

# Release Notes - December 2024

12/02/2024 8:59 am MST

Here's a list of updates found in our December 2024 release! Highlights include a [quick way to create manual cards](#) for unmatched files, updates to the Library, and more streamlined navigation.

## Projects (Individual)

### Incoming and Outgoing Documents

#### Incoming Documents

- **Quickly create manual cards for unmatched files:** after running bulk match, you can quickly bulk create cards for unmatched files. See [Create Cards and Match](#) for details. This feature supports regular expressions to pull card metadata from the file names.

### Set Up and Configuration

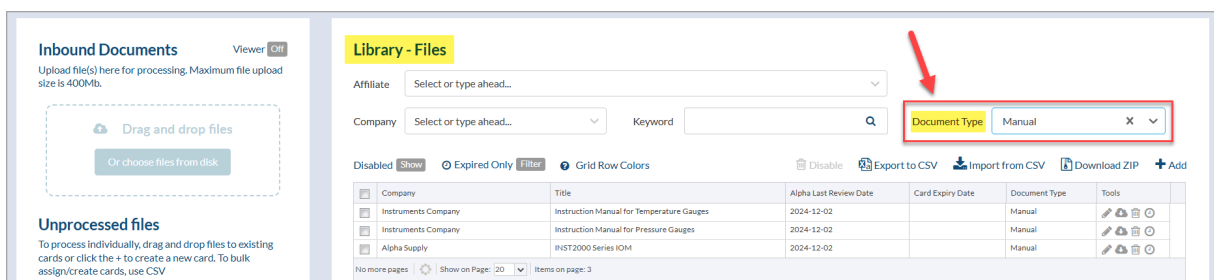
#### Stage Lists

- **More flexibility for Internal Approval workflows:** previously, this workflow forced the document back to the sub-supplier before submitting to target. Now, the sub-supplier submittal is optional. This is set with the "On approval, queue approved file to submit source, then target" checkbox on stage settings.

## Admin

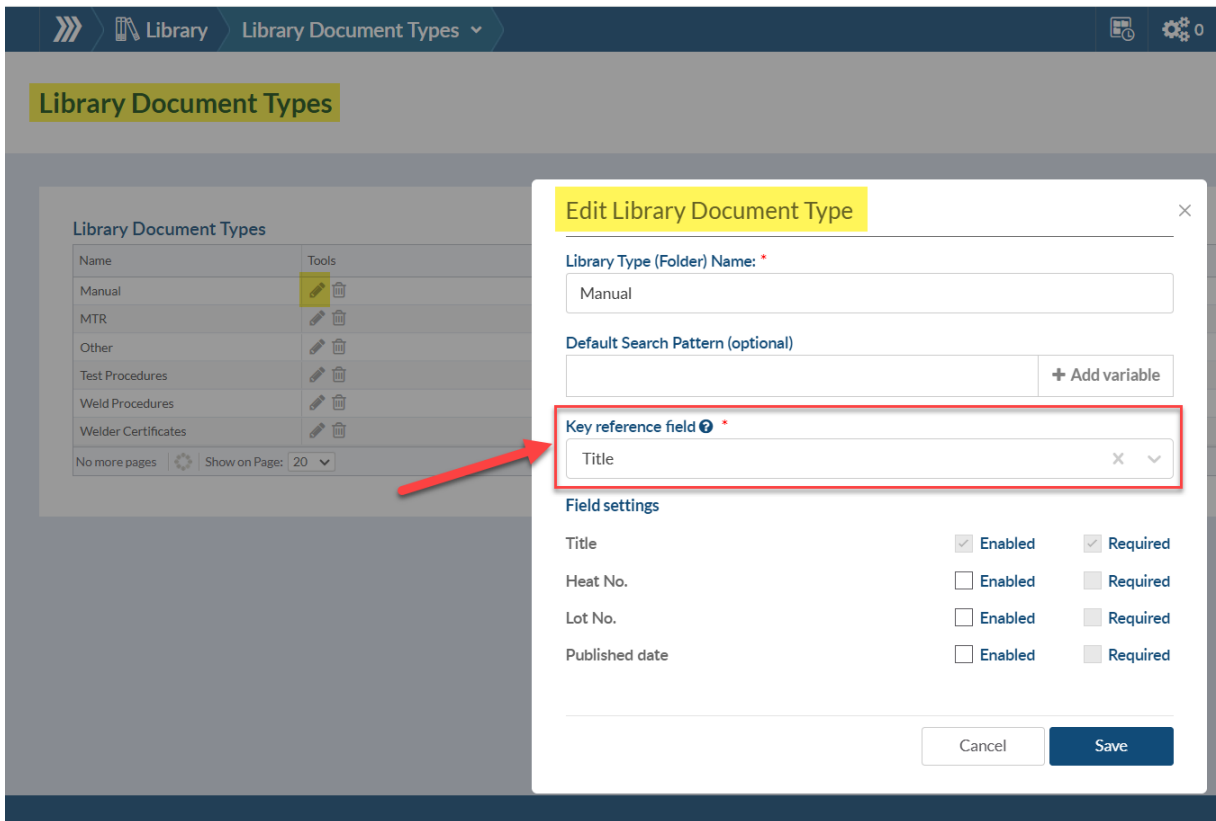
### Library

- **Library "folders" renamed "types":** we find this is a more helpful distinction, as the folder is what determines which fields are available. Other sorting data can be added as custom fields.

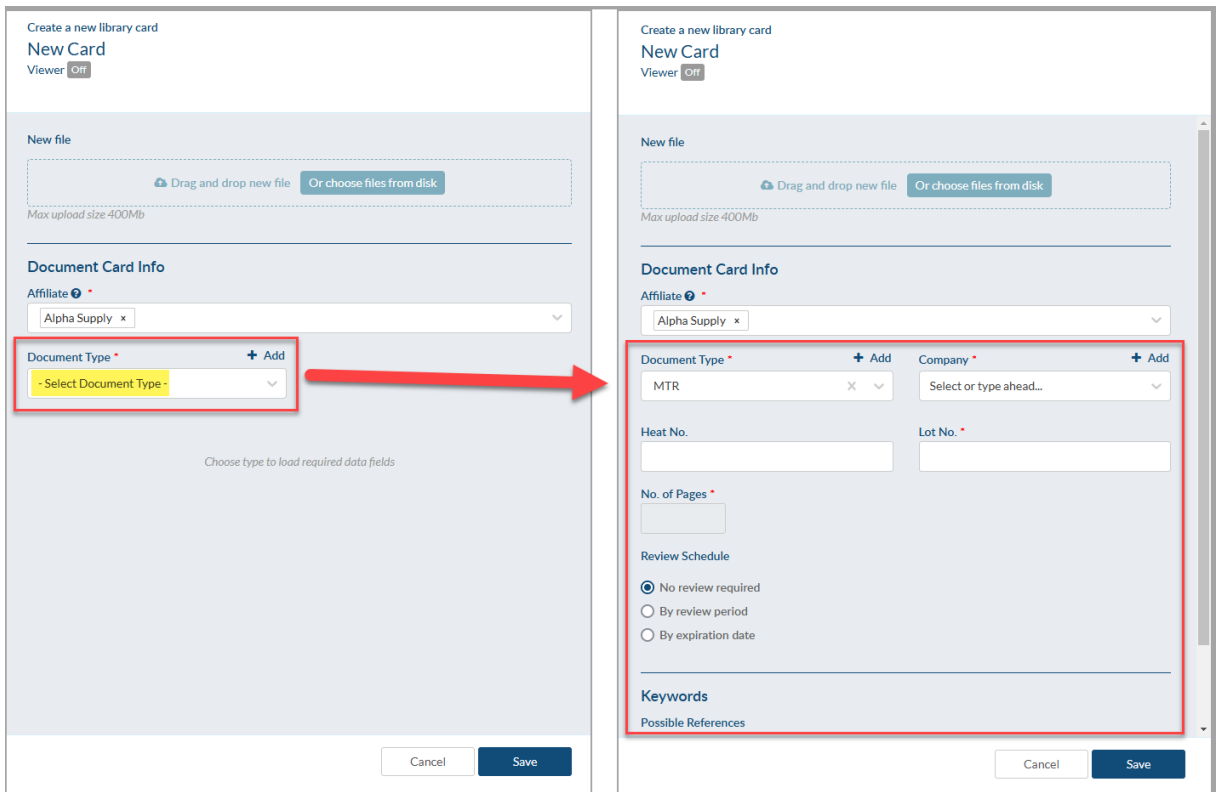


The screenshot shows the 'Library - Files' interface. On the left is the 'Inbound Documents' section with a 'Viewer' button and a 'Drag and drop files' area. The main area is titled 'Library - Files' and contains search filters for 'Affiliate', 'Company', and 'Keyword'. A red arrow points to a 'Document Type' dropdown menu set to 'Manual'. Below the filters is a table with columns: Company, Title, Alpha Last Review Date, Card Expiry Date, Document Type, and Tools. The table lists three items: 'Instruments Company' (Instruction Manual for Temperature Gauges), 'Instruments Company' (Instruction Manual for Pressure Gauges), and 'Alpha Supply' (INST2000 Series IOM). At the bottom, there are pagination controls showing 'No more pages', 'Show on Page: 20', and 'Items on page: 3'.

- **Fewer mandatory fields:** rather than force specific fields and field names, all fields are now custom and managed for each file type/folder. Note the original data fields have been transitioned to custom fields, but they retain all behavior and data.
- **Options for field copied to project card's title:** previously, the library card's "title" field was copied to the project when attaching docs from the library. Now that the title field is an optional custom field, users can choose which field they want to overwrite the project card's title with. By default, we've kept this as "title", but it can be adjusted under Library > Library Document Types > Edit Library Document Type > Key reference field. Note that the field used must be set as required.



- **Updated UI:** the interface for adding new library cards and editing/assigning files to existing cards, has been updated to reflect the changes above. Because the available fields are configured per document type, most fields will be hidden until a document type is selected.



## System

## API

- **Get company details:** new calls to get company profile details, and names and IDs of doc code lists and return status lists.
- **Get list of incoming submittals in project:** use the "Search Incoming Submittals" call.
- **Add/update incoming submittal:** use the "Create Incoming Submittal" call to add and the "Edit Incoming Submittal" call to edit.
- **Upload file as a binary object:** files can now be uploaded as binary objects via JSON queries.

For full details, see our [API documentation](#).

## Templates

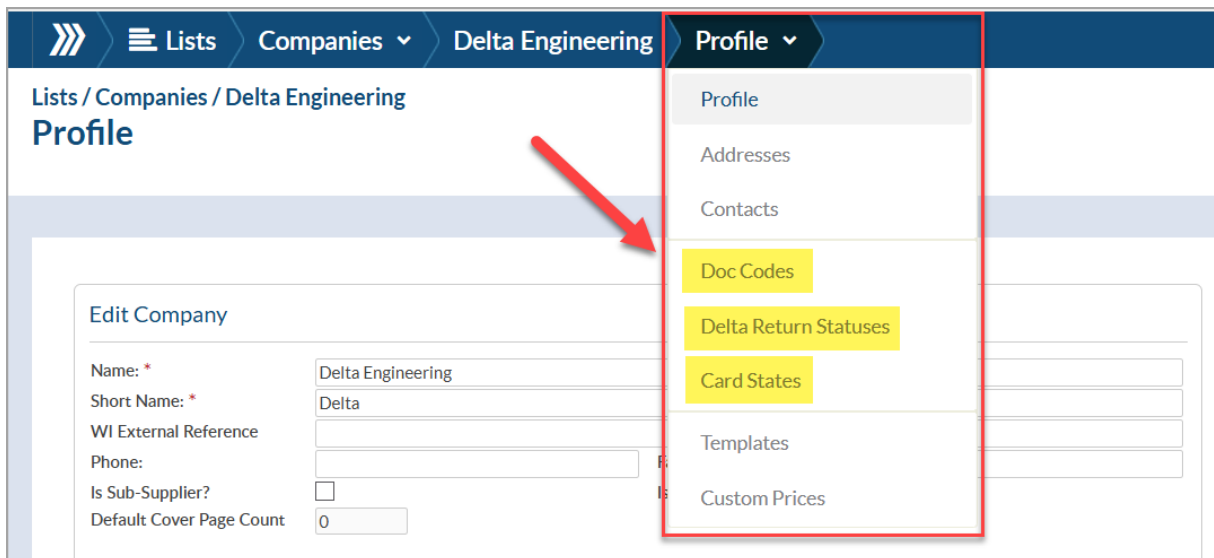
### Output Templates (XLS/CSV/PDF)

- **Real Supplier Doc Number variable for cover page:** this variable outputs the supplier doc number, and is blank (rather than substituting sub-supplier number) if there is no supplier doc number. Use `<Document_Real_Supplier_Doc_Number>`. This variable was previously available only for document index and transmittal templates.

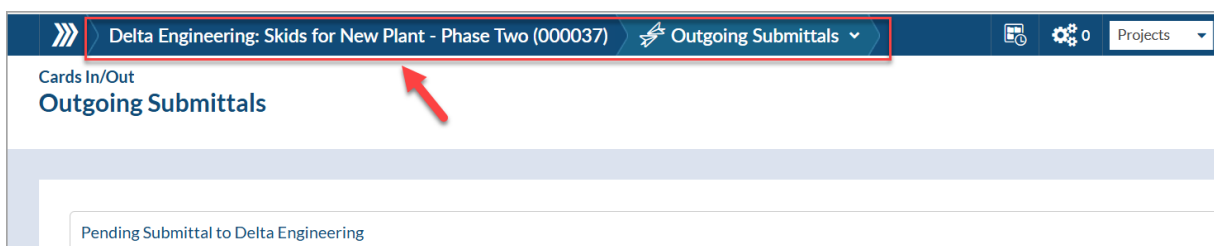
## General Updates

### Navigation

- **Simpler company profile navigation:** we've flattened the navigation in the company area, making it easier to get where you're going. The items previously under the "Code/Status/State" submenu are now part of the main company profile menu.



- **More data visible in header:** no more cut off project names.



- **"Lock cards" function moved:** previously on the dropdown menu from clicking on project name, is now on Card List > Other Actions.

## User Interface

- **Incoming Documents:** New grid style on the Incoming Documents assign page, and new filters layout.
- **Dropdown search results highlighted:** Type ahead in search highlights matching text in results.

## Additional Notes

- **Search for companies expanded:** can also search by company short name and external reference.
- **eSignature in history:** eSignature events are now visible on the card history screen.

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If you have any questions or feedback regarding our latest release, please reach out to our Support team and we'll be happy to assist.

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