

For information about previous releases, visit [our website](#).

February 21, 2023 Version 2023.03

Feature enhancements

Checklists - Optional results selector PSW-I-263

The results selector is now optional in the checklist template and has been renamed to Yes/No/NA.

Note: The optional results selector is not available for Labels, Memos, Section Headers, and Section Headers - Copyable.

Agitator Inspection		
CHECKLIST APPROVERS		
Checklists		
<input type="checkbox"/> Type	Include Yes/No/NA	Description *
<input type="checkbox"/> Section Header	<input type="checkbox"/>	GENERAL
<input type="checkbox"/> Date and Time	<input type="checkbox"/>	Date and time
<input type="checkbox"/> Text	<input checked="" type="checkbox"/>	Unit/Item No.
<input type="checkbox"/> Text	<input checked="" type="checkbox"/>	Reference Doc. (QA/QC)

Westminster Office Campus
Checklist

Agitator Inspection

CHECKLIST APPROVALS HISTORY

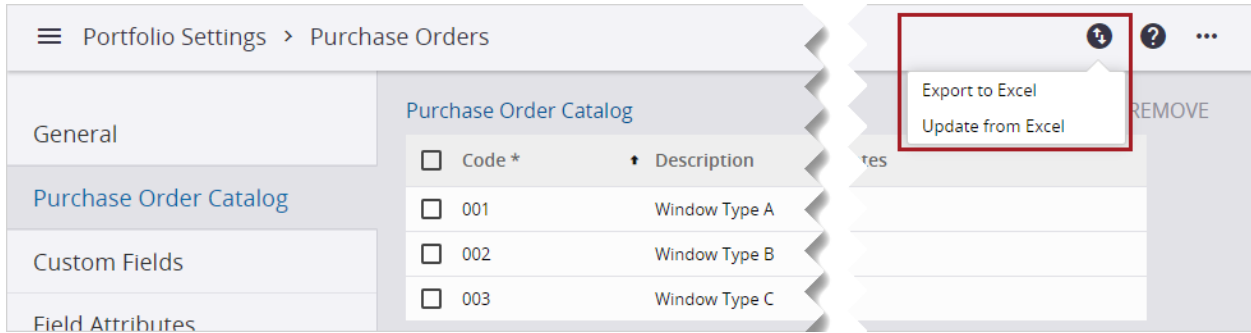
GENERAL

Date and time				
Unit/Item No.	Yes	No	N/A	
Reference Doc. (QA/QC)	Yes	No	N/A	

Results selector in checklist template and record

Purchase order catalog - Export and import catalog items PSW-I-1541

In the portfolio record settings for purchase orders, you can now export the purchase order catalog to an Excel file. Then you can edit the items and import the file back into ProjectSight.



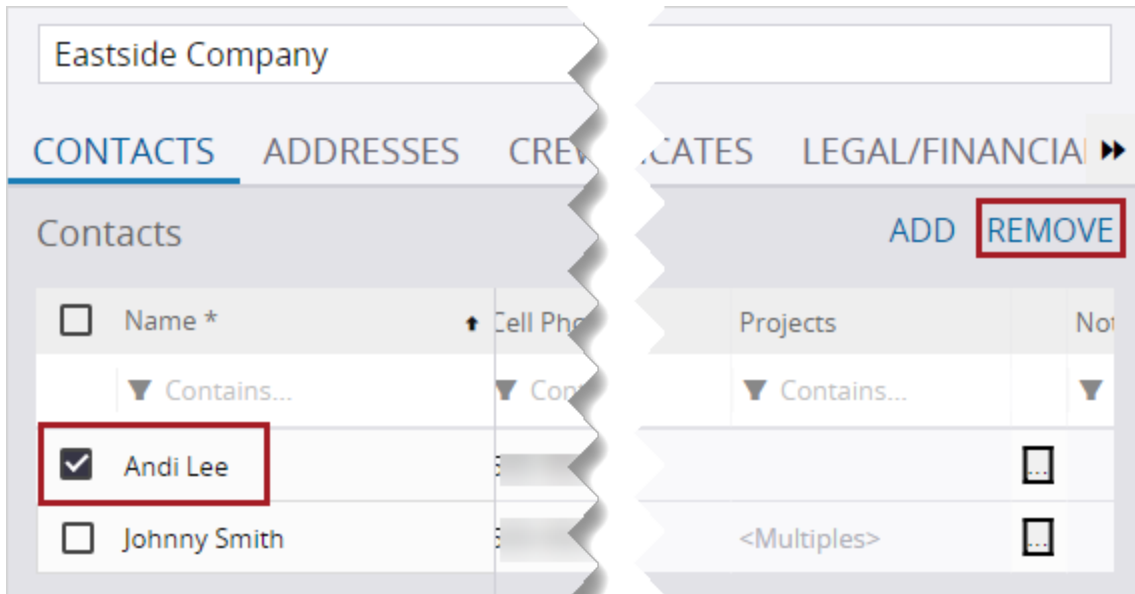
Import/Export button for purchase order catalog

Users - Project access PSW-I-2909

When project access is removed from a user in the portfolio or project settings or when a user is removed from a portfolio, the user's name is removed as a project contact.

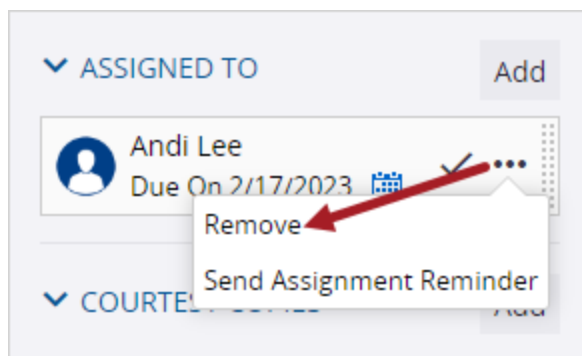
Note:

- To completely remove the user from the Contact Search dialog, remove the user from the Contacts tab of the company record.



Remove user from company record

- To stop notifications from records in which the user is a participant, such as a record author or assignee, remove the user from those records.



Remove user as record participant

Resolved issues

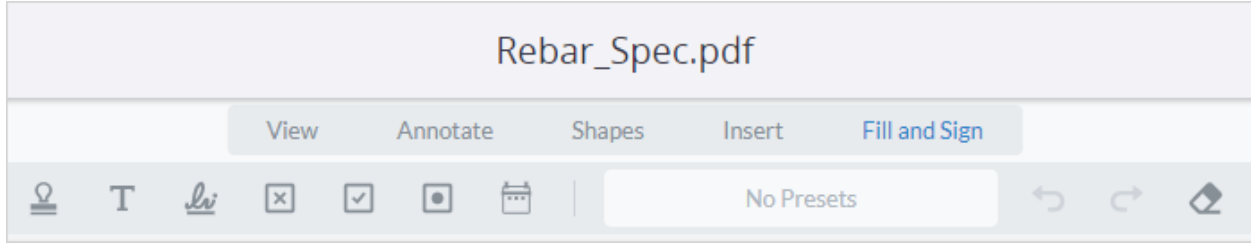
- When a new meeting is created, the start and end times in the record match what was initially entered. (CN 03263249 / CN03278467 / PS-37986)
- When Trimble Connect is the file management system, the link count in the daily reports list view is correct. (CN 03262369 / PS-37999)
- For drawing measurement annotations, the Scale and Precision settings have been added back to the Style dialog. (CN 03269610 / PS-38126)
- In the Subcontract Change Order [Detailed with Signatures] report, a typo has been corrected. (CN 03268728 / PS-38162)
- When the default security role is changed, an error is no longer displayed. (CN 03271526 / PS-38200)
- When a PDF is downloaded from the PDF viewer, the downloaded file now has the correct file name. (CN 03278210 / CN 03277083 / CN 03278645 / CN 03279823 / CN 03282528 / PS-38270)
- If Trimble Connect is the file management system, and the quick upload folder or nomenclature contains invalid characters for Trimble Connect, the invalid characters are replaced, and files can be attached to meeting minutes without any errors. (CN 03277174 / PS-38292)
- Projects are now exported successfully. (CN 03279514 / PS-38338)
- When the As Builts option is selected for a drawing download, the linked items are included in the .zip file. (CN 03279692 / PS-38493)

February 7, 2023 Version 2023.02

Feature enhancements

File Library - PDF viewer upgrade

The PDF viewer has been upgraded and includes new [annotation tools](#).

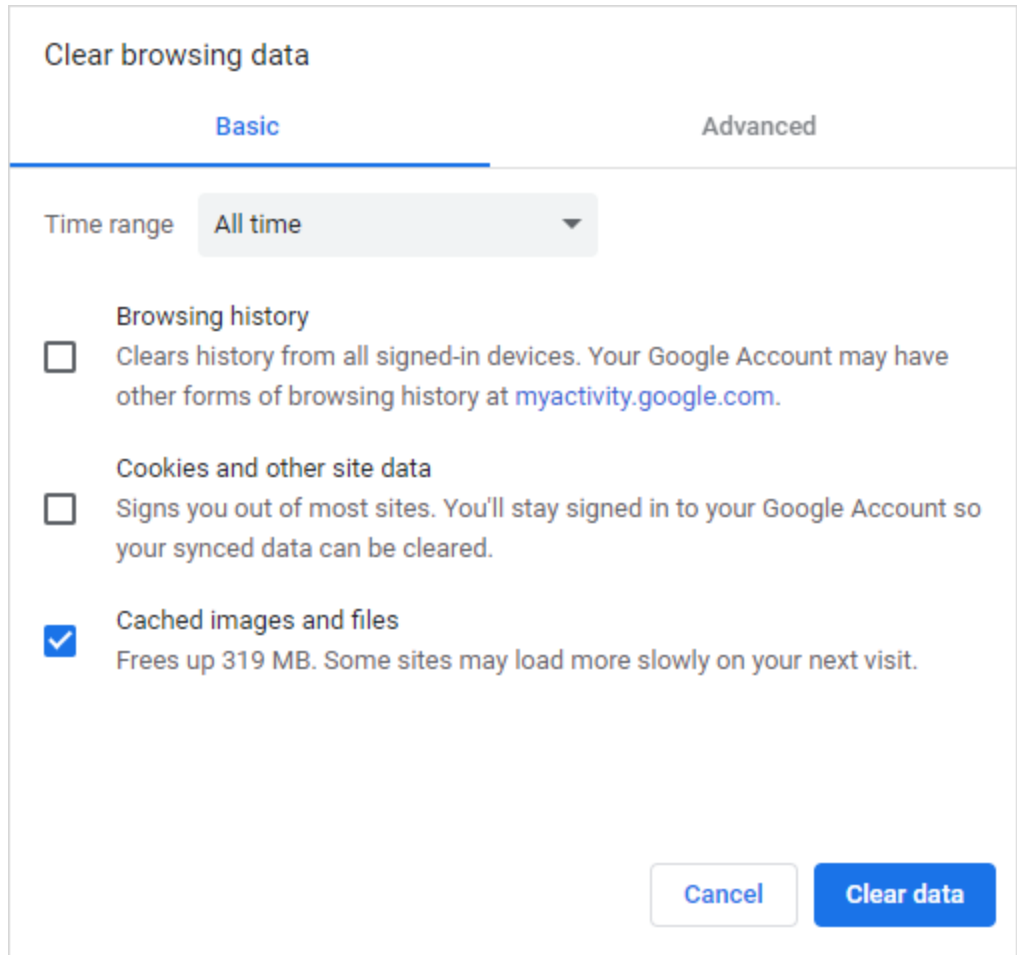


Annotation tools in the upgraded PDF viewer

Note:

This is a major upgrade, so please clear your browser cache before you use the PDF viewer. To clear the cache, press **Ctrl + Shift + Del**, and ensure that **Cached images and files** (Chrome / Edge) or **Cache** (Firefox) is selected.

Example

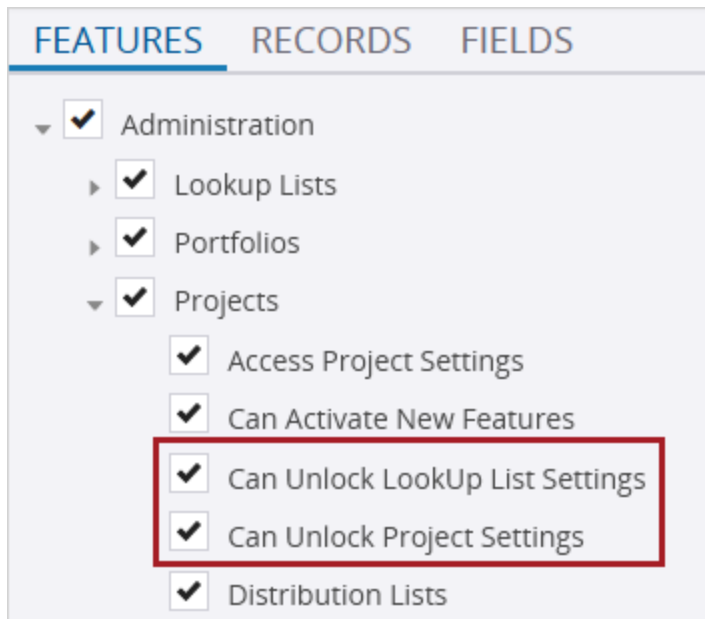


Clearing the browser cache in Chrome

Feature permissions - Unlock project settings

You can assign the following feature permissions to a security role:

- **Projects - Can Unlock LookUp List Settings:** Unlock lookup lists at the project-level so that they're no longer inherited from the portfolio settings.
- **Projects - Can Unlock Project Settings:** Unlock project-level settings so that they're no longer inherited from the portfolio settings.



Feature permissions for unlocking project settings

Resolved issues

- When the Get Files button is clicked in a submittal package with attached files, an error is no longer displayed. (CN 03235978 / PS-37350)
- When the Punch Item [Summary Log with Assignments and Links] report is generated, all the drawings that are linked to the punch items are included. (CN 03242275 / PS-37486)
- In the tile view of the Drawings module, all the drawings are now displayed. (CN 03252830 / PS-37755)
- When a PDF without defined sections is uploaded into a specification set, the PDF is now uploaded successfully. (CN 03264816 / PS-38069)
- When a specification from a list of more than 250 is linked to a submittal, an error is no longer displayed. (CN 03253794 / PS-38086)