

# Release Notes

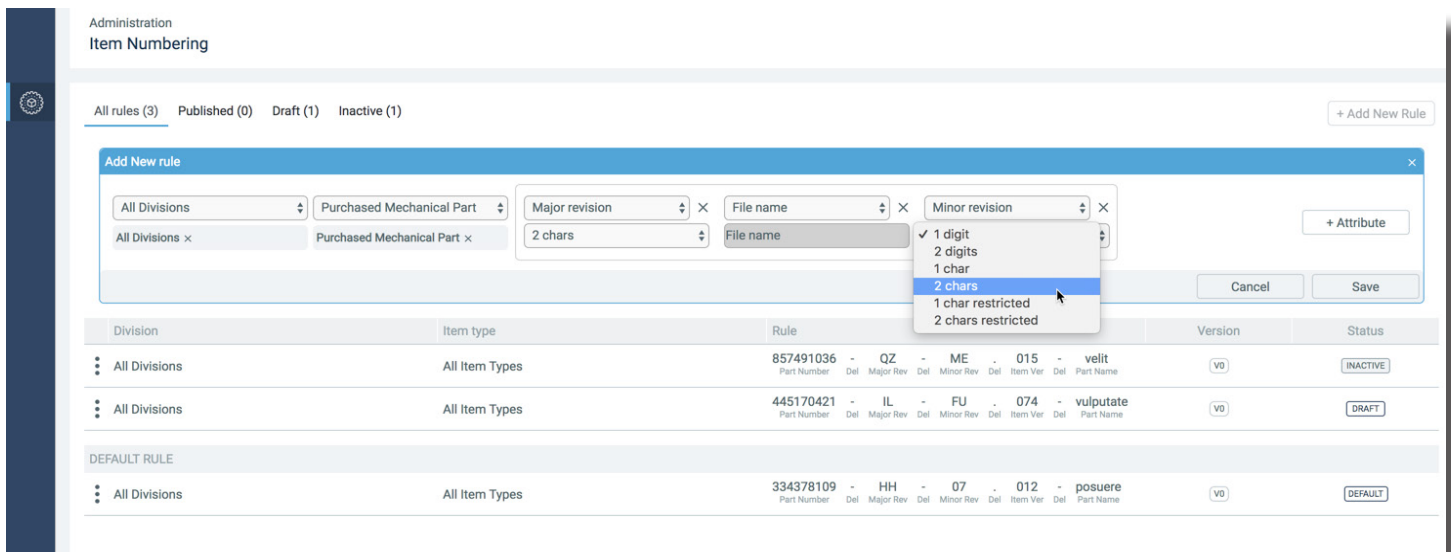
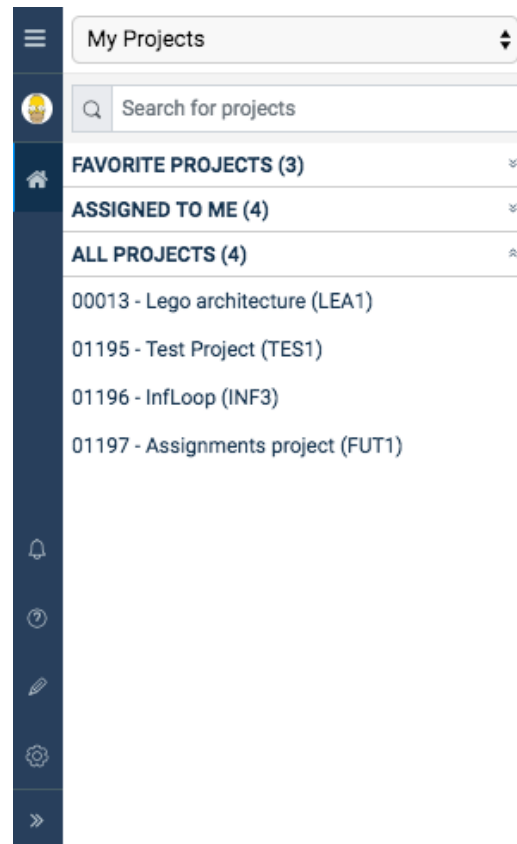
## Upchain v5.0

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.0.

For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

## What's New

- Our new **plugin intergration with Google Sheets** brings with it a variety of functionality, such as the ability to access Upchain projects, view activities and documents, and import and export BOMs.
- Users can now perform various tasks through Upchain's new **REST API**. Functionality includes accessing check-in/check-out, downloads, link management, utility methods, and the main document interface.
- We've added an **item numbering interface** to the administration page that gives users the ability to create item numbering rules by selecting from a variety of attributes. The item number entry field is also now dynamic to match item numbering rules.



- Various usability improvements were done to CAD and Google Suite plugins, making them faster and more efficient.

## Implemented Enhancement Requests

The following enhancement requests were implemented in Upchain v5.0.

- We've added the ability to link multiple issues and RFQs to an ECR.
- Administrators can now cancel other users' item checkouts from CAD plugins.
- An integration for the CAD software PTC Creo, is now available.
- Viewable components can now be toggled on and off in the 3D Viewer.
- The item number entry field is now dynamic to match item numbering rules.
- We've added the ability to create custom attributes for CAD models.
- Administrators now have more visibility into the number of types of subscriptions in their organizations.
- STL & SLP formats can now be used for CAD previews.
- Part numbers are now mapped to item numbers when items are imported into a BOM.
- Users now have added functionality when cleaning existing item records.
- Performance enhancements were done for cBOM in NX.

## Upgrade Advisories

Please note the following advisories before proceeding with your product upgrade.

### Reinstall Plugins

All users should uninstall old plugins, and install new plugins.

## Resolved Issues

The following issues were resolved for Upchain v5.0.

- Logging into the Excel plugin did not allow you to type your username or password right away.
- After selecting the "All Active" filter in the main dashboard, not all project data was displayed.
- Changes made to top assemblies were not being saved in certain CAD plugins.
- Attributes would not export from assembly items in NX.
- Edits made to drawings in the SolidWorks plugin would not carry over to the main Upchain application, even though the version number was updated.
- The incorrect version was opening for certain BOM items.



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# Release Notes

## Upchain v5.1.2

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.1.2.

For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

# Implemented Enhancements

The following enhancement requests were implemented in Upchain v5.1.2.

- Completed ECR tasks now display which user completed the task
- Various Gantt Chart enhancements
- Several Solidworks performance improvements

# Upgrade Advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

All users should uninstall old plugins, and install new plugins.

# Resolved Issues

The following issues were resolved for Upchain v5.1.2.

- Users were getting an error when attempting to download a top level assembly item.
- API was returning duplicated constraints when pulling information about a BOM structure that was created in Upchain.
- Users were unable to manually move activities past a certain date range.



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# Release Notes

## Upchain v5.1.3

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For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

## Implemented Enhancements

The following enhancement requests were implemented in Upchain v5.1.3.

- Users now have the ability to share documents across projects.
- The Creo CAD plugin now supports Creo version 4.
- Users now have the ability to change the home folder location for CAD plugins.
- Added the ability to manually input text within an item number.

# Upgrade Advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

Users should uninstall all old versions of plugins, and install the latest versions.

# Resolved Issues

The following issues were resolved for Upchain v5.1.3.

- The wrong version of assemblies were being downloaded from the NX plugin.
- The API was returning translation files with no size.
- System decisions were not working correctly for certain ECR workflows.
- Items were being numbered incorrectly when imported via the Excel plugin.
- When attempting to import a broken assembly into the NX plugin, the error message was not displaying the list of the components that are missing.
- When users changed the Gantt chart zoom settings in one project, the settings would be saved for other projects as well.
- Users were unable to check out a second component from multi-instance subassemblies.
- When refreshing an assembly containing one or more outdated children in the NX plugin, the user was not being given the option to download the latest versions.
- Users were experiencing dependency issues for certain activities (between Stage\_Gate to Stage\_Gate and Task to Task).



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## Upchain v5.1.4

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.1.4.

For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

## Implemented Enhancements

The following enhancement requests were implemented in Upchain v5.1.4.

- All conversion regeneration options now create STL and STEP files.
- Various enhancements to item numbering rules.



# Upgrade Advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

Users should uninstall all old versions of plugins, and install the latest versions.

# Resolved Issues

The following issues were resolved for Upchain v5.1.4.

- Users were seeing incorrect dates for tasks and stage\_gates in Gantt view and detail view.
- When attempting to create item numbering rules, users were getting error messages that did not describe the cause of the error.
- Users were getting an error when attempting to save drawings from the Creo plugin.
- API was returning corrupted STLs.

# Known Issues

The following issues are known for Upchain v5.1.4.

- Certain users have been experiencing issues when attempting to change the duration of subtasks with predecessors.  
**Workaround:** Delete the link between the two activities, change the duration of the subtask, then link the two activities again.



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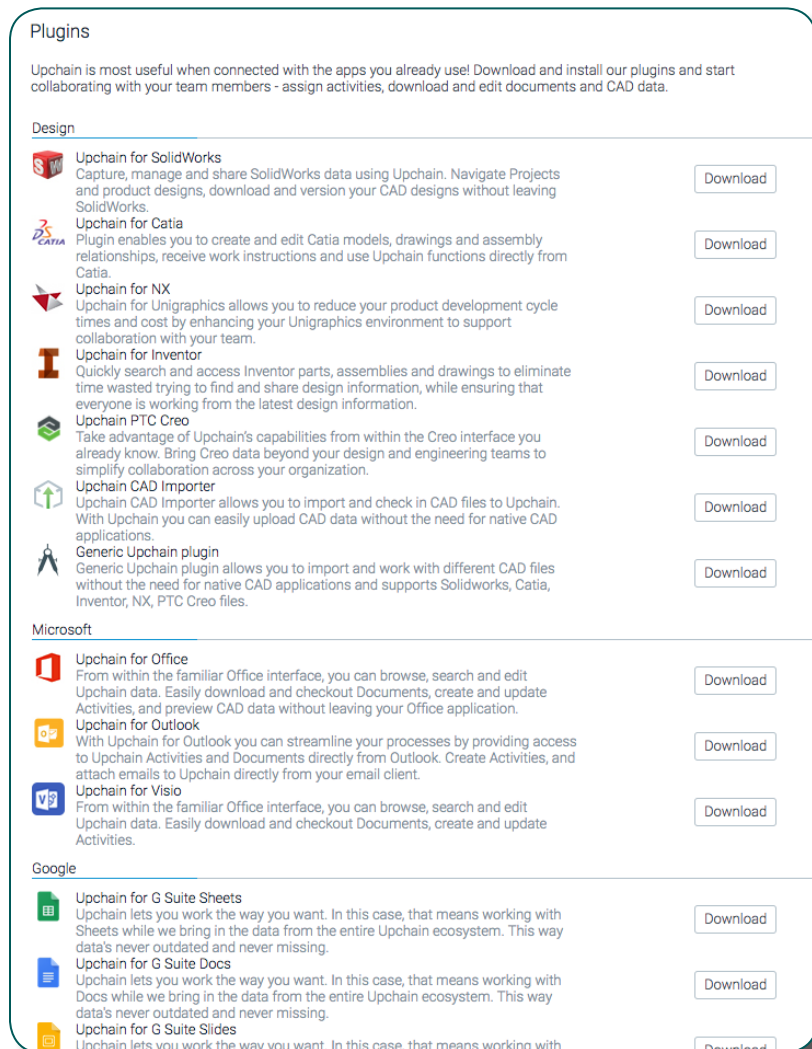
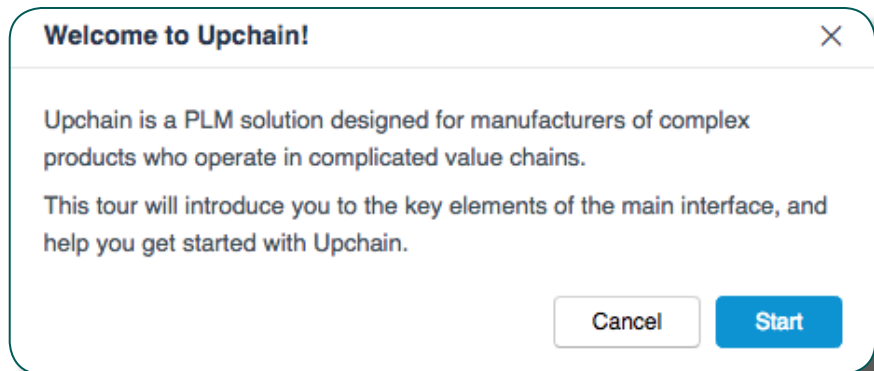
## Upchain v5.1

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.1.

For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

# What's New

- Our new guided tours and contextual help allow users to participate in self-guided onboarding. The guides give users an overview of the application and its navigational elements, as well as the what steps they can take to get started with Upchain. The contextual help directs users to areas of the help documentation in context with what area of the application they are in.
- The plugins page is now easily accessible from the user menu, and has been refreshed and reorganized for improved clarity.
- Various usability improvements were implemented in the main application and various Design and Microsoft plugins, making them faster and more efficient.



## Implemented Enhancements

The following enhancement requests were implemented in Upchain v5.1.

- The item actions menu has been reorganized for quicker and easier BOM management.
- The new view cube replaces the axis icon in the 3D Viewer, allowing users to select various views of their models faster, as well as rotate models in any direction.



- Several Office and Outlook plugin updates for added consistency and usability.
- Various core platform improvements.

# Upgrade Advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

All users should uninstall old plugins, and install new plugins.

# Resolved Issues

The following issues were resolved for Upchain v5.1.

- When attempting to download assembly items from a BOM, users received a notification that the download was successful, however, the files were not downloaded.
- eBOM versions were being overwritten when importing the BOM through the Excel Plugin.
- The sequence of dates was being displayed incorrectly on the project dashboard.
- Hoops was not generating 3D visualizations or thumbnails for checked-in Inventor 2019 files.
- Once Inventor 2019 items were saved in Upchain, users were unable to edit their drawings.
- When attempting to create assembly items, product structure items were created instead.
- Users were unable to find items when one of their children were checked out by another user.
- A blank error message was being displayed when attempting to save the BOM structure in certain CAD plugins.



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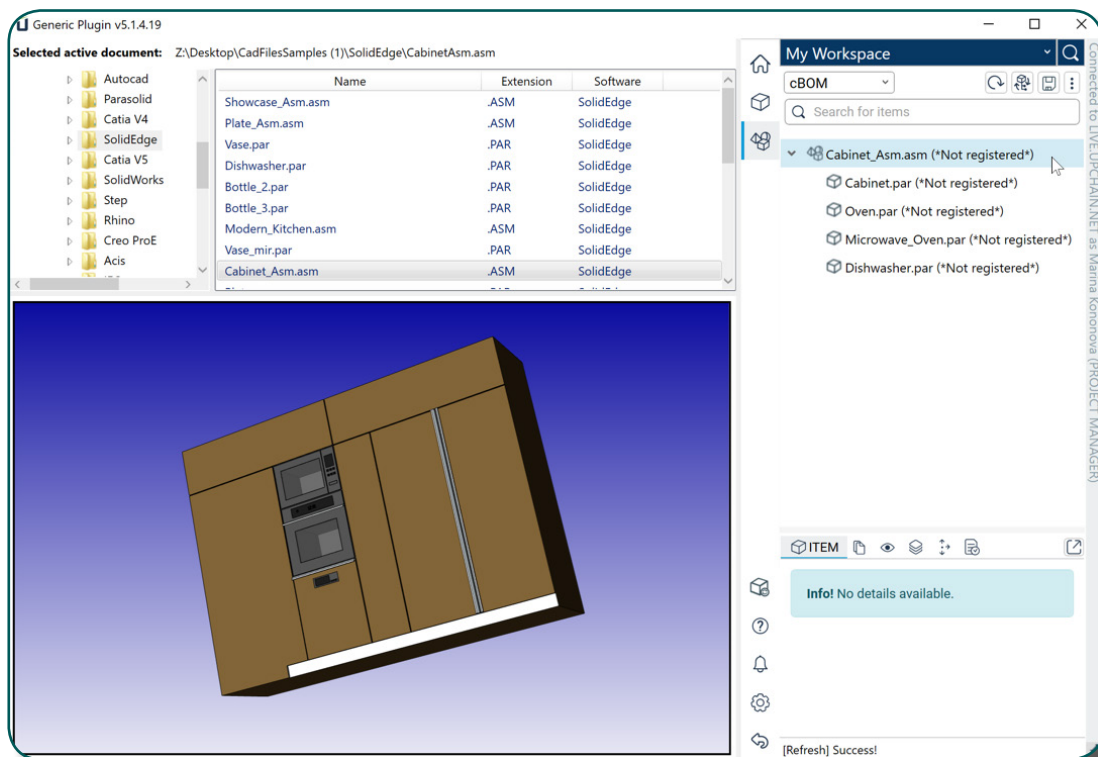
## Upchain v5.2

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.2.

For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

## What's new

- Our new Generic Plugin is used as a bridge between your CAD files and Upchain. It enables you to preview and import CAD files into Upchain, without the need for native CAD software – ideal for non-CAD users. Additionally, if you are using a CAD software we do not yet support, you can import your CAD files into Upchain using the Generic Plugin.



- We now have an application available in the OnShape app store. Upchain for OnShape allows you to import your OnShape documents to Upchain directly from within OnShape, mapping your OnShape documents to Upchain BOM items.
- Certain usability improvements were implemented in activities view, making it cleaner and easier to work with.
- Various UX/UI tweaks to the main application and DMS plugins.
- A plethora of back-end enhancements.

# Upgrade advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

Users should uninstall all old versions of plugins, and install the latest versions.

# Resolved issues

The following issues were resolved for Upchain v5.2.

- Users were getting an error when attempting to view item compares.
- BOM item drawings were not loading in the 2D Viewer.
- Users were not prevented from updating children of released assemblies.
- When changing the start date of a parent activity, its children's start dates would not update.
- System decisions were not working in certain workflows.
- Users were experiencing longer than normal cBOM refresh times in the NX plugin.
- Users were getting an error when attempting to import welds through the NX plugin.
- The 2D Viewer was not working in Internet Explorer.
- Activity status filters were not displaying all activities with the selected status.
- Users were unable to manually update part numbers when checking in items in the NX plugin.
- When users were working with assemblies containing out of date children in the NX plugin, they were not being asked to download the latest version.
- Items in an ECR workflow were getting stuck on system primitive stages.
- Users were unable to start activity workflows unless they were the assignee or creator of the activity.



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## Upchain v5.3

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For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

## Implemented enhancements

- Automatic Item Versioning when importing Documents from OnShape.
- The Creo CAD plugin now supports Creo version 5.
- Plugin downloads are now accelerated using CloudFront CDN.
- Certain UX/UI tweaks to the main application.
- Various back-end enhancements.

## Resolved issues

The following issues were resolved for Upchain v5.3.

- Certain users would get errors when attempting to edit unlocked BOM items in the NX and SolidWorks plugins.
- Users were unable to check items in or out after mapping the home folder location to a network drive in the SolidWorks plugin.
- BOM items were showing multiple CAD item links instead of just the latest CAD item link.
- Certain users would get errors when attempting to download BOM items in the NX plugin.
- Documents were not loading in the PDF viewer.
- The wrong versions of phantom items were being displayed in the NX plugin.
- Certain users were unable to view 3D visualizations in the Generic Plugin.

# Upgrade advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

Users should uninstall all old versions of plugins, and install the latest versions.

## Known issues

The following issues are known for Upchain v5.3.

- The G Suite plugin is not loading in Internet Explore 11.
- The measure angle, distance, and edge functions in the 3D viewer are not working.
- When working with released models in the Solidworks plugin, drawings are remaining locked after the models are saved.  
**Workaround:** Open the locked drawing and cancel its check out.
- Users are getting an error when attempting to view drawings in the PDF viewer that were saved in the Creo plugin.



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## Upchain v5.4

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.4.

For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

## Implemented enhancements

- Added enhancements to item cloning in the Catia, Creo, Inventor, and NX CAD plugins.
- The SolidWorks CAD plugin now supports SolidWorks version 2019.
- Onshape Document Import now includes automatic versioning for all children components of an assembly.
- Certain UX/UI tweaks to the main application, including updated logo and colors.
- Various back-end enhancements.

## Resolved issues

The following issues were resolved for Upchain v5.4.

- When attempting to access the help center from the G Suite plugin, users were being redirected to the incorrect page.
- Users were experiencing issues with moving items in and out of assemblies that have more than one version.
- Users were getting errors when attempting to upload large assemblies in the Inventor plugin.
- When working with released models in the Solidworks plugin, drawings were remaining locked after the models were saved.
- Users were getting errors in the NX plugin when attempting to save assemblies that contain unregistered child items.

# Upgrade advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

Users should uninstall all old versions of plugins, and install the latest versions.

## Known issues

The following issues are known for Upchain v5.4.

- SOLIDWORKS 2019 users are unable to generate and view their CAD visualizations in Upchain.



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# Release Notes

## Upchain v5.5

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.5.

For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

## Implemented enhancements

- Added support for SOLIDWORKS 2019.
- Users are now able to map Onshape properties to Upchain attributes.
- Added the ability to import eCAD data into Upchain.
- Users can now link documents to one another directly in the main Upchain application.
- Various back-end enhancements.

## Resolved issues

The following issues were resolved for Upchain v5.5.

- Users were unable to edit a task's assignee after the initial creation of the task.
- Certain users were experiencing issues with changing the states of ECR workflows after editing the ECRs.
- Users were experiencing issues downloading previous versions of drawings for items sent to ECR and released through the workflow.
- Users were getting an incorrect error message after 20 minutes of inactivity.
- When attempting to remove shared documents, the documents would not be removed if the document had been checked out and checked back in through the Office plugin.



# Upgrade advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

Users should uninstall all old versions of plugins, and install the latest versions.



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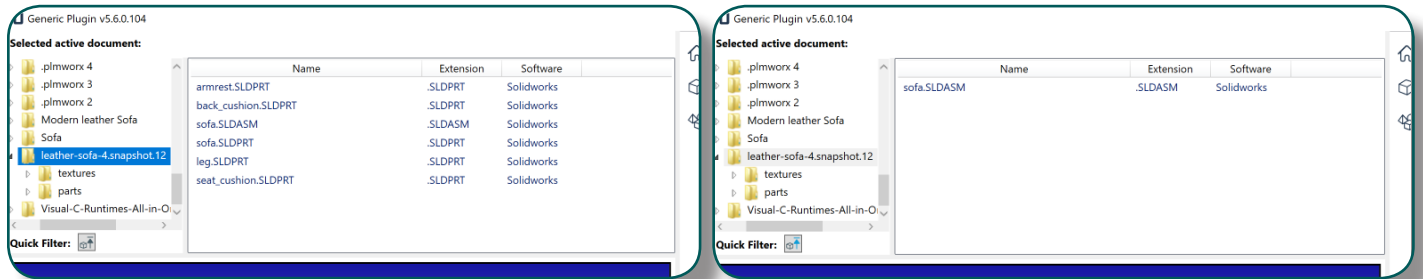
## Upchain v5.6

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.6.

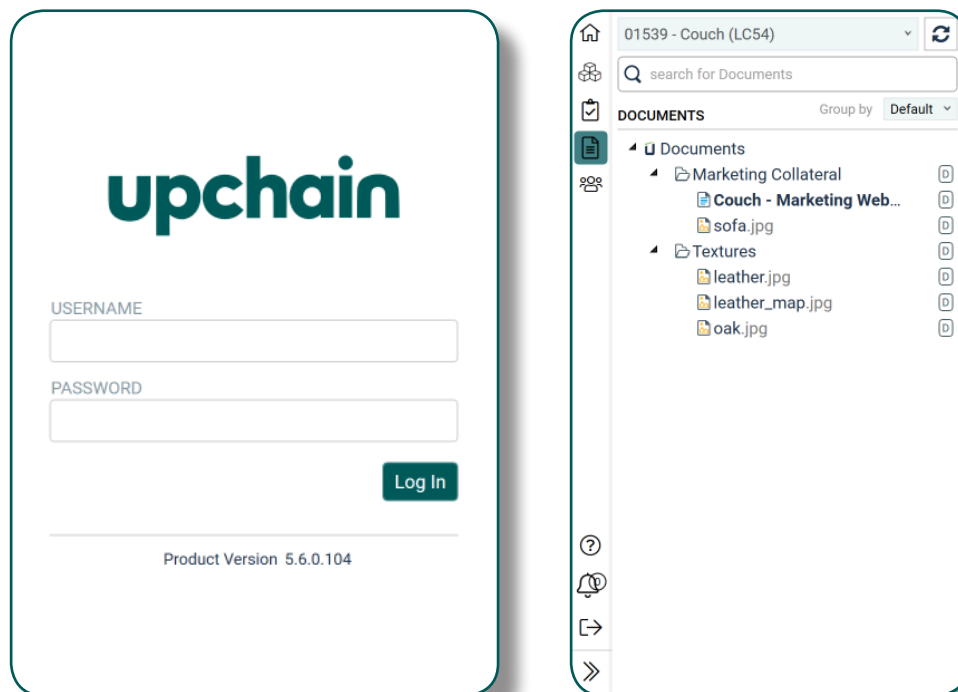
For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

## What's New

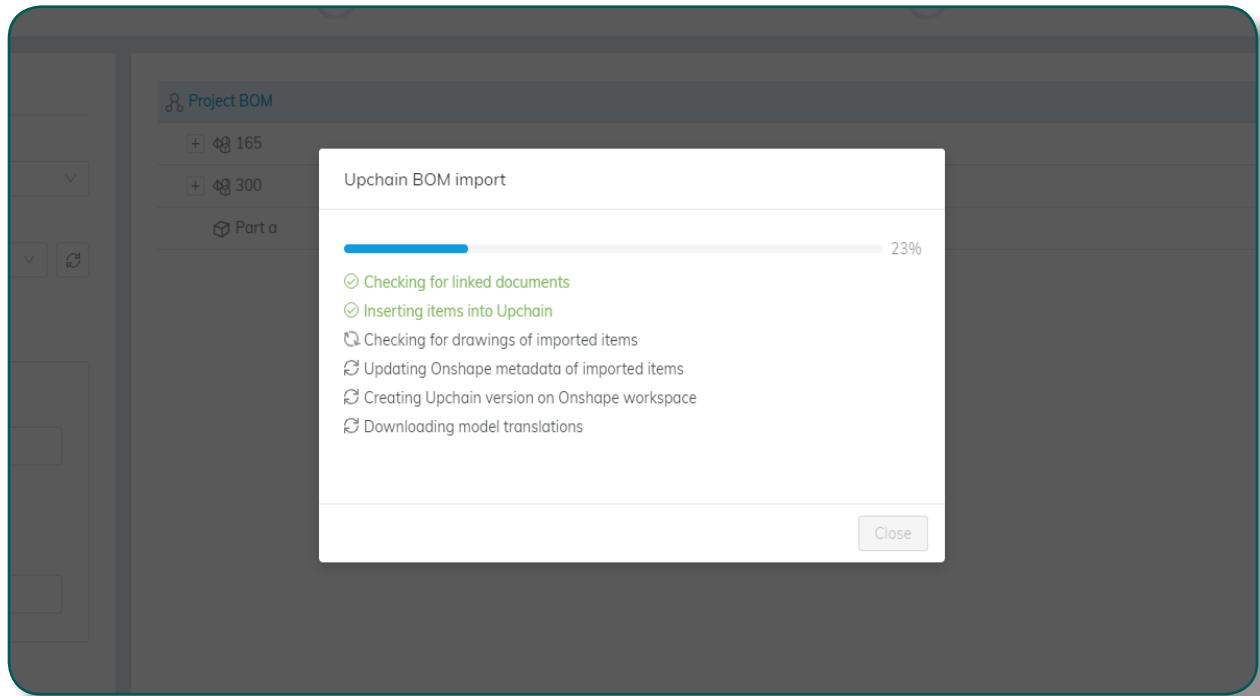
- We've updated the Upchain Generic Plugin with the ability to filter top assemblies, making it easier to find your parent files.



- We've started rebranding the Office Plugins — they are now updated with our new logo, icons, and colors.



- Our Onshape plugin now syncs drawings from Onshape to Upchain. Once imported into Upchain, the drawings will be displayed in the details view of the imported BOM item. They can also be downloaded as PDFs and opened in the PDF Viewer.



- Various back-end enhancements.

## Resolved issues

The following issues were resolved for Upchain v5.6.

- NX users getting an error when attempting to create items in the Upchain CAD plugin.
- Certain NX users were experiencing issues downloading BOM structures.

# Upgrade advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

Users should uninstall all old versions of plugins, and install the latest versions.



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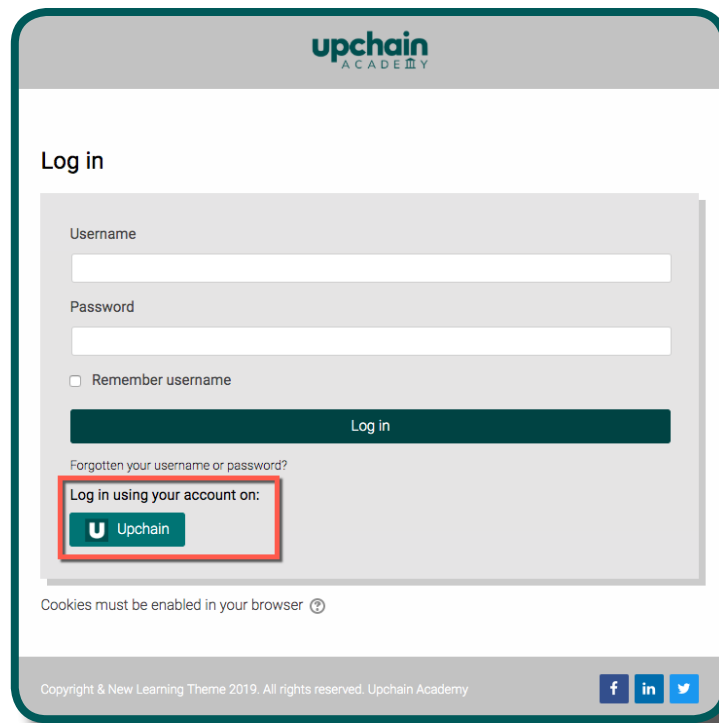
## Upchain v5.7

This document provides an overview of the new enhancements that were implemented in this release, and describes any important upgrade advisories and resolved issues. It also outlines the known issues, and workaround if applicable, that you may experience while using Upchain v5.7.

For more detailed information about Upchain, please refer to the Upchain product documentation, accessible through the product's user interface.

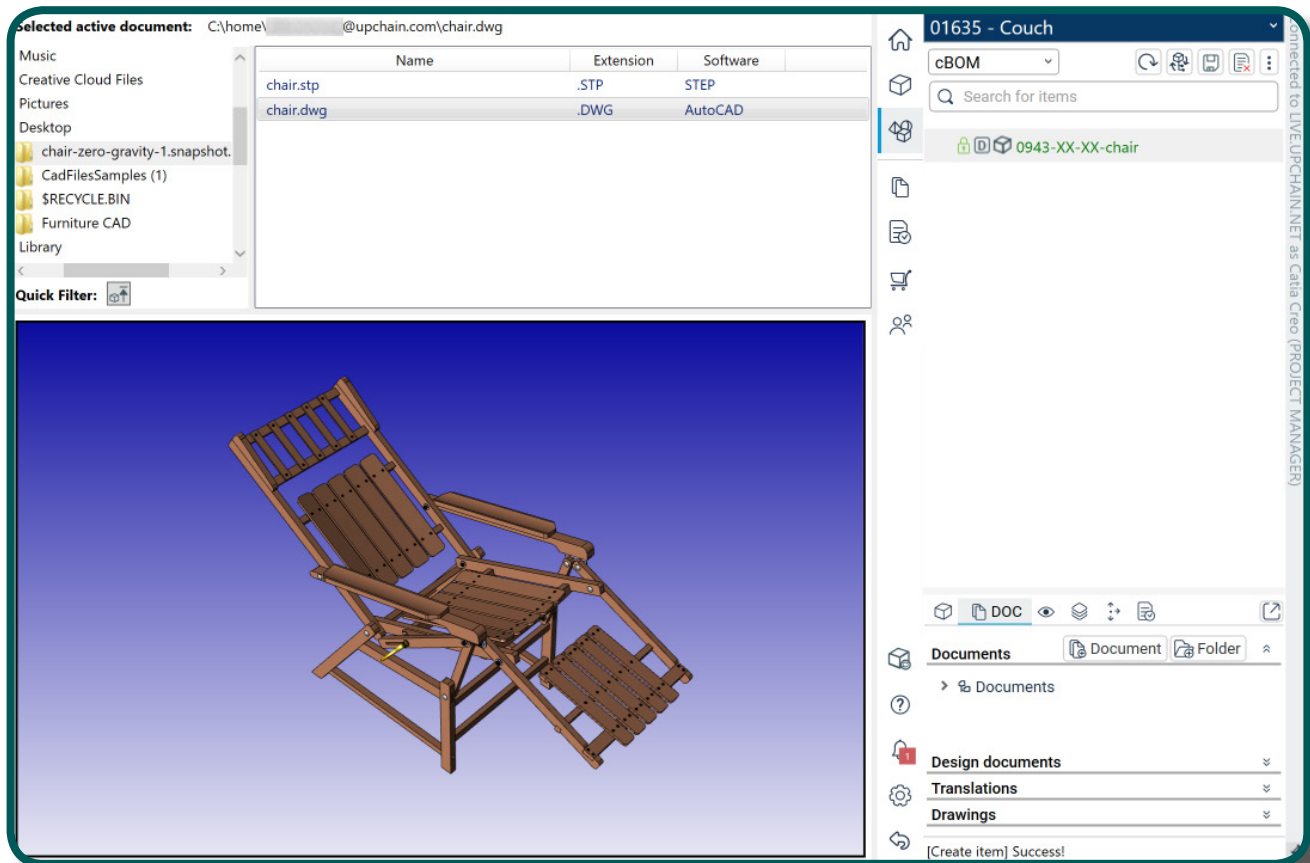
## What's New

- Updated our identity management system — this is part of our ongoing endeavour to enhance security across our platform. With the release of 5.7, you will receive an email asking you to **reset your password**. You will no longer be able to access Upchain with your previous password. If you work in more than one Upchain environment, you will receive separate emails for each environment to which this applies.
- Added Single Sign-On support for Upchain Academy. Users may now log in to the Academy with their Upchain credentials.



- Added webhooks for ECRs — once subscribed, users will receive notifications whenever the status of an ECR changes from one workflow state to another.
- Added support for SOLIDWORKS Toolbox libraries in the CAD plugin.
- When cloning or replacing items in the PTC Creo plugin, any registered drawings attached to those items will now reference the newly-created part.

- Added support for Autodesk Revit files through the Upchain Generic Plugin.



- Various back-end enhancements.



# Upgrade advisories

Please note the following advisories before proceeding with your product upgrade.

## Reinstall Plugins

Users should uninstall all old versions of plugins, and install the latest versions.

# Resolved issues

The following issues were resolved for Upchain v5.7.

- The statuses of documents and activities are now displaying correctly in search results.
- When using the NX or Catia plugins, users are now only given the option to edit a part when it is a valid action.
- When using an outdated version of the NX or PTC Creo plugins, users now receive direct links to download the updated version.
- When users working in the NX plugin select the **latest working** filter, all the latest files are now downloaded.



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## Upchain v5.8

We're marking the end of the summer with the release of Upchain v5.8, which brings many highly-anticipated features.

In this release, we wanted to focus on improving your daily workflow, thereby enabling you to work faster and more efficiently than ever before.

We'll give you the highlights here, and you can head over to Upchain Help for more details on a particular feature.

Also, just a friendly reminder to download and install the latest versions of any plugins you are using.

# What's New

## Advanced search

We heard you loud and clear, and we give you a faster, easier, and more precise way to sift through the mountain of data in your organization. Advanced parametric search enables you to narrow your search by defining the specific attributes of the object you are looking for. You can also save your search criteria to save yourself time when conducting future searches.

### Advanced search

Project ▾

Match All ▾

✖

Name ▾

equals ▾

Bicycle

+

+()

AND ▾

File ▾

Match All ▾

✖

File extension ▾

equals ▾

SLDPRT

+


+()

+ Add type

Delete search

Save search

Clear

Search 

# Enhancements

- We're beginning to implement the new UI changes we've secretly been working on. Your project management activities (tasks, stage gates, and milestones) are now displayed in a new and more intuitive way. This is your first sneak peek of something big!

While we roll out these changes, we may have to make tweaks to the product in the next few releases. **This release, you will not be able to create tasks within any of the plugins, and you will not see tasks in the CAD plugins specifically.** This update does not affect change management activities, including ECRs and issues.

Additionally, please note that **your previously-created project management activities will be temporarily unavailable** in the web application until Monday, September 9th, 2019. ECRs and issues will remain available, simply click their corresponding tabs in the activities interface. Should you have any questions about this process, please don't hesitate to contact us at [support@upchain.com](mailto:support@upchain.com).

- We've revamped our Onshape plugin. You can now do all your release work in Onshape, and then import released items directly to Upchain.
- We're hitting you with two more enhancements to drawings! First off, each time you check in a drawing, a DWG file will now automatically be generated, in addition to the translated PDF file. Upon release, your drawing will also be available in both these formats.

Secondly, once a drawing is released, the mapped attributes will be updated in the drawing title block within the PDF file. Now you can be sure that your drawings contain the most up-to-date information!

- We've updated viewer permissions for our CAD and document management system plugins. Viewers now only see published documents and released items.
- As always, our engineers are working hard to make Upchain faster and more reliable through various backend enhancements.

**Please bear with us as we update the documentation to reflect these changes.**

# Resolved Issues

- After a major revision, the minor revision number now properly resets to xx.
- Renamed documents can now be downloaded in all document management system plugins.
- When users working in the NX plugin select the **latest working** filter, all the latest files are now downloaded.
- Release items are now properly locked so no documents can be added to them.



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# Release Notes

## Upchain v5.9

As the leaves are changing colours and falling, we're dropping even more fantastic features with the release of Upchain v5.9.

In this release, we are giving you more control and customization than ever before, and adding your suppliers into the mix.

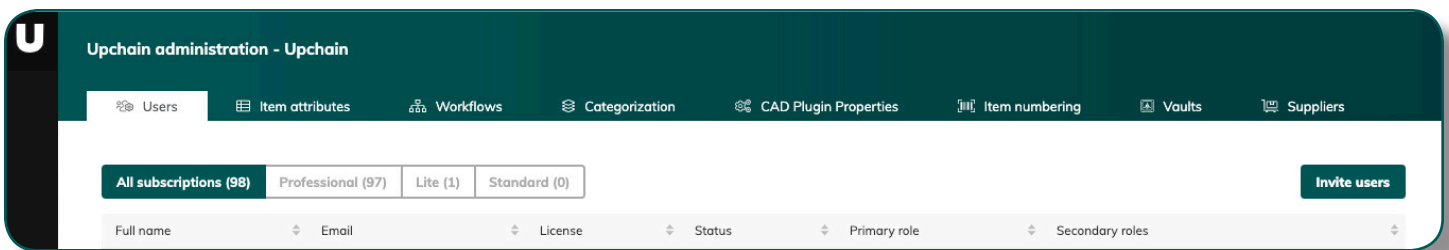
We'll give you the highlights here, and you can head over to Upchain Help for more details on a particular feature.

Also, just a friendly reminder to download and install the latest versions of any plugins you are using.

# What's New

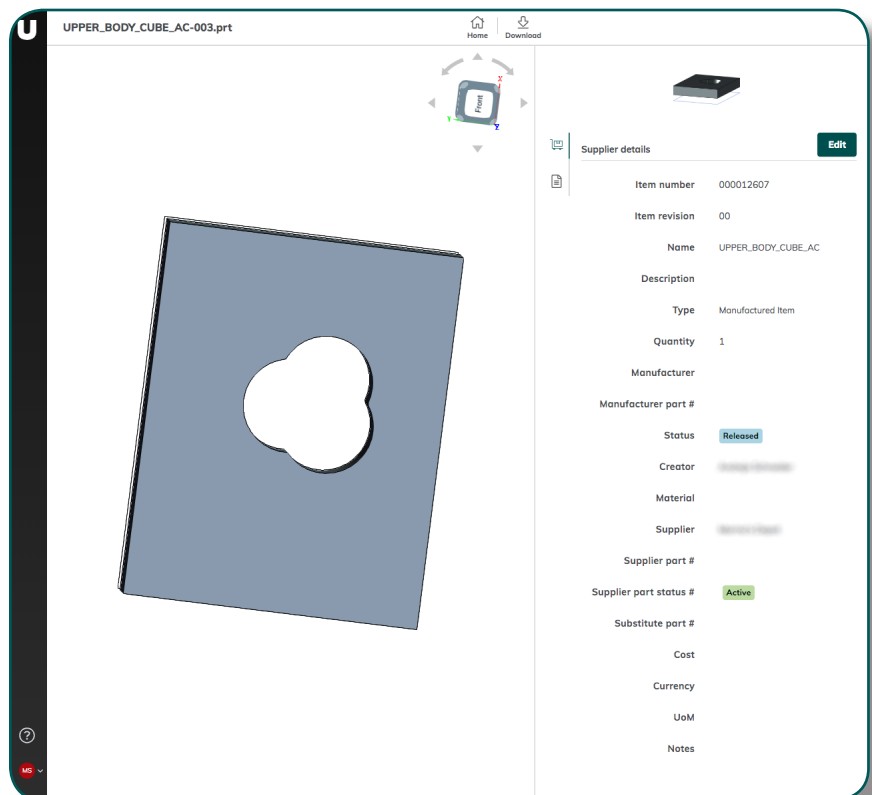
## Tenant Administration

The long-awaited and highly-anticipated tenant administration has arrived. We are handing over the reigns and letting you customize your environment like never before. The tenant administrator in your organization will be able to access and manage users, item attributes, workflows, categorization, CAD plugin properties, item numbering, vaults, and, new this release — suppliers!



## Supplier Viewer

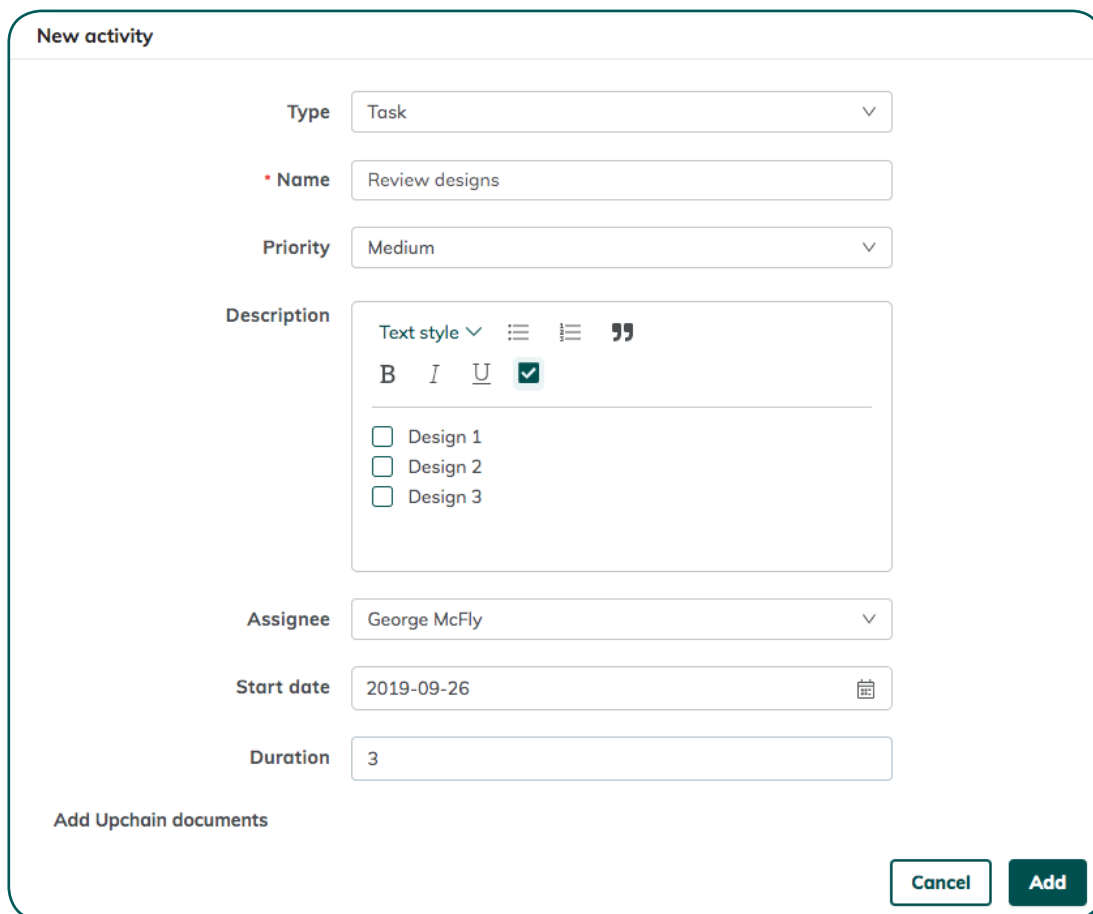
Let's all give a warm welcome to suppliers, who now have their own entry point into Upchain. After your tenant administrator adds a supplier to your environment, you will be able to add suppliers to items, and grant them access to view those items, enter their data, and attach quotes.



# What's New

## Rich Text Activity Descriptions

We've added Rich Text functionality to project management activity (tasks, stage gates, and milestones) descriptions, including the ability to add checklists. You can now format your descriptions exactly as you envisioned them. Rich Text will be read-only in all plugins.



The screenshot shows a 'New activity' form with the following fields and options:

- Type:** Task (dropdown)
- Name:** Review designs (text input)
- Priority:** Medium (dropdown)
- Description:** A rich text editor with a toolbar containing 'Text style', bold (B), italic (I), underline (U), a checked checkbox icon, bulleted list, numbered list, and quote icons. Below the toolbar is a checklist with three items: 'Design 1', 'Design 2', and 'Design 3', each with an unchecked checkbox.
- Assignee:** George McFly (dropdown)
- Start date:** 2019-09-26 (calendar icon)
- Duration:** 3 (text input)
- Footer:** 'Add Upchain documents' link and 'Cancel'/'Add' buttons.



# Enhancements

- Remember advanced search from last release? We've now added it to plugins as well. Advanced parametric search enables you to narrow your search by defining the specific attributes of the object you are looking for. You can also save your search criteria to save yourself time when conducting future searches.
- We've added the ability to attach items to an issue during and after the creation process, both from the web application and the CAD plugins. Designers no longer need to leave their workspace and reviewers now have a simplified workflow.
- You can now preview even more file types before opening them, thereby decreasing the steps in your workflow. We've added document preview support for .xml, .txt, .pptx, .xlsx, and .docx files.
- We introduced MuleSoft as an enterprise API and integration gateway. The benefits of this include enterprise-grade security and ease of integration with 3rd party enterprise systems.
- As always, our engineers are working hard to make Upchain faster and more reliable through various backend enhancements.

**Please bear with us as we update the documentation to reflect these changes.**

# Resolved Issues

- When viewing a compare in the 3D viewer, added and removed parts are now being shown as different colours.
- When attaching documents to items or issues, the document checkboxes are now being displayed correctly for all users.
- All ECRs linked to documents are now correctly navigating the user to the ECR interface.



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Upchain is a collaborative engineering platform. Our mission is to connect engineers with manufacturers, suppliers, procurement teams, project managers, and other product stakeholders to bring complex products to market — faster and more efficiently than ever before.

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# Release Notes

## Upchain v5.10

The weather might be getting colder, but Upchain v5.10 is hot off the press.

This release is all about simplicity, clarity, and organization, and includes improvements for both designers and project managers.

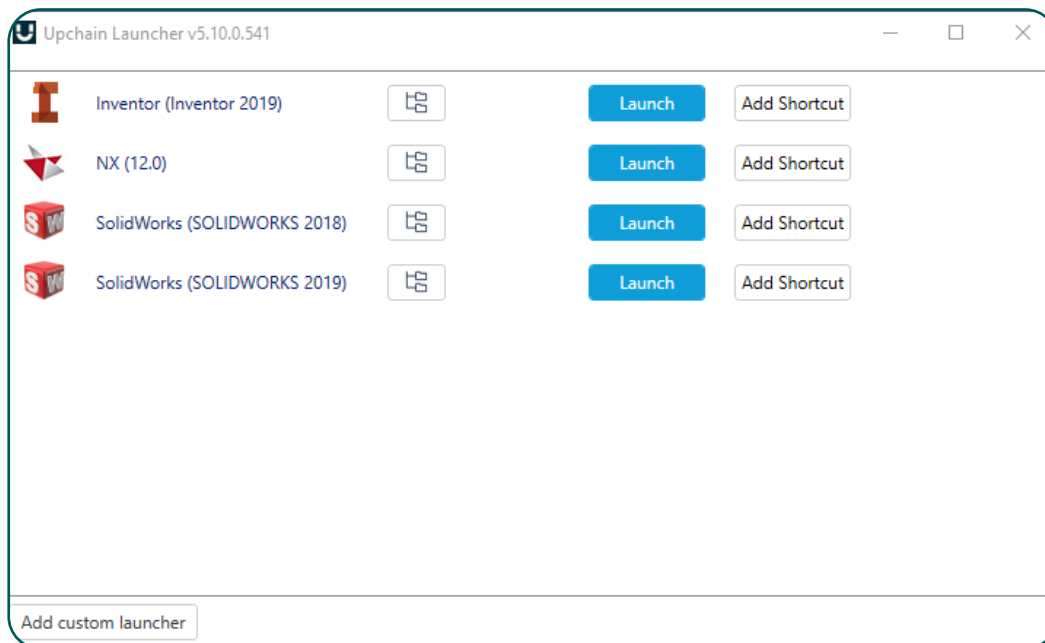
We'll give you the highlights here, and you can head over to Upchain Help for more details on a particular feature.

Also, just a friendly reminder to download and install the latest versions of any plugins you are using.

# What's New

## Upchain CAD Connector

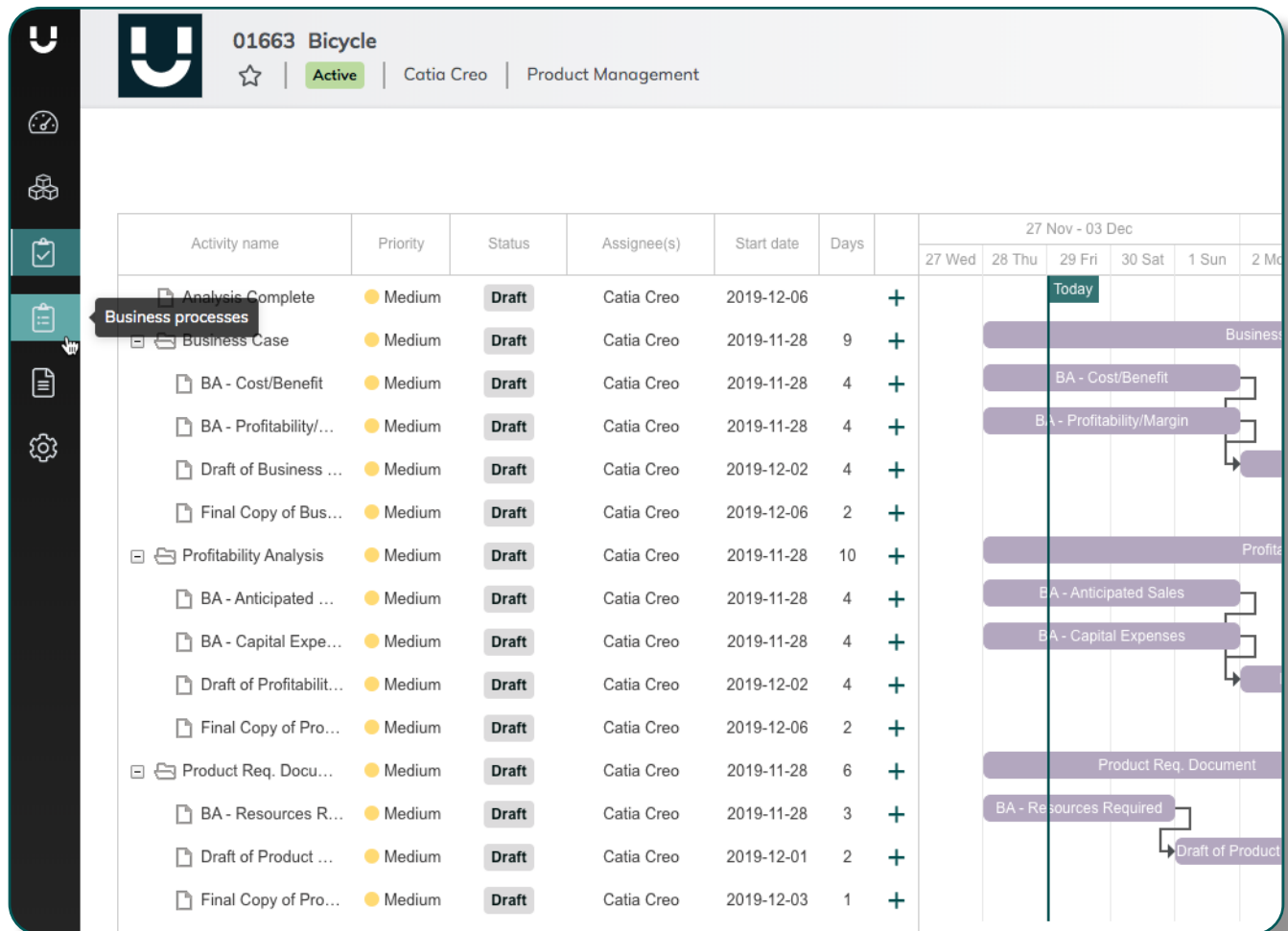
We've simplified the way you download and launch CAD plugins. The Upchain CAD Connector is a hub for all of Upchain's dedicated CAD plugins: Solidworks, Catia, NX, Inventor, and PTC Creo. Use this application to manage and launch the plugins for your preferred CAD systems — no need to download and install a separate plugin for each CAD system you work with! As shown below, the CAD Connector also supports multiple versions of the same application, which are launched as individual instances.



## Business Processes

We're making it quicker and easier to access the content you need by separating your activities from business processes. Your tasks, milestones, and stage gates remain in the activities tab, while your ECRs, ECNs, and Issues are moved to the new business process tab. The RFQ tab has been removed from business processes, but RFQs can still be found under Issues.

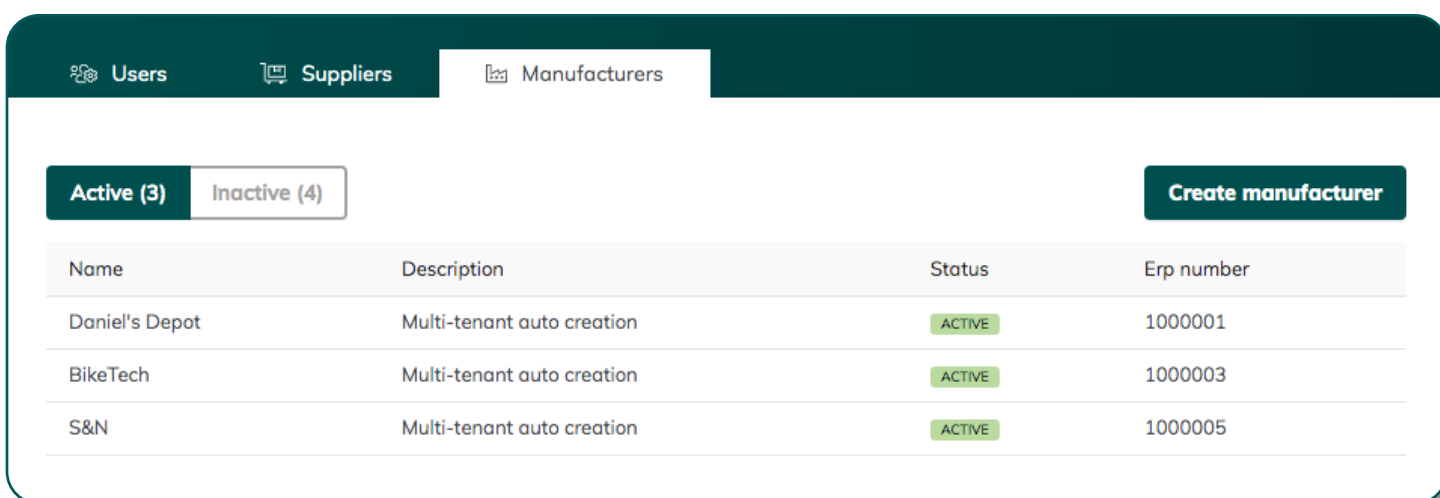
# What's New



## Manufacturer Support

Manufacturers are now available in Upchain. We've given your tenant administrator the power to add manufacturers, and you the ability to select them for any of your purchased parts. Manufacturers will also automatically be created from eCAD imports.

# What's New

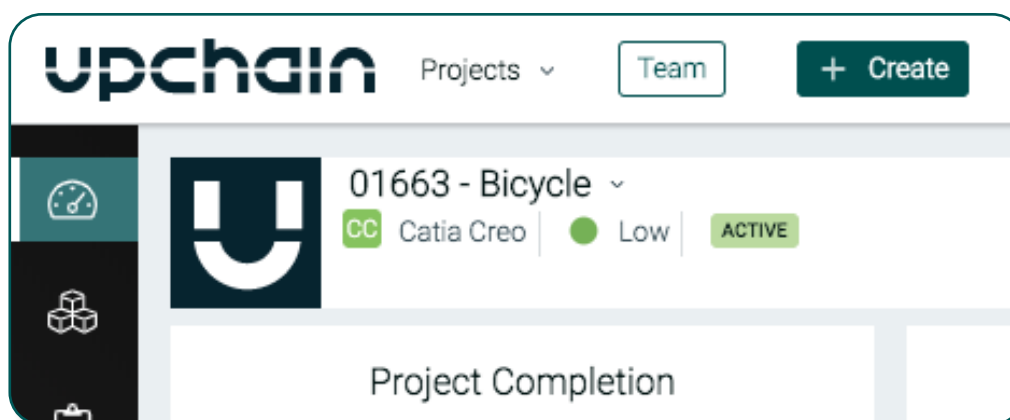


The screenshot shows the 'Manufacturers' tab in the Upchain application. It features a header with 'Users', 'Suppliers', and 'Manufacturers' tabs. Below the tabs are filters for 'Active (3)' and 'Inactive (4)', and a 'Create manufacturer' button. A table lists three active manufacturers: Daniel's Depot, BikeTech, and S&N, all with a status of 'ACTIVE' and an 'Erp number'.

Name	Description	Status	Erp number
Daniel's Depot	Multi-tenant auto creation	ACTIVE	1000001
BikeTech	Multi-tenant auto creation	ACTIVE	1000003
S&N	Multi-tenant auto creation	ACTIVE	1000005

## Upchain Rebrand

As you may have noticed, Upchain has rebranded! Our new logo is now present in all areas of the application, in the help center, and in the Upchain Academy.



# Enhancements

- Project managers rejoice — we've returned full workflow functionality to tasks! All newly-created tasks now require a workflow. Don't worry, we've configured a default task system workflow to get you started. Tasks also now support multiple assignees through workflows.
- We heard your confusion, so we moved some key messages from the BOM Wizard to your CAD plugin. You will now see messages for the following validation types: root check in validation, SpeedPAK validation, root check in children validation, and suppressed files validation.
- We've added a workflow tab to your ECR interface so you can rapidly access information about an ECR's history and see the next steps in the workflow.
- To improve CAD plugin performance for large assemblies, the cBOM will no longer automatically refresh after you download or check out an item from the project BOM. You can toggle this feature on or off in the plugin settings.
- You now have new options available to you when checking in CAD files that contain SOLIDWORKS suppressed components.
- We've added a few performance enhancements to the NX plugin.

Firstly, custom properties will no longer be cached — they are now read from hidden files by default.

Secondly, users that work in load structure only mode will notice that the cBOM now only displays items that they actually have loaded in their CAD application.

Lastly, any item attributes you have set up CAD mappings for will now be mapped upon item creation. No need to check items out and back in to see the attributes mapped correctly!

- In the Upchain Academy, we've been busy making some major updates to our Design Fundamentals course. These changes include new content on: copying files, editing released parts, resolving BOM Wizard anomalies, and working with load filters. We are also merging all the different versions of the course — we had one for each CAD plugin — into one main course.
- We've added support for Catia v5 r23.

# Enhancements

- As always, our engineers are working hard to make Upchain faster and more reliable through various backend enhancements.

**Please bear with us as we update the documentation to reflect these changes.**



# Resolved Issues

- For users working in the eBOM of any CAD plugin, the “download latest version” action is now downloading the correct version.
- When trying to check out a document in the Office plugin, users are now notified if there is a newer version available.
- The Office plugin no longer times out when importing attributes from Excel for large assemblies.
- When changing their home folder location in a CAD plugin, users no longer have to log out and log in again for the changes to be registered when creating items.
- When attempting to replace shared subassemblies in a CAD plugin, the subassemblies are now successfully replaced across all parents.
- When working with ECNs, users can no longer edit attached documents after the ECN workflow is complete.
- Catia groups no longer cause errors in the Catia plugin. Now, when creating items, Upchain will flatten Catia groups.



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# Release Notes

## Upchain v5.11

As the year draws to a close, we've got one final gift to give — the release of Upchain v5.11.

This release we focused on streamlining the way designers work in our plugins, as well as adding more layers of organization and customization to business processes.

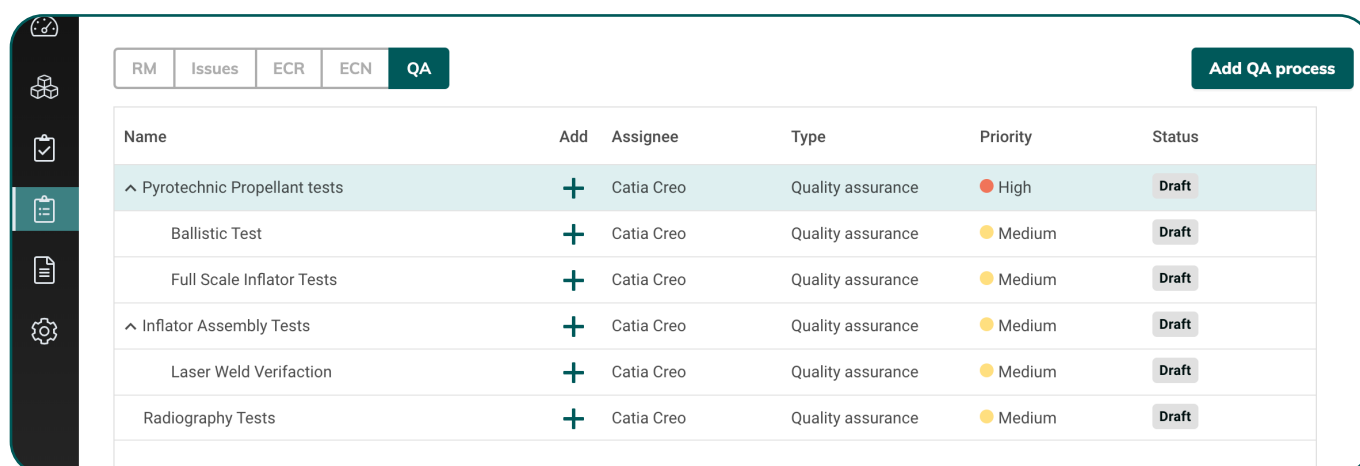
We'll give you the highlights here, and you can head over to Upchain Help for more details on a particular feature.

Also, just a friendly reminder to download and install the latest versions of any plugins you are using.

# What's New

## Requirements Management & Quality Assurance

We've added two new business process types to Upchain — requirements management and quality assurance. You can now add your requirements and QA processes to Upchain, assign them to specific people, attach documents to them, link them to items and create child tasks and processes.



QA						Add QA process
Name	Add	Assignee	Type	Priority	Status	
^ Pyrotechnic Propellant tests	+	Catia Creo	Quality assurance	High	Draft	
Ballistic Test	+	Catia Creo	Quality assurance	Medium	Draft	
Full Scale Inflator Tests	+	Catia Creo	Quality assurance	Medium	Draft	
^ Inflator Assembly Tests	+	Catia Creo	Quality assurance	Medium	Draft	
Laser Weld Verification	+	Catia Creo	Quality assurance	Medium	Draft	
Radiography Tests	+	Catia Creo	Quality assurance	Medium	Draft	

## Activity Types

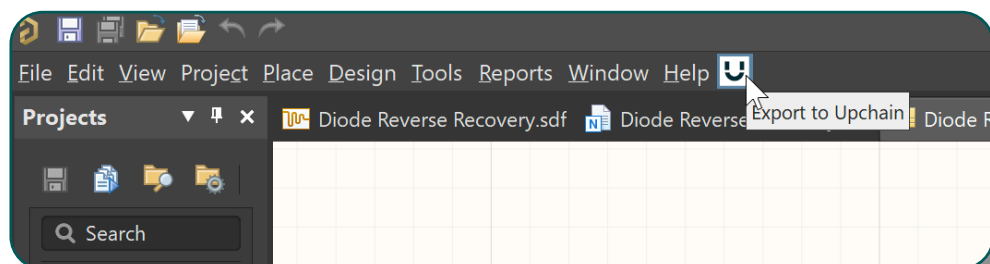
In conjunction with the above, we've added a new section to the tenant administration interface — activity types. You can now add more granularity and precision to your projects by creating custom types of tasks, requirements and QA processes.

# What's New

Workflows		Activity Types	
	Task type	Business process type	Status
...	Task	Project management activity	Active
...	Stage gate	Project management activity	Active
...	Milestone	Project management activity	Active
...	Requirements management	Requirements management	Active
...	Quality assurance	Quality assurance	Active
...	Regulatory Requirements	Requirements management	Draft
...	Engineering Standards	Requirements management	Draft
...	Software Requirements	Requirements management	Active
...	System Requirements	Requirements management	Active
...	Electrical Requirements	Requirements management	Active

## Altium Exporter

Our Altium Exporter makes it easy to export eCAD from Altium Designer to Upchain. At the click of a button, export a full eCAD package that contains all the data you need to add your electrical items to Upchain.



# Enhancements

- We've made linking CAD files to existing Upchain BOM items easier and more intuitive. With your CAD model open, left-click the Upchain item in the project BOM and select this new option.
- We've increased the maximum manufacturer name length to 256 characters.
- We've decreased the amount of time it takes to download large amounts of drawings in all the CAD plugins.
- As always, our engineers are working hard to make Upchain faster, more secure, and more reliable through various backend enhancements.

**Please bear with us as we update the documentation to reflect these changes.**

# Resolved Issues

- The material attribute is now correctly mapping from SOLIDWORKS to Upchain.
- When creating and checking in items in the PTC Creo plugin, DWG and PDF files are now being created.
- When removing parts from assemblies in the NX plugin, the parts are now correctly removed from the cBOM and eBOM.
- SOLIDWORKS users are now able to use the replace action in the Upchain plugin multiple times in a row without performance impacts.
- Users are no longer able to edit the details of tasks that were created in a CAD plugin once the task's workflow has started.
- Queries in advanced search that contain the categorization and categorization attribute fields now return search results correctly.

# Upgrade Advisory

As of January 14, 2020, Microsoft will no longer provide security updates or support for PCs running Windows 7 and Windows Server 2008. This means that computers running on Windows 7 will be more vulnerable to security risks and viruses. To avoid these risks, Microsoft recommends upgrading to Windows 10.

At Upchain, the security of our partners' data is a top priority, therefore, **with the release of 5.12 in Q1 2020, we will no longer support Windows 7.** To help partners safeguard their personal information, like their product data, we strongly recommend that partners using Windows 7 upgrade to Windows 10.



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# Release Notes

Upchain v5.12

The Upchain team is very excited to bring you v5.12!

This release includes significant updates to key Upchain nomenclature, as well as a wealth of improvements for tenant admins, designers and project managers.

We'll give you the highlights here. Please bear with us as we continue to update our Help Center and Upchain Academy.



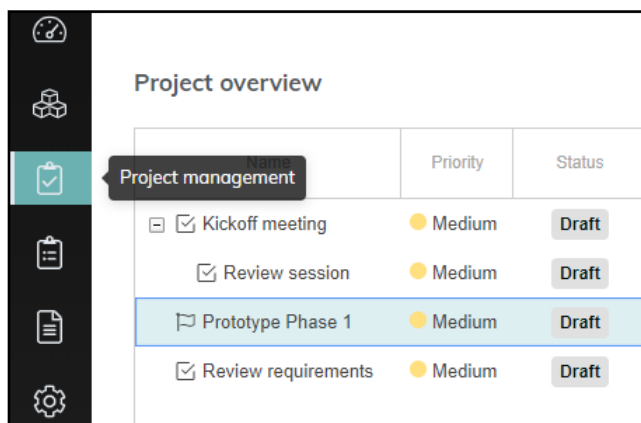
# What's New

## Updated Nomenclature: Business Processes and Project Management

We've updated our nomenclature for key activities and processes to bring them in line with industry best practices. For one, we've dropped the E (for engineering) from ECRs and ECNs. While engineering is at the heart of everything Upchain, not all change requests or change notices originate with engineering! Second, issues have been renamed investigation requests to encompass a wider range of use cases.




These changes will not affect existing activities and processes. Here's a quick summary:


- The **Activities** section is now **Project management**
- **Engineering change request** (ECR) is now simply **change request** (CR)
- **Engineering change notice** (ECN) is now simply **change notice** (CN)
- **Issue** is now **investigation request** (IR)




The screenshot shows a sidebar with icons for various functions. The main content area is titled "Project overview" and contains a table with the following data:

	Priority	Status
<b>Project management</b>		
<input checked="" type="checkbox"/> Kickoff meeting	Medium	Draft
<input checked="" type="checkbox"/> Review session	Medium	Draft
<input checked="" type="checkbox"/> Prototype Phase 1	Medium	Draft
<input checked="" type="checkbox"/> Review requirements	Medium	Draft





01822 SD1 Headphones

 | 

Active

 | Steve Smith | Upchain

Requirements

Investigation requests

Change requests

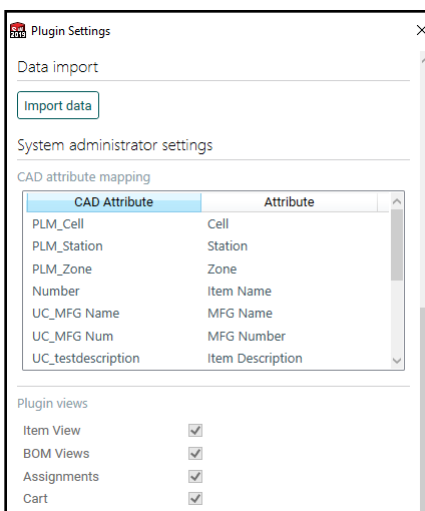
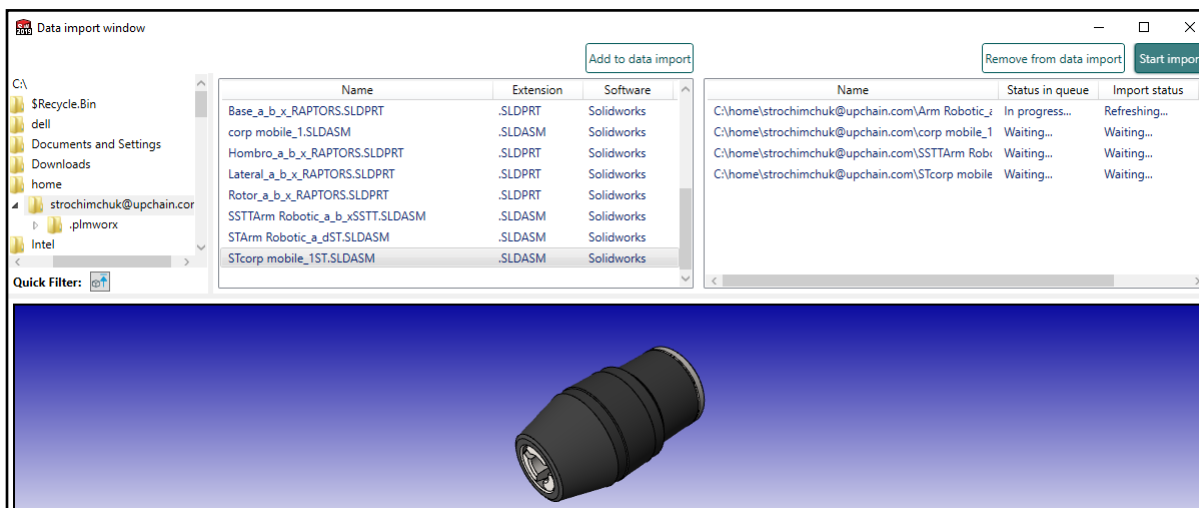
Change notices

Quality assurance

# What's New

## Data Migration

We're making it easy to import large sets of data into Upchain. All of our CAD plugins now include a data import tool, which enables your team to import CAD files in bulk from a folder! If a specific folder is selected, you can easily filter by top-level assemblies, select each assembly to include in the import, and Upchain will read their structures. The data import tool is found within your CAD plugin settings. Stay tuned as we continue to add enhancements to this tool!





# What's New


## LDAP Support


Upchain can now be configured to integrate with LDAP instances, which enables an organization's domain users to log in to Upchain using their domain credentials. If your organization is interested in configuring LDAP integration with Upchain, please contact [sales@upchain.com](mailto:sales@upchain.com).

**User management**

 **Users**  
Invite new users, modify existing users, and assign licenses and user roles.

 **Suppliers**  
Invite and manage suppliers to enable external collaboration.

 **Manufacturers**  
Invite and manage manufacturers to enable external collaboration.

 **User federations**  
Configure federated identity management to enable your users to log in to Upchain using their LDAP credentials.

**Create user federation**

\* Name

User federation

Description

Integrating our local LDAP with Upchain

\* Connection URL

ldap://

\* Bind DN

cn=admin,dc=test,dc=com

\* Bind credential

.....

\* Users DN

ou=people,dc=test,dc=com

\* UUID LDAP attribute

entryUUID

\* Username LDAP attribute

uid

\* RDN LDAP attribute

uid

Cancel

Save

# Enhancements

- We've made a variety of improvements to Tenant Administration:

We've made it easier to create individual items using our CAD plugins. Previously, when creating an item, you were required to enter the item name, type and description. Now, any new item will be assigned the same name as the file, and the item type will be manufactured item. This setting - `show.new.item.window` - can be found in your tenant properties tab, and is disabled by default.

We made the user menu consistent with the rest of the platform by including access to My Profile and Plugins. The user menu is found in the bottom-left corner, and is most commonly represented by your initials.

The **CAD plugin properties** tab is now labeled **Tenant properties**.

Suppliers and Manufacturers may now be sorted by columns.

A column has been added for prefix keys to make it easier to see what prefix keys are already in use when creating custom activity types.

- We've streamlined our CAD plugins by including the Generic Plugin within the CAD Connector. By default, the CAD Connector will install the Generic Plugin, in addition to the plugins specific to your CAD software.
- We've added intelligence to our ECN module. Now, when working with an ECN, orphaned items can be redistributed more efficiently, making it easier to resolve anomalies.
- To make it easier to identify objects in the Gantt chart as well as within requirements and quality assurance management, we've added unique icons for tasks, milestone, stage gates, requirements and QA processes.
- The UI and branding is now consistent across our CAD and Office plugins.
- As always, our engineers are working hard to make Upchain faster and more reliable through various backend enhancements.

**Please bear with us as we update the documentation to reflect these changes.**

# Fixes

- When creating a new item in a CAD plugin, custom item type icons are now displaying properly.
- When deactivating a user and reassigning their tasks to another assignee, selecting Cancel will successfully revert the tasks back to the original assignee. The tasks will not be reassigned until you select Save to confirm the deactivation of the user.
- Our email notifications are displaying consistently in both Outlook and Gmail, and are fully visible in dark mode.
- Within the project management, requirements management, and quality assurance viewers, clicking expand/collapse on an object will no longer open the details pane. If the details pane is open, clicking expand/collapse on an object will no longer change the current detail view.
- Projects that have been set to “public” are now properly displaying in the project dropdown menu for all users within the same tenant, as well as being searchable. Further, only the project manager and tenant admin may edit the project privacy settings.
- When working with change notices, the major and minor revisions are now visible within the item number for all child items.
- Suppliers are now able to download documents directly from the supplier view.
- Suppliers may now be removed from BOM items within the supplier tab of the item details view.
- When using the Gantt chart, the slack and critical path settings are now preserved when refreshing or returning to the Project Management page.
- Catia V5R29 files are now visualizing properly within the Generic Plugin.
- The image preview for BOM items and documents is no longer displaying as stretched for certain image dimensions.
- The tables within the requirements and quality assurance management viewers resize when you resize your browser.



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# Release Notes

Upchain v5.13

The Upchain team is very excited to bring you v5.13!

We've packed a ton of new features with this release, including key improvements to the BOM, projects settings, tenant administration, and Advanced Search.

We'll give you the highlights here. Please bear with us as we continue to update our Help Center and Upchain Academy.

# What's New

## BOM Management

We've redesigned the Bill of Materials view within the web app by adding a BOM navigation tree on the left side of the view. From there, you can expand/collapse your end items, and select any item to display the BOM attribute details within the center of the view.

You're able to change the BOM filters, add end items, paste items as end items, and export BOM reports from the left pane. You can also collapse the left pane to gain some extra real estate within the center view once you've chosen a set of items to work with.

Please note that in this release, we've removed the BOM quick search bar as we continue to make improvements to our search features in future releases.

Ultimately, these changes make it much easier to work with large sets of data, and your BOM will load faster than ever!

The screenshot displays the Upchain BOM Management interface. On the left, a navigation tree under the heading 'BOM' shows a hierarchy of items, including '11171 - Upchain' and various sub-items like 'ARM ROBOTIC\_A' and 'ARM 01\_A'. The main area on the right shows a table of BOM items with columns for Item Name, Status, Files, Visualization, Tasks, Creator, Qty, Cost, and Currency code. The table lists items such as 'ARM 01\_A', 'ARM 02\_A', 'ARM 03\_A', 'ARM 05\_A', 'ARM 07\_A', 'BASE\_A', 'HOMBRO\_A', 'LATERAL\_A', 'ROTOR\_A', 'ARM 06\_A', 'ARM 04\_A', 'ElectricalPackage', and 'Software Package'. The status of these items varies, including 'DEVELOPMENT', 'PENDING', and 'RELEASED'. The interface also includes a 'Close Project' button in the top right corner and a '+ New view' button at the bottom.

Item Name	Status	Files	Visualization	Tasks	Creator	Qty	Cost	Currency code
ARM ROBOTIC_A	DEVELOPMENT							
ARM 01_A	DEVELOPMENT					1.0000	560.0000	USD
ARM 02_A	DEVELOPMENT					2.0000	50.0000	USD
ARM 03_A	PENDING					2.0000	450.0000	USD
ARM 05_A	DEVELOPMENT					1.0000	784.0000	USD
ARM 07_A	DEVELOPMENT					4.0000	45.0000	USD
BASE_A	DEVELOPMENT					1.0000	95.0000	USD
HOMBRO_A	DEVELOPMENT					2.0000	184.0000	USD
LATERAL_A	DEVELOPMENT					2.0000	49.0000	USD
ROTOR_A	DEVELOPMENT					1.0000	78.0000	USD
ARM 06_A	RELEASED					6.0000	15.0000	USD
ARM 04_A	RELEASED					1.0000	650.0000	USD
ElectricalPackage	DEVELOPMENT					3.0000		
Software Package	DEVELOPMENT					1.0000		



# What's New

## License Permissions

We're introducing new user permissions for projects based on license types assigned to users. Tenant administrators will be familiar with the types of licenses: Professional, Standard (Team), and Lite (Participant).

Here's a summary of the changes included in this release, which affect only project-level permissions:

- A project can be created by a user with a Professional or Standard license only.
- Only the creator of the project can view and access a project in draft state.
- Only the creator of the project can activate the project.
- Once a project is active, only users with a Professional license will be able edit the project settings, and add additional members.

- Within the project settings, projects can have one of two states: private or public.
- Active public projects can be viewed by all users in the tenant.
- Private projects can only be viewed by project members. Projects are private by default.

Our license-based permissions will continue to evolve with our next releases, so stay tuned for more updates!

# What's New

## Project Dashboards

We've added additional project dashboard views available to Professional and Standard license holders. When viewing the dashboard for a project, you'll be able to switch between the default view, the project management view, and the design view.

The default view contains exactly the same information you're accustomed to viewing here, including a high-level overview of the completed assignments, overdue assignments, and critical assignments within the project.

The project management dashboard provides a deeper overview of the individual and total cost of the BOM items for each project, the percentage of items that have been released as well as requisitioned, and a list of your assigned work on the right side.

Dashboard

Project management
Default
Design
Project management

Item	Status	eBOM	Qty	UOM	Unit Cost	Total Cost	Released	Requisitioned
11000 - 5130demo						844.00 USD	0%	0%
00094-TEST-XX-XX-001-CCASSEMBLAGE SUPER...	DEVELOPMENT	1	1	EA		844.00 USD	0%	0%
00095-TEST-XX-XX-001-CCBLOC BLOWER-TEST...	DEVELOPMENT	0	1	EA	100.00 USD	100.00 USD	0%	0%
00096-TEST-XX-XX-001-CCBOUCHON-TESTUCC	DEVELOPMENT	0	1	EA	34.00 USD	34.00 USD	0%	0%
00097-TEST-XX-XX-001-CCBUG CATCHER-TEST...	DEVELOPMENT	0	1	EA	0.00 USD	0.00 USD	0%	0%
00098-TEST-XX-XX-001-CCCECROU PAPILLON T...	DEVELOPMENT	0	6	EA	0.00 USD	0.00 USD	0%	0%
00099-TEST-XX-XX-001-CCENGRENAGE SUPER...	DEVELOPMENT	0	2	EA	54.00 USD	108.00 USD	0%	0%
00100-TEST-XX-XX-001-CCJOINT-TESTUCC	DEVELOPMENT	0	3	EA	0.00 USD	0.00 USD	0%	0%
00101-TEST-XX-XX-001-CCPAPILLON EXTRÉMI...	DEVELOPMENT	0	2	EA	53.00 USD	106.00 USD	0%	0%
00102-TEST-XX-XX-001-CCPAPILLON MILIEU T...	DEVELOPMENT	0	1	EA	0.00 USD	0.00 USD	0%	0%
00103-TEST-XX-XX-001-CCPIECE ARRIERE-TES...	DEVELOPMENT	0	1	EA	124.00 USD	124.00 USD	0%	0%
00104-TEST-XX-XX-001-CCPIECE AVANT 1-TES...	DEVELOPMENT	0	1	EA	20.00 USD	20.00 USD	0%	0%
00105-TEST-XX-XX-001-CCPIECE AVANT-TESTU...	DEVELOPMENT	0	1	EA	0.00 USD	0.00 USD	0%	0%
00106-TEST-XX-XX-001-CCPOULIE SUPERCHAR...	DEVELOPMENT	0	1	EA	0.00 USD	0.00 USD	0%	0%
00107-TEST-XX-XX-001-CCROND AVANT-TESTU...	DEVELOPMENT	0	1	EA	0.00 USD	0.00 USD	0%	0%
00108-TEST-XX-XX-001-CCROTOR EDWIN - 2.T...	DEVELOPMENT	0	1	EA	40.00 USD	40.00 USD	0%	0%
00109-TEST-XX-XX-001-CCROTOR EDWIN-TEST...	DEVELOPMENT	0	1	EA	0.00 USD	0.00 USD	0%	0%
00110-TEST-XX-XX-001-CCTIGE PAPILLON TES...	DEVELOPMENT	0	1	EA	0.00 USD	0.00 USD	0%	0%
00111-TEST-XX-XX-001-CCVIS AVANT PLATINE...	DEVELOPMENT	0	6	EA	30.00 USD	180.00 USD	0%	0%
00112-TEST-XX-XX-001-CCVIS AVANT-TESTUCC	DEVELOPMENT	0	12	EA	0.00 USD	0.00 USD	0%	0%
00113-TEST-XX-XX-001-CCVIS BUG CATCHER-T...	DEVELOPMENT	0	4	EA	33.00 USD	132.00 USD	0%	0%
00114-TEST-XX-XX-001-CCVIS ARRIERE SUPER...	DEVELOPMENT	0	12	EA	0.00 USD	0.00 USD	0%	0%
00115-TEST-XX-XX-001-CCVIS ARRIERE TES...	DEVELOPMENT	0	1	EA	0.00 USD	0.00 USD	0%	0%

My Assignments

Hooray! You currently have no assignments.  
Go enjoy your day.

# What's New

## Project Dashboards cont'd

The design dashboard provides an overview of your recently created objects, including BOM items and workflow actions, your assigned work, an activity stream of all actions performed within that project, and - last but certainly not least - a full list of all objects currently locked by you. This includes BOM items as well as documents.

From this list, you can clear (cancel) your check out lock on any individual object, or you can select 'Clear all' to cancel your check out for all objects at once - a very convenient timesaver!

Dashboard Design


**My Recently Created Objects**

Name	Description	Creation Date
CCASSEMBLAGE SUPERCHARG...		2020-03-18
Close or Archive Project		2020-03-18
Activation		2020-03-18

**My Locked Objects** Clear all

Name	File	Description	Locked Date	Clear
00094-TEST-XX-XX.001...	ccAssemblage...		2020-03-19	Clear
00095-TEST-XX-XX.001...	ccBloc Blower...		2020-03-19	Clear
00096-TEST-XX-XX.001...	ccBouchon-tes...		2020-03-19	Clear
00097-TEST-XX-XX.001...	ccBug catcher...		2020-03-19	Clear
00098-TEST-XX-XX.001...	ccEcrou papillo...		2020-03-19	Clear
00099-TEST-XX-XX.001...	ccEngrenage S...		2020-03-19	Clear
00100-TEST-XX-XX.001...	ccJoint-testUC...		2020-03-19	Clear
00101-TEST-XX-XX.001...	ccPapillon extr...		2020-03-19	Clear
00102-TEST-XX-XX.001...	ccPapillon mili...		2020-03-19	Clear
00103-TEST-XX-XX.001...	ccPiece arriere...		2020-03-19	Clear
00104-TEST-XX-XX.001...	ccPiece avant ...		2020-03-19	Clear
00105-TEST-XX-XX.001...	ccPiece avant...		2020-03-19	Clear
00106-TEST-XX-XX.001...	ccPoulie super...		2020-03-19	Clear
00107-TEST-XX-XX.001...	ccRond avant t...		2020-03-19	Clear
00108-TEST-XX-XX.001...	ccRotor Edwin ...		2020-03-19	Clear


**My Assignments**



Hooray! You currently have no assignments.  
Go enjoy your day.

**Activity Stream**

Write a new project update

 Oleg Baranov posted Welcome to project 11000 - 5.13Demo on Project 11000 - 5.13Demo  
0 comment 18 hours ago

Professional license holders will have access to all three dashboard views, while Standard (Team) license holders will have access to the default and Design dashboards.

Please note that these dashboards will not be enabled by default within your tenant. Your tenant administrator must enable the tenant property: 'enable.project.manager.dashboard'.

# What's New

## Exchange Rates


We've added the ability to configure exchange rates for the default currencies used within different divisions. Now, your tenant administrator can create any number of different exchange rates to define the cost of change notices within different divisions. The exchange rates can also be set to be valid within a specific period of time.

If you are interested in learning more about division management, please reach out to [sales@upchain.com](mailto:sales@upchain.com).

Upchain administration - Upchain

Workflows Activity types Exchange rates

Add exchange rate

From currency	To currency	From date	To date	Exchange rate	
USD	CAD	March 27, 2020	April 30, 2020	1.41	

### Add exchange rate

From currency USD

\* To currency CAD

\* From date March 27, 2020 00:00

To date April 30, 2020 23:59

\* Exchange rate 1.41

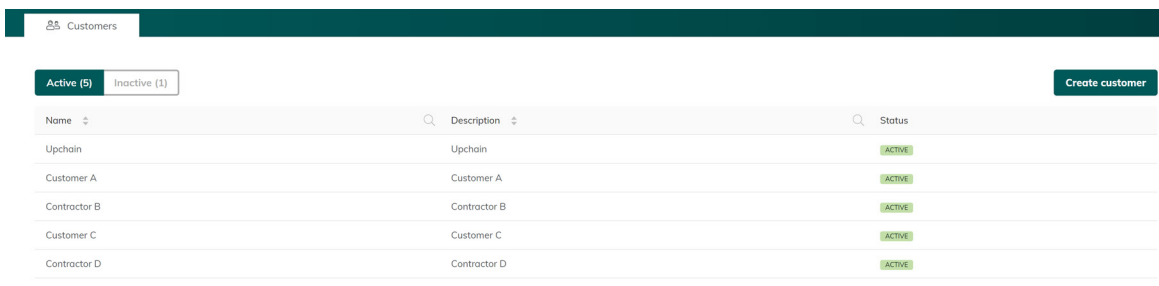
Cancel

Save

# What's New

## Customers

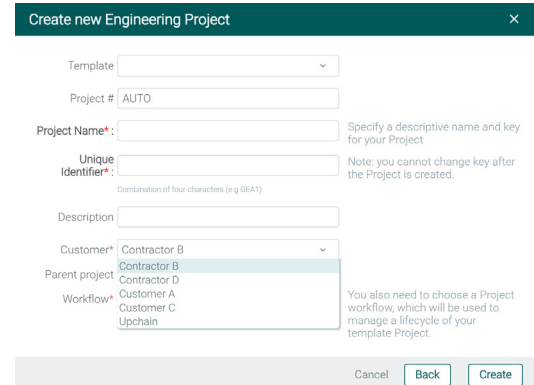
It's now easier than ever to organize your projects by customer! In tenant administration, you can create and manage customers to be associated with projects:



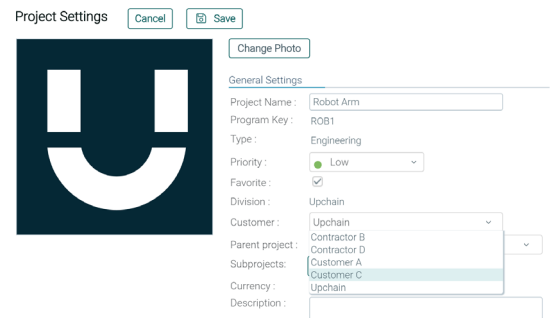
Name	Description	Status
Upchain	Upchain	ACTIVE
Customer A	Customer A	ACTIVE
Contractor B	Contractor B	ACTIVE
Customer C	Customer C	ACTIVE
Contractor D	Contractor D	ACTIVE

When you create a project, you will now associate that project with a customer using the Customer drop-down menu.

Once you have a customer associated with a project, that project can become a parent project for other projects associated with that customer. This makes it easier to track project-customer relationships.



You can view and edit the customer associated with a project from within the project settings. You can also view any parent projects associated with that project and customer.



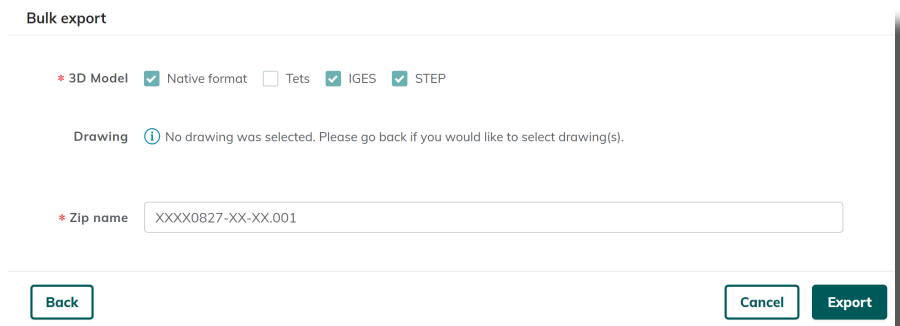
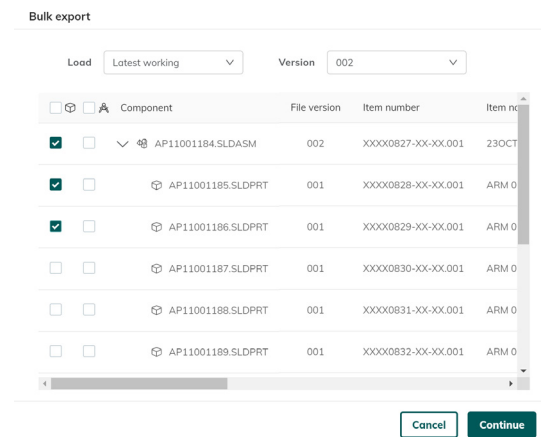
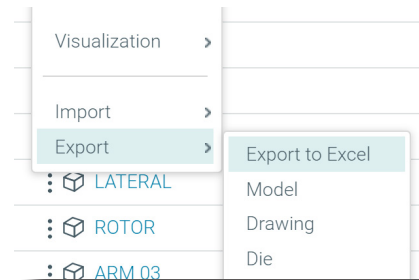
# What's New

## Bulk Export Files from BOM

Our new Bulk Export feature enables users to pick and choose items with CAD data, generate translations for the CAD files, and download a ZIP package containing all the files.

Selecting 'Bulk Export' from the More Actions icon to the left of a BOM item will open a window where you can check off each item you wish to include in the export, and whether to include the model files and/or the drawings.

If you are interested in learning more about Bulk File Export, please reach out to [sales@upchain.com](mailto:sales@upchain.com).



# Enhancements

- Upchain now supports SolidWorks 2020! Your team will enjoy full file version control with our CAD plugin; however, please note that file translations, visualization, and compares for SolidWorks 2020 files is not yet supported by our translation service. We expect the plugin to regain translation capabilities in our next release!
- Within our mechanical CAD plugins, users now have the option to manually launch the BOM Anomaly window (formally known as the BOM Wizard) and manage anomalies between the cBOM and eBOM. To manually launch the BOM Anomaly window, navigate to the ProjectBOM within a project, right-click on an item, and select 'BOM anomalies'.
- When using Advanced Search within the web app, your most recent search results will be saved during your session. Now you can perform a search, leave that screen, and return to it again and your search results will remain!
- An item that has no relation to a project (i.e. removed from all projects) will now appear in all users' Advanced Search results, assuming it satisfies the search criteria.
- You can now search for a variety of additional objects using the Advanced Search within the web app, including Customer, Change Request, Change Notice, and eBOM-specific attributes.
- Similar search parameters have been added to the Advanced Search within the CAD plugins. Please note that Change Requests and Change Notices may only be selected as secondary search objects.
- The web app Quick Search now displays columns for Creation Date and Revision note, which makes it easier to distinguish between multiple revisions of the same item.
- When selecting Edit on an item from the CAD plugin ProjectBOM, you're now able to select previous versions of the top assembly. The assembly structure will be loaded based on selected file version.
- In the web app BOM view, we've added a Translations section to the Documents tab within the item details pane.

# Enhancements

- Published documents can now be versioned from the Office Plugin. A published document may be checked out, edited, and once checked in, a new version of that document will be created in Draft state. That version can then be Published.
- A 'Drawing' BOM attribute column has been added to the BOM viewer to help identify the file name of all drawings associated to an item.
- You can now substitute an item with another item directly within the BOM viewer. As long as the Substitute Item # attribute is filled in on the item attributes, select the More Actions Icon to left of the item and select the new action Substitute Item to complete the swap.
- As always, our engineers are working hard to make Upchain faster and more reliable through various backend enhancements.

**Please bear with us as we update our documentation to reflect these changes.**



# Fixes

- Fixed: Organizations with their own dedicated Upchain environment were unable to access Help Center.
- Fixed: In the CAD plugin, copying and saving items in the item view resulted in an error message.
- Fixed: In some cases, the workflow status of investigation requests was not updating beyond the work in progress state.
- Fixed: Within the user management menu in tenant administration, sorting by users would sort only the users currently displayed on the page. Now, all users in the tenant will be sorted.
- Fixed: In some versions of SolidWorks, selecting 'Clear all' within My Locked Objects would result in an error message from SolidWorks.
- Fixed: The status and completion percentage of tasks were not updating properly as users progress through the task workflow.
- Fixed: In some cases, when file attributes are committed between SolidWorks and the CAD plugin, users were experiencing reduced performance in SolidWorks.
- Fixed: Suppliers no longer see the My Profile and Plugins menu options within the Supplier item viewer.
- Fixed: In some cases, users were unable to download documents from the CAD plugin.
- Fixed: Change request email notifications were not sending properly when there were more than 512 characters within the email.
- Fixed: After signing out of the web app and signing back in, users were incorrectly directed to the last page they were viewing during the previous session. Now, they are directed to the main dashboard. If a user times out, however, they will still be directed to the most recent page upon signing back in.



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Upchain is a collaborative engineering platform. Our mission is to connect engineers with manufacturers, suppliers, procurement teams, project managers, and other product stakeholders to bring complex products to market — faster and more efficiently than ever before.

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# Release Notes

Upchain v5.14

The Upchain team is very excited to bring you v5.14!

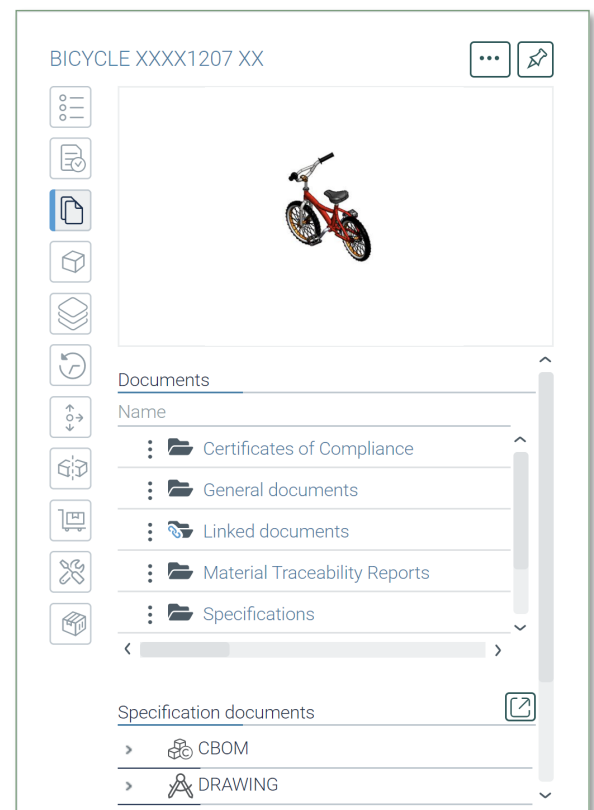
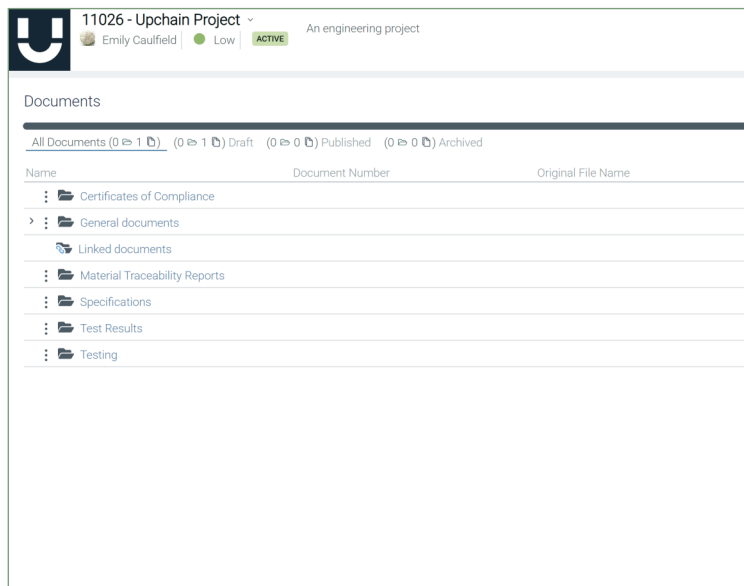
We've packed a ton of new features with this release. We've added major enhancements to the ways documents are organized, numbered, and revised, and we've included improvements to attribute management, new 3D comparison tools, and additional Gantt chart functionalities. We'll give you the highlights here.

# What's New

## Document Management

Tenant administrators can now configure Document Categories for documents other than CAD, drawings, or translations. Document categories are a classification system that can drive certain behaviors for your documents within your projects and items. This also allows you to organize all additional documentation you may wish to associate to a project or an item in the same way across your entire tenant. Document categories cannot be edited or removed from within projects or items.

Once configured, document categories appear in a project's Document Section as well as an item's Document Section.

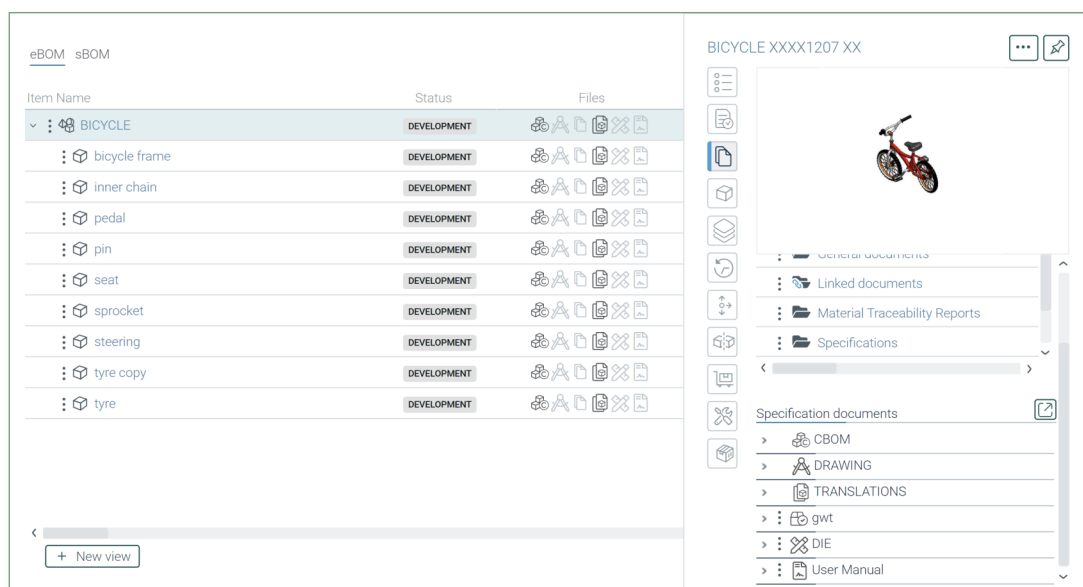


# What's New

## Document Management Cont'd

In addition to Document Categories, tenant administrators can also configure Specification Types, which are document categories for items only, and are displayed in addition to the default CBOM, Drawing, and Translation types.

Specification Types have icons associated with them and can be configured to appear on the BOM table in the Files column. If the item has a document in a specification type, the icon appears solid. Double-clicking the icon downloads that document.



# What's New

## Document Management Cont'd

We have also introduced a document numbering and revisioning system, as well as Document Workflows. Upon upload of a document (not including CAD, drawings, and translations) into a project or item, the original document name is prepended with a number and revision in accordance with the document numbering rules as configured by your tenant administrator. If no specific document numbering rules have been configured, the default rule applies: **#####-XX-document name**.

This is to ensure that all documents have a unique identifier in the system that you can search for in the Quick Search, and to allow for a document's lifecycle to follow a more structured document workflow that can include reviews, approvals, and revisions.

The screenshot displays the Upchain Document Management interface. On the left, a 'Documents' panel shows a list of documents with columns for Name, Document Number, Original File Name, Status, and Version. The list includes folders like 'Certificates of Compliance', 'General documents', 'Linked documents', 'Material Traceability Reports', 'Specifications', 'Test Results', and 'Testing'. Under 'Specifications', two documents are listed: '000000148-XX-Specification.pdf' and '000000156-XX-AUTOMOTIVE PROJEC...', both in 'DRAFT' status with version 'V1'. The second document is selected. On the right, a detailed view of the selected document is shown. It features a thumbnail of a document titled 'AUTOMOTIVE PROJECT' with 'TECHNICAL SPECIFICATIONS' and a date '15/06/2020'. Below the thumbnail, a 'Details' section provides metadata: Workflow (Publish WF (4)), Created (Tue Jun 16 2020 20:48:10 GMT+0100 (British Summer Time)), Creator (Edna Cauliflower), Version (001), Revision (XX), Last Modified (Today), Modified by (Edna Cauliflower), Size (4.65 mb), and Change (Initial version).

# What's New

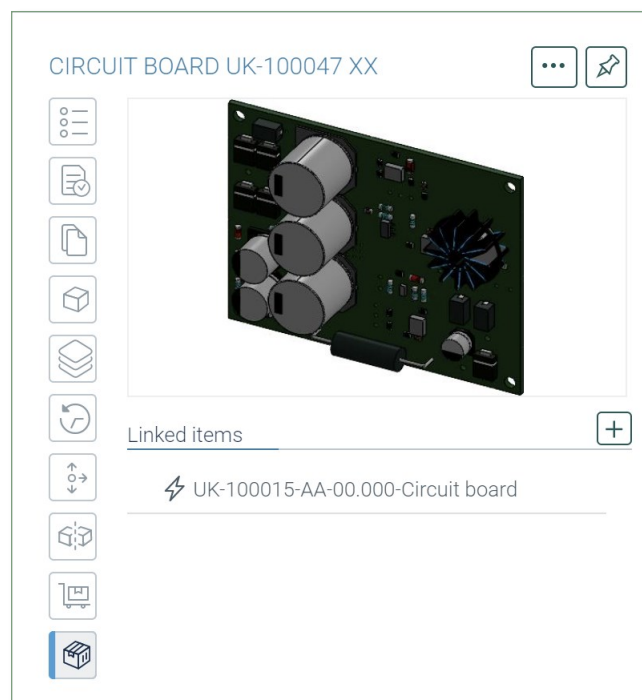
## Linked Items

You can now create a soft link within the Web application between items that are otherwise unrelated (such as through their genealogy, substitute item, relation to a document, etc). This allows you to link items from across engineering disciplines, for example.

You can see linked items in the new Linked Items section in an item's detail view. Link items to other items by using the plus button.

Note that adding items to this section creates a unidirectional link. That is, by pasting item A into item B, item B does not automatically appear as a link to item A. You would need to Copy and Paste item B into item A for the link to go both ways.

The soft link is between item **versions**. This means that when items are versioned up, the new item version does not appear in the Linked items section. However, if an item is released that has links listed in its Linked items section, the links are maintained.



# What's New

## Custom Item Attributes

We have expanded custom attribute data types to include URL, picklists, and rich text. You can configure the URL type with CAD mapping capabilities. If you choose to show the URL attribute in a BOM table or item details, the link is active and opens the respective webpage in a new tab in your browser.


eBOM

sBOM

All Items

Item Name	Slogan	Spare Reason	Supplier Website	Weight	Status
<div><div></div><div>BIKING INTO THE FUTURE</div></div>	BIKING INTO THE FUTURE	Wear Part	<a href="http://www.bikes.com">http://www.bikes.com</a>	2412.63	<div><div></div>DEVELOPMENT</div>

BICYCLE FRAME UK-100032 XX



MTR: ☒   
 C of C: ☒   
 Apvl: ☒   
 Ref Only: ☒

Custom attributes

Slogan: BIKING INTO THE FUTURE   
 Spare Reason: Wear Part   
 Supplier Website: <http://www.bikes.com>   
 Weight: 2412.63

The picklist library from which the picklist type reads must be configured by Upchain. If you are interested in creating your own picklists, please reach out to [sales@upchain.com](mailto:sales@upchain.com).

CP0001 - Cauliflower Project 1

cBOM

Search for items

UK-100032-XX-XX.001-BICYCLE FRAME

Item

UK-100032-XX-XX.001-BICYCLE FRAME

server:   
 Project name:   
 System:   
 Sub-System:   
 Recommended Spare: ☐   
 Quantity: 0   
 Spare: ☐   
 PC/WP: ☐   
 MTR: ☐   
 C of C: ☐   
 Apvl: ☐   
 Ref Only: ☐

Custom attributes

Slogan: BIKING INTO THE FUTURE   
 Spare Reason: Wear Part   
 Supplier Website: <http://www.bikes.com>   
 Weight: 2412.63

[Edit] Success!

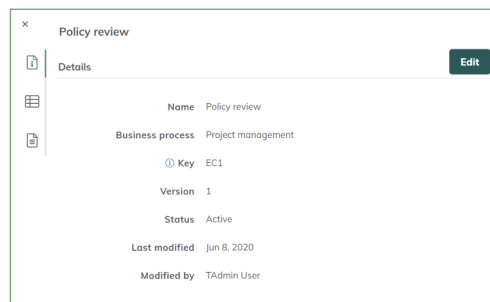
The CAD plugin has been expanded to show all common and custom attributes in each place where you can view an item's details (ie. item details page, lower panes, my assignments, my workspace, search pane). When the user edits an item, those attributes with CAD mappings set to READ are shown as a greyed out box to ensure users cannot mistakenly edit them. Those attributes with CAD mappings set to WRITE are shown as a white box so users can enter the appropriate data.



# What's New

## Custom Task and Business Process Types

The tenant administration has been reorganized and expanded to include all new functionality added in this release. Specific to this new set of features, *Activities* have been renamed to *Tasks*, and we have separated out custom Business Process (BP) and Task type configurations into their own respective sections. The Web app UI has also been updated to this new nomenclature.

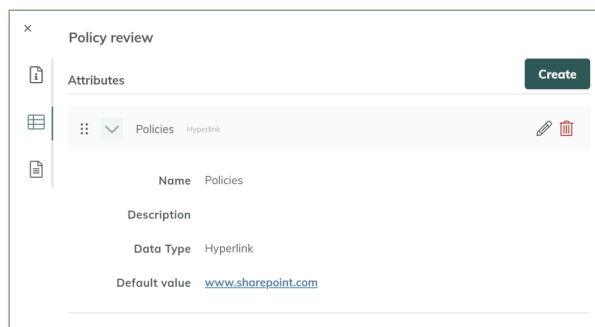


The screenshot shows a 'Policy review' details form. It includes fields for Name (Policy review), Business process (Project management), Key (EC1), Version (1), Status (Active), Last modified (Jun 8, 2020), and Modified by (Admin User). An 'Edit' button is visible in the top right corner.

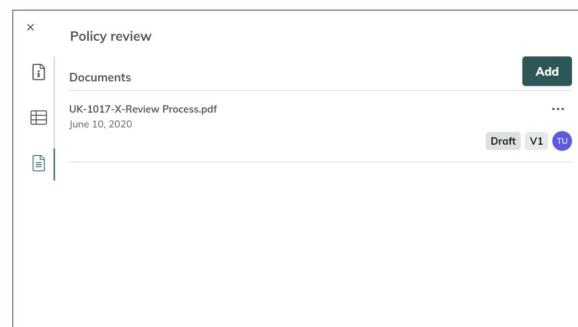
In this new set of features, when you create a custom BP or task, you can now configure additional custom attributes and attach documentation that appear on that custom BP/task when added to your project. This ensures that each of your custom BPs/tasks have the same information every time or can be customized for each situation.

For example, you may create a Project Management task that contains a link to your company's Policy webpage so users assigned the task can find them easily.

Attaching documentation is also particularly handy for tasks or BPs that reference standard supporting documentation. For example, you may have a specific form that must be filled out every time you complete a specific task.



The screenshot shows a 'Policy review' attributes form. It includes a 'Create' button in the top right corner. Below the 'Attributes' section, there is a list of attributes: Name (Policies), Description, Data Type (Hyperlink), and Default value (www.sharepoint.com).



The screenshot shows a 'Policy review' documents form. It includes an 'Add' button in the top right corner. Below the 'Documents' section, there is a list of documents: UK-1017-X-Review Process.pdf, June 10, 2020. There are also buttons for Draft, V1, and a status indicator.

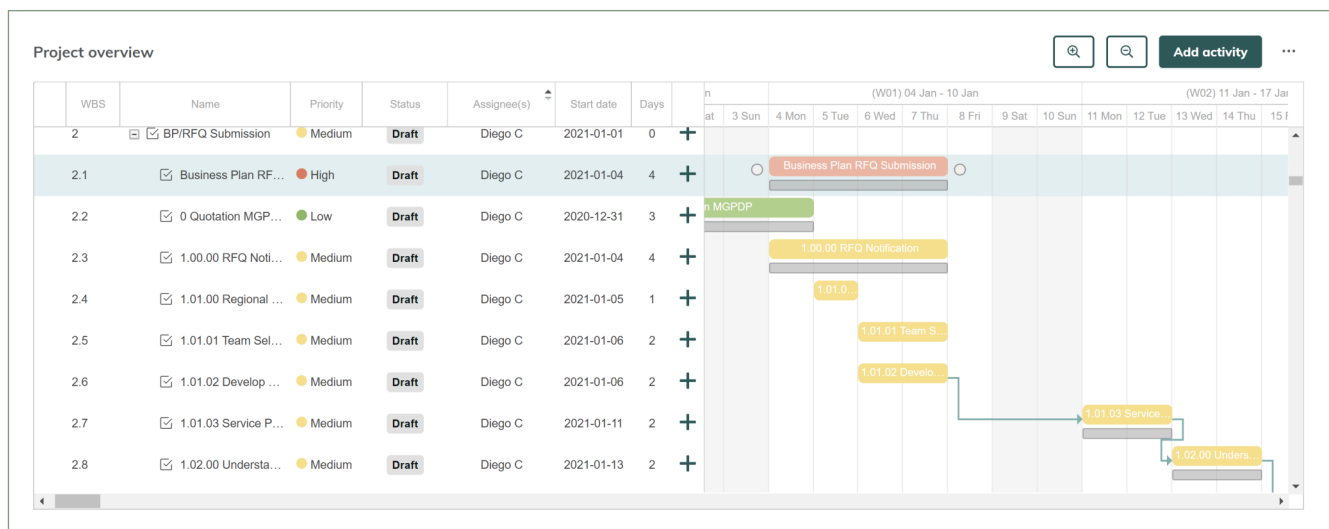
# What's New

## Gantt Chart

We have expanded the functionality within the Gantt chart. In addition to the current finish-to-start dependency, you can now create additional dependencies including start-to-start, finish-to-finish, and start-to-finish. This allows you to create more complex relationships between each task in your project.

The Gantt chart also now includes the following:

- Color coding based on task priority
- Users can update progress percentages
- Overdue indicators
- Highlighting weekends and removing them from timescales
- Dates/types become uneditable once a workflow begins
- Adding timing constraints
- Configure baseline timelines to monitor how well the project is on schedule
- Week and quarter numbers displayed



# What's New

## sBOM—Phase 1

This release of Upchain introduces the first phase of the Service Bill of Materials (sBOM) module. The sBOM is found as a new tab in the BOM section of a project.

The sBOM tab shows the sBOM for your selected item from the project BOM. In this tab, you can manually edit the first level of that item's sBOM by pasting in items from your clipboard, create new items, and edit sBOM attributes such as quantity and a reason for the item to appear on the sBOM. Each time you edit the sBOM it creates a new version of it.

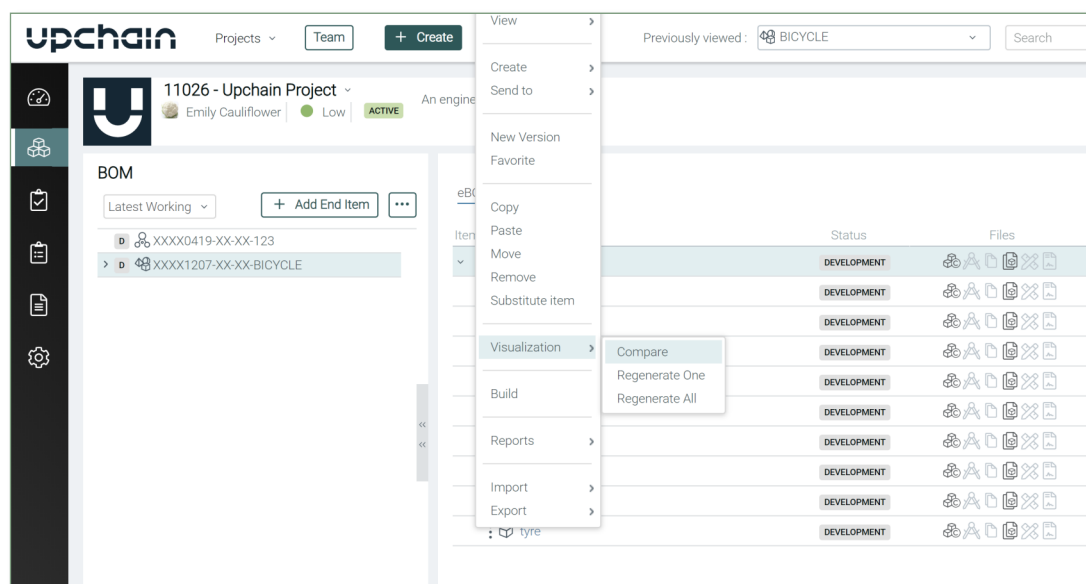
Creating an sBOM within Upchain means you can keep it closely tied to its corresponding eBOM and update it as the eBOM changes. sBOM versions keep a record of all changes made and allows you to determine the spare parts list you sent to your customers.

eBOM sBOM								
		Status	sBOM Qty	Reason category	Manufacturer	Manufacturer Item Number	Recommended Spare	Spare
▼	Top Level	DEVELOPMENT					?	
▼	Zone 1	DEVELOPMENT					?	?
▼	Cell 10	DEVELOPMENT					?	?
▼	Station 10	DEVELOPMENT					?	?
	FESTO 6543	DEVELOPMENT	5.0000	long lead	Festo	12345	?	?
	DISPENSER SHOOT	RELEASED	10.0000	wear part			?	?
	STATION SERVICE KIT	DEVELOPMENT					?	?
▼	Station 20	RELEASED					?	?
	FESTO 1234	RELEASED					✓	?
	GEAR	RELEASED					?	?
▼	Cell 20	DEVELOPMENT					?	?
▼	Station 30	DEVELOPMENT					?	?
	FESTO 6543	DEVELOPMENT	5.0000	long lead	Festo	12345	?	?
>	Station 40	DEVELOPMENT					?	?
>	Station 10	DEVELOPMENT					?	?

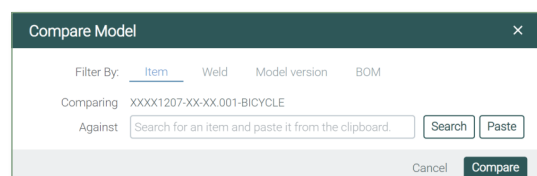
# What's New

## 3D Comparisons

We have added the ability to perform a 3D model comparison of an item within your project to the latest item version from another project. The comparison is launched from the Action Menu beside an item in the BOM table and opens a search window.



In this search window, you can paste in an item you have copied to your clipboard from elsewhere. Both items must have a 3D model to compare and you must have permission to access both items.



# Enhancements

- You can create custom reports similar to those found in older versions of Upchain. An experienced Upchain user creates their report template and returns it to Upchain with details of where this report should appear in the Web application. Once Upchain implements this for you, your end users would then see and be able to run this report from its specified location, assuming they have permission to do so. If you're interested in learning more about custom reports, please contact [sales@upchain.com](mailto:sales@upchain.com).
- We continue to refine the permissions associated with specific license types. There are now four licence types: *Professional* holders can create and edit projects, items, BOMs, CAD files, Business Processes, and Documents; *Team* license-holders can create tasks, make use of our Office plugins, and generate visualizations and compares for items; *Participant* license-holders can participate in workflows, view released items and active projects, and download files; *Viewer* license-holders can only view released items and active projects for which they are a team member.
- When importing or checking in an electrical package, Upchain no longer requires the manufacturer or part number to be defined in the spreadsheet file. Now, you can add the manufacturer and part number at a later time.
- You can now easily generate compares between two different engineering BOMs to view the differences between them. This can be done directly from the BOM in the web app, selecting an item's More Actions icon, and selecting Visualization > Compare > BOM.
- Quick search and Advanced search open a new dialog box in front of the page you're currently in. This allows you to quickly copy and paste objects from your search results into the page you are working on. Furthermore, you can export your search results to an Excel file.
- Within an item's detail pane within the web app, we've renamed the "Change Management" tab to "Business Processes." This tab now includes individual sections for all Requirements, QA Processes, Project Tasks, Investigation Requests, Change Requests, and Change Notices associated with the item. Additionally, you may create a new Requirement, Project Task, QA Process or Investigation Request directly from this tab.

# Enhancements

- Upchain now fully supports SolidWorks 2020. Visualizations and 3D comparisons may now be generated for all SolidWorks 2020 files.
- The PDF Viewer now supports viewing Office documents that have been uploaded directly into the Web Application.
- To make it easier to distinguish between tasks in the CAD Plugins “My Workspace” menu, we’ve added the project name and the task creation date next to the task name and number.
- Suppliers may now be added as assignees to requirements and QA processes, as well as the tasks associated with those two Business Processes.
- Suppliers may now perform workflow actions directly within the Supplier view when viewing items shared with them. Additionally within the Supplier view, they may check out/in documents and view a full list of Business Processes assigned to them.
- Within the 3D viewer, we've added an option to view the drawing for a model. From this view, you can download the PDF translation of the drawing.
- The Quick Navigator retains the full history of all objects you have visited across all sections of a project.
- When associating item(s) to a task, you can now copy an item to your clipboard and paste it in the Items section of the task.
- We have improved the performance of the refresh function in the CAD plugin for SolidWorks and Siemens NX.
- We have improved the visual quality of the thumbnails within an object’s detail view.

## Fixes

- Fixed: Some users using NX were experiencing an issue with the Regenerate Feature Data command not completing.
- Fixed: Some users with a Viewer role were not able to view released items correctly in the BOM table.
- Fixed: An issue where you could not move documents from categories into folders within those categories has been resolved.
- Fixed: Shape and heat treatment item attributes were missing from the BOM table.
- Fixed: The CAD plugin was changing the SolidWorks setting to load a large assembly in lightweight model.
- Fixed: Revision notes were not being maintained from the CAD plugin to a Change Request.
- Fixed: Create Items was not reading custom properties from files to populate the item attributes upon creation.
- Fixed: Some of the permissions related to specific users and Change Notices have been corrected.
- Fixed: The permissions on the eBOM spare attribute in revised assemblies have been corrected.
- Fixed: Bulk exports that take longer than 20 minutes now extends your login session. Bulk exports also show you a progress bar.
- Fixed: Certain files were not being versioned during check in through the CAD plugin.
- Fixed: Migrated items with single major revisions have been fixed to handle incrementing to a two-character revision system.
- Fixed: Translations are now synchronized across multiple vaults as required. This fixes the issue of users from a different division than a project division accessing translations.
- Fixed: Performance on translation downloads has been improved.

## Fixes

- Fixed: Check-ins now ignore any children that are part of Change Request.
- Fixed: The quick search results table have been fixed to show item major and minor revisions.
- Fixed: The Change Notice/Change Request details view is launched in the Business Process page when a Change Notice/Change Request is selected from main dashboard.
- Fixed: Business Processes are now maintained on the item when it is released.
- Fixed: Upon export of an electrical package from Altium, it now includes the PCB components.
- Plugin behavior fixes: lower pane resizing unexpectedly, check-out now maintains current view/location in the cBOM.





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Upchain is a collaborative engineering platform. Our mission is to connect engineers with manufacturers, suppliers, procurement teams, project managers, and other product stakeholders to bring complex products to market faster and more efficiently than ever before.

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# Release Notes

Upchain v5.15.1

The Upchain team is excited to bring you v5.15.1!

This release focuses on several important enhancements, including key improvements to supplier management and project management, as well as bug fixes.

We'll give you the highlights here.

## Enhancements

- When you add a Supplier to an item, this also adds the Supplier as a team member to the project in a new Supplier tab found within the project settings. The Supplier tab is updated for all projects the item is currently used in, as well as when you copy and paste the item from one project to another.
- When you add a Supplier to an item, the list from which to choose Suppliers is now sorted alphabetically to make it easier to locate your desired Supplier.
- Suppliers can now view notes and decision comments added to an RFQ in the Supplier Portal to allow for better communication between you and your suppliers.
- Supplier attributes including supplier names, quantity, preferred status, supplier part numbers, supplier part status, supplier substitute, costs, and currency can now be included in custom reports.
- When creating a new Request for Quotation (RFQ), the assignee field only displays the Suppliers associated to the item added to the RFQ. Furthermore, when a regular Design Investigation Request (IR) is created, Suppliers are not shown in the Assignee list. This helps to avoid lengthy Assignee lists and ensures you do not accidentally send RFQs to the wrong suppliers.
- Requirements and QA process tasks can now be created from an item's Business Processes tab. The item must already have an associated requirement or QA process to which the task will be added.

## Enhancements

- You can now import Business Processes (Requirements and QA processes) and the Gantt chart (in addition to the BOM, Documents, and Team members) from a project template when creating a new project. These options are shown in the New Project window when you select a template project.
- You can create Gantt chart tasks without an Assignee. This allows you to create a general project management structure without needing to know right away who will complete each and every task.
- When importing any combination of Teams, Documents, BOM, Business Processes, and the Gantt chart when creating a new project from a template, we ensure that relationships between them are maintained when included and removed when not included. For example, if you import the Gantt chart but not the team members, the assignee fields on the tasks will be empty in your new project.
- You can now adjust the project start date on the Gantt chart while a project is in a Draft state. You can also do this at any time for a project template. This adjusts all other tasks on the Gantt chart accordingly.

## Fixes

- Fixed: For the CAD plugins, auto-login no longer functioned after the introduction of Single Sign On. Now, if you have auto-login enabled, the plugin will automatically log you in upon opening if you are already logged in elsewhere, such as the Web app. This means you do not need to select “Log in” when you first open the plugin.
- Fixed: Suppliers are now retained when a new item version is created.
- Fixed: The Supplier portal was not refreshing or would stall out after clicking a workflow action button.
- Fixed: Checking out and then checking in eCAD files within an Electrical Package was removing the entire electrical BOM.
- Fixed: When importing an electrical package, the manufacturers are searched for and retained in one Tenant.
- Fixed: When switching between the details view of different milestones, stage gates, or tasks, users would sometimes receive an error message.
- Fixed: The Gantt chart was not loading after exporting to an MS Project.
- Fixed: Custom attributes were not being read properly for child components in NX assemblies. To ensure proper functionality, please make sure NX is using the correct UG customization file from the 5.15.1 plugin installation folder.
- Fixed: PDFs that were generated from NX files came out blurry due to GPS not correctly identifying the sheet sizing and orientation.
- Fixed: The bulk export function was not always sending emails when completed.
- Fixed: Translations were not being displayed in the Documents tab of the item details view for items viewed from a search. Consequently, you could not download translations from a search.

## Fixes

- Fixed: Project creators could not access a project if it was created from a template with the team included and the project creator was not a member of that team.
- Fixed: Documents uploaded to a project's Document section were not always assigned the next sequential number, often skipping numbers.
- Fixed: Opening a very large assembly using the Latest Release download filter was not working.
- Fixed: Change Notices were not displaying the correct total costs.
- Fixed: Change Notice workflows were not detecting that the CN Type was set to Adjustment Requisition and sent mBOMs to ERP anyway.



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# Release Notes

Upchain v5.15

The Upchain team is very excited to bring you v5.15!

We've packed a ton of new features with this release. We've added project effectivity functionality, updated nomenclature to industry standards, added the ability to create custom project types, enabled single sign on in our plugins, and much more!

We'll give you the highlights here.



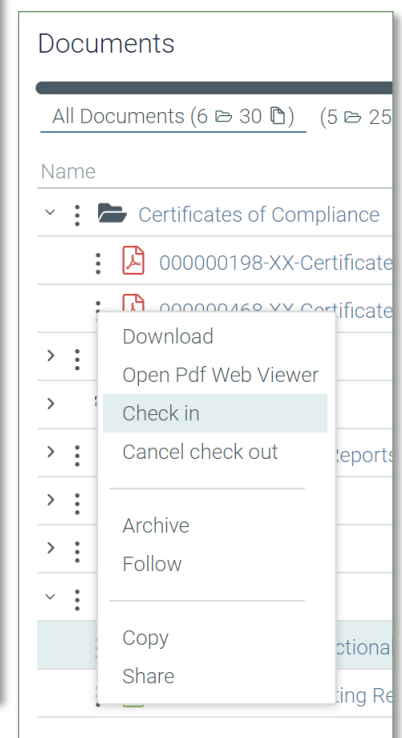
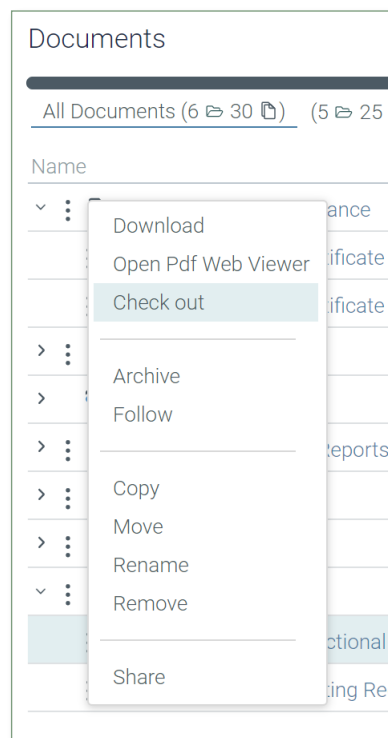
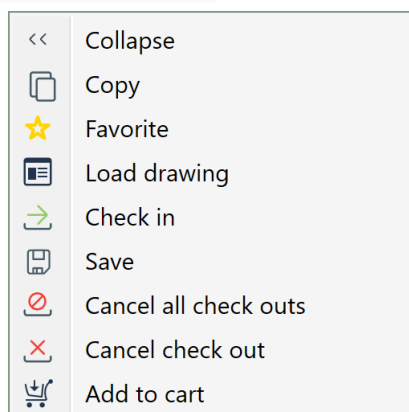
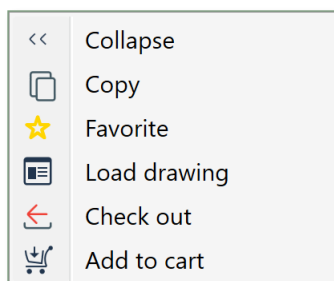
# What's New

## Nomenclature Updates

We have renamed important file management functions to align with industry standards. The changes are as follows:

- **Edit** is now **Check out**.
- **Save** is now **Check in**.
- **Save In** is now **Save**.
- **Cancel** is now **Cancel check out**.
- **Cancel All** is now **Cancel all check outs**.

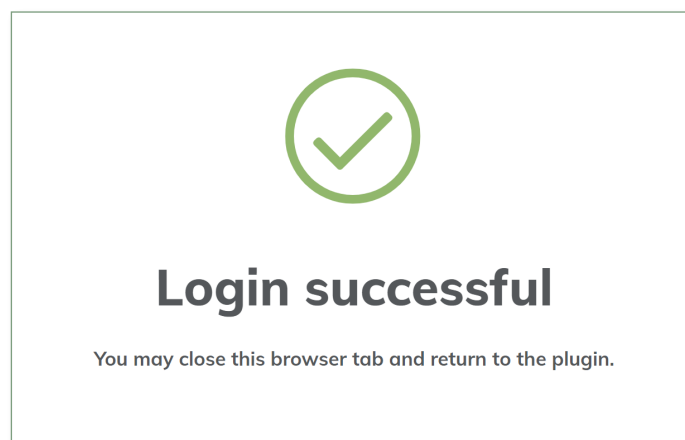
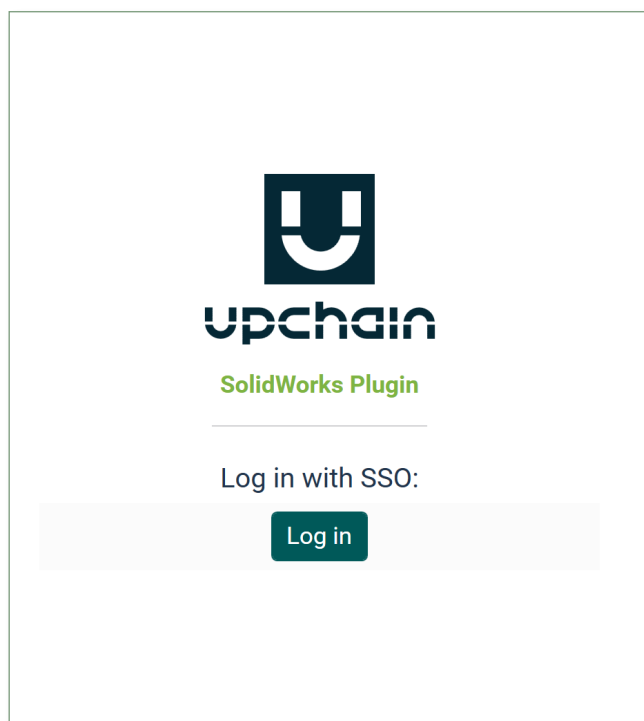
These changes apply to all mechanical CAD plugins, the Web application (including the Documents section), Microsoft Office plugins, and error/success messages. The functionality remains as before.



# What's New

## Single Sign On

We have introduced Single Sign On capabilities into our MCAD and Generic plugins, Office plugins, and the Outlook plugin. When you log into these plugins, you will be redirected to a browser to complete the login. For companies that already use a Single Sign On procedure, we can assist in configuring your Upchain system to use Single Sign On. For all other companies, it is simply a new way to log into the plugins.

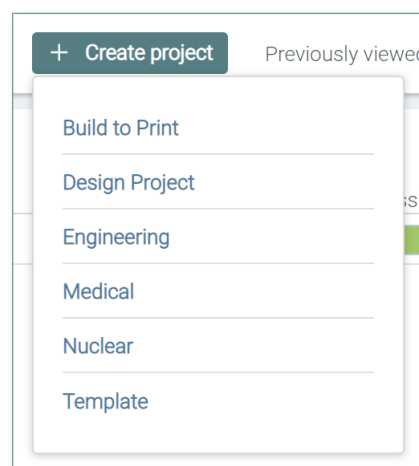


# What's New

## Custom Project Types

You can now configure your own custom project types. This allows you to be more specific with the type of projects you will be working on at your company and to configure different workflows for each project type. Configure new project types in the Engineering section of the Tenant Administration page. Your new active project types will be available from the Create menu on the main dashboard. When you configure a new workflow, you can choose your new project type to assign it to.

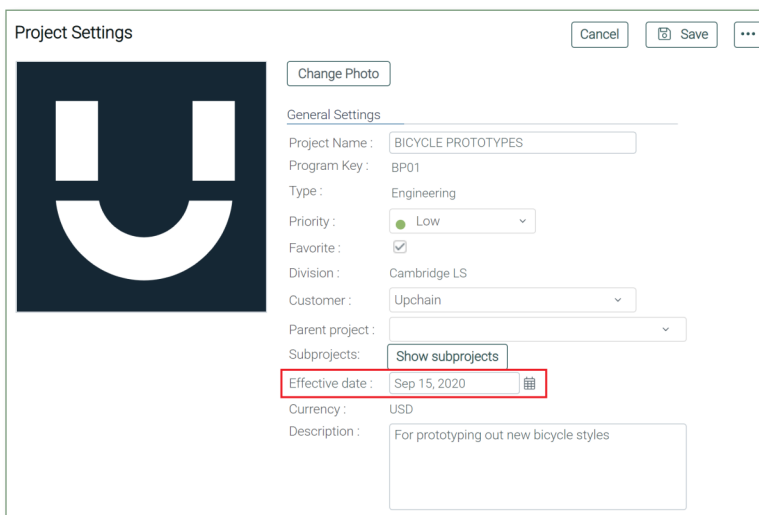
Item numbering Document numbering Categorization Item attributes Document attributes Tenant properties Exchange rates Picklists Project types				
Create project type				
Name	Description	Has effective date	Default BOM filter	Status
Engineering	Track engineering activities and CAD design through entire project lifecycle.	✓	Effective Date	ACTIVE
Build to Print	Manage and produce products according to the customer's exact specifications.		Latest Working	ACTIVE
Design Project	Track all changes from simple issue till release. All Cad changes and revisions will be stored under workorders.		Latest Working	ACTIVE
Template	Create new template project.		Latest Working	ACTIVE
Nuclear	For nuclear jobs		Latest Working	ACTIVE
Medical	For medical jobs	✓	Effective Date	ACTIVE



# What's New

## Project Effectivity

This new feature allows you to specify an **Effective Date** for your projects. The Effective Date serves as a filter for your BOM where any items created after this date are not shown on the BOM. The Effective Date filter shows the BOM with the latest version of items (in *Development* or *Released*) up to the Effective Date. This filter is available on the BOM table, Project management dashboard, and Change Notices once an Effective Date is set for a project. This new feature can be useful when taking items from older projects into new projects; you can quickly view the BOM with updated item versions and create Change Notices that already contain the updated item versions without having to update the CAD and Latest Working eBOM.



Project Settings

Change Photo

General Settings

Project Name : BICYCLE PROTOTYPES

Program Key : BP01

Type : Engineering

Priority : Low

Favorite : ☒

Division : Cambridge LS

Customer : Upchain

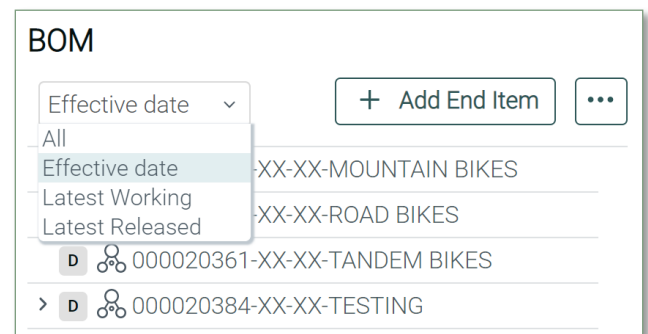
Parent project :

Subprojects : Show subprojects

Effective date : Sep 15, 2020

Currency : USD

Description : For prototyping out new bicycle styles



BOM

Effective date

All

Effective date

Latest Working

Latest Released

+ Add End Item

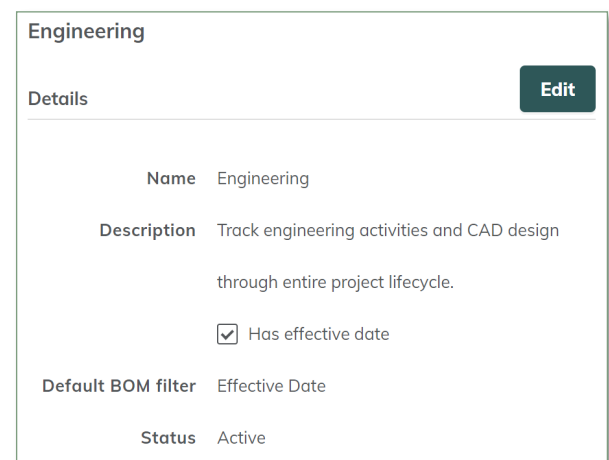
XX-XX-MOUNTAIN BIKES

XX-XX-ROAD BIKES

000020361-XX-XX-TANDEM BIKES

000020384-XX-XX-TESTING

The use of Effective Date is configured in the Tenant Administration section under the new Project Types tab in the Engineering section. When configuring a project type, you can specify whether you wish to use the Effective Date or not for each project type, and what the default filter will be. If Effective Date is selected, then you can enter a project Effective Date on a project's settings page. Only Project Managers and Tenant Administrators can set and change the project's Effective Date.



Engineering

Edit

Details

Name Engineering

Description Track engineering activities and CAD design through entire project lifecycle.

☒ Has effective date

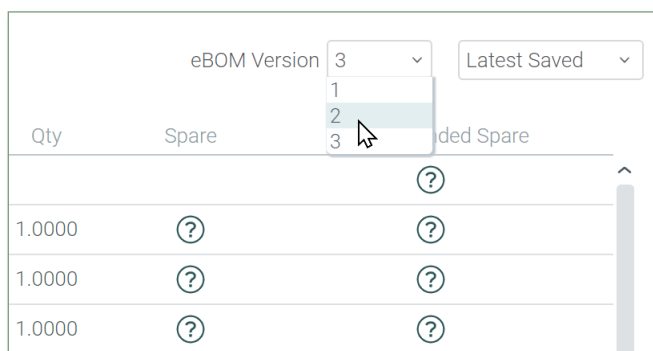
Default BOM filter Effective Date

Status Active

# What's New

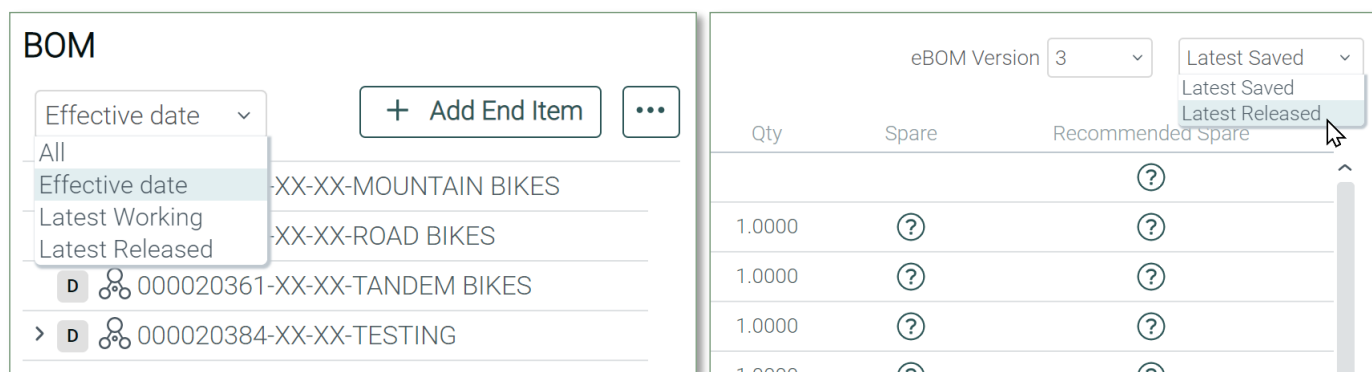
## BOM Table Updates

Within the BOM table, you can now view eBOM versions. An eBOM Version is created every time you check in an item that has an eBOM structure and the structure changes. This helps to track changes to your eBOM over time. This can be useful if items are accidentally removed and you wish to retrieve them. View the eBOM versions in the top right corner of the BOM table.



eBOM Version 3		
Latest Saved		
Qty	Spare	Recommended Spare
1.0000		
1.0000		
1.0000		

The filters that affect how you can view the BOM have changed. The End Item filter now includes the Effective Date filter (described above). When an item has been loaded into the center view, there are two additional filters shown beside the eBOM version: Latest Saved (showing how the loaded eBOM was last saved) and Latest Released (showing the latest released version of the loaded eBOM). These filters help you to see how your BOM has changed since its last released state.



eBOM Version 3		
Latest Saved		
Latest Released		
Qty	Spare	Recommended Spare
1.0000		
1.0000		
1.0000		
1.0000		

# What's New

## BOM Table Updates Cont'd

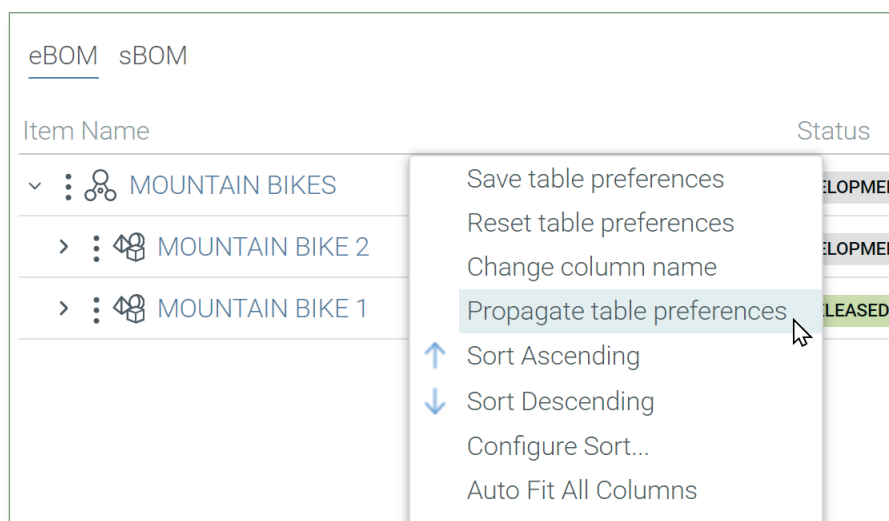
The BOM table now includes a column that displays what Change Requests workflow was used to release the item (and what workflow version). This can help you ensure the correct workflow was used to release the item.

eBOM

sBOM

Item Name	CR Workflow Name ^	Status
<div><div><div>▼</div><div><div><div></div><div></div><div></div></div></div><div>MOUNTAIN BIKE 1</div></div></div>	ECR Workflow (81)	RELEASED
<div><div><div></div><div></div><div></div></div><div>BICYCLE FRAME</div></div>	ECR Workflow (81)	RELEASED
<div><div><div></div><div></div><div></div></div><div>INNER CHAIN</div></div>	ECR Workflow (81)	RELEASED
<div><div><div></div><div></div><div></div></div><div>PEDAL</div></div>	ECR Workflow (81)	RELEASED

Tenant administrators can configure a table layout for the BOM table, Change Request table, and Change Notice table that can be propagated to all users in your tenant. This appears on the BOM table in a view entitled *BOM*. If you wish to use your own table layouts, you can still do so with the use of BOM Views.



eBOM sBOM	
Item Name	Status
▼ : 🚲 MOUNTAIN BIKES	DEVELOPMENT
> : 🚲 MOUNTAIN BIKE 2	DEVELOPMENT
> : 🚲 MOUNTAIN BIKE 1	RELEASED

Save table preferences

Reset table preferences

Change column name

Propagate table preferences

↑ Sort Ascending

↓ Sort Descending

Configure Sort...

Auto Fit All Columns

# What's New

## Requirements and QA Process Updates

The Requirements and Quality assurance tables now include an Index column to number each requirement/QA process as it is added and nested under other requirements/QA processes.

You can now link a requirement to another requirement or QA process (and vice versa) and indicate what the relationship is between the two. This can help you understand where dependencies between requirements and QA processes exist.

The screenshot displays the Upchain application interface. On the left is a dark sidebar with navigation icons. The main header shows the project '11272 BICYCLE PROTOTYPES' with a star icon, an 'Active' status tag, and the user 'Edna Cauliflower' from 'Upchain'. Below the header is a tabbed interface with 'Requirements' selected. The table below has columns for Index, Name, Add, and Assignee.

Index	Name	Add	Assignee
^ 1	✓ REQ4000 Mechanical Requirements	+	Mary Proj-Man
^ 1.1	✓ REQ4001 Weight Requirements	+	Mary Proj-Man
1.1.1	✓ REQ4003 Frame Weight	+	Mary Proj-Man
1.1.2	✓ REQ4004 Steering Weight	+	Mary Proj-Man
1.1.3	✓ REQ4005 Wheel Weight	+	Mary Proj-Man
1.1.4	✓ Weight Requirements Testing	+	Mary Proj-Man
^ 1.2	✓ REQ4002 Material Requirements	+	Edna Cauliflower
1.2.1	✓ REQ4006 Frame Material	+	Edna Cauliflower
1.2.2	✓ REQ4007 Steering Material	+	Edna Cauliflower
1.2.3	✓ REQ4008 Wheel Material	+	Edna Cauliflower

On the right, a detail panel for 'Wheel Weight' is open. It shows 'Created by: Edna Cauliflower | Sep 15, 2020'. Below this are two sections: 'Linked business processes' with an 'Add' button, and 'Is dependent on' which lists 'Wheel Material' with a 'Passed' status and a delete icon. A link icon is visible at the bottom of the panel.

# What's New

## Document Attributes

We have introduced the ability to create custom **Document attributes**. These attributes appear on a document's details view and can be used to provide more information about the contents of the document without having to download and open the document. Currently, these attributes only appear on a document's details view.

000000468-XX-Certificate Of Complia...

Workflow not selected!

**Certificate of Compliance With Rule 12a**

Certificate of Compliance With Rule 12a (Standard Certificate of Compliance)

1. This brief complies with the requirements of Rule 12a, App. P, (1)(a) (b) (c) (d) (e) (f) (g) (h) (i) (j) (k) (l) (m) (n) (o) (p) (q) (r) (s) (t) (u) (v) (w) (x) (y) (z) (aa) (ab) (ac) (ad) (ae) (af) (ag) (ah) (ai) (aj) (ak) (al) (am) (an) (ao) (ap) (aq) (ar) (as) (at) (au) (av) (aw) (ax) (ay) (az) (ba) (bb) (bc) (bd) (be) (bf) (bg) (bh) (bi) (bj) (bk) (bl) (bm) (bn) (bo) (bp) (bq) (br) (bs) (bt) (bu) (bv) (bw) (bx) (by) (bz) (ca) (cb) (cc) (cd) (ce) (cf) (cg) (ch) (ci) (cj) (ck) (cl) (cm) (cn) (co) (cp) (cq) (cr) (cs) (ct) (cu) (cv) (cw) (cx) (cy) (cz) (da) (db) (dc) (dd) (de) (df) (dg) (dh) (di) (dj) (dk) (dl) (dm) (dn) (do) (dp) (dq) (dr) (ds) (dt) (du) (dv) (dw) (dx) (dy) (dz) (ea) (eb) (ec) (ed) (ee) (ef) (eg) (eh) (ei) (ej) (ek) (el) (em) (en) (eo) (ep) (eq) (er) (es) (et) (eu) (ev) (ew) (ex) (ey) (ez) (fa) (fb) (fc) (fd) (fe) (ff) (fg) (fh) (fi) (fj) (fk) (fl) (fm) (fn) (fo) (fp) (fq) (fr) (fs) (ft) (fu) (fv) (fw) (fx) (fy) (fz) (ga) (gb) (gc) (gd) (ge) (gf) (gg) (gh) (gi) (gj) 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Created:

wed Sep 16 2020 10:26:48  
GMT+0100 (British Summer  
Time)

Creator:

EC

Edna Cauliflower

Version:

001

Revision:

XX

Last Modified:

2 days ago

Modified by:

Edna Cauliflower

Size:

261.13 kb

Change  
description :

Initial version

Document  
Number:

000000468

Original File  
Name:

Certi

Custom attributes

Purpose :

This document is a template of tl

This document is a template of the stand  
ard Certificate of Compliance that must b  
e submitted with this item.



# Enhancements

- A new tenant property has been introduced to allow you to restrict which users can create projects. With this tenant property enabled, creation of projects is restricted to tenant administrators only.
- Suppliers can now download the translations of the CAD for an item in the supplier portal.
- Performance when exporting a BOM from Altium has been improved.
- Upchain now supports NX 1899.
- Custom attributes for your custom tasks and business processes have been expanded to include numbers and dates.
- The Business Processes section on an item's detail view has been enhanced so that you can create Change Requests and Change Notices. Requirements and QA processes have indices to show their hierarchy.
- The codes used for title blocks have been updated so that some of the existing codes match more closely to what users would interpret them to be, and expanded to include more options for sections that users felt were missing.
- Item numbering and revisioning rules have been enhanced to include: a space as a delimiter, three digit minimum for all sequence options, and you can now define your own exclusions for revisions.
- The Project Management section has been updated so that the 'Add Activity' button now reads 'Add', and there is a zoom to fit button. Weekends are highlighted grey to make them more visible, critical paths are more obvious, and overdue tasks are shown in the project management dashboard.
- In the Orphaned Items window within a Change Notice, the columns can now be resized and the contents of a column can be sorted alphanumerically.
- When searching through the list of Change Notices and Change Requests within a project, you can now search by CN/CR description.
- You can now right-click and select all released items beneath any item in a Change Notice.

# Enhancements

- It is now possible to download phantom files from search results within the Web application and the CAD plugins.
- When creating a .DWG translation of a CATIA drawing, the drawing is first updated to ensure it captures all model changes before the translation is done.
- This enhancement writes attributes to the files you have checked out in background without having to open the files first.
- You can now bulk update the spare attribute on the BOM table in the Web application.
- When installing the CAD Connector, it now includes a step to install the SolidWorks Document Manager 2020 so that you can work with SolidWorks files without having to install SolidWorks.
- When using the CATIA plugin, changing the home folder location, re-references the model and drawing files without having to open them.
- You can now check in Office documents within the Web app.
- We have removed the Context Sequence option from Document numbering rules as it relies on Free Text, which is not supported for Document numbering rules.

## Fixes

Fixed: There was an issue where you could not edit an item in the BOM view in the Web application.

Fixed: A custom report that included Change Request numbers was instead inserting Investigation Request numbers into the report.

Fixed: The Project BOM in the CAD plugin did not match the same sort order as the sort order in the Web application BOM table.

Fixed: Saving a model with external references was resulting in unregistered files after a refresh and attempted check in.

Fixed: Users with large assemblies were experiencing issues when performing a full check in.

Fixed: Custom properties were not being written to files during the Create Item process, but only once a check in was performed.

Fixed: Clicking a Business Process on an item in the CAD plugin was opening the Gantt chart instead of the appropriate Business Process section.

Fixed: The CAD plugin was not allowing editing of the 'spare' eBOM attribute for released children of a revised parent in Development.

Fixed: If an item existed in multiple locations on an eBOM being released and it was missing the 'spare' eBOM attribute in one location (resulting in a task), there were errors when attempting to mark the task as complete.

Fixed: Several users' logins were affected when they were added to subsequent tenants created while they were logged in, or not logged out properly.

Fixed: XML and PDF files within electrical packages were not being versioned up when the ZW1 file was checked in.

Fixed: Bulk export was not including PDF translations.

Fixed: The first document numbering rule created would encompass all document categories regardless of what the user specified in the rule. Only subsequently added rules would allow specific document categories.

Fixed: Users with a TEAM license were unable to create projects even though the Create button was enabled.

Fixed: Users were able to remove items from a Change Request after the Workflow had been started, leaving items in a Pending state.



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Upchain is a collaborative engineering platform. Our mission is to connect engineers with manufacturers, suppliers, procurement teams, project managers, and other product stakeholders to bring complex products to market faster and more efficiently than ever before.

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# Release Notes

Upchain v5.16

The Upchain team is very excited to bring you v5.16!

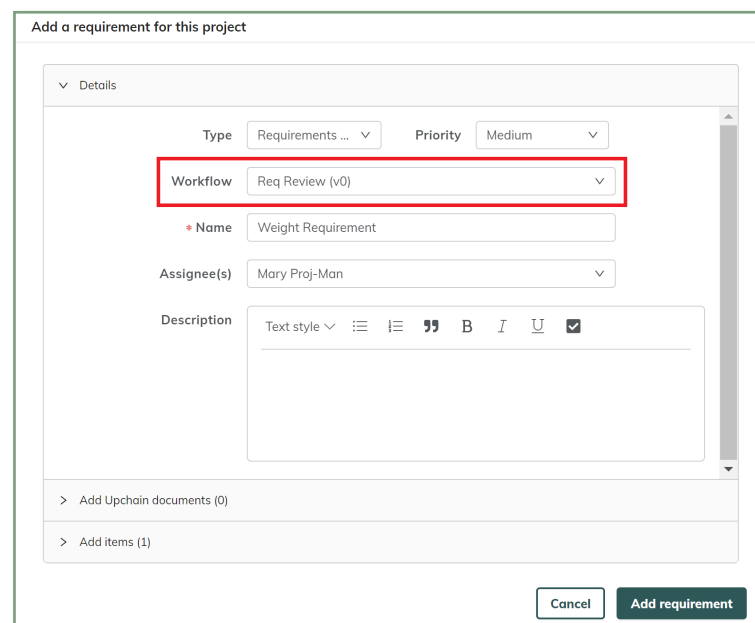
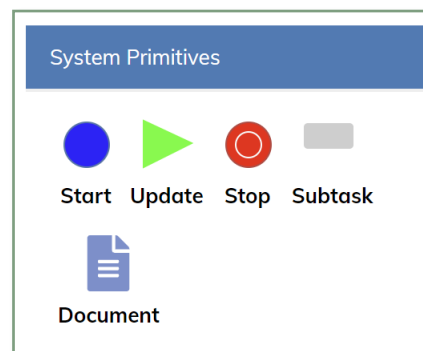
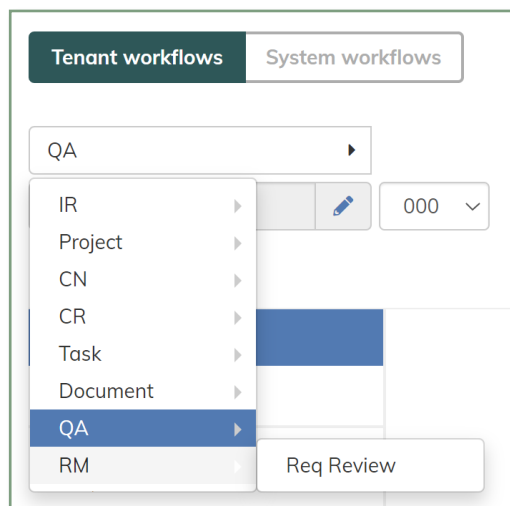
We've packed a ton of new features with this release. We've added requirements and QA process workflows, search and replace functionality in our CAD plugins, improved sBOM interactions, additional project effectivity capabilities to the Web app and CAD plugins, and much more!

We'll give you the highlights here.

# What's New

## Requirements and QA Process Workflows

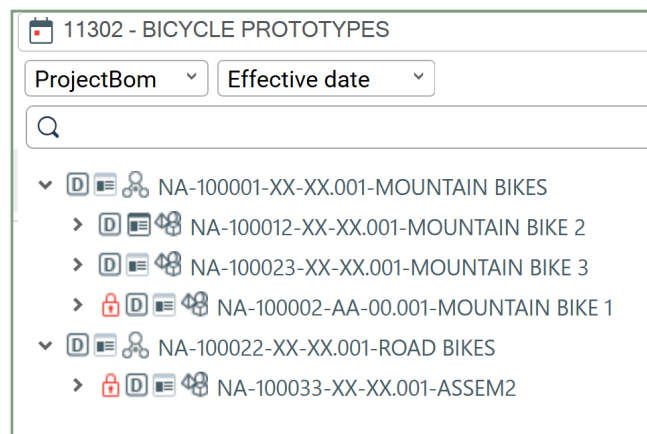
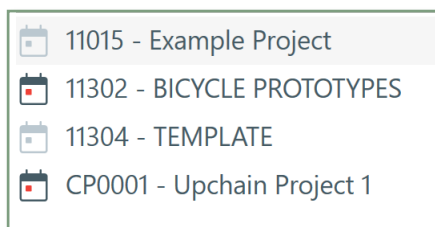
QA Processes and Requirements now have their own workflows. This allows further control over the lifecycle of these business processes (BPs). Additionally, these workflows include two new primitives: one to generate a custom task (that you configure and is governed by its own task workflow), and one to take all documents that were created during a task and attach them to the item(s) associated with the BP workflow. This allows you to streamline all tasks that need to be completed for each business process without having to manually configure each one every time.



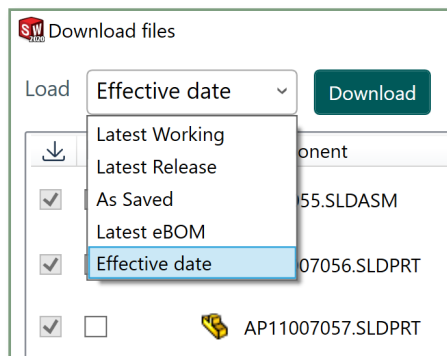
# What's New

## Project Effectivity in the CAD plugins

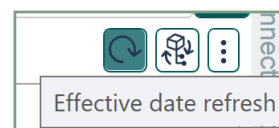
We have extended Project Effectivity functionality to the CAD plugins. When selecting a project to work with, a new icon indicates whether the project has an Effective Date set. The Project BOM for projects that have an Effective Date includes the Effective Date filter and works the same as it does in the Web application.



The download and check out windows include the Effective Date filter. This filter checks the child item versions in the eBOM against the project's Effective Date and downloads the latest file versions associated with the child item versions that have a creation date no later than the Effective Date set for the project. This allows you to begin working with an assembly that has components cut off at a specific Effective Date right away.



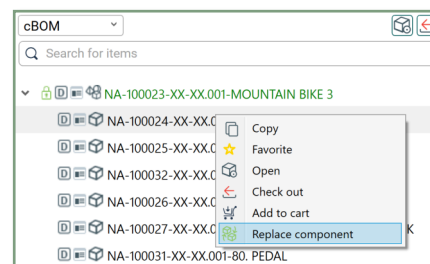
The cBOM/eBOM refresh functionality also checks if there is an Effective Date for the selected project and highlights any files/items that are not the latest version up to the Effective Date. Any items that you have open that were created after the Effective Date are also identified.



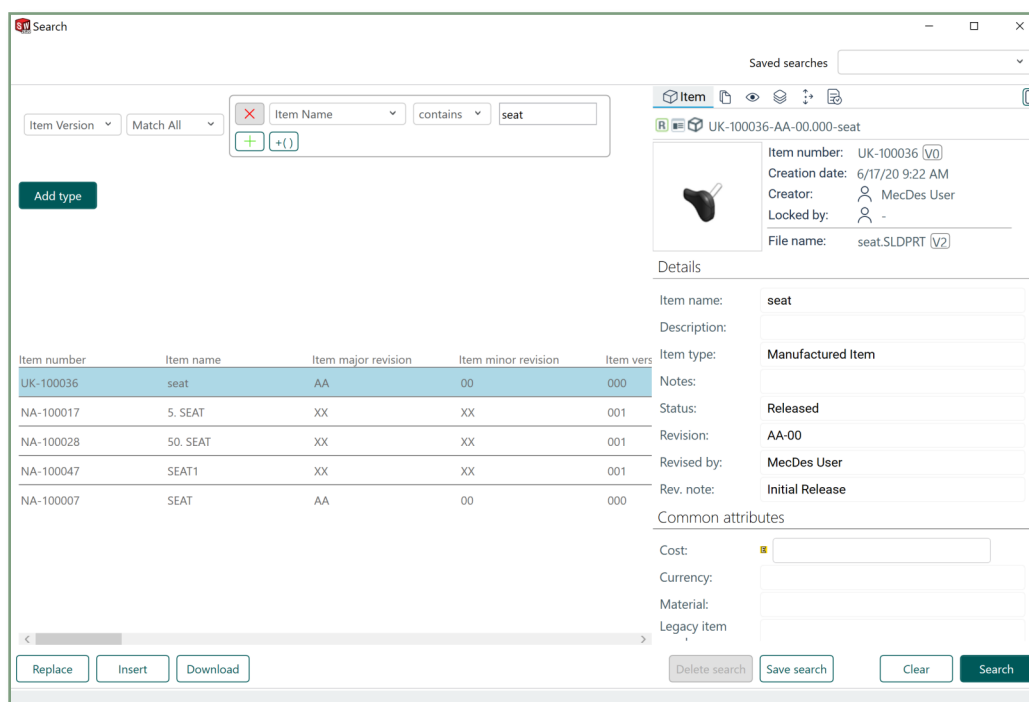
# What's New

## Search and Replace Items in the CAD plugins

In the CAD plugin, you can now insert an item directly into your cBOM or replace an item in your cBOM with another item that already exists in Upchain. The parent assembly must be open and checked out. You can access the replace function by right-clicking the item in the cBOM to be replaced and selecting **Replace component**. You can access the insert function through this same right-click menu, or the Advanced Search.



After you perform a search, you can click on each search result in the search window to display the item details on the right side to help you select the correct item. Once you locate your desired item, you can either download it to your home folder, have Upchain insert it into your cBOM for you, or have Upchain replace the selected CAD file in the cBOM. Be careful that you have the correct item selected for replace in the cBOM! The search results are preserved until you clear them or close the plugin, so you can close this window to confirm you have selected the correct item to replace. The insert and replace functions uses the existing functionality in your CAD software, making it easier for you to make quick changes to your CAD.





# What's New

## Saving eBOM versions in Web

We have introduced the functionality to take a BOM for an item loaded into the main BOM view and save it into a new eBOM version. This works for any item in development loaded under any of the End Item filters (except Latest Released) and for previous eBOM versions as well. This is useful in a number of cases:

- To allow you to edit and save a BOM that is loaded under an Effective Date filter. This copies the 'Effective Date BOM' to the latest 'as saved' BOM that you can edit.
- To make changes to the BOM without affecting the latest saved ones.
- To retrieve a previous eBOM version of the BOM, should the latest one contain errors.

eBOM

sBOM

eBOM Version

4

Latest Working

Save as new eBOM version

Item Name	Status	Files	Visualization	Tasks	Creator	Qty
<div> <div>▼</div> <div> <div>🔗</div> <div>🔗</div> <div>🔗</div> </div> <div>MOUNTAIN BIKES</div> </div>	DEVELOPMENT	<div>🔗</div> <div>🔗</div> <div>🔗</div> <div>🔗</div>	<div>🔗</div> <div>🔗</div>	<div>📄</div>	MP	1
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<div> <div>&gt;</div> <div> <div>🔗</div> <div>🔗</div> <div>🔗</div> </div> <div>MOUNTAIN BIKE 2</div> </div>	DEVELOPMENT	<div>🔗</div> <div>🔗</div> <div>🔗</div> <div>🔗</div>	<div>🔗</div> <div>🔗</div>	<div>📄</div>	MP	1.0000
<div> <div>&gt;</div> <div> <div>🔗</div> <div>🔗</div> <div>🔗</div> </div> <div>MOUNTAIN BIKE 3</div> </div>	<div>🔒</div> <div>DEVELOPMENT</div>	<div>🔗</div> <div>🔗</div> <div>🔗</div> <div>🔗</div>	<div>🔗</div> <div>🔗</div>	<div>📄</div>	MP	1.0000

# What's New

## BOM Sequence Number and Sorting

Every item in the BOM is now assigned a unique sequence number based on its location in the BOM, displayed within a new column in the BOM table. By default, this number is what determines the sort order of the BOM and is initially assigned based on the sort order of the CAD. However, you can drag and drop items within the same level on the BOM to re-order them and assign them a new sequence number. This allows you to sort your items in a way that makes sense to you and your team.

Please note that all items created prior to this Upchain release will display sequence numbers that are not unique. However, as soon as you drag and drop an item in the BOM tree to a new location, it forces all sequence numbers below the parent item to be re-calculated. Any items created after this build is deployed will be assigned a unique sequence number upon creation.



eBOM sBOM	
Item Name	Sequence number ^
▼ : MOUNTAIN BIKES	
> : MOUNTAIN BIKE 1	1
▼ : MOUNTAIN BIKE 2	2
: 1. STEERING	2.1
: 2. FRAME	2.2
: 3. TYRE	2.3
: 4. SPROCKET WITH PEDAL LINK	2.4
: 5. SEAT	2.5
: 6. INNER CHAIN	2.6
: 7. PIN	2.7
: 8. PEDAL	2.8
: 9. FRONT TYRE	2.9
: LINK	2.10
> : MOUNTAIN BIKE 3	3

# What's New

## sBOM Wizard and Service Workflow

We have introduced an sBOM Wizard to help you to quickly build service BOMs. The sBOM Wizard uses the eBOM Spare and Recommended Spare item attributes that you can set for the items in your eBOM to determine what items should go into the sBOM. The sBOM Wizard also allows you to see your full eBOM and quickly add items to your sBOM without the need to copy and paste. The sBOM Wizard uses colors to help you determine what items you may want to add to the sBOM (green) and which ones you won't (red) based on the eBOM and Recommended Spare attributes.

eBOM							sBOM						
Item	Number	Quantity	Status	Recommended spare	eBOM spare	Has sBOM	Item	Number	sBOM quantity	Reason			
1. STEERING	NA-100013-XX-XX-001	1	Development	Yes	Yes	✓	1. STEERING	NA-100013-XX-XX-001	1				
2. FRAME	NA-100014-XX-XX-001	1	Development	Yes	Yes	✓	2. FRAME	NA-100014-XX-XX-001	1				
3. TYRE	NA-100015-XX-XX-001	1	Development	Yes	Yes	✓	3. TYRE	NA-100015-XX-XX-001	1				
4. SPROCKET WITH PEDAL LINK	NA-100016-XX-XX-001	1	Development	Yes	Yes	✓	4. SPROCKET WITH PEDAL LINK	NA-100016-XX-XX-001	1				
5. SEAT	NA-100017-XX-XX-001	1	Development	Yes	Yes	✓	5. SEAT	NA-100017-XX-XX-001	1				
6. RANDED CHAIN	NA-100018-XX-XX-001	1	Development	Yes	Yes	✓	6. RANDED CHAIN	NA-100018-XX-XX-001	1				
7. PPH	NA-100019-XX-XX-001	1	Development	Yes	Yes	✓	7. PPH	NA-100019-XX-XX-001	1				
8. PEDAL	NA-100020-XX-XX-001	1	Development	Yes	Yes	✓	8. PEDAL	NA-100020-XX-XX-001	1				
9. FRONT TYRE	NA-100021-XX-XX-001	1	Development	Yes	Yes	✓	9. FRONT TYRE	NA-100021-XX-XX-001	1				
10. LINK	NA-100022-XX-XX-001	1	Development	Yes	Yes	✓	10. LINK	NA-100022-XX-XX-001	1				

The sBOM Wizard builds sBOMs on the level immediately below the starting item, so we have introduced a Service Workflow to help you quickly build a fully indented sBOM for your End Items. The Service Workflow is not a configurable workflow; instead it works through your eBOM from the lowest specified level up and uses the sBOM Wizard rules to automatically build sBOMs at each level based on the eBOM Spare and Recommended Spare attributes that have been set. The workflow saves you time as you do not need to manually create sBOMs at each level from the bottom up, and instead can focus on editing quantities, adding additional items to the sBOM, and detailing the reasons for why each item is on the sBOM.

Item name	Item type	Item number	Item status	Thumbnail	Item description	Manufacturer	Mfr. item number	Rec. spare	eBOM spare	Has sBOM
1. STEERING	Product Structure Item	UK-100013-XX-XX-001	Development		PROTOTYPES			Yes	Yes	✓
2. FRAME	Assembly	NA-100014-AA-00-001	Development					Yes	Yes	✓
3. TYRE	Assembly	NA-100015-XX-XX-001	Development					Yes	Yes	✓
4. SPROCKET WITH PEDAL LINK	Assembly	NA-100016-XX-XX-001	Development					Yes	Yes	✓
5. SEAT	Product Structure Item	UK-100017-XX-XX-001	Development		PROTOTYPE			Yes	Yes	✓
6. RANDED CHAIN	Manufactured Item	NA-100018-XX-XX-001	Development					Yes	Yes	✓
7. PPH	Manufactured Item	NA-100019-XX-XX-001	Development					Yes	Yes	✓
8. PEDAL	Manufactured Item	NA-100020-XX-XX-001	Development					Yes	Yes	✓
9. FRONT TYRE	Manufactured Item	NA-100021-XX-XX-001	Development					Yes	Yes	✓
10. LINK	Manufactured Item	NA-100022-XX-XX-001	Development					Yes	Yes	✓

# Enhancements

## Projects

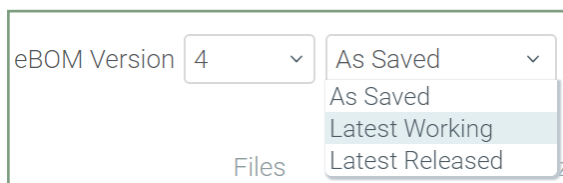
- The project header now includes a label to indicate whether the project is one of your project types or a template.



- When creating a project template, you are no longer able to start task workflows. We have also disabled the creation of Investigation Requests, Change Requests, and Change Notices within project templates since these are not relevant functions for a project template.
- On the project settings page, the parent project is now a link to that project.

## BOM Interface - Web

- The BOM table now includes a 'Latest Working' filter in addition to the current As Saved and Latest Released filters shown in the top right corner of the BOM table to provide consistency with CAD plugins.

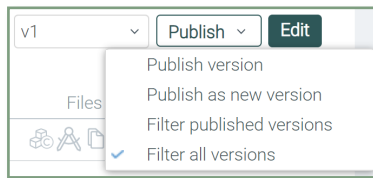


- We've improved the messages related to regenerating visualization. The messages more accurately describe the current status of the visualization.
- You can now edit the Responsible Designer field within the item details view.
- We have exposed the Revision Note and Release Type attributes in the BOM table and the item detail view. Both of these attributes are editable to allow you to fully prepare items for release before sending them to a Change Request.

# Enhancements

## sBOM

- You can now publish an sBOM version. This allows you to separate out the versions you have finalized for delivery to a customer.



- The Where Used tab on the item now includes an sBOM section that displays any other sBOMs that the item belongs to and what its quantity is in that sBOM.
- Users who do not hold a PROFESSIONAL license can view sBOMs, view previous sBOM versions, and export the sBOM to Excel.
- sBOM edits are now tracked in the History tab of the item's detail view.

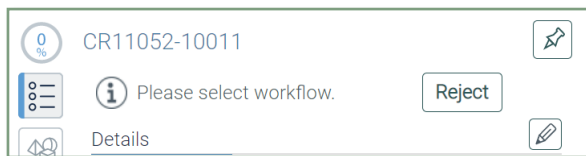
## Project and Business Process Tasks

- Gantt chart tasks, requirement tasks, and QA process tasks can be created without an assigned workflow.
- Task constraints are now optional when you create the task, and editable as long as the task is still in a Draft state.
- Actual start and actual end dates are now editable regardless of task status to allow you to more accurately track when tasks are started and ended. If the task has a constraint that conflicts with your edited actual start/end dates, you will receive a warning message detailing the conflict, and should you choose to proceed, the constraint will be removed.
- The task completion percentage field is now editable to give you more control over the tracking of the task should it not have a workflow assigned.
- You can create a task that begins in the past. This allows you to add in additional work to your project that was started or completed in the past but did not have a task at the time.

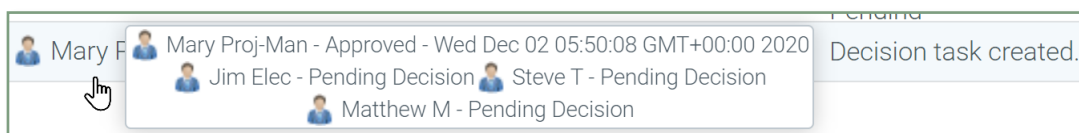
# Enhancements

## Business Processes

- When you create a requirement or QA process and associate an item to it that has associated suppliers, only those suppliers appear in the list of assignees, in addition to your other project team members. This ensures the list of assignees is short if your project has many suppliers.
- Change Requests (CR) and Change Notices (CN) can now be canceled/discarded from their quick view panel within their respective dashboard as long as the CR/CN is still in draft.



- Should a task be generated for an item that has a missing attribute, the item's attribute can be edited in its quick view window directly within the CR. This saves you time by not having to switch between the BOM view and the CR to fix each item.
- Revision Compares on Change Requests have been improved to now always display the previous revision on the left and latest release candidate on the right. Changes to Material, Quantity and Revision are communicated through a tooltip by hovering your mouse pointer over the warning symbol. Clicking each item displays its details on the right hand side so that you can see what the attribute value changed to.
- The full list of users who have been assigned a quorum decision, as well as the result of their decision, can now be viewed in the Workflow Actions tab of a CR and CN when you hover your mouse over the step owner.

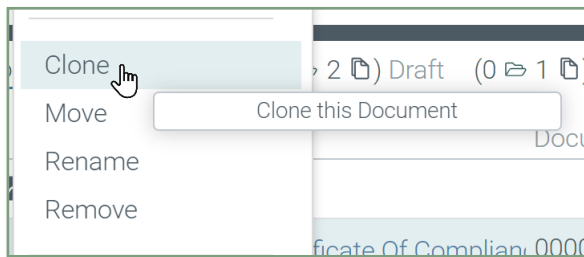


- On a CN, you can filter the BOM tree to show you only the items that have been selected. This makes it easier to review the items that have been submitted to the CN if your BOMs are large.
- When clicking on an assignment from any My Assignments section or from an email, it takes you to the appropriate section of the CR or CN to complete the task.

# Enhancements

## Documents and Document Categories

- You can set a document category to be editable on a released item. This means that you can add documents to a particular document category on an item that is released.
- The document Copy function has been renamed to 'Clone' to align with how the Clone function works for items in the CAD plugins. Cloning a document creates a duplicate document with a new document number assigned to it.



## Searching

- Users who have access to at least one specific item version can access all other versions of that item through a search in the CAD plugin and Web, regardless of whether some of those item versions belong to a private project or a project in which the user is not a member. Users can view the item's details, copy and paste, download, and check out the item.

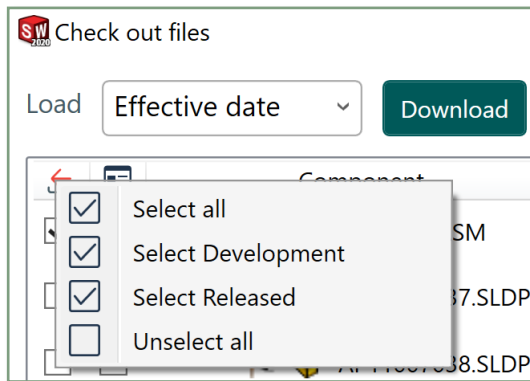
## 3D Viewer

- We have improved what happens if you have left the 3D viewer idle; the timeout now happens after four hours of inactivity and, at that point, a message appears prompting you to refresh the visualization. This gives you more flexibility for time when interacting with the 3D Viewer.
- We have improved the stability and performance of our visualization infrastructure to provide a more user-friendly experience.
- The nomenclature for creating an IR has been fixed; it previously read 'Create Issue' and now reads 'Create IR'.

# Enhancements

## CAD plugins

- When checking out an item from the project BOM or the cBOM view, you can select all development, all released, all items (regardless of status), or unselect all. You do this by right-clicking on the 'Select' column heading on the download window, or on the parent checkbox on the cBOM view. This gives you quicker control over which items you can check out at once.



- The buttons that are always at the top of the item view and the cBOM view (eg. refresh, root refresh, more actions) remain visible and never change position, and any other buttons that appear based on context are shown to the left of the constant buttons. This ensures you do not accidentally click a button you did not intend to click because it had shifted as other buttons appeared.



## Support

- Upchain now fully supports Inventor 2020 and 2021.
- Initial launch of the Office and Outlook plugins after installation now verifies the publisher as Upchain Inc.
- You can now subscribe to a new webhooks event notification to confirm that the webhooks service is alive and able to send other event notifications.
- Various informative and error messages throughout the application have been improved to be more clear.



# Enhancements

## Administration

- Within the item numbering rules, there is now an option to allow you to extend the major and minor revision digit and character length when the current length limit has been reached. This allows you to continue revising the item without having to create a new item number.
- A new tenant property has been added (**private.floating.items**) to control who can access items that have no association to a project ("floating items"). When enabled, only the creator of the floating item can find the item through a search. Otherwise, it will be searchable by everyone.
- A new tenant property has been added (**item.name.in.translation.name**) that, when enabled, means all translations are renamed to: Item Number-Major Revision-Minor Revision.Item Version-**Item Name**. When disabled, translations are renamed to: Item Number-Major Revision-Minor Revision.Item Version-**File Name**.
- When disabling a user and reassigning active tasks to another user, more information is displayed about each user (name, email, primary role) to help you distinguish between users with the same name.
- Within the user federation section, you can now enter a custom user LDAP filter. This filter is optional.
- The users page now has a search field to allow you to search for a specific user by name, username or email.
- The Create Supplier/Manufacturer windows warn you when you exceed the maximum allowable character limit (256) for the Name.
- We have simplified the new user registration process so that user information is populated directly from the SSO service credentials that you are using, rather than having new users enter their own information.

## Fixes

Fixed: NX users were experiencing issues when their configuration version did not match the version of the CAD plugin. This fix introduces a check to ensure the versions are compatible.

Fixed: German characters are now handled correctly when sending data from a Change Notice to Web services that interact with a connected ERP system.

Fixed: Non-CAD users were unable to download translations from certain items.

Fixed: NX users that had configured specific load options for their files noticed that these load options would change once the files were registered into Upchain. This has been fixed.

Fixed: Comments from user decision tasks were not appearing on CRs. These now correctly show in the Activities tab of a CR.

Fixed: Performance when loading Change Notices that contain a large amount of items has been significantly improved.

Fixed: When downloading a large assembly from the Web application, the download window now shows a progress indicator for the download.

Fixed: Change Notices with a workflow that returns the CN to a draft state allows for the WF to be changed.

Fixed: The estimated cost attribute was not being displayed properly in the item view after a refresh of the item view.

Fixed: Using an API endpoint to download files from other vaults was not working without first needing to manually synchronize the vaults. This fix adds an additional check to see if a sync is first needed before downloading a file.

Fixed: It was not possible to edit the sBOM quantity or reason attributes on an sBOM for a released item.

Fixed: Manufacturer Item Number and Manufacturer Item Description are now consistent terms used across all platforms and plugins.

Fixed: When selecting all released items within a CN, it would select all previously ordered released items as well, setting the R quantity to 0, making it harder to see which items were actually selected for requisitioning on the current CN.

## Fixes

Fixed: Modifications to checkbox settings on users profiles would change upon refresh of the page.

Fixed: Users were unable to print PDFs from Web.

Fixed: Missing Finish and Manufacturer's Item Description were missing from the BOM table in Web.

Fixed: Performance when loading CRs that contain large amounts of items has been improved.

Fixed: PDFs would not load when clicking the preview icon next to it.

Fixed: The 'Group by' option is now working BOM items, CRs, and CNs reach over 1000 components.

Fixed: Items ended up with a null status after two users selected opposing options on a CR Decision task without first refreshing the page.

Fixed: Correct previous version of PDF file is downloaded on user request.



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Upchain is a collaborative engineering platform. Our mission is to connect engineers with manufacturers, suppliers, procurement teams, project managers, and other product stakeholders to bring complex products to market faster and more efficiently than ever before.

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# Release Notes

Upchain v5.14.1

The Upchain team is excited to bring you v5.14.1! This release focuses on several important enhancements and bug fixes. We'll give you the highlights here.

## Enhancements

- In order to reduce disruption to users, we have improved the way in which Upchain CAD plugins and the Upchain Cloud Service check for compatibility with each other. These improvements mean that new updates to the Upchain Cloud Service will only require users download and install new plugins when absolutely necessary. We have introduced a *minimum* plugin version, which defines what version of each plugin you must have installed to be able to use it, and a *recommended* plugin version, which defines what version of each plugin you should have installed. This will help reduce how often you are required to download and install the latest plugin version, including situations where the latest build does not contain fixes that affect the plugins. Plugin version information will be displayed on the plugin download page and in pop-up windows when necessary.
- Custom properties are now written to DWG files upon check in so that you can view an updated title block.
- When configuring Item Numbering and Document Numbering rules, the Sequence option now allow you to choose as few as three digits.
- We have updated our APIs to allow the creation of items with the same item master but different revisions and versions to support legacy project migration into Upchain.
- When a search returns purchased parts, all relevant purchased items are being shown in the search results regardless of whether it belongs to a public or private project, regardless of whether the purchased part is a floating part (no associate project), and regardless of item status. The available actions to the user depend on whether the user has access to the project(s) in which the purchased item belongs.

## Fixes

- Fixed: Certain customers were experiencing issues with their custom reports due to the limit of project BOM items and specific custom attributes. The Project BOM Report was not generated for projects that contained more than 3000 items. It can now handle up to 100,000 items.
- Fixed: There was an issue where the Edit function was not working in the BOM view of the Web application. This was due to the Edit function not handling disabled CAD attributes correctly.
- Fixed: The Generic Plugin was failing to create items when the AutoCAD file was too large.
- Fixed: Suppressed files were being removed from the cBOM during check-in. This has been fixed so that if the suppressed component is known to already be registered in Upchain, it will use information from the database during check-in.
- Fixed: Specification Documents were being removed from the item once it was released.
- Fixed: Improved download and check-out performance to load the download/check-out window faster.
- Fixed: The **show.new.item.window** tenant property was not creating the item type selected by the user in the Create Item window.
- Fixed: Refreshing the cBOM view in the CAD plugin was sometimes throwing an error when certain custom attributes were found in a null state.
- Fixed: The creation of eBOM attributes is disabled until further enhancements are introduced to ensure they are handled correctly.



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Upchain is a collaborative engineering platform. Our mission is to connect engineers with manufacturers, suppliers, procurement teams, project managers, and other product stakeholders to bring complex products to market faster and more efficiently than ever before.

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