Release Notes - May 2026

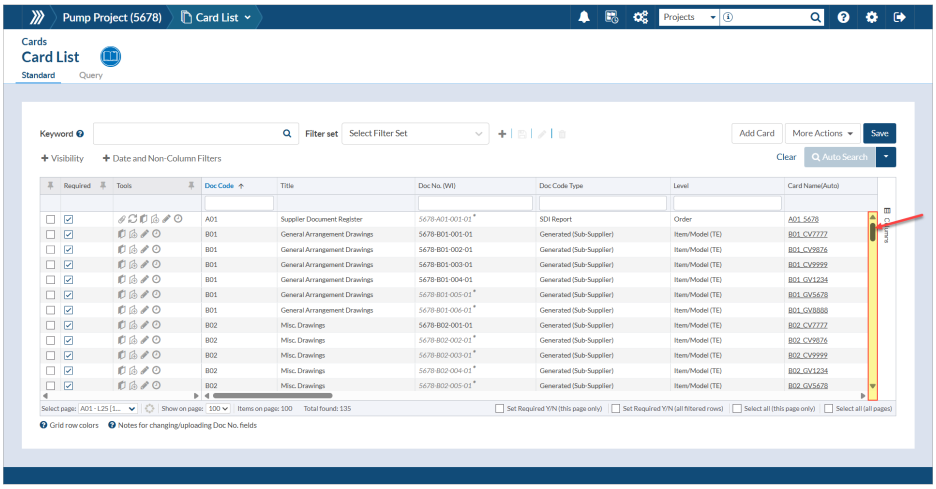
05/19/2026 2:37 pm MDT

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

Key Updates

Grid Improvements

The code, card and equipment list grids will now be fit to the size of your screen, and scrolling will occur from within the grid. These changes make it easier to utilize options available above and below the grid, including search/filter, bulk action features and row selection tools.



Submittals

Outgoing Submittals Page

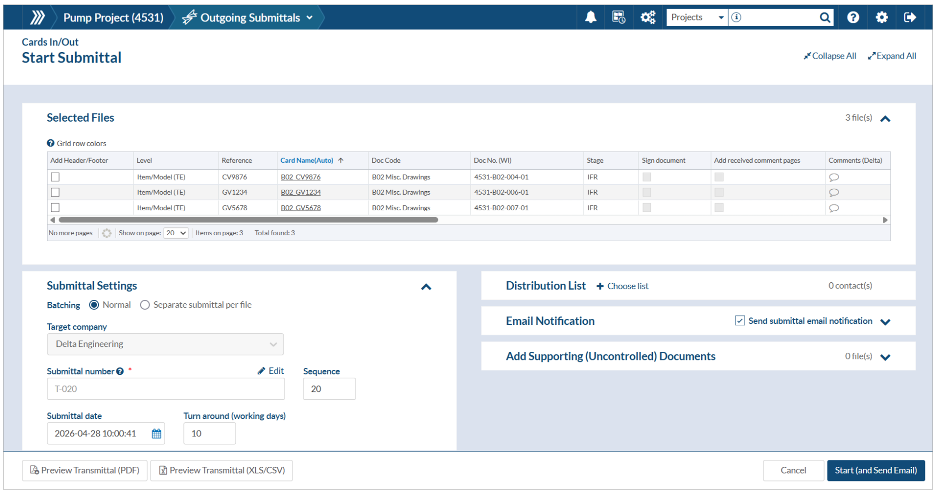
The outgoing submittals page has been reconfigured to show pending submittals on the main landing page, and the submittal history in a separate tab. The submittal sequence (to each target) can now be easily changed from one central location, and target-specific sections can be expanded/collapsed.

Start Submittal Page

When creating an outgoing submittal, a full-screen form will now appear for you to make the desired adjustments. All of the same options remain, but the options have been re-organized to make the process more user-friendly.

See the following articles for details:

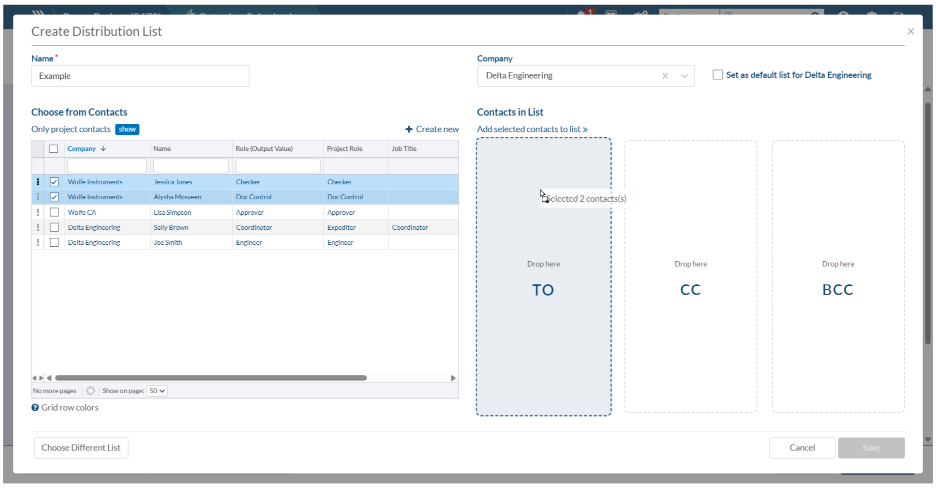
- Sending Documents (Outgoing Submittals)
- Options for outgoing (submittal) notification emails.



Distribution Lists

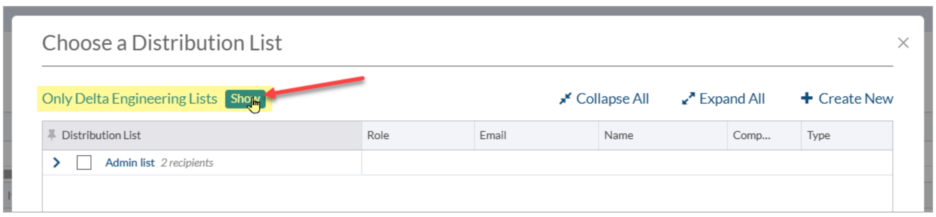
Interface Update

Working with distribution lists has never been easier. Contacts can be added to the distribution list individually or in bulk via drag & drop, and details of existing contacts can be edited directly from the form. Quickly review the included contacts **before** selecting a distribution list, and make any necessary adjustments to the list before making your submittal (see article for more details: Distribution Lists).



Assign a Company to Distribution Lists

Distribution lists created at the system level can now be assigned to a specific company. When creating submittals on a project, the list of pre-existing distribution lists can be filtered by the target of the submittal.

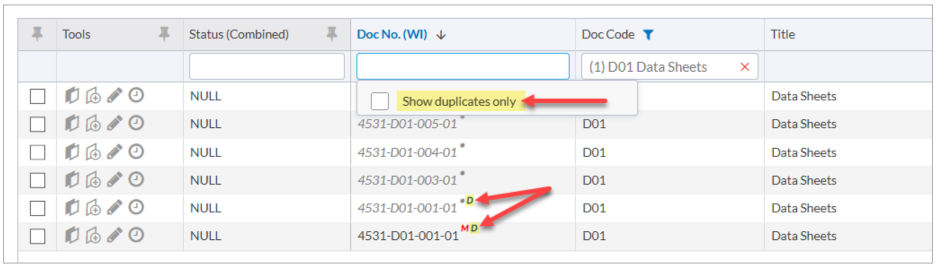


Card List

Several updates and data pieces have been added to the card list. They include:

Identify Duplicate Document Numbers

To help prevent mistakes, duplicated document numbers will now be clearly indicated in the card list with a "D" suffix. You can also filter the card list to show only cards with duplicate document numbers to facilitate quick corrections.



Numbering for Split Cards

Previously, if a card was split (from the card list or via card to unit changes), either the sequence number OR the sheet number would increase to prevent duplicate document numbers. To accommodate projects where one of these options may not apply, there is now an either/or option available from the global admin settings.

Equipment Number

The equipment number value can now be viewed in the card list grid (from the "Equipment Number" column). This can be useful to preview which equipment value(s) will be displayed on the cover page (if using the <Units_EqNumbField_List> variable).

Manual Cards

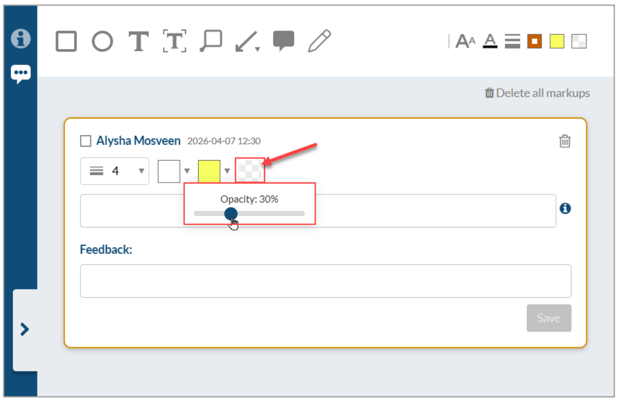
Sub-supplier selection for manual cards: Filling in the sub-supplier override column is no longer required when creating manual cards, allowing you to pull the sub-supplier(s) listed on the linked equipment OR your affiliate company (see article: Create Manual Cards).

Changes to linked equipment: On projects that only include major tags (no tagged equipment units), it is now possible to manually adjust the linked major tag(s) on auto-generated cards needing to be modified (see article: Can equipment be modified on auto-generated cards?).

Outstanding Actions

Markups

Looking to highlight information on the document? You can now change the opacity of the selected markup color in order to see the text underneath.



Actions Grid

The "Status (Combined)" field (previously only on the card list) will now be available from the Outstanding Actions grid, allowing you to review the current/expected workflow at a glance while completing your action.

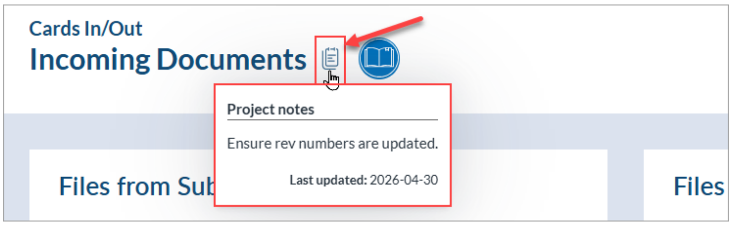
Email Notifications

The email alert received for newly-assigned actions will now include the document numbers applicable to that card (e.g., internal doc no., customer doc no., etc.).

Project Set Up and Configuration

Project Notes

If your team includes important details related to the processing of incoming/outgoing documents in the "Project notes" section of the Project Configuration page, you can now quickly review these notes on different pages throughout your project (see article: Where can I see project notes?).



Doc Codes

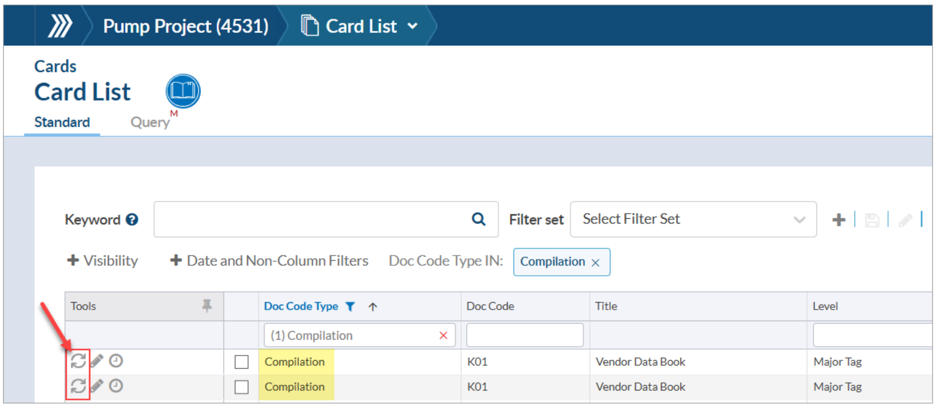
Add doc codes across pages: When adding doc codes to a project, it is now possible to load all doc codes (across all pages) at once (using the "Select all (all pages)" checkbox), making project setup more efficient.

Note: If you select all doc codes (across all pages) and then de-select a code on the page, the codes on subsequent pages will be de-selected, too.

Doc code bulk import/export: When adding doc codes to a company doc code list in bulk, the template can now be exported and imported via Excel, making it easier to work with large amounts of data. Previously, this was limited to CSV.

Compilations

Previously only available from the compilation doc code, compilations can now beregenerated from the card list. This is useful in cases where there is more than one compilation card created (e.g., one compilation per major tag) and only one requires regeneration.



Expediting

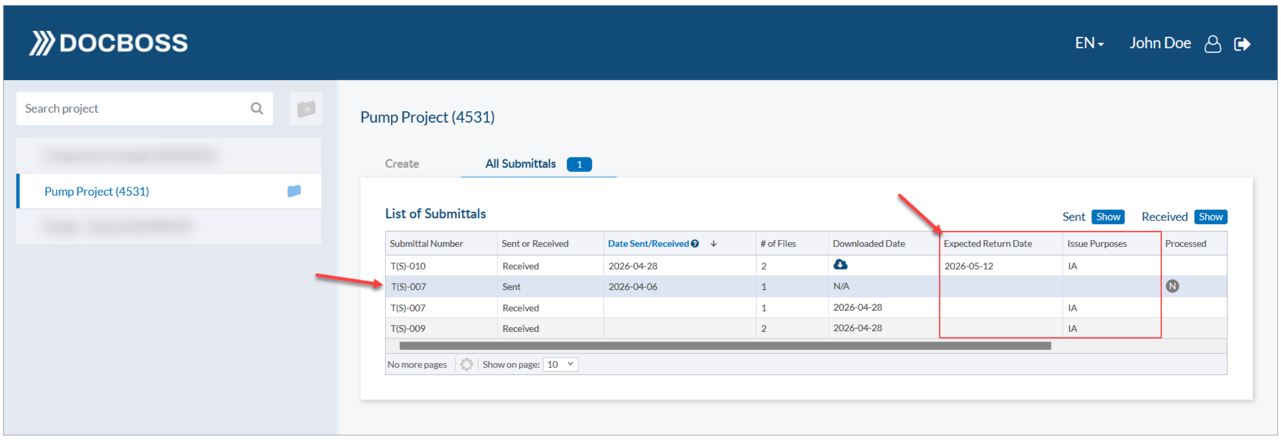
Filtering the expedite grid: Is is now possible to filter the list of projects available for expediting by the assigned project user(s).

Export list of projects: The list of projects available for expediting can be exported as an Excel file, making it easier to keep track of projects with late returns.

Portal (Sub-Supplier/Customer)

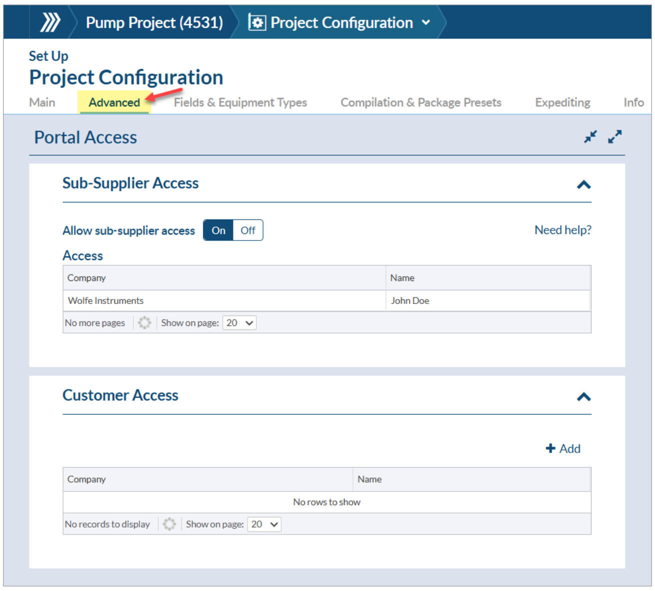
Grid Updates

The expected return date and issue purpose(s) of the documents included in a submittal are now visible to your sub-supplier/customer from the "All submittals" grid. In addition, submittals sent to your company through the portal will now be displayed in blue to more clearly differentiate between sent and received submittals.



Portal Access Visibility

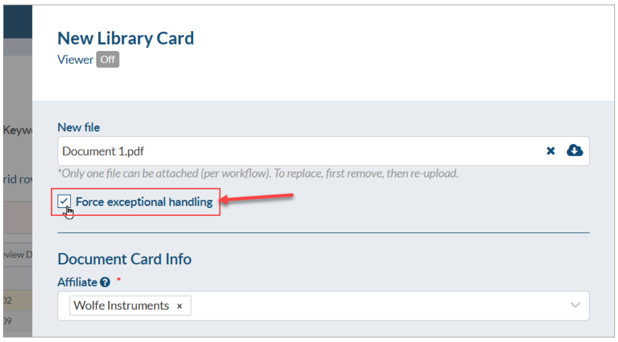
From the "Advanced" tab of the Project Configuration page, there is a new "Portal Access" section which indicates the sub-supplier/customer contacts who have access to the project from the portal. Sub-supplier access is also now enabled/disabled from this area.



Admin

Library

Exceptional handling: Files which are extraordinarily large or which themselves contain embedded files and/or authorized digital signatures/stamps can now be added to the library using exceptional handling. When the library card is assigned to a project card, the file will remain exceptionally handled (see article: Exceptional File Handling).



Export library cards: The CSV export of the library will now include a "Status" column to indicate whether the card is active or disabled. In addition, if the grid is filtered prior to export, the exported file will only include the applicable cards.

Add files: If you're looking to assign files to pre-existing library cards, assign them via CSV and simply enter the appropriate library ID for each file.

Delete library cards: Library cards that have been disabled can now be permanently deleted from the library, either individually or in bulk (see article: Edit Library Cards).

Note: Disabling and deleting library cards can also be achieved through the API (see article:API Documentation).

Library grid updates: Library cards can now be filtered by last review date and/or by custom library fields, and the "Show disabled" filter will now only show active OR disabled library cards (not both). In addition, "Select all" options (current page / all pages) are now available in order to perform bulk actions.

Reporting

If additional files are added to an already completed incoming submittal (i.e., a submittal where all originally-uploaded files were assigned to cards), an additional incoming submittal email report will be sent. This additional report will include all files assigned as part of the submittal, including those that were included on previous reports.

Templates & Variables

Custom field variables for reports: Custom doc code/card fields can now be included in both the overdue card report template and expedite report template.

New role-based variables: By default, only one user will be generated using role-based variables, even if there are more than one user listed for that role. If you would like all users listed for that role to be generated in the output, you can instead use the RoleX_Users variable and define which value to show (e.g., full name, first name, last name, etc.) using the *outputField=X* parameter.

Note: The default behavior of the general RoleX_User variables is to generate the first user (in alphabetical order), OR to generate the last user to complete their action for document history variables.

Page count of primary document: When sending stand alone (Excel) cover pages, the <Primary_Document_Pages> variable can be used instead of the <Document_Pages> variable in order to generate the actual number of pages in document associated with that cover page.

SDI variables: When using the highOrderFilter parameter to group an SDI into sections, the regular filter parameter can now be used to filter the cards within each section. In addition, there is a new variable that indicates the routing scenario assigned to the card (<DocumentsByIndex.RSName>), which is useful when using an SDI report for internal tracking.

Filter document history: The revisions included in the Document_History array can now be filtered by custom doc code/card fields, allowing you to filter the history by specific custom field values.

Other Updates

Outgoing submittals landing page: By default, the section of the outgoing submittals page that was last visited will be the section that is loaded upon return. If you would prefer to always be brought to the same page, this can be selected from the user profile (see article: User Profile).

Sub-supplier submittal history: Working with more than one sub-supplier? The outgoing "Submittals Sent" grid now includes a sub-supplier column, allowing you to quickly see which sub-supplier the submittal was sent to.

Download incoming file: If an uploaded document is downloaded from the assignment screen, you can now choose whether to download the original (as uploaded) file, or the processed (flattened) file.

Customer display pattern: The customer short name and/or external reference number can now be included as part of the customer display pattern, making it easier to choose the correct customer on your project. The display pattern can be adjusted from the global admin settings (see article: Instance Default Settings General).

File naming pattern for stand alone cover pages: The naming pattern for stand alone (Excel) cover pages can now be customized from the "File Naming Pattern" section of the Project Configuration page, helping you to fulfill your customer's unique requirements.

Project dashboard lens updates: When filtering the project dashboard using the internal code lens, more than one internal code can be selected. In addition, the project dashboard can now be filtered by pending submittals to each target (customer/internal/sub-supplier) using the "Location" lens.

Project list template prefix: The "Project Template" column on the project list will now include the template prefix before the template name, helping you to identify which specific template was used.

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.