



**Deltek**

# Deltek Project Information Management

PIM 24.0 Release Notes

**May 24, 2024**

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# Introduction

Welcome to Deltek PIM 24.0 Release Notes. These release notes contain a summary of the following:

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

## Important Note

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

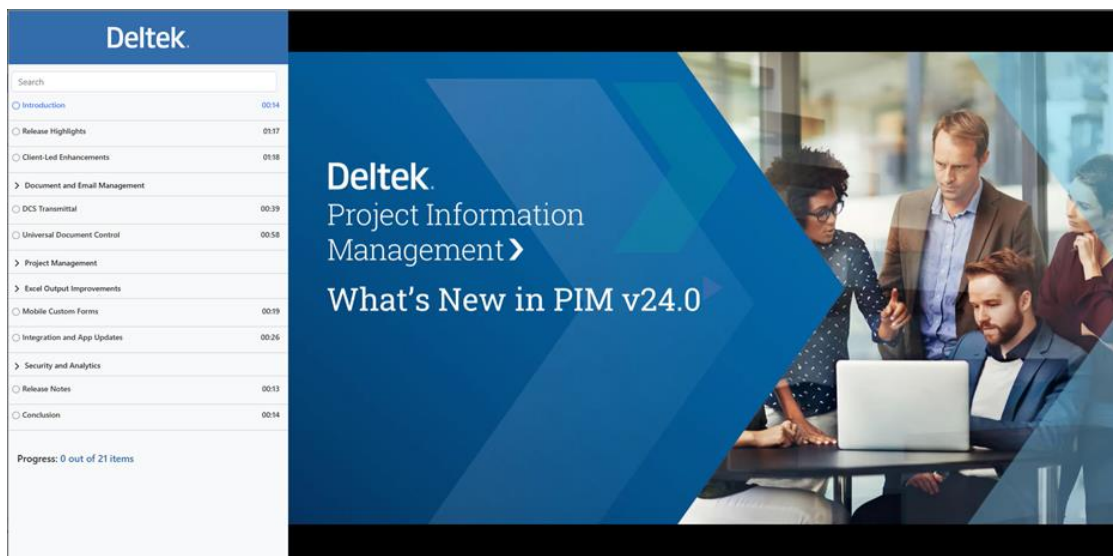
Some of the features described in this document are only available in a standard installation and may not be available if you are using custom bands and entities.

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

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

## What's New in PIM 24 Video

To see the new features in PIM 24.0, watch this video: [What's New in PIM v24.0](#).



## Pre-Installation Information

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

### Software Support

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

#### PIM Software Support

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

[Customer Care Support Lifecycle: Deltek Project Information Management \(PIM\)](#)

Details for all PIM versions from 19.1 to 24.0 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 22.0, to resolve any issues that arise, we may require you to upgrade to the latest version.

#### Withdrawal of Third-Party Software Support

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

##### Reminder of Third-party Server Software Support

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

##### Notice of Third-party Client Software Support

Please be aware that Microsoft have withdrawn support for the Windows 7 PC operating system as of January 2020 and Windows 8 / 8.1 as of January 2023. This means that PCs running this version will no longer receive security and framework updates. Owing to this, Deltek will limit any new client application development work to the currently supported versions of Windows 10 and 11 operating systems. We recommend that you review and update your client machines as a matter of urgency.

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

##### Mandatory SSRS Install to Receive PIM 20.0+ Upgrades

As part of our continuing product improvements, we are migrating our reporting in PIM into SSRS (SQL Server Reporting Services). From PIM 20.0 onwards, you will be required to make provisions for SQL Server Reporting Services in your PIM environment. Please contact your account manager for information

on how best to achieve this. Deltek can provide a guide that walks you through the process, which is recommended for clients with a capable IT department. Alternatively, Deltek offers a chargeable infrastructure service to configure this for you.

## **Server Software Requirements**

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

## **Client Hardware Requirements**

### **Display Resolution**

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

## Upgrade Actions for System Administrators

System administrators should consider the following actions after an upgrade:

### Azure Single Sign-On:

- If you have implemented PIM's Azure Single Sign-On in version 22.0 without upgrading to PIM 23.0, you need to add the following redirect URI to your existing Azure App registration, under the Authentication tab, for your PIM Single Sign-On entry:  

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

### Email Flows (on-premises clients only):

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

### Edge Hybrid Mode:

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



## Post-Installation Information

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

### Upgrading PIM Components

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

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

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

### Outlook Add-in

You must install the latest version of PIM before you install the Outlook Add-in component. In addition, the Outlook Add-in requires .NET 4.8 to be installed on client machines.

### Local File Management

Local File Management (LFM) requires .NET 8.0. If this is not already installed on a user's machine, the LFM installer will automatically install it. To install LFM, you are required to manually roll out the latest LFM client component to users' machines, either by Group Policy or by provisioning users with a link to the installer.

### Universal File Management

Universal File Management (UFM) requires .NET 8.0. If this is not already installed, the UFM installer will automatically install it. You must install the latest UFM component on all servers running UFM for Universal Document Control (UDC).

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

### API Application

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

Component	Notes	PIM Version of Last Update
<b>Essential Components</b> – Required on all client PCs		
<b>Working Files</b> Allows the DMS to interact with files in the workingfiles folder on a client PC.	This component has been removed from PIM 23.0 and above versions. New users will now need to move to the cross-browser compatible Local File Management (LFM) component (see below).	19.0.1
<b>Local File Management (LFM)</b> 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.  <b>Requires .NET 8.0.</b>	24.0
<b>Outlook Add-In</b> Provides features that are integrated into Microsoft Outlook.	In addition to 32-bit, a 64-bit version is provided for 64-bit Outlook.  <b>Requires .NET Framework 4.8.</b>	22.0
<b>Excel Link</b> Provides rapid export of lists from the system into MS Excel.	No Longer required with PIM 24.0. Client admins may uninstall from user machines once upgraded.	19.0.1
<b>Optional Components</b> – Required only if specific modules are installed on a client PC		
<b>AutoCAD Integrator</b> Provides features for integration with AutoCAD.		23.0
<b>Revit Integrator</b> Provides features for the integration with Revit.		23.0
<b>MYOB API Ledger Connector</b> Ledger connector functionality used if you integrate with MYOB with the available API functionality.		20.0
<b>MYOB Ledger Connector</b> Ledger connector functionality used if you integrate with MYOB without using the API.	MYOB have withdrawn support for their classic ledger offering. PIM clients should consider migration to MYOB's other ledger software or Xero.	19.1

Component	Notes	PIM Version of Last Update
<b>Sage 50 Ledger Connector</b> Ledge connector functionality for integration with Sage 50 accounts.	Please see <a href="#">KB 91867</a> if you are planning to upgrade your version of Sage 50 accounts.	19.0.1
<b>Sage 200 Ledger Connector</b> Ledge connector functionality for integration with Sage 200 accounts.	Please see <a href="#">KB 92151</a> if you are planning to upgrade your version of Sage 200 accounts.	20.0
<b>TAPI</b> Provides telephony integration.		2015.0032
<b>Universal File Management (UFM)</b> 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.  <b>Requires .NET 8.0.</b>	24.0

## Obsolete Components from PIM 2017 Onwards

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

Name	Notes
<b>EML Opener</b>	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.
<b>Intranet Readiness Application</b>	No longer used extensively by our customer care department.
<b>Outlook Sync</b>	Replaced by the Outlook Add-in.
<b>Working Files</b>	Replaced by Local File Management (LFM) component.
<b>Excel Link</b>	Replaced by new server-side Excel exporter.
<b>Rasterex Client</b>	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 introduced new maintenance update versions of Android and iOS Timesheet & Expenses and PIM Mobile Working apps to bring them up to the latest operating system versions for both platforms.

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

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

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

## Apryse Requirements

Apryse, which replaced the Rasterex Viewer in PIM 20.1 as the internal 2D document viewer for collaborating on drawings, office documents, and PDF files, requires Microsoft Visual C++ Redistributable 2015-2022 x64 to be installed on the server.

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

## Known Issues

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

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

### **Mailbox Alias Email Setting Only Applies to Certain Outbound Email Types**

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

## Deprecated Features

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

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

### PIM 24.0 Deprecated Features

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

### Planned Deprecated Features

The following features are planned for deprecation in future releases.

Feature	Notes
<b>Hard Copy Scanner</b> (Local SMTP email provider)	If you have Local SMTP enabled as your email provider, this feature is scheduled for deprecation in PIM 25.0.
<b>Customer Customizations of Older Pages</b>	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.
<b>Cache Servers</b>	Cache server hosted document content will be synched with your main PIM system ahead of final deprecation.

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

Feature	Notes
<b>Asset Management</b>	This module is not thought to be used anymore.
<b>Request For Information</b>	This refers to the old system and is now replaced by Contract Management.

## Deprecated Features

Feature	Notes
<b>Variations</b>	This is now covered by Contract Management for non-Project Accounting systems.
<b>Activity</b>	This heritage module is not thought to be used anymore.
<b>Hard Copy Scanner (Inbox)</b>	Universal Document Control (UDC) will provide a partial replacement for this.
<b>Sales Applications for Payments</b>	This will be replaced by a tandem Sales Payment feature – consultancy will be required to aid this transition.
<b>Purchase Invoice Line Approvals</b>	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.
<b>Legacy MYOB Account Right Connector (ANZ)</b>	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.
<b>Silverlight Charting</b>	<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"> <li>• Staff requirements</li> <li>• Fee Reporting</li> <li>• Revenue by Month</li> <li>• Key Performance Indicators</li> <li>• Actual and Forecast Finance Documents</li> <li>• Captive Fees</li> <li>• Overdue Invoices</li> <li>• Workstage Finances</li> </ul>
<b>Excel Deep-linking</b>	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. <b>Note:</b> This should not be confused with Excel Web Queries that will continue to be supported.

## Deprecated Features

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Feature	Notes
<b>Mail Vault</b>	<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"> <li>• 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.</li> </ul> <p>A move to an external provider of email journaling, such as Microsoft Exchange Office 365's Unified Hold feature.</p>
<b>AutoCAD-LT</b>	This Autodesk product was not adopted by PIM Clients.



## New Features: General

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

### Copy External Contacts for Common Projects

To streamline the setup process for common projects, the External Organizations and Contacts band now includes a Copy Contacts button. This allows you to select active (non-superseded) contacts from an existing project or enquiry and add them to your new project. This feature also automatically creates associated organization records for any missing external organizations.

### Enhanced Flexibility When Copying Entity Contacts

You now have the option to include or exclude a contact's roles when copying a contact from a source entity, such as a project or enquiry. This added flexibility in the copy entity contact feature applies to both internal and external contacts. The feature ensures that only relevant roles are copied, and any restricted entity contact roles are excluded.

### Streamlined Access to Your Absence Information

The Absence dashparts (personal, My Organization, My Line Manager) have been enhanced with the reinstatement of the My Absence button. This provides a direct link to your contact record's Absence tab, streamlining access to your personal absence information.

### Modernized Excel Outputs with Enhanced Formatting

PIM now produces modern Excel outputs with improved data type sensitivity, reducing potential security risks associated with outdated Excel versions.

- **Safer Files:** PIM now uses a modern format (XLSX) that reduces risks associated with older Excel versions.
- **Clearer Layouts:** Your exported data is formatted as a table within Excel, with filters on headers for easy sorting.
- **Smarter Formatting:** PIM automatically formats cell values based on data type (e.g., dates, numbers) for a cleaner look.
- **Organized Exports:** The title of your exports reflect the report or search that generated it, including the date. For example, "Sales Documents - 15 Jan 2024.xlsx".
- **Filters:** PIM now pre-adds filters to each of the outputted columns by default.
- **Frozen Top Row:** PIM now freezes the column header row by default.

### HTTP Security Headers

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

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

## New Features: Document Management

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

### Enhanced Sorting and Viewing Options in Document Search Results

Experience enhanced control over the default sort order of your search results in the Document Management System (DMS), allowing you to customize your viewing preferences according to your needs.

#### Sort by Document Date

In Document Mode, Basket Mode, and Drawing Mode, a Document Date column is now included, facilitating sorting of your search results by document date for improved organization and clarity.

#### Published Date Filter Enhancement

The 'All Dates' filter option in the Published Date filter is now relabeled to 'All Published Dates' to maintain consistency with the addition of the new Document Date column.

#### DMS User Preferences Enhancement

The following updates have been made to the DMS User Preferences options:

##### Enhanced Default Ordering of Search Results

New options are available in your DMS User Preferences to define how your search results are ordered by default. After you select to sort by most recent or most relevant, you can now choose a secondary default field to sort by, including Title/Document, Version, Publisher/Published By, Type, Document Date, Published Date, and more. Additionally, you can specify the sorting order (ascending or descending) for your selected criteria to further tailor your viewing experience.

**Notes:** Sorting by version may produce unusual results in scenarios where different version schemes are used. Upon upgrade, the default setting for sorting search results will be Published Date. This default value applies across both Classic and Smart modes, ensuring consistency and familiarity in your search result organization.

##### Enhanced Display Options for Search Results

Smart DMS now offers an optional setting that reduces the spacing between search results in Email, Document, and Drawing modes. By reducing the space between results, you can now conveniently view more items on a single page, minimizing the need for excessive scrolling. This feature, labeled 'Decrease the Space Between Smart DMS Results', can be found within your DMS User Preferences, and is active in both the Information Zone and the Documents bandset on records.

## Preview Office Documents

You can now preview Office documents directly in the Document Management System (DMS) before checking out or downloading. This feature is available in both Classic and Smart View modes of the DMS for managed documents via each mode's preview pane. It allows you to navigate through the DMS results list, select and copy contents, and view documents in a timely manner. Supported Office file types include Word, Excel, and PowerPoint. Note that editing of document content is not supported in Preview mode.

## Apryse Update

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

## Smart Superseder Enhancements

The Smart Superseder feature has undergone significant updates to prioritize user context security and enhance functionality, ensuring a secure and compliant document management process.

### Enhanced User Context Security

The Smart Superseder now strictly adheres to user permissions, fostering a more secure document management environment. Users can only supersede documents within their designated access levels. This restricts unauthorized superseding of emails and prevents the selection of existing documents for email supersession. Additionally, publishing functionality has been enhanced to limit publishing actions to pools where users have explicit access. This added layer of security guards against accidental or unauthorized publishing.

### Enhanced Publishing Experience with Improved Validation and Streamlined Workflow

Enhanced validation mechanisms have been implemented to streamline the publishing process and minimize errors. The system now prevents publishing actions when either the incoming or target document is checked out, ensuring users perform tasks aligned with their roles and fostering a more efficient workflow. The user interface has also undergone improvements to enhance usability, including renaming the "POOLS" column to "PUBLISH TO" for improved clarity. Certain columns are now read-only to prevent accidental edits, and validation messages have been updated to provide a more user-friendly experience.

Additionally, the publishing process within Smart Superseder has been optimized for greater efficiency. Improved validation now identifies superseded and checked-out documents, allowing you to focus on publishing only valid documents with ease. Furthermore, a new automatic version increment feature has been introduced for same-filetype supersession, eliminating the risk of accidental supersession with the same version and ensuring consistency across workflows. However, if the version is included in the incoming document name, the Superseder will use the version from the file name and not increment.

## Universal Document Control Enhancements

### Enhanced File Extension Management

You can now define the file extensions that UDC is allowed to consume, ensuring only necessary documents are tracked and published into PIM. Additionally, you can also specify which file extensions require text extraction, preventing unnecessary IFiltering.

### Updates to Entity Function Roles

The entity function roles concerning Universal Document Control have been updated, and the following roles now exist:

- **UDC.Admin:** Specific role for UDC administrators and replaces previous DMS.Admin for users.
- **UDC.Map:** Enables users to map new project document sources.
- **UDC.Publish:** Enables users to publish unmanaged documents from the DMS page.

## New Features: Design Management

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

### Streamlined Document Issuing

Both the DCS issuing process and the document issuing process have been enhanced to boost your efficiency and improve your experience.

A new 'Finish and Process Now' button has been introduced. This button allows you to bypass the Issue Summary page and directly process a document issue, saving you time (if you have the necessary permissions). Selecting this button completes the issue creation process and takes you straight to the relevant page (Issue Summary for DCS or Document Issue bandset for documents) where the newly created and processed item is readily available. Additionally, unnecessary confirmation messages have been replaced with brief on-screen messages, further streamlining your workflow.

For document issuing, the system now automatically loads the Issue Report if you select "Hardcopy" or "Digital" as the issue method, eliminating the need for additional confirmations.

## New Features: Mobile Working

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

### **Increased Photo Capture Limit in Custom Form Builder**

In the Custom Form Builder, the maximum photos per Photo Capture control has been increased from 2 to 5. This allows you to capture more images per control without needing workarounds, enhancing your form input capabilities. After the PIM Workflow upgrade, you can edit existing forms to utilize the new maximum limit for any existing or new 'Photo Capture' controls.

## New Features: PIM Teamwork

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

### **Enhanced Privacy Settings for Teamwork Users**

Teamwork users now have restricted visibility in the PIM system, ensuring they only access the data they are permitted to see. The 'Filter by' options in the PIM Teamwork Documents section now hide certain information, including Email Recipient, Email Sender, Organization, Project, Published by Organization, and Published by User. This enhancement prevents unauthorized access to sensitive data, maintaining the integrity and confidentiality of your PIM system.

### **Correct User Contact Organization Displayed in Email Invitations**

The system now displays the correct user contact organization in any email invitations sent out from Teamwork. This ensures that the contact organization of the user sending the invite is used, rather than the first internal organization. This update applies to invitation emails only, providing more accurate and relevant information in your communication.

## New Features: System Administration

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

### Direct Email Publishing with New Email Providers

With the new email providers (SMTP Relay and Azure SMTP Client), PIM now directly publishes carbon copies of emails sent via Workflow modules or PIM, eliminating the need for Microsoft's local SMTP instance's drop folder. This feature lays the groundwork for the new Outlook Add-In, enabling system administrators to finally transition away from the legacy local SMTP instance.

### Enhanced Security with Azure SMTP Client Provider Logout Feature

The Azure SMTP Client Provider now allows PIM administrators to logout the system user mailbox. This feature ensures the session or OAuth token is disconnected or cleared when changing mailboxes, switching to an alternate provider, or in the event of an account attack. The "Mailbox Logon" method always remains enabled, allowing for easy transition to an alternate mailbox if necessary. Additionally, the OAuth token associated with a mailbox logon will be cleared whenever an alternate provider is saved in an enabled state, further enhancing security measures.

### Streamlined Security Management

Admin security pages now display only elements with active security settings by default. This means unsecured items won't clutter your view, giving you a clearer picture of your actual system configuration. A 'Show Unsecured Items' toggle lets you reveal them whenever needed for configuration. This streamlined approach simplifies security management and saves you time.



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

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

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

### Unionpoint API Enhancements

Integrated document publishing is now available via the Unionpoint PIM Connector following a series of enhancements to the PIM API. These updates encompass the addition of new endpoints for streamlined document publish management, including retrieval of document IDs upon publish and status checking for files in the publishing queue. Additionally, the output now includes a "DocumentPropertiesLink" element for specific document IDs, facilitating easier access to relevant document information. Improved exception handling for webhooks has been implemented to enhance error diagnosis.

Furthermore, new endpoints have been introduced for retrieving detailed information about specific document IDs and accessing document versions. These enhancements aim to empower Unionpoint integrators with advanced capabilities, facilitating seamless integration and efficient document management within the PIM system.

Finally, measures have been taken to enforce single-user mode during PIM upgrades, ensuring data integrity and system stability throughout the upgrade process.

For clients interested in more information around PIM's Unionpoint API Connector please visit our [PIM Connector Learning Zone](#) content.

### Segmented API Log Display for PIM Admins

A new feature allows exceptions and external request logs associated with a new PIM API connection to be displayed under the relevant client ID in the new Manage API access page, instead of the main system logs area. This segmentation of API log information from main application log entries enhances clarity and organization. The Manage API Access page is extended to include a new manage subpage, providing a detailed overview of log entries. This feature requires API.Admin Entity Function for access.

# 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: 1719403**

When you resized the Outlook Add-on window, some texts and buttons were not properly visible because they overlapped and did not rescale with the window size. This issue was specific to the Smart Publish Outlook add-in modal.

**Defect: 2075507**

When you viewed an approval item through the PIM Approvals dashpart in Vantagepoint, the details of the Document and Recipients section was not visible due to the absence of scroll bars.

**Defect: 1996115**

When you published emails, attachments were not included. This issue was encountered both in new emails and when publishing from the inbox.

**Defect: 2098183**

When you sent a document via email from the DMS, it would not record a Document Sent action against the document.

**Defect: 2106921**

When you entered notes against an open timesheet in Advanced Entry Mode, if overtime was disabled in the configuration options, the Notes entry field displayed outside of the popup window.

**Defect: 2107978**

When many files were published together via the LFM, and an action was assigned to you as part of the publish process, you could not view all linked documents on the email you received.

**Defect: 2068526**

When you viewed the Opportunity band, the opportunity status icon was missing, and the status icons did not appear.

**Defect: 2072800**

When you viewed document search results, you were unable to resize the Publisher field.

**Defect: 2078617**

When you upgraded from a pre-20.1 version to a newer one (e.g., 23.0), the Migrate Markup scheduled task failed with each run attempt.

**Defect: 2089778**

When you entered an incorrect password during the 2FA setup, the system incorrectly displayed 'An email has been sent to your registered email address.' However, no setup email was sent.

**Defect: 2091431**

When you published files to pools configured with coding schemes, coding schemes were not applied.

**Defect: 2009211**

When you exported organizations from the Activity Zone in PIM, not all classification types were displayed in the exported file, and they were cut off at 252 characters.

**Defect: 2021687**

Users with Azure AD accounts were not visible on the Contact User Role Membership page.

**Defect: 2021689**

When you attempted to preview compressed files such as .ZIP or .RAR within Outlook's DMS window, an "An Error Occurred" dialog box appeared instead of the expected email preview. This issue occurred when you selected the Preview tab or double-clicked the file icon.

**Defect: 2059206**

After upgrading to PIM v23, you experienced an issue where, when viewing a Project record, the external contacts band had a very wide Contact column that couldn't be resized. This caused other columns to be pushed off-screen, requiring you to scroll over to see details.

**Defect: 2060337**

When you clicked the pencil icon multiple times very quickly on a file in the Information Zone of PIM, instead of downloading only one copy of the file, multiple copies were downloaded and opened in the application.

**Defect: 2063376**

When you accessed the My Projects dashpart, it displayed the oldest 500 projects instead of the most recent 500 projects. As a result, you were unable to immediately see your latest projects.

**Defect: 2055905**

When running the ThirdPartyAccessUtils.RevokeExpiredLicences() scheduled task, an error occurred with the message "Incorrect syntax near the keyword 'INNER'." This error is logged in the system, indicating a syntax issue during the task execution.

**Defect: 2064472**

After you selected an HTML Email Footer Document from Admin > System Configuration > Email Configuration, the selected document did not appear in the designated field. Instead, the HTML Email Footer Document field remained blank despite the selection process.

**Defect: 2070587**

When you attempted to merge organizations, the following error could display if you had two external organizations with the same name: "Is\_Resource\_Planning\_Placeholder\_Organisation".

**Defect: 2072141**

When you selected two or more document sets to filter documents on the Documents tab on a project, the search results displayed no results.

**Defect: 2072177**

When you expanded the suggestions box in the DMS, the exact number was cut off if it exceeded four digits. This issue occurred when conducting a search, and even when expanding the suggestion box sideways, the numbers are still truncated if they are longer than four digits.

**Defect: 2072233**

When you clicked Edit Properties for a file in the DMS, the Recycle Bin pool appeared in the pool list.

**Defect: 2101010**

When you added an action in a project on PIM version 23.0, the emails sent to users were mistakenly using a system email address instead of the user specified in the "Entered By" field. This issue occurred even though SMTP and email were set up with the Local SMTP Provider.

## Document Management

**Defect: 1979104**

When you attempted to publish emails in a conversation in the PIM Outlook Add-in, an error occurred, preventing you from publishing some emails. This issue affected emails that were part of a thread or conversation.

**Defect: 2009283**

When in Email Mode in the Information Zone of PIM, only EML files were displayed, while other email file types such as MSG were not shown.

**Defect: 2021731**

When you published a file using Smart Superseder in PIM and marked it as 'New,' the newly published file's name changed to a number instead of retaining the original filename. This issue occurred after filling out the new revision details, selecting a pool, and checking the 'NEW' tick box before proceeding with publishing.

**Defect: 2066516**

When you created a transmittal and added a DMS document to it in DLM, the DCS report only displayed the document's rendition and ignored the primary document. However, both the primary document and its rendition were present in the DCS issue summary page. This issue occurred regardless of the issue method or issue report used.

**Defect: 2067290**

When you created a DLM scheme with a revision type of Status-Based (00,01) in a project on the PIM site and added a placeholder using this scheme, the next revision did not increment as expected when adding renditions against the placeholder. Despite adding renditions, the version remained the same, continuously showing the Document Status + 00 (e.g., C00). This issue persisted regardless of the attempts to add new renditions against the placeholder.

**Defect: 2038131**

When you attempted to finalize codes for documents created from templates and published to pools with coding schemes in DMS, the 'Finalize Code' button was unresponsive. This issue prevented you from publishing the document. The button remained disabled, stating "Document title is required," and modifying the document title did not resolve the issue. As a result, you could not complete the publishing process.

**Defect: 2052345**

When you viewed Actions in the DMS after upgrading, either no actions were displayed or the previous action version was missing. This occurred even after adding a file, adding an action, editing or checking out the published file, and publishing the file again. The Actions tab showed the message "There are no Actions for this document," even when "Show All Versions" was ticked, contrary to the expected behavior where previous actions should be displayed in this mode.

**Defect: 2082574**

When you attempted to download zipped files with a total size greater than or equal to 4 GB from both the DLM and DMS, the downloaded files were found to be corrupted in some cases. This issue occurred regardless of the method used, whether through the distributed download method in DLM, zipping files in the basket tab of DMS, or sending tender with Send Method = Download in SCT. Additionally, in SCT, users did not receive any email despite sending the tender with the download method.

**Defect: 2008516**

When you attempted to publish large files in LFM, an error "Response status code does not indicate success: 401 (Unauthorized)" occurred in the LFM logs when the OAuth token lifetime reached 5 minutes remaining.

**Defect: 2113045**

When you set a classification on a DLM document and transferred it to another project using the Entity Links function, the classification was stripped off from the document in both projects.

**Defect: 2114177**

When you converted a document to PDF multiple times, the document could appear in the Document Management System (DMS) multiple times, but the duplicates were not accessible/clickable.

**Defect: 2076370**

When you navigated to the DMS page and selected a Placeholder item, the 'Send to Recycle Pool' button was erroneously enabled, allowing you to delete protected DLM documents, which should not be permitted.

## Drawing Management

**Defect: 2027947**

When you attempted to push schedule documents from Revit to PIM using the Revit Integrator, you encountered an issue where the scale/size/status value appeared as blank. Since Revit does not provide an option to edit this value and it is not applicable for schedule documents, PIM rejected the blank value as it does not allow it. Consequently, you were unable to proceed with creating a rendition for the schedule document due to this issue. However, you could still push regular drawing documents using the same Revit Integrator without encountering this problem.

**Defect: 2034963**

When you auto-assigned sets using a number scheme, if a document's name matched the prefix, facet code, and suffix of the selected scheme, the issue date was missing, and you could not click the issue to view it. Note that this fix to the Auto-Assign Sets feature creates a new minor revision and now reflects the same functionality as when you manually assign placeholders.

## Mobile Working

**Defect: 2028436**

When you navigated to the Offline Docs tab of a project and attempted to add a document for mark-up by selecting a newly added file and clicking Convert, an error occurred.

**Defect: 1992150**

When you clicked on the Excel Data button in the Observations tab of a project, the excel report configuration defaulted to EMEA instead of NA, causing the report to get stuck in loading without any further action. This issue affects clients using Defect Management in the NA region.

**Defect: 2079244**

When you attempted to open the Global Excel Snag Report in Excel, if it contained many records, an error occurred due to a request timeout issue. The error message displayed indicated that the information requested could not be downloaded.

**Defect: 2111576**

When you upgraded from PIM version 21.0 to 23.0, email notifications were not sent for newly-submitted custom forms.

## Project Accounting

**Defect: 2077092**

When you created a new purchase document, and included a PDF attachment, the file's filename appeared as if it were hyperlinked. However, clicking on the filename did not redirect you to the document as expected. This issue occurred both for draft purchase documents submitted for approval and for those already approved.

**Defect: 2075706**

When you attempted to access the Actual vs Forecast Time page under Project Accounting in the Activity Zone of PIM, the page failed to load and displayed a timeout error after a few minutes. This issue occurred due to a large number of workstage records with distinct names (e.g., 4000).

**Defect: 2069028**

When a project had only one workstage available and forecast items needed to be linked to it, creating a draft invoice from the Draft Sales Documents band failed to load the available forecast items initially. The dropdown for the Workstage column needed to be refreshed by selecting the blank option and then selecting the workstage again.

**Defect: 2084246**

When a rate table was renamed in the Finance Lookup Editor, the new name did not reflect in the Rate Table dropdown in Manage Rules. The previous name continued to display instead of the updated name.

**Defect: 2089644**

When you accessed the Finance Settings dropdown in the Accounting tab with a large number of workstages (e.g., 400+), there was a delay in loading. This delay occurred when using Edge and Chrome browsers, where clicking on the dropdown did not immediately display the options, but after a few seconds, the options appeared.

**Defect: 2094377**

When you created a credit note from an invoice, the numbers on the top right of the credit note displayed three times. This issue did not have any financial consequences.

**Defect: 2091054**

When you accessed the Draft Invoices report from the Search Draft Invoice page after rejecting an invoice in the Sales Documents section of any project, the report did not include the Rejected status. Instead, the rejected invoice remained as Draft in the report, despite the rejection action.

**Defect: 2041035**

When you attempted to generate a report from the Search Sales Documents feature in the Activity Zone, an error occurred despite having all the code pages intact in the system and not customizing searches.

**Defect: 2063899**

When you attempted to edit a credit note from the Draft Sales Documents section, a blank page displayed, or an error displayed that pointed to the sqlCreditNotes function.

**Defect: 2064471**

When you attempted to move a Saved Search to the Standard Searches set on some standard search pages like Search Purchase Orders, Search Purchase Order Lines, and Search Purchase Order Invoices, you couldn't move the saved search to the standard searches set.

**Defect: 2058395**

When you accessed certain screens on a project in PIM and adjusted the browser window to be shorter than the full length of the form, scroll bars were not available if the content extended beyond the viewport. Similarly, when viewing specific tabs and resizing the browser window to be shorter than the content, fields at the bottom were cut off without any scroll bars provided.

**Defect: 2072654**

After successfully emailing a finance document from the Posted Sales Documents band, the "Emailings" column still displayed "NO" instead of updating to "YES." This issue persisted even though the email was successfully sent.

**Defect: 2031910**

After an upgrade, the filename format for the invoice templates was missing. Previously, the format had been 'INVOICE INVxxxx [Project code] [project name] [(invoice date)].docx,' but after the upgrade, it was no longer present.

**Defect: 2035110**

When you viewed Purchase Credits for suppliers in the Purchase Invoice for Suppliers band, the negative display sign indicating a credit was not shown in the amount. This issue occurred despite the Purchase Credit being correctly linked to the supplier and submitted.

**Defect: 2024736**

When you viewed Purchase Invoices linked to Purchase Orders with 2 or more entities (such as Project and Organization), the total displayed for each project was incorrect. Instead of showing only the total for the specific project, the total displayed was the net total of the Purchase Invoice used across different projects.

**Defect: 1946458**

When you generated a Sales Invoice using Finance Document Output for a project with multiple billing organizations, the organization being invoiced to was not pre-selected as the default organization for that Sales Invoice. Instead, the pre-selected organization was always the billing client assigned from the Finance Settings, regardless of the organization linked to the invoice.

**Defect: 2100181**

When you logged a timesheet line with no linked entity and a contact with no set finance department, an error occurred when you attempted to perform a Re-Rate action for the timesheet.

## Workflow Runtime

**Defect: 1982264**

When you selected the "Run Report" button for a specific Export to SQL report created in the Workflow Manager application, the application closed unexpectedly. This occurred after creating a custom package, adding a new report under the workflow package, and configuring the Workflow Binding fields.

**Defect: 2021686**

When you responded to a Contract Management (CM) item and answered the User-Defined Field (UDF) questions, the responses did not appear in the template. This issue occurred even when 'Additional Response Information' was filled out. This issue was observed when using the standard template for the print functionality.

**Defect: 2037794**

During the PIM upgrade process from version 20 to 23, the value of 'singleuserID' in the PIM\_Config table was not set to NULL as expected, resulting in Workflow not being authorized to PIM during the installation of packages. This issue occurred when configuring the Contract Management package, triggering a "Server Error" prompt and logging a 401 "Unauthorized" error in the Event Viewer.

**Defect: 2043369**

When external users attempt to download documents one by one from the SCT Landing Page, they encountered a restricted permission prompt despite access being granted to the landing page for external users. This issue prevented them from downloading the documents individually.

**Defect: 2052414**

When you attempted to create a report within SCT by generating either a summary report or an Excel report, both reports appeared blank. Further investigation revealed that the connection string in the Excel report contained unwanted characters in the URL, resulting in an error.



## Appendix A: Noteworthy Software Changes for Heritage Clients

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

Area	Page	Reason	Removed in PIM Version
Replace Document by Email	Not applicable	Not compatible with the new SMTP Relay or Azure SMPT Client email providers  <b>Note:</b> Only disabled if you enable either SMPT Relay or Azure SMTP Client as your email provider	24.0
Support Diagnostic Tools	/code/Legacy/Web/_Admin/diagnostics (all content)  /code/Legacy/Web/_Admin/upgrader/PostUpgradeSteps/02-2013/FormAndSearchMerge/Forms/DataDefs (all content)  /code/Legacy/Web/_Admin/upgrader/PostUpgradeSteps/02-2013/FormAndSearchMerge/Search (all content)  /code/Legacy/Web/forms/DataDefs/stdDiagnostic.xml  /code/Legacy/Web/forms/DataDefs/stdDiagnostic.xml  /code/Legacy/Web/search/stdQueueLog.xml	No longer valid	22.0
Legacy JavaScript	/code/Legacy/Web/managedJS/workspace/Commands/Dlm/dlm.js  /code/Legacy/Web/managedJS/workspace/Commands/Workflow/workflow.js  /code/Legacy/Web/managedJS/workspace/DLM/configurator.js  /code/Legacy/Web/managedJS/workspace/DLM/dlm.js  /code/Legacy/Web/managedJS/workspace/UI/ServerControls/workflowDataSource.js  /code/Legacy/Web/managedJS/workspace/workflow/workflow.js	No longer valid / replaced in Xweb	22.0

## Appendix A: Noteworthy Software Changes for Heritage Clients

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

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

## Search Definitions Moved to Xweb

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

## HTTP Security Headers

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

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

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

## Appendix B: Deprecated Features in Previous Releases

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

### PIM 23.0 Deprecated Features

Feature	Notes
<b>HTTP Only</b>	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.
<b>Legacy Performance Ratings</b>	Performance Ratings was replaced by the Team Evaluation module in PIM 22.0.

### PIM 22.0 Deprecated Features

Feature	Notes
<b>Bulk Superseder</b>	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.
<b>Merge SQL into Workflow documents</b>	The ability to merge SQL data into Workflow document templates using the =sql() function has been removed.
<b>Search and Form Designers</b>	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.
<b>PIM Search Folders in the Outlook Add-in</b>	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
<b>/m Smartphone Access</b>	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.
<b>Build Contact Usage Cache Data</b>	This feature has been removed from the Activity Zone and has been replaced by the new System Usage Charts.

Feature	Notes
<b>Contacts Usage Grid</b>	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
<b>Support for legacy Admin components</b>	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.
<b>Decision to Bid and Risk Register Workflow Packages</b>	Support for the Decision to Bid and Risk Register workflow packages has now ended, and no further work will be undertaken.
<b>Creation of Contract Management Item Groups</b>	<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>
<b>Workflow Random Number Function</b>	The Workflow random number function – <code>math.random</code> – has been deprecated.
<b>Render Engine for Custom Workflow Forms</b>	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.
<b>System Password and Known IP Addresses Pages</b>	The System Password and Known IP Addresses pages, which were available from the Activity Zone, have been deprecated, as they are no longer relevant.
<b>PIM Viewer – Rasterex</b>	<p>Rasterex is being replaced by Apyse, (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
<b>Custom Help Panel</b>	The customizable help panel has been replaced by an online help system. This removes the ability to create your own custom help pages within the product. Should you wish to use your own help, a system setting is provided that allows you to redirect all help links to your own hosted help system.  You can configure the system to use your own custom hosted help. For information, see the PIM 20.0 release notes.
<b>Manage Notifications Option in Contract Management</b>	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.
<b>Missing Contacts Band</b>	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
<b>DMS Projections</b>	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
<b>PIM Skins Tab in Admin Zone</b>	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.
<b>Outlook Sync Dashpart</b>	The Outlook synchronization dashpart has been removed. You should use the synchronization functionality available through the Outlook Add-in.
<b>Legacy Contact Photo Band</b>	The contact photo band has been removed from the Contact record. Contact photos are now displayed in the General band.

Feature	Notes
<b>Union Square Mobile Timesheets &amp; Expenses App</b>	<p>The previous Union Square Mobile Timesheets &amp; 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><b>iOS Download Link:</b> <a href="#">Deltek PIM Timesheets App (Apple App Store)</a></p> <p><b>Android Download Link:</b> <a href="#">Deltek PIM Timesheets App (Google Play)</a></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
<b>Editing Projects and Enquiries from Administer Screen</b>	<p>The Edit/Delete Projects and Edit/Delete Enquiry pages have been removed from <b>Activity Zone &gt; Administer</b>. 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.</p>

## PIM 2017 Deprecated Features

Feature	Notes
<b>LDP</b>	<p>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.</p>
<b>Splash Screen</b>	<p>The temporary pop-up splash screen that required users to read and accept the terms and conditions before using the software was deprecated.</p>
<b>View as PDF</b>	<p>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.</p>
<b>Bulk Superseder (Bulk Revise)</b>	<p>The functionality provided by this band is now provided by the 'Assign External Renditions' feature in DLM.</p> <p><b>Note</b> This feature was reinstated in PIM 19.0.</p>
<b>Legacy Workpackages in Document Issuing System</b>	<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>

Feature	Notes
<b>Custom Logon Page</b>	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
<b>Outlook IMAP Folders</b>	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.
<b>DMS Search Screen</b>	The old DMS Search screen was deprecated and was automatically replaced with a new main DMS page.
<b>Drawing Manager Lite</b>	Drawing Manager Lite was replaced by Document Lifecycle Manager (DLM). Please consult with your account manager to discuss migrating to DLM.
<b>Legacy Work Packages Module</b>	Support for the original subcontract tendering module (also known as Workpackages) was deprecated and replaced by the new Subcontract Tendering module.
<b>Project Accounting Resource Planning</b>	Resourcing by Grade was deprecated as it was not compatible with the Summary tables.
<b>Other Workflow Apps</b>	<p><b>Convert PDF to Image</b> – Functionality moved to core runtime and the app was retired.</p> <p><b>Generate QR Code</b> – Functionality moved to core runtime and the app was retired.</p> <p><b>Union Square Enterprise Integrator</b> – Installed automatically by App Upgrades toolset and the app was retired.</p>

## PIM 2015 Deprecated Features

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



## Appendix C: Known Issues in Previous Releases

This section provides information about known issues in previous releases.

### **Previous Mandatory Entity Classifications No Longer Mandatory after Upgrading**

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

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

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

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

### **Missing Contact Roles in DLM Approval Route Templates Organization Roles**

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

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

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

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

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

### **Documents Missing in the Offline Documents Band in Some Projects**

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

## Slow Performance Loading for Some Look-Up Editors

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

## Security Grids

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

## Firefox Displays Misaligned Text in Search Boxes

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

## Issues with Workflow and Document Removal

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

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

## Appendix D: For Additional Information

### Deltek Support Center

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

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

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

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

### Access Deltek Support Center

#### To access the Deltek Support Center:

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

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



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