish History

Access a complete audit trail of your email publishing activity. The Publish History tab allows you to review past publishes, including successful, failed, and cancelled events, with detailed summaries and status indicators.

You can view logs, open related documents, and retry failed publishes directly from this view, helping you manage and resolve issues efficiently.

Monitor and Manage Publishing Tasks

The Folders and Locations tasks fly-out is only intended for our Customer Care teams to help support you in cases of folder synchronization issues or email publish failures. Deltek may ask users to check task information via shared session during support calls. You can track the status of email publishing activity directly from the PIM for Outlook dashpart—a dedicated Tasks tab provides visibility into pending, active, completed, failed, and aborted publishing jobs.

You can review task details, access logs, and retry failed publishing attempts—this improves transparency and reduces the need for support intervention.

Important Usability Factors

- Due to the Microsoft O365 Add-in Framework there are some known limitations in how Outlook mailbox folders must be managed. As noted to users when initiating the new dashpart, folder names and structure **MUST** be managed via the PIM dashpart and not within Outlook. Changes made to folder names, ordering, or the original structure sync'd from PIM, will not be reflected in the PIM for Outlook dashpart and may prevent emails dropped in edited folders from being published. When users become unsynchronized, they will be required to clear configured folders manually and reinstate them.
- When an email is published by another recipient with access to PIM ahead of a colleague's email, the background processor will intentionally mark the losing user's email publish as "Cancelled", but it will point the user to the winning user's published email.

PIM for Outlook Side-Bar App Enhancements

Publish Emails Directly from the Locations Window

Save time by publishing emails without returning to the side panel. A new “Publish Now” button in the Locations window allows you to complete publishing immediately once a valid location is selected, reducing extra steps in the process.

Retain Outlook Categories when Publishing Emails

Keep your existing email categories intact when publishing to PIM. Categories applied in Outlook are no longer removed during publishing, allowing you to continue using them for organization and tracking.

View Detailed Publishing Status in Outlook

Understand the status of your published emails directly within Outlook. The publish details panel now shows who published the email, when it was published, and its current status, including pending and failed states. You can also access document properties and related task information for further action.

Note: While an issue is looked into in the final release, you must be logged into PIM in your default browser when you click Edit Properties for the link to be resolved.

New Features: Document Management

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

Smart Filter Awareness

See Additional Filter Counts at a Glance

Quickly understand when additional filters are affecting your results. The Additional Filters label now displays the number of filters currently applied, providing a clear visual indicator even when the filter panel is hidden. This ensures you always have visibility into active filtering.

New Features: Teamwork

Performance Management

Increase the Limit for Multi-Organization Rating

The maximum number of organizations that can be rated simultaneously has increased from 30 to 60. This limit is configurable, enabling administrators to adjust it based on their needs while retaining the existing default settings.

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 implemented some of the workarounds and can now upgrade to receive a standard fix, or you simply want more background information about the defect repairs.

General

Defect 2345863

When you sent an email from the DMS, DLM, or Sales Invoice module, the published email in PIM was missing TO and CC recipient attributes.

Defect 2394170

When you performed an Enquiry Search and viewed the Classification column in the results, the classifications did not appear in the expected order based on the Admin page configuration. The Process classification, which was set to appear first in the Admin page ordering, was not listed first in the search results.

Defect 2474066

When you sent an email with an attachment sourced from PIM using PIM for Outlook, both the email and the attachment were published separately in PIM, creating duplicate entries. This issue also occurred when attaching files directly from the computer. Emails with attachments published from the Inbox were unaffected.

Defect 2481848

When the Password Iteration Factor was set higher than the default value of 8, users experienced timeout errors when attempting to reset or change their passwords. This occurred both on the password reset screen after clicking the email link and when administrators tried to reset passwords from the Users and Licenses page. In both cases, the process timed out, and password reset emails were not sent.

Defect 2513012

When entities containing integer references were pushed from Ajera, the PIM for Outlook integration failed due to mismatched data expectations in the API.

Defect 2520952

When you sent a campaign email with an attachment from PIM, the queue job failed to complete. Although some emails were successfully sent, the total number of delivered emails remained uncertain due to the reuse of the same attachment stream across multiple emails.

Defect 2543475

When you searched the Contact Usage Summary report, users with only an Entra ID username were not included in the results.

Defect 2557719

When you published an email with attachments using PIM for Outlook and selected the option to publish attachments as separate files to a different document pool, the attachments did not retain the attributes and details from the email.

Defect 2557745

When users with only the Contact Role attempted to add a pool with User Role and Contact Role definitions assigned, validation logic incorrectly denied write access, preventing the pool from being added.

Defect 2558861

When the "Include N/A response" option was enabled for dropdown questions in the Team Evaluation feature, selecting N/A was treated as a score of 0 and included in the maximum possible (Out Of) score calculation. This caused incorrect percentage scores, negatively impacted overall weighted scores, and resulted in behavior inconsistent with documented scoring logic and User Guide expectations.

Defect 2571007

When you replied to a published email from Outlook's Inbox, the option to 'Publish email to same location' was no longer available. Instead, the dialog displayed options to publish in 'Recent Locations'.

Defect 2571782

When you saved the Entra SSO configuration on a PIM site running version 25.1 and returned to the configuration page, an error occurred, and the page failed to load the previously saved configuration details.

Defect 2590889

When you attempted to publish an email without a subject using the Outlook Add-In (COM OAD), an error occurred, preventing the email from being published. Additionally, when publishing on send, no error was displayed, but the email was not published, and no logs were generated.

Defect 2598648

When you attempted to save a new value in the Client/Subcontractor Spend band under Organization (General > Insurances) after upgrading to version 25.1, a server error occurred, displaying the message: 'A problem occurred when processing a request to the server.' The error prevented the entry from being saved.

Contract Management

Defect 2623982

When you deleted a draft item in Contract Management, the draft remained visible in the list instead of being removed.

Defect 2557691

When you edited the 'Add' value in a Contract Management item and saved the changes, the approximate cost field did not update to reflect the new value.

Defect 2473361

When you created multiple submittals in Contract Management, the reference number did not increment in some cases.

Defect 2493350

When the midnight export ran on the SaaS server, it failed to sync data from Contract Management to the customized report, resulting in missing data. This issue also occurred with the standard counterpart report.

Document Management

Defect 2582790

When you clicked the Refresh button in the Documents view of a Project record after upgrading to PIM version 25.1, the page did not refresh or reload its content.

Defect 2582791

When you searched across all document pools in the Document Management System (DMS) using Classic View and clicked the 'More Results'; button, additional documents did not load, limiting the results to the first 100 documents.

Defect 2592532

When the maximum basket size for email and zip was set to 0 in the DMS configuration, attaching files from PIM to emails was prevented. The system displayed a validation message stating, "The size of attachments exceeds the limit for outbound emails,"; incorrectly interpreting the value 0 as a hard limit rather than no limit.

Defect 2481855

When you downloaded a file using a shared download link in DMS, the filename delimiter was displayed as a dash (-) instead of the configured underscore (_).

Defect 2500695

When you sent emails using the Entra SMTP Client as the email provider, the send queue jobs failed with an 'Authentication unsuccessful' error. This issue persisted until the email provider was reauthenticated.

Defect 2522663

When you accessed the DLM Resend Email page to resend emails, the target recipients failed to load. The page appeared to finish loading, but the query had not retrieved the recipient data. Despite this, the 'Select All' checkbox and the 'Send' button were still enabled.

Defect 2543742

When clients upgraded to version 25.0.1 without configuring Teamwork Access settings in the Admin Zone, basket user roles did not appear in the following areas: My Basket dashpart > Create New Basket, and DMS Smart View > Basket Mode > Edit and Share Basket.

Defect 2549374

When you renamed a document in Smart Superseder, previous details such as Project, Contact, and Organization were cleared, requiring manual re-entry of metadata.

Defect 2557722

When a publish location was migrated from OAD to P4O, records in the `Publish_Locations_Entities` or `Publish_Locations_Categories` tables were deleted. This caused the location to be missing from the recent locations list and resulted in an error when attempting to add the location again. The error message indicated that the publish location already existed.

Defect 2568110

When the TextExtraction module ran and the required extract folder did not exist, the folder was not created, causing extract files for published documents to fail to generate. If another component created the folder, text extraction continued successfully; otherwise, the process failed with a 'Could not find a part of the path' error in system logs.

Defect 2571639

When a file extension was marked as obsolete in the File Extensions configuration page, files with that extension continued to appear in the Working Files dashboard instead of being hidden from the UI.

Defect 2585162

When you resent a tender after updating a work package document, the tender became stuck in a pending status. No errors or warnings were displayed to the end user, but the failure was logged in Workflow Manager and Failed Tasks logs.

Defect 2587587

When recipients accessed documents sent via SmartShare by clicking on file icons, the page opened but loaded endlessly, preventing access or download of the file.

Defect 2590551

When you rapidly changed the document pool selection in DMS Smart View and clicked the search button, an intermittent error occurred stating, 'Value cannot be null. Parameter name: attribute.' The error persisted until the site was refreshed to clear the temporary browser cache.

Defect 2620236

When emails were published using PIM for Outlook, the From address was missing, causing the From column to display as empty in Smart DMS.

Project Accounting

Defect 2557729

When you edited a working week scheme with the 'Minimum Time Unit' setting configured to a whole number (e.g., 1), time entries did not round as expected.

Defect 2573357

When you created a Finance Cost Centre with a duplicate CODE or NAME value in a different Finance Company, the system displayed an error and prevented saving, even though the values were only required to be unique within the same Finance Company.

Defect 2580131

When you upgraded from v25.0.1 to v25.1.0, traffic light icons in certain PA bands did not display. The icons remained functional as clickable buttons but were invisible.

Workflow Runtime

Defect 2593692

When you attempted to remove a document from a DLM approval ticket created before the version 25.0 upgrade, a generic server error occurred, and the document was not removed.

Defect 2593901

When you removed a document from a DLM approval ticket created after upgrading to version 25.0, the document continued to appear on the Documents Remove page and the Approvals Landing Page, despite no error being displayed during the removal process.

Appendix A: Noteworthy Software Changes for Heritage Clients

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

Area	Page	Reason	Removed in PIM Version
Publish Document by Email	Not applicable	Not compatible with the new SMTP Relay or Azure SMPT Client email providers Note: Only disabled if you enable either SMPT Relay or Azure SMTP Client as your email provider	25.0
Hard Copy Scanner	In Tray or Hard Copy Scanner Dashpart	This feature is disabled when moving to either SMPT Relay or Azure SMTP Client as your email provider	24.0
Replace Document by Email	Not applicable	Not compatible with the new SMTP Relay or Azure SMPT Client email providers Note: Only disabled if you enable either SMPT Relay or Azure SMTP Client as your email provider	24.0

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

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

Legacy RFI Management	/code/Legacy/Web/Bands/RFI/add_rfi_1.asp /code/Legacy/Web/Bands/RFI/add_rfi_2.asp /code/Legacy/Web/unionjava/pupdate.js	This is now defunct	22.0
Deprecated Search Definitions	/XWeb/Search/Search.aspx?def=stdVehicleAssignmentRegister /XWeb/Search/Search.aspx?def=stdvehicleepirys /XWeb/Search/Search.aspx?def=stdvehiclereplacement	Vehicle management is no longer considered "standard" as related to an informal module of Union Square. If you were using the standard vehicle search you may request the listed searches be applied to your custom content.	23.0
Excel Deep-Linking	Not applicable	The legacy Union Square feature to reference other Excel spreadsheets in the DMS relies on full IE mode and will not be redeveloped in the modern format.	23.0

Search Definitions Moved to Xweb

All advanced "search definitions" in PIM have been relocated to the modern Xweb section of the site, specifically under the "\search" folder. Customized versions of standard searches are expected to remain operational post-upgrade.

HTTP Security Headers

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

- Permissions-Policy/Feature-Policy Header
- Referrer-Policy Header
- Strict-Transport-Security (HSTS) Header
- X-Content-Type-Options Header
- X-Frame-Options Handling (applied dynamically by the application unless your site is integrated with Vantagepoint)

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

PIM 26.0 extends HTTP headers further by adding [Content Security Policy Header](#).

Appendix B: Deprecated Features in Previous Releases

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

PIM 24.0 Deprecated Features

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

PIM 23.0 Deprecated Features

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

PIM 22.0 Deprecated Features

Feature	Notes
Bulk Superseder	The Bulk Superseder feature, which was used to quickly supersede a batch of project documents with the latest revisions, has been replaced by the new Smart Superseder. The Smart Superseder feature is accessible as a tab on project records.
Merge SQL into Workflow documents	The ability to merge SQL data into Workflow document templates using the =sql() function has been removed.
Search and Form Designers	The developer pages to design legacy XML Search and Form definitions have been removed from the 22.0 code base. You may edit the definitions in any XML editor, such as Notepad.
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	<p>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.</p> <p>Note: If you upgrade from a previous release, any non-standard groups that you created will still be available.</p>
Workflow Random Number Function	The Workflow random number function – <code>math.random</code> – has been deprecated.
Render Engine for Custom Workflow Forms	All newly created Workflow forms default to the new UI Render Engine. This Render Engine should be used for all new forms that you create. As of PIM 21.0, Deltek will remove the ability to create new Workflow forms using the legacy old UI Render Engine.
System Password and Known IP Addresses Pages	The System Password and Known IP Addresses pages, which were available from the Activity Zone, have been deprecated, as they are no longer relevant.
PIM Viewer – Rasterex	<p>Rasterex is being replaced by Apyrse, (formerly PDFTron) as the PIM Viewer. This process is automatic and existing Rasterex markup will be automatically exported as a PDF file which will be published alongside the original file and will be related to the original. Any existing in-flight DLM Approvals will continue to use Rasterex until they are completed. New DLM Approvals will use the new viewer.</p> <p>Support for Rasterex will end in June 2024. All current PIM Viewer users should ensure they are upgraded prior to this date.</p>

PIM 20.0 Deprecated Features

Feature	Notes
Custom Help Panel	<p>The customizable help panel has been replaced by an online help system. This removes the ability to create your own custom help pages within the product. Should you wish to use your own help, a system setting is provided that allows you to redirect all help links to your own hosted help system.</p> <p>You can configure the system to use your own custom hosted help. For information, see the PIM 20.0 release notes.</p>
Manage Notifications Option in Contract Management	<p>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.</p>
Missing Contacts Band	<p>The Missing Contacts band has been removed. You should now use the Missing Contacts Search to view missing contacts.</p>

PIM 19.2 Deprecated Features

Feature	Notes
DMS Projections	<p>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.</p>

PIM 19.1 Deprecated Features

Feature	Notes
PIM Skins Tab in Admin Zone	<p>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.</p>

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
LDAP	For existing clients, support for the LDAP-provided address book will continue. However, for new applications and new clients, usage is prohibited, as the Outlook Add-in now provides an alternative.
Splash Screen	The temporary pop-up splash screen that required users to read and accept the terms and conditions before using the software was deprecated.

View as PDF	The View as PDF functionality in the Document Details area of the DMS, which allowed you to view documents in PDF format, was deprecated. This was available to clients that had purchased the universal viewer. The 2017 release provided an update to this viewer that allows users to output documents to PDF format.
Bulk Superseder (Bulk Revise)	The functionality provided by this band is now provided by the 'Assign External Renditions' feature in DLM. Note This feature was reinstated in PIM 19.0.
Legacy Workpackages in Document Issuing System	Support for legacy workpackages was removed from DCS. The new workpackages can now be assigned to DLM documents. To issue a specific workpackage, you filter the results in DLM, and issue the resulting set of documents.
Custom Logon Page	To ensure the secure logon to the PIM system, custom logon pages are no longer permitted. Any custom logon pages are replaced with the standard Deltek PIM logon page.

PIM 2016 Deprecated Features

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

Project Accounting Resource Planning	Resourcing by Grade was deprecated as it was not compatible with the Summary tables.
Other Workflow Apps	<p>Convert PDF to Image – Functionality moved to core runtime and the app was retired.</p> <p>Generate QR Code – Functionality moved to core runtime and the app was retired.</p> <p>Union Square Enterprise Integrator – Installed automatically by App Upgrades toolset and the app was retired.</p>

PIM 2015 Deprecated Features

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

Appendix C: Known Issues in Previous Releases

This section provides information about known issues in previous releases.

Mailbox Alias Email Setting Only Applies to Certain Outbound Email Types

The new Mailbox Alias Email configuration setting will only apply to certain outbound emails. We are aiming to resolve this as part of the modernization of PIM's mail flows across the product. This is fixed from version 24.1.

Previous Mandatory Entity Classifications No Longer Mandatory after Upgrading

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

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

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

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

Missing Contact Roles in DLM Approval Route Templates Organization Roles

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

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

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

Documents Missing in the Offline Documents Band in Some Projects

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

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

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

Slow Performance Loading for Some Look-Up Editors

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

Security Grids

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

Firefox Displays Misaligned Text in Search Boxes

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

Issues with Workflow and Document Removal

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

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

Appendix D: For Additional Information

Deltek Support Center

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

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

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

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.