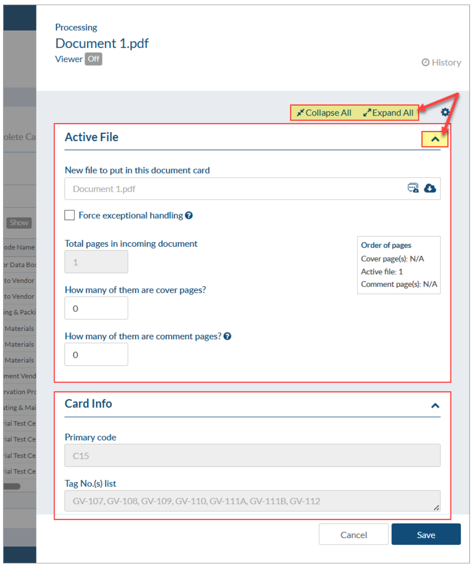
Release Notes - February 2026

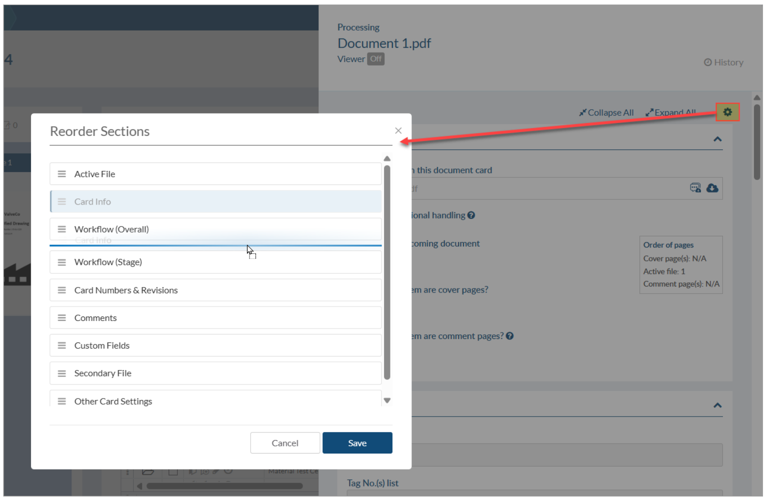
02/17/2026 4:26 pm MST

Here's a list of updates found in our February 2026 release.

Interface Changes

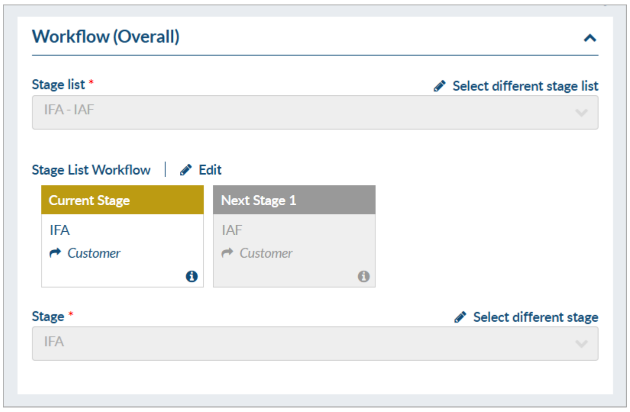
Incoming Documents - Assign pop-up: The layout of the incoming assign form (*Project Menu > Cards In/Out> Incoming Documents > [Assign File]*) has been streamlined to improve visibility into the card's workflow, as well as increase flexibility. Options on the form are now clearly defined with distinct and collapsible sections, and these sections can be re-ordered to align with your flow of work.

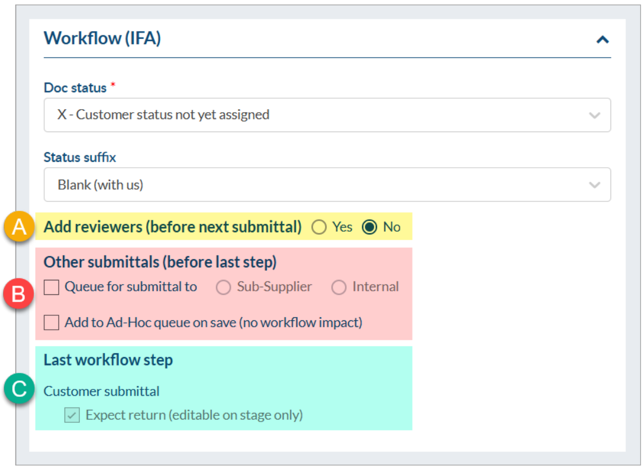




Options associated with document workflow are now grouped into two distinct sections:

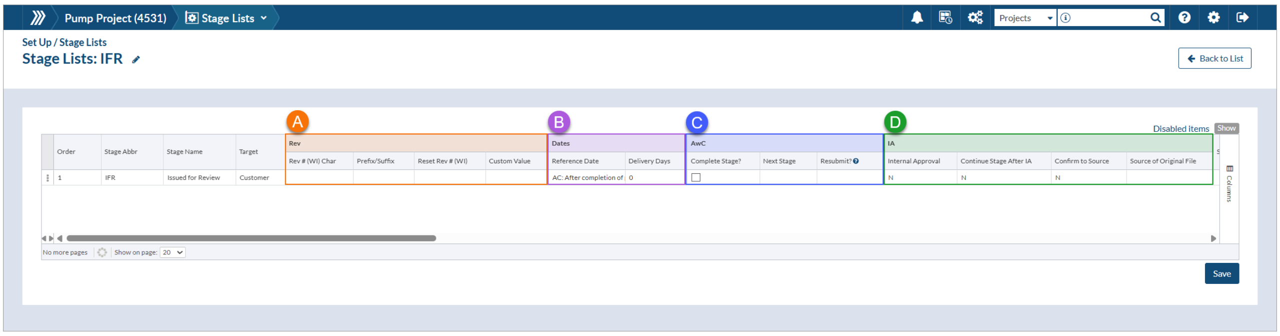
1. **Workflow (Overall):** Shows the full stage list workflow that is set on the card.
2. **Workflow ([*Stage Abbreviation*]):** Shows the workflow specific to the stage the card is currently in. This section is organized in sequential order by step, making it easier to understand the order of steps that are set to take place in the current stage:
    a. Before next submittal (i.e., internal review)
    b. Before last step (i.e., additional/other submittal)
    c. Last workflow step (e.g., submittal to stage target)





Note: The layout changes reflected on the Incoming assign form are also reflected on the* ***Card edit form* *(Project Menu > Cards > Card List > Tools > Edit) and the* ***Outstanding Actions form*** *(Project Menu > Outstanding Actions > [Select Card] / Logo Menu > Actions Dashboard).*

Stage list related column grouping: Related columns are now presented together under a top-level grouping.



Card Workflow

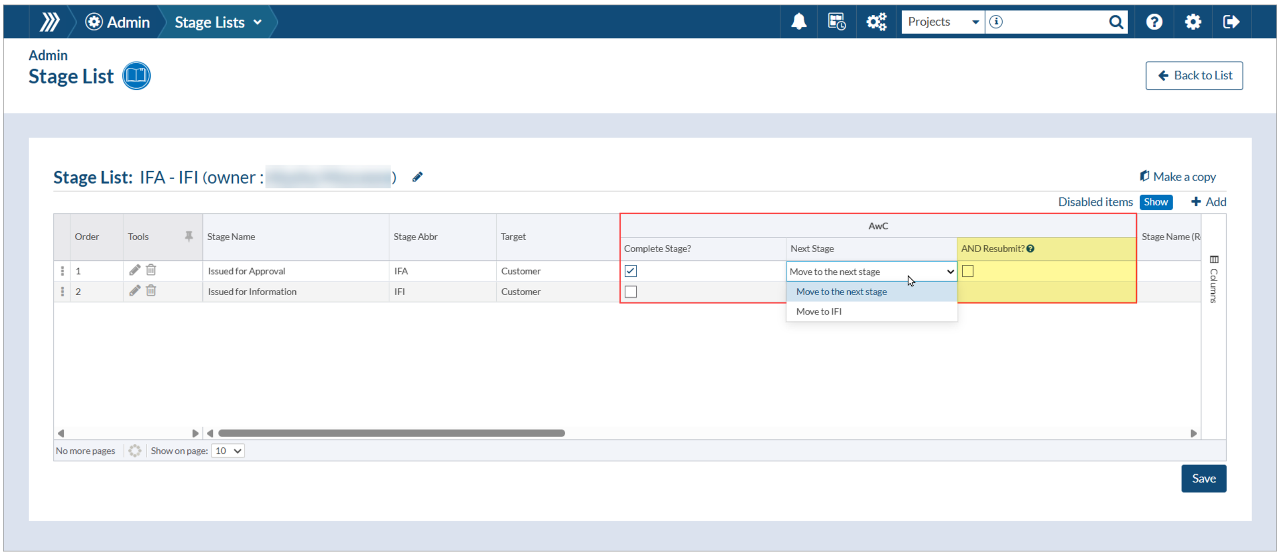
Approved with Comments (AwC)

Updates to the "If AwCR, Complete Stage" stage option: Additional options have been added to expand the functionality provided by the "Approved with Comments" stage list option. This option is now split into two, allowing the stage to be completed with or without resubmittal:

1. **AwC: Complete Stage?**
2. **AwC: Resubmit?**

In addition, the stage that the card moves to once completed can now be defined (from the "AwC: Next Stage" column) instead of defaulting to the next stage in the list.

How it works: If the "AwC: Resubmit?" box is checked, a temporary card will be created in order to manage the resubmittal in the original stage (and the active card will be moved to the next stage, as defined by the "AwC: Next Stage" column). Once the temporary card is approved by the stage target (e.g., customer), the temporary and active cards will be merged together.

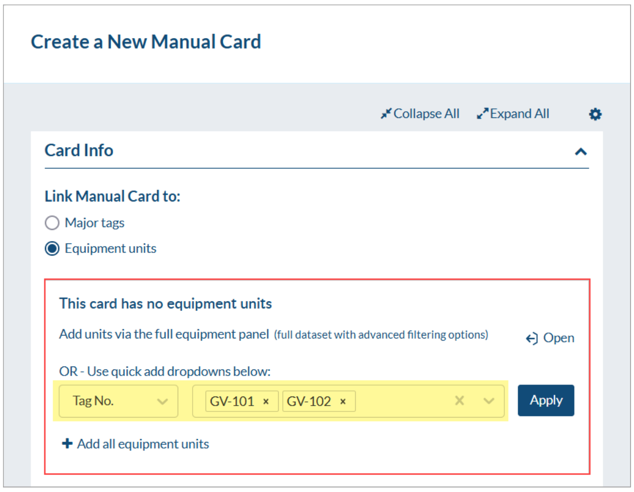


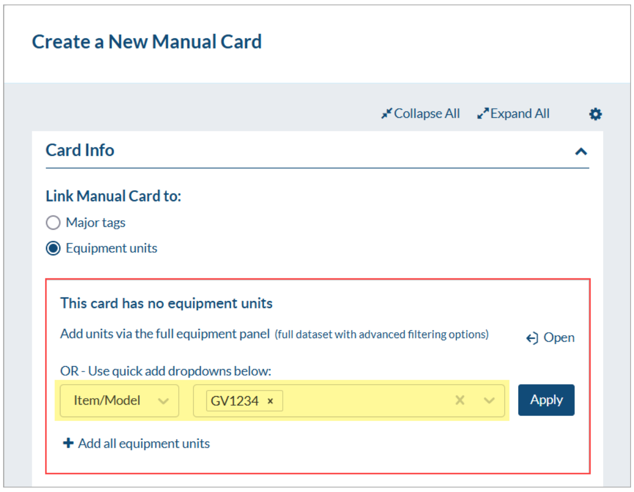
Other workflow updates

Restart internal approval from bulk process: If a document is matched to a card which has already undergone internal review (and received an "approved" status), it is now possible to restart the internal approval process via bulk processing. Previously only an option via individual processing, internal approval can be restarted on applicable cards by checking the box in the "Restart IA process" column **before** bulk processing the files.

Default cover page/stamp option for SDI doc code: The cover page/stamp option selected on the doc code will now **match** the option selected on the SDI attach form, making it easier to tell which cover page/stamp option will be applied to the associated card(s).

Selecting equipment unit(s) for manual cards: Linking equipment units to manual cards is now easier than ever using the quick add dropdowns. Once an equipment value is selected (e.g., Tag No., Item/Model, etc.), the applicable value(s) can be selected from the dropdown. If more than one value should be included, click on each value individually to add them to the card. Once all values have been selected, click "Apply" to link the associated unit(s) to the card. If you prefer linking units to the card from the full equipment panel, this is still available by clicking the "Open" button.





Delete pre-existing manual cards from incoming submittal: If documents are received differently than expected, it is now possible to delete manual cards that are no longer needed directly from the "Assign to" grid (using the "Delete Cards" icon under "Tools").

**Note: As a reminder, auto-generated cards can be merged in cases where documents are received differently than expected.*

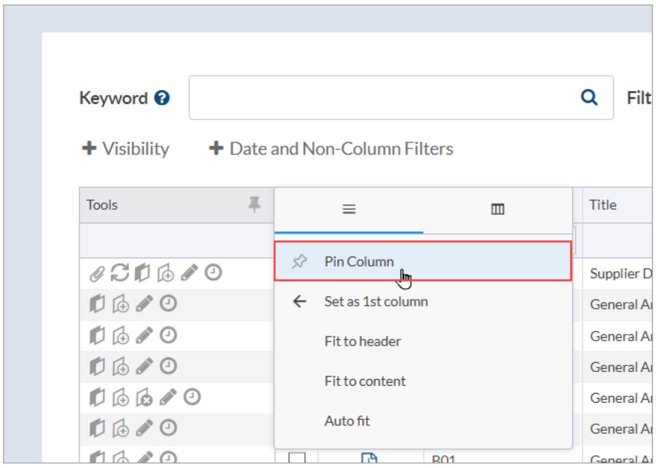
Templates

List of documents in transmittal email: It is now possible to include a list of documents in the notification email that is sent to the target upon making an outgoing submittal. This addition makes it easier for recipients to quickly see which documents are included in the submittal without having to open the attached transmittal file. For more details, see this article: Include a List of Documents in Submittal Notification Email.

Card List

Add/edit routing scenarios via CSV upload: Routing scenarios can now be added and/or edited bulk via CSV on the doc code list and card list, allowing you to apply your desired workflows quickly and efficiently.

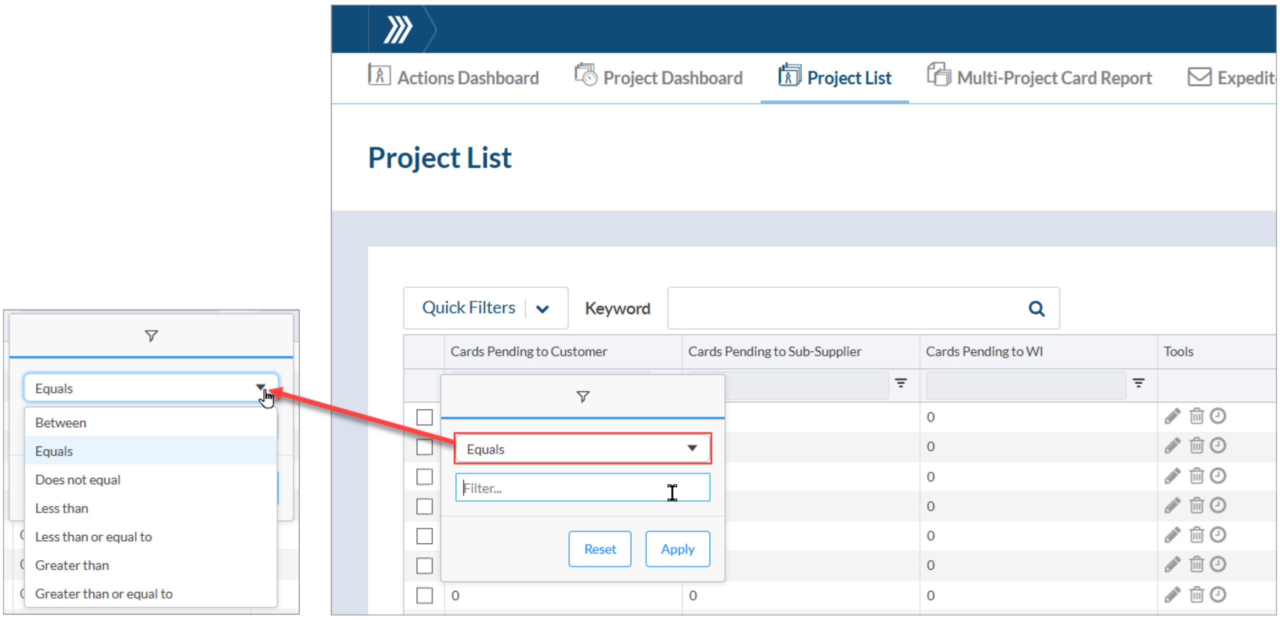
Pin the "Select" column: By default, the "Select" column will appear after any pinned columns in the grid. If you would prefer that this column appear before/within the list of pinned columns, it can now be pinned from the column header.



Project List

Filter projects by pending submittals: Want to see only the projects which have pending submittals? The Project List can now be filtered by pending submittals to any target (customer, sub-supplier, or internal), and the filter value can be set to an exact match OR a range of values.

**Note: The filter for pending submittals to the customer was previously available under the "Quick Filters" list.*



Variables

Order date on project dashboard tiles: To increase flexibility, the sales order date recorded on each project can now be displayed on project dashboard tiles. Adding the order date variable for any of the tile lines can be achieved from from *System Menu > Admin > General > Global Settings > Screen Specific Settings*.

New variable in document numbering pattern: There is now a document auto-numbering variable available for the customer PO number (as defined on the equipment list). This variable functions similarly to other "single" variable options, where the data will be included in the document number if there is a single value (and will not be included if more than one value).

FormatOnChange parameter available for cover pages: Has your customer ever requested that changes (since last submittal) be clearly indicated on the next submitted document? Previously only available for SDI reports, the FormatOnChange=[*cell*] parameter can now be applied to cover page variables, automating this work for you. See this article for instructions: Excel Parameter to Show Changes Since Last Submittal.

API

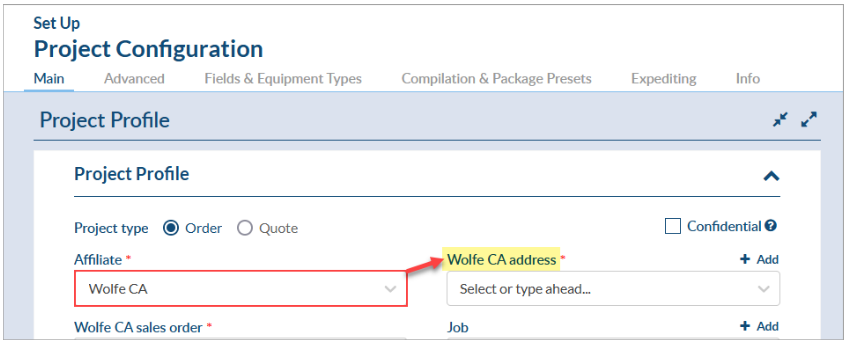
Additional data added to "Project Doc Code List" endpoint: Additional query parameters have been added to the "Project Data by Project Fields" endpoint to increase accessibility to doc code data, including (but not limited to) to the internal doc code/doc code name, stage list, routing scenario, and custom field data.

Small Updates/Fixes

Cover page count retained when no return expected: Sometimes, documents are returned for additional adjustments despite not expecting a return. In these cases, the number of cover pages included in the latest outgoing submittal will now be reflected upon return, preventing the need to update the cover page count manually.

Updates to comment page counts: If a document is returned with a comment page, the total page count will now include the number of identified comment pages when determining if the total page count matches the expected number of pages. In addition, if a document is submitted to the target (e.g., customer) with the received comment page(s) included, the comment page count will now be set to expect the same number of comment pages upon return (from the same target).

Affiliate project settings: When using affiliates, the applicable affiliate company and address are selected on each new project. To clarify which address is being requested, the header for the address field will now display the name of the selected affiliate. In addition, the affiliate company name will be displayed for internally generated documents (i.e., Doc Code Type = Generated ([*Affiliate Name*]) instead of the instance name.



Secondary doc code(s) column added to outstanding actions grids: To improve visibility, outstanding action grids (both the system-level Actions Dashboard and project-level Outstanding Actions grid) now include a column to display the secondary doc code(s) associated with manual cards (if applicable).

Stage list custom revision value: The order of options related to resetting the revision number have been reorganized to improve usability. Specifically, the text box to enter a custom revision value now appears below the custom value header.

Coming-due documents included in the overdue card report: The overdue cards report (enabled from the user profile) will now include cards which are approaching their due date (up to 5 days before), helping you to submit documents on time (or even ahead of schedule!).

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.