

upchain
accelerating innovation





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Overview

This document describes the new features, enhancements, and fixes provided in the Upchain 21.2 major service update.

In between major service updates, Upchain deploys weekly minor updates to address any critical issues reported by our customers. This document includes details of the changes introduced in the weekly updates, denoted by an asterisk (*).

CAD Plugin Compatibility

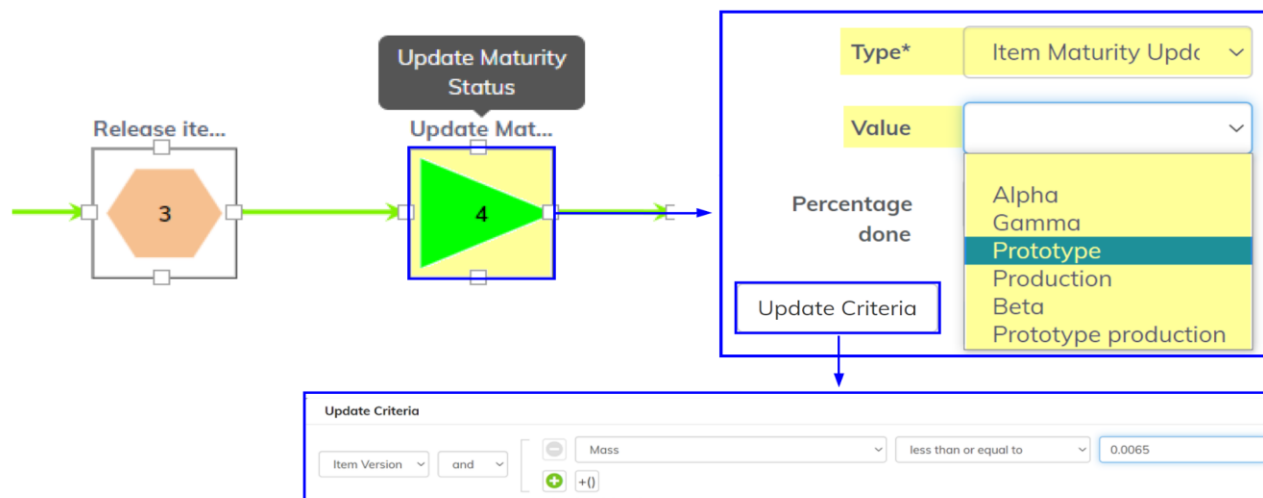
Users currently on CAD Plugin v21.1.x are not required to update their plugin to continue using Upchain with 21.1.x features and capability. However, it is strongly recommended that they upgrade their CAD plugin to receive the new capabilities of Upchain v21.2. Upchain CAD Connector v21.2 is available for download on the Plugins page immediately following the service update maintenance window.

What's New

Item maturity status: Add granularity to an item's release state

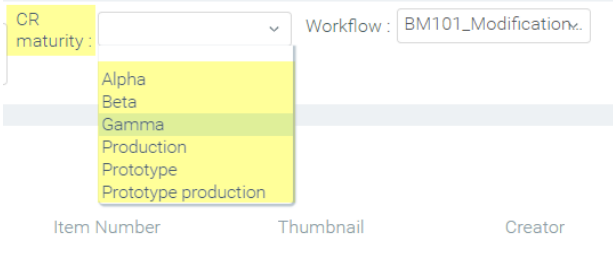
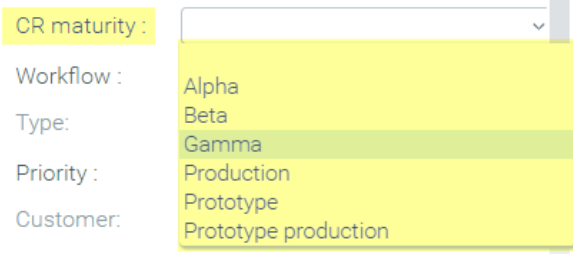
Items can now be set to a designated maturity state using a Change Request (CR) workflow. These states provide additional specificity to the developmental lifecycle of an item and may be defined as per your organization's business rules. For example, in addition to its released state, the maturity of an item may be set to 'Production' or 'Prototype'. This helps stakeholders, who may only be interested in items at a specific maturity level, distinguish between items at different maturities.


The 'Update' primitive in a CR workflow may now be configured to update an item's maturity status. Additionally, conditions may be specified that determine whether the item qualifies for its new maturity status. If a workflow is rejected, then the maturity status reverts to a previous state (or left blank if the maturity state was not specified). As a best practice, an update to the item maturity status should follow the 'System' primitive for releasing items, as reflected in the diagram below.





Alternatively, the status may be set from the Business processes > Change Request (CR) header or the CR details pane before initializing the workflow.

	
Setting item's maturity status before initializing a CR's workflow from the CR header.	Setting item's maturity status before initializing a CR's workflow from the CR details pane.

When a CR workflow completes, the maturity status is recorded in the CR Details () pane. Item maturity status can only be updated through the CR process.

An item's maturity status can be viewed from the following locations:

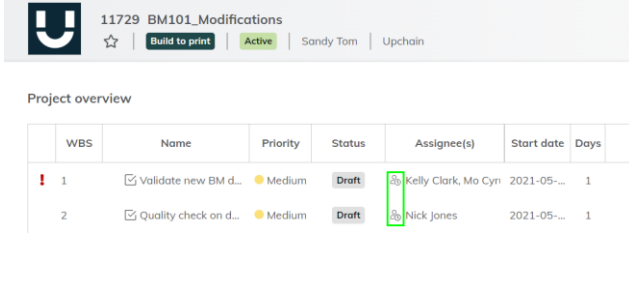
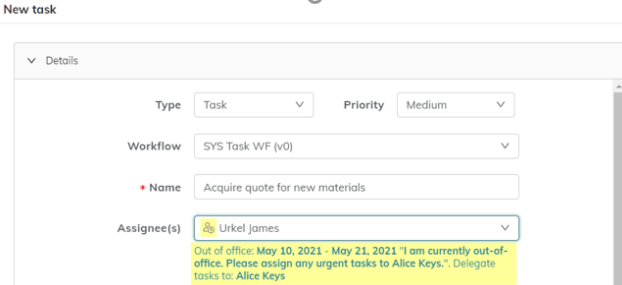

- Upchain Web: BOM > eBOM table, 'Item maturity' column.
- Upchain Web: Item 'Details' pane, 'Item maturity' field.

Currently, you will require assistance from [Support](#) to enable and configure values for item maturity.

Out-of-office notifications: Automate activity reassignment to appointed delegates

Users may now set an out-of-office notification that fulfills three main purposes:

1. The out-of-office feature alerts those who would unknowingly assign a project management activity to an unavailable Team Member.
2. In a workflow, the out-of-office feature seamlessly re-assigns a task from an out-of-office user to an appointed delegate without interrupting the workflow's progression.
3. The 'Project management' page offers visibility to out-of-office users and displays a notification when assigning activities to users.

	
A new out-of-office icon () clearly shows an out-of-office user on the 'Project overview' table.	If the Team Member selected in the 'Assignee' field is unavailable to complete a task, the Team



	Member's out-of-office configurations are displayed.
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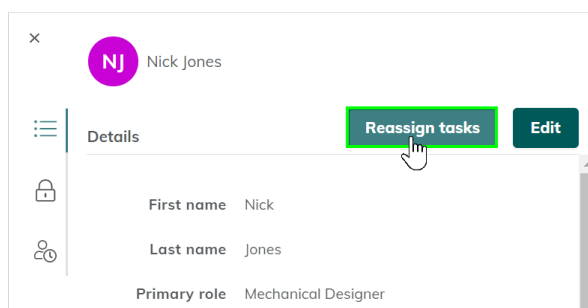
Tenant Admins may configure out-of-office notifications on behalf of users or users may configure the out-of-office notification for themselves.

Tenant Admin configures out-of-office notification on behalf of a user when viewing the user's details in the User pane.	Users configure out-of-office notification from the new 'Create out-of-office message' section in 'My profile'.

Note: See related [API enhancements](#).

Reassign tasks: Reassign tasks to any user within a tenant

Tenant Admins may now reassign one or more incomplete tasks to another user within the same tenant. The new **Reassign tasks** option is available from the 'Details' pane when viewing a selected user in the 'Users' administration panel. A wizard walks Tenant Admins through the selection of one or more incomplete tasks currently assigned to that user. The selected tasks may then be reassigned to another specified tenant user.



The new assignee is not required to share the same role as the original assignee, or be a member of the same project as the original assignee. The new assignee will be automatically added to the appropriate project(s) and assigned the same role as the original assignee.



Reassign tasks

Carefully review your selections before reassigning. Please note that if your **Reassigned to** user is not a part of certain projects, they will be added to that project, and be assigned the same role as **Nick Jones**.

Reassign to Blake Shells

Task name	Type	Status	Project
Quality check on design changes	PMA	Draft	11729 - BM101_Modifications

Cancel

Back

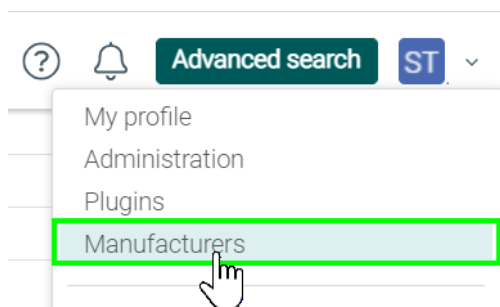
Reassign

Note: See related [API enhancements](#).

Manufacturer details viewer: Manage additional manufacturer information

All users may now access information about manufacturers from the new 'Manufacturers' option in

the user menu. In earlier versions of Upchain, only Tenant Admins could view limited information about manufacturers.

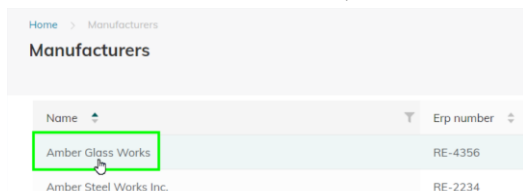


The 'Manufacturers' page lists the following additional information about manufacturers: Primary location, Primary contact, Parent manufacturer, ERP number, and Status.

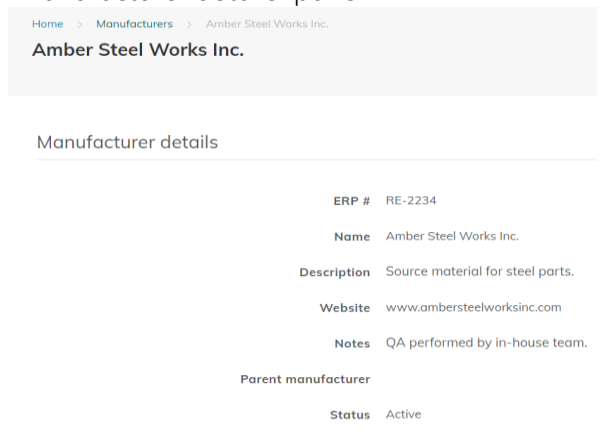
All users may select a manufacturer to view more details such as the manufacturer's website address and description, as well as any notes added by the Tenant Admin.

A manufacturer's detailed information may be viewed from the 'Manufacturer details' pane. This may be accessed from one of two places:


1. Double-click on a manufacturer listed on the 'Suppliers and manufacturers' table, or



'Manufacturer details' pane:






2. Double-click on the manufacturer listed in the 'Manufacturer' field in the Item Details pane (.

Release type : Major

Revision Note : Initial Release



Common attributes

Cost : 0.2567 

Currency : USD

Manufacturer : Amber Steel Works Inc.

When viewing a manufacturer's details, users may access sub-tabs to see:

A list of locations, the location flagged as 'primary', and associated contacts.	 Locations tab
A list of all contacts for a manufacturer and the contact flagged as 'primary'.	 Contacts tab

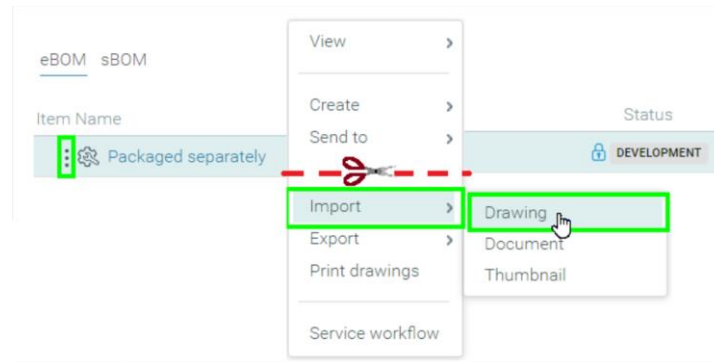
Only Tenant Admins may add and edit information about manufacturers, their locations, and contacts.

Note: See related [API enhancements](#).

Drawings: Attach drawings to items without models

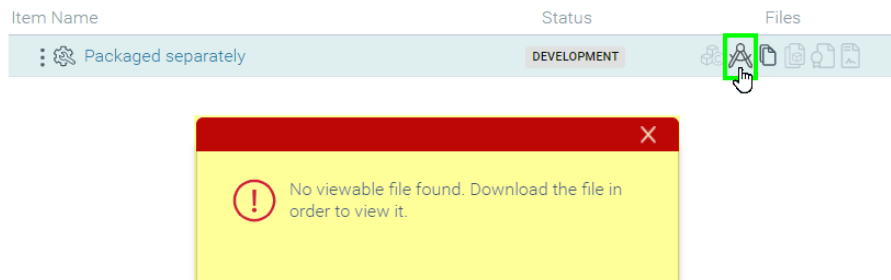
Prior to this release of Upchain, users could only attach a drawing to an item that already contained a CAD model. This new feature allows users to attach a drawing to an item that does not contain a CAD model, or to an item that already contains a drawing, perhaps in a different file format.

This functionality is only available in the Web application. Users can import drawings using the action menu beside an item in the BOM table. The drawing can be versioned by uploading a file with the same name and extension as the existing drawing. Importantly, drawings uploaded through the Web application to items that *do* contain a model do not automatically reference the model. In order to ensure the drawing references the model, the drawing must be checked out, referenced to the model in the appropriate CAD software, and checked back in through the CAD plugin. The history tab in an item's detail view shows if a drawing was uploaded through the Web app or through the CAD plugin.



This screenshot has been modified from its original source.

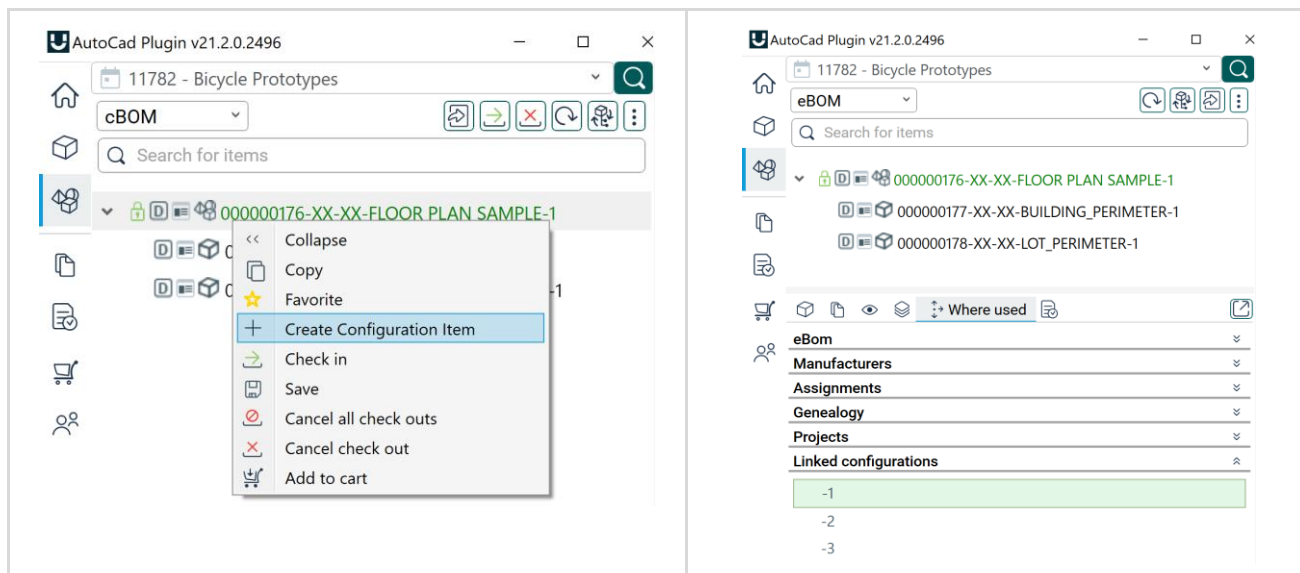
The following file formats are supported: AI, BMP, CATDrawing, DFT, DRW, DXF, DWG, EDRW, GIF, IDW, JPEG (JPG), PDF, PNG, SLDDRW, TIF (TIFF), and ZIP. However, not all of these file formats may be viewed in the PDF Viewer and users will receive a notification if a file type is not supported by the PDF Viewer.



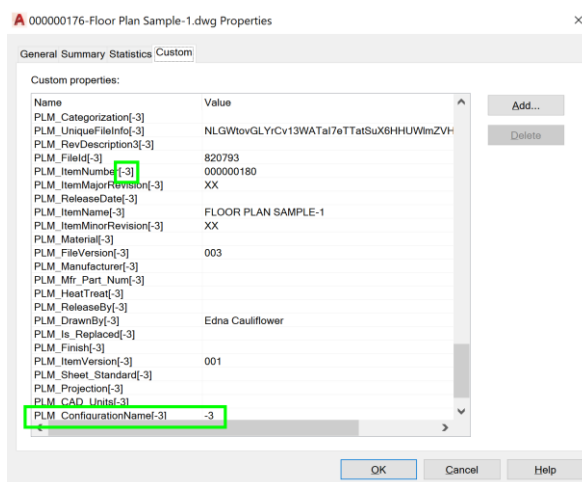
AutoCAD Configurations: Create separate eBOMs from one AutoCAD drawing

We now support the creation of configuration items for AutoCAD drawings. AutoCAD software does not support the creation of configurations in the same way that other CAD systems do. However, users can now create multiple configuration items from a single DWG file, and subsequently create separate eBOMs for each configuration item.

This functionality is enabled alongside SolidWorks configurations. Users create configuration items from the AutoCAD plugin. However, users can only configure the individual eBOMs within the Web application. Any DWG external references are not registered to items and are instead placed in the cBOM as phantom. All check ins will preserve the eBOM structures of individual configuration items.



AutoCAD custom properties show the configuration name in brackets beside each property to distinguish to which configuration they belong.



Additional Enhancements

Assignments

- *Users can select a role as the assignee on project activities, requirement processes and tasks, and QA processes and tasks. Once assigned to a role, anyone with that role on the project team can claim the task to begin working on it.

BOM - Web App

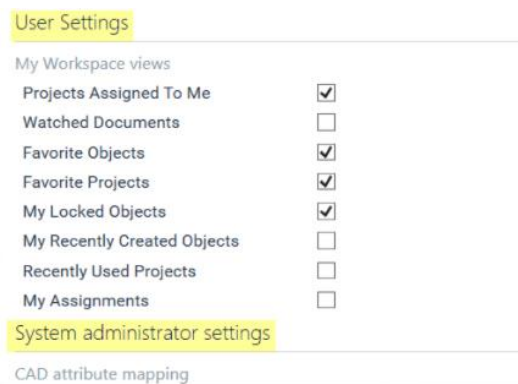
- Users will receive a more informative error message if they attempt to regenerate visualizations when visualizations are still being generated or failing.
- The BOM view in the Web application and the Project BOM in the CAD plugins are sorted in the same order for consistency.



- *We have introduced a Virtual Latest Released filter to the BOM table, which displays the selected item's eBOM structure with the most recently released versions of each item. This differs from the Latest Released filter, which displays the eBOM structure the selected item had in its most recent released state.

CAD Plugins

- We have added the options Open, Edit, Add to Favorites, and Add to Cart to *all* right-click menus throughout the CAD plugin, not just from the Project BOM.
- When creating a new item for an assembly, the icon shown beside the assembly in the cBOM column of the CAD Check In window shows an assembly file icon instead of a phantom file icon.
- When creating a task from the Project BOM or Quick Search results, users can now select a role or team as the assignee.
- Within the My Assignments section, users can now see tasks assigned to the role or team that they have been assigned to on the project. They can then claim the task from the CAD plugin if desired.
- Suppressed files within a cBOM now show a new suppressed icon on the download and check out windows to make it clear that the file is suppressed.
- When the tenant property **enable.manufacturer.on.all.item.types** is enabled, users may now edit the item attributes of manufacturer and manufacturer item number from the CAD and generic plugins.
- CAD users can clearly see the delineation between their own configurable settings and the administrator's settings.



- The tenant property **redownload.files.to.home.folder** has been updated so that when it is set to true, the download window is always shown. When set to false, Upchain only presents users with the download window if it detects that the file has been changed in your home folder.
- *We have modified how the CAD Connector is installed and the requirements that must be in place to work with SolidWorks files. Please view our Help Center article on [SolidWorks Document Manager API Support](#) to learn more.
- *We have changed how users configure custom launchers in the CAD Connector. Please view our Help Center article on [setting up the CAD Connector](#) to learn more.
- *The Copy (clone/replace) functions are now available within the AutoCAD plugin.



- *We are continuing to improve the German translations in the CAD plugin and Web application.

CAD Plugin Error Messages

- When registering new items, users will receive more useful messages about what they can and cannot include in free text fields for item numbers.
- Users now receive a more detailed error message when attempting to open a CAD file that was created in a newer CAD version of the software than the version of the CAD software currently open.
- Users now receive a more descriptive error message when attempting to register a new CAD file that has the same name as an existing registered CAD file in Upchain.
- Users sometimes lose connection to Upchain when performing a task such as downloading files or performing a check in. This can sometimes be due to network connectivity issues. The error message related to lost connection now provides more information and a link to a Help Center troubleshooting article.
- When refreshing the cBOM view of the NX plugin, if any files are not saved on the local hard drive, the plugin shows the files with a "Not Loaded" status and offers to save the files for you. If Upchain is unable to save the files, it produces an error message indicating this and a list of files it was unable to save. A full cBOM refresh will always be necessary to be able to register the files.

PDF Viewer

- *Additional file formats are now available to be viewed in the PDF viewer. Users are now able to view: BMP, DGN, DOC, DOCX, DWF, DWG, DXF, GIF, JPEG, JPG, JP2, PNG, ODP, ODT, ODS, PDF, PPT, PPTX, RTF, TIF, TIFF TXT, VSD, VSDX, WMF, XLS, and XSLX files.

Reports

- The option to generate a BOM report is now available for items when viewed with the 'Latest Released', 'Latest Working', or 'Virtual Latest Released' filters applied to the BOM table in the Web app (and not just the 'Saved As' filter as was the previous behavior). The generated reports take into account the applied filter to ensure consistency between the BOM displayed in the Web app and the information in the report.
- Reports now facilitate easy and direct access from objects listed in a report to where they reside in Upchain Web. Items and projects may be hyperlinked in the reports so that readers can click on the link to open the associated pane in Upchain Web.

Hyperlinked information in the report	Pane in Upchain
Specific end item	BOM > eBOM tree with the specific end item selected.
Item visualization	3D Viewer with the visualization of the specific item version.
Project number	Referenced project's dashboard.

- BOM and item details reports may be configured to include additional attributes, including the item's legacy description, whether an item is a recommended spare or not, latest BOM revision number, and much more.



- Report templates may now be set up to generate reports as a CSV file. PDF and XLSX file formats are still supported.

You will require assistance from [Support](#) to set up report templates and custom reports.

Note: See related [API Enhancements](#).

Search Improvements - Web App

- *The Quick Search in Web now includes the legacy item number attribute as a search option and includes this value in the search results table.

SolidWorks Configurations

- Users can now find the list of linked configurations in the Where Used tab of the item details pane in Web.
- *Users can now access the drawing and its translations from any of the linked configuration items in Web and the CAD plugin.
- *If SolidWorks configurations are enabled and the tenant property **material.library.name** is also enabled, then when users apply a material to one configuration item it is only applied to that configuration. If SolidWorks configurations are not enabled and the tenant property **material.library.name** is enabled, then when users apply a material to an item it is applied to all configurations within the CAD file.
- *When registering a new assembly that contains multiple configurations, changing the resolution for a configuration to an X (so that no item is created for a specific configuration) on the BOM Wizard no longer resolves the child components with an X as well since you often want to create items for them to be included in many of the other configurations.
- *If SolidWorks configurations are enabled, the Copy (clone/replace) function has been reinstated for all other CAD plugins *except the SolidWorks plugin*. This is because the Copy (clone/replace) function has not yet been updated to work with SolidWorks configurations.
- *When checking in an assembly to create a new configuration item for one of its child components, the new part configuration item is linked to all other part configuration item(s) that contain the same CAD file in Upchain.

Tenant Administration

- Upchain Web now boasts an improved process for creating, inviting, registering, and deactivating users who belong to multiple tenants.
- Tenant Admins may export information from the Users menu into a spreadsheet. The new **Export** button in the Users menu generates and downloads a .xlsx file. In the spreadsheet, users are sorted from the first user added to the tenant to the most recently-added user.

The following user information is included:

- | | |
|----------------|-------------------|
| ◦ Full name | ◦ License |
| ◦ First Name | ◦ Status |
| ◦ Last Name | ◦ Division |
| ◦ Company Name | ◦ Primary Role |
| ◦ Username | ◦ Secondary Roles |
| ◦ Email | |

Note: See related [API Enhancements](#).



- *Tenant Admins can now set a **default eBOM version filter** for specific project types. This sets the default filter shown on the BOM table in the Web app for all users in the tenant. They can choose from one of the following: As Saved, Latest Working, Latest Released, Latest Virtual Released.

Fixes

API

- ***GET: bom/v1/ebom_children_items** no longer returns duplicate or obsolete items. The response returns a single record of each unique eBOM item(s) for the specified parent item (**partVersionId**).

BOM

- When creating an item in the Web app and assigning the item a manufacturer, the manufacturer was not always visible on Change Requests or Change Notices.
- Special characters were not displayed correctly when used in the item description.
- *Many of the functions in the 3D Viewer became unresponsive after we upgraded our servers that manage visualization.
- *When printing drawings or other documents, the time zone is included with the time to make it clear.
- *When using a single digit for the minor revision and enabling this value to extend its length once the maximum is reached, items that reached a double-digit minor revision were not being brought into BOM under the Latest Released filter.
- *Users were sometimes seeing an error indicating that they did not have access to the visualization file of the item. This was due to incorrect company IDs on the visualization files.

Business Processes

- When a User Decision primitive was selected for a Change Request, and if one user decided to approve the CR and the other user decided to reject the CR, this would put the items into a NULL state. The second user who decides to reject the CR now receives a message indicating that the other user has already approved it.
- When attempting to release a branch of an item (version 2), the Change Request was failing if version 1 of the item had previously been released.
- *When released items with a revision note were included in other Change Requests, the revision note was being cleared.
- *When releasing items that contained drawings, the System Primitive set to generate a PDF translation of the drawing was not updating the title block to display the correct revision.
- *The *Fix Stale cBOM* step in a Change Request workflow was not always completing because the GPS node assigned to fix the stale cBOM was not able to remove the CAD files from its hard drive after the stale cBOM was resolved, and so the whole step would be recorded as a failure.
- *The *Fix Stale cBOM* step in a Change Request workflow was creating cBOM loops.
- *The release type and revision note were not viewable on the CR if Item status was not Development or Released.



- *Workflows started through the CAD plugin were not being released because one item on the CR did not have a Release Type set, but the workflow was allowed to begin.
- *The Change Notice (CN) dashboard would not load any CNs on certain projects due to at least one corrupted CN.
- *The 3D viewer in the supplier portal was not loading any visualizations.
- CR workflow can be configured to update XX-XX Item version to Released after CR release process.

CAD Plugins

- The Advanced Search window is now properly named 'Advanced Search'.
- The stale cBOM report was not always detecting the correct stale files.
- eBOM attributes of released child components could not be edited.
- *eBOM-only items were being removed from the eBOM when performing a (full or root) Save or Check In.
- *Advanced search in the CAD plugin for files using the 'contains' operator was not returning all matching files.
- *Using Save As to unregister an NX file and then create a new item from it was not writing item attributes to the new item. Furthermore, checking out an item was also not updating the item attributes.
- *The degraded performance when downloading large assemblies is now resolved.
- *The vertical scroll bar was missing from the quick search results list.
- *Adding an additional instance of a component to a cBOM where existing instances were suppressed resulted in incorrect eBOM quantities.
- *When creating items, copy>replacing items, loading the BOM Anomaly window, and checking in an assembly containing previously suppressed items, these processes would fail and produce an error message. These issues were present when the file renaming tenant property (**filename.pattern**) was not set to the default value.
- *When the tenant properties **private.floating.items** is enabled, and a purchased part is removed from a project, it would not appear in the search results to users who do not have access to the project(s) that the purchased part belongs to.
- *Users were not able to send items to a Change Notice from the Cart in the CAD plugin. This was due to a change put in place to prevent floating (no project association) items being sent to a CN.
- *When loading the BOM Anomaly window from the ProjectBOM, some users were receiving an error message when attempting to resolve eBOM anomalies.
- *When loading a drawing for an item from the cBOM view or item view, a popup window appeared listing all available versions of the drawing instead of only the latest version.
- *Using Find Item to associate CAD to an item in Upchain was not following the file renaming rules set in the tenant.
- *Item name and item number attributes were not being written to NX files even though the CAD mapping was set to Write.
- *Users were unable to check in an assembly because it contained promoted items that were not updated to their released version. The files have been datafixed and further root cause analysis is ongoing.



- *When cloning an assembly in NX, any selected sub-assemblies were not being cloned as well.
- *When editing an item's attributes in the Item View, pressing the tab button now moves sequentially through the attributes from top to bottom.
- *The eBOM section in the Where Used tab for an item was not displaying its contents.

Electrical CAD

- *The eCAD import process was failing when quantity was mapped.
- *Checking in an electrical package with updated costs for each component was not updating the cost attribute on the item in Upchain.

Office Plugins

- When checking in a document through the Office plugin and the change description contained a colon (:), all text following the colon was not displayed in the Web application but was shown in the Office plugin.
- *The Office Plugin was not loading the Documents tab for all projects.

PDF Viewer

- *Opening the PDF translation of the drawing in the PDF Viewer was only showing the translation for the first file version of the drawing, not the latest.
- *When clicking the thumbnail for PNG and JPEG document types, the PDF Viewer was not opening.

Project Management

- When creating a new project management task and no assignee was selected, but an assignee was added after an initial save, the assignee could not start the workflow as the button to do so remained greyed out.
- *Assigning tasks to roles was not creating the Claim button for a user on the project with the specified role to claim the task and begin the workflow.

Search Fixes - Web App

- *When including custom attributes in an Advanced search, all operators (eg. Not equal, Is Null, Is not null, etc.) are now functional and the custom attribute is included as a column in the search results table.
- *Using the Advanced Search to search for a file by name and using the "contains" operator produced a list of matching files but they were not accessible to the user.

SolidWorks Configurations

- When clicking on an item in the Project BOM, the Where Used tab in the lower pane now highlights which configuration is currently selected.
- *This fix addresses the different ways that users can add configurations to CAD files and ensures that when items are created for the new configurations the new items are linked to the already existing configuration items.
- *SolidWorks custom properties that were being mapped to item attributes were not being handled correctly when the file contained multiple configurations.
- *Item attribute mappings set to read from the CAD files were only updating the item attributes of the active configuration and all other configuration item attributes were being removed.



- *Users attempting to register a SolidWorks file that only contained one configuration were not presented with the BOM Wizard to select a BOM location, and so the item was not associated with any project.
- *Configuration items were not being properly linked together when each configuration was being used in different assemblies.

SolidWorks Plugin

- *Clicking the Download button in the Advanced Search window now launches the Download window to download the selected files.
- *Advanced search in the CAD plugin for files using the 'contains' operator was not returning all matching files.
- *If components are suppressed in the cBOM, they should still appear in the eBOM.
- *Suppressed components were not being downloaded along with the parent assembly.
- *Drawings were not being registered to items if they contained custom properties. The custom properties were not being cleared properly and so it was not registering with its model to a new item.
- *Items inserted into an assembly using the Insert function from the Advanced Search window would not allow any SolidWorks functions, such as opening the file, to be performed on it.

API Enhancements

- Upchain Web now supports 'Security Assertion Markup Language Single Sign-On' (SAML SSO) so users that log in to Upchain through third-party identity providers may access the Upchain API and SwaggerHub.
- The following tables summarize new and expanded endpoints for the Upchain API:

BOM

Method: Endpoint/{parameter} and Description
POST: lock/{fileVersionId}/actions/release-file-lock Description: Unlocks items that are locked because they are checked out or being edited.
POST: file_version/{fileVersionId}/write-properties Description: Stores item attributes such as 'PLM_fieldId' and 'PLM_FileName' in CAD files.
DELETE: category_attribute/{categoryAttributeId} Description: *The existing endpoint now allows category-type attributes that are associated with an item to be deleted such as 'regional production' and 'status'.

Manufacturers

Method: Endpoint/{parameter} and Description
POST: v2/manufacturers Description: Adds the one manufacturer's information to the database.
POST: v2/manufacturers/bulk Description: Adds multiple manufacturers' information to the database.
POST: v2/manufacturers/{manufacturerId}/locations/{locationId}/contacts Description: <ul style="list-style-type: none"> • Adds a contact's information to the database. • Set the 'primary' field to 'true' in the request body to flag a contact as primary.



POST: <code>v2/manufacturers/{manufacturerId}/locations</code>
Description: <ul style="list-style-type: none"> Adds a location for the specified manufacturer. Set the 'primary' field to 'true' in the request body to flag a location as primary.
PUT: <code>v2/manufacturers/{manufacturerId}</code>
Description: Can update an existing manufacturer's ERP number, name, description, website, notes, and status.
PUT: <code>v2/manufacturers/{manufacturerId}/locations/{locationId}/contacts/{contactId}</code>
Description: Updates the specified contact's information.
PUT: <code>v2/manufacturers/{manufacturerId}/locations/{locationId}</code>
Description: Edits a manufacturer's location.
GET: <code>v2/manufacturers</code>
Description: Response returns a list of all manufacturers. ¹
GET: <code>v2/manufacturers/{manufacturerId}</code>
Description: Response returns specified manufacturer's details.
GET: <code>v2/manufacturers/{manufacturerId}/contacts</code>
Description: Response returns a list of contacts for the specified manufacturer. ¹
GET: <code>v2/manufacturers/{manufacturerId}/locations/{locationId}/contacts</code>
Description: Response returns a list of contacts for the specified location.
GET: <code>v2/manufacturers/{manufacturerId}/locations/{locationId}/contacts/{contactId}</code>
Description: Response returns the details of the specified contact.
GET: <code>v2/manufacturers/{manufacturerId}/locations</code>
Description: Response returns a list of locations for the specified manufacturer.
GET: <code>v2/manufacturers/{manufacturerId}/locations/{locationId}</code>
Description: Response returns specified location. ¹

Note:

- ¹All users may use the related endpoints.
- Existing manufacturer-related API calls are still valid.
- See related topics in [What's New](#).

Out-of-office notification

Method: Endpoint/{parameter} and Description
PUT: <code>user/v1/user/{userId}/out-of-facility</code>
Description: Tenant Admins can configure out-of-office (OOO) notifications on behalf of users.
GET: <code>user/v1/users/{userId}/out-of-facility</code>
Description: The response returns OOO details for the specified user.
GET: <code>project/v1/{projectId}/out-of-facility</code>
Description: The response returns a list of all OOO-users assigned to the specified project.
GET: <code>project/v1/{projectId}/delegates</code>
Description: Tenant Admins can obtain a list of all users that have the OOO feature enabled. The list automatically excludes all users with OOO timeframes in the past. The response also includes the appointed delegates.
GET: <code>activity/activities/users/{userId}/tasks</code>
Description: Tenant Admins can get a list of the specified user's assignments.
GET: <code>activity/activities/users/{userId}/tasks</code>
Description: Tenant Admins may use the tasks endpoint to get a list of all of the specified user's assignments. Tenant Admins may then reassign incomplete task(s) from one user (sourceUserId) to another user (targetUserId) by either specifying the tasks to reassign (under taskList) or reassign all tasks except



for those listed under **ExcludedTaskList**. The information is added to the request body for **POST**: **task/v1/actions/reassign**.

Note: See related topics in [What's New](#).

Reports

Method: Endpoint/{parameter} and Description

POST: **report/v1/generate**

Description:

- The existing '**report**' endpoint returns a URL in the response's header.
- When generating the Item Details report, the '**projectId**' field is required in the request header.

When generating a BOM report for a specific **itemVersionId** the new **activeEbomFilter** field (added to the request body) filters the generated report to reflect one of the following accepted values: **AS_SAVED**, **LATEST_WORKING**, **LATEST_RELEASED**, or **LATEST_VIRTUAL_RELEASED**. If **itemVersionId** is not specified then **activeEbomFilter** is set to **LATEST_WORKING**, by default, and cannot be overridden.

POST: **report/v1/reports**

Description: Report templates may now be set up to generate reports as a CSV file. PDF and XLSX file formats are still supported.

Note: See related topics in [What's New](#).

SolidWorks Configurations

Method: Endpoint/{parameter} and Description

POST: **bom/v2/file-versions/{fileVersionId}/children-bulk**

Description: Creates new cBOM nodes under the parent node.

POST: **bom/v2/file-versions/{parentId}/children-bulk**

Description: Creates new eBOM nodes under the parent node.

GET: **/bom/v1/parts/{partNumber}/versions**

Description: The response returns all versions of the specified part number.

Tenant Administration

Method: Endpoint/{parameter} and Description

POST: **user/v2/users/export**

Description: The new '**export**' endpoint exports all tenant users' information to a spreadsheet. Refer to the related entry under '[Enhancements > Tenant Administration](#)' for details about the exported spreadsheet.

POST: **user/v1/invite_users**

Description: *Sends email invites with activation links to brand new users. This may be done in bulk.

POST: **user/v2/invite-existing-users**

Description: *Generates a new verification code and sends email invites to non-activated users. This may be done in bulk.

GET: **workflow/v1/workflows**

Description: All users may use the new, read-only, endpoint to see all tenant and system workflows. Optional parameters can filter the response to include a workflow with a specific name, creator, type (i.e. IR, CR, etc), status, etc.

Note: See related Fixes for common functionality in the UI.



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