Release Notes - May 2024

Our May 2024 release is packed with new features including lots of user-friendly changes to the interface, additional flexibility with stage lists, a learning mode, and Single Sign On.

Grid Updates

Filtering

The ability to filter data in grids has been dramatically improved on the following grids:

- Card List
- Outstanding Actions
- Equipment List
- Multi Project Card Report

For more details, see Filtering the Card List and Multi-Project Card Report.

Single Sign On

Single sign on is now available. There is generally an extra fee for this. Contact Sales or Support to discuss further.

Manage custom library fields by folder

Custom library fields can be enabled/disabled per folder, and also set as required or not per folder. For steps, see Add Custom Library Fields.

Markups

Line/Arrow, and Sticky Note

Additional markup tools are available - arrow/line tool (1A, 1B, 1C) and sticky note tool (2A, 2B, 2C). These are accessible by selecting the markup icon in the viewer.
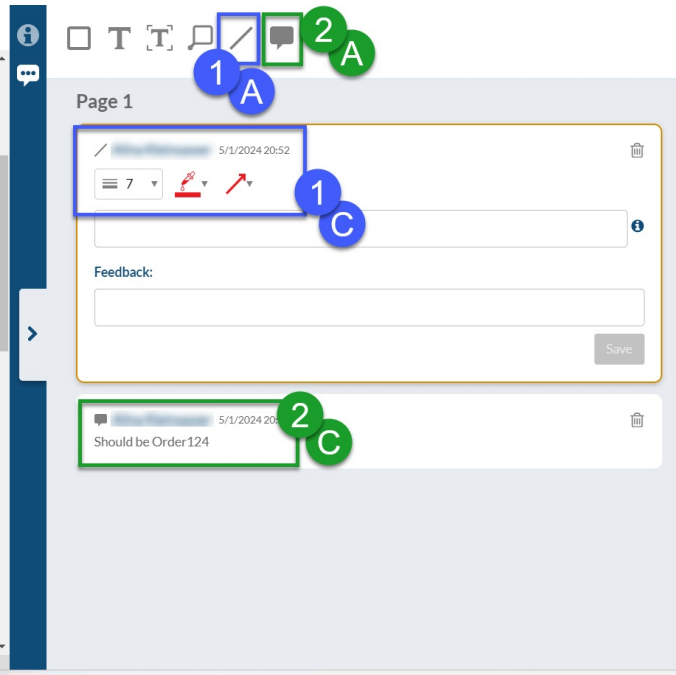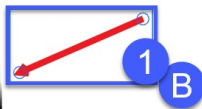
Arrow/line markups and be forced to 90 degree angles by holding the Shift key on your keyboard while drawing them.
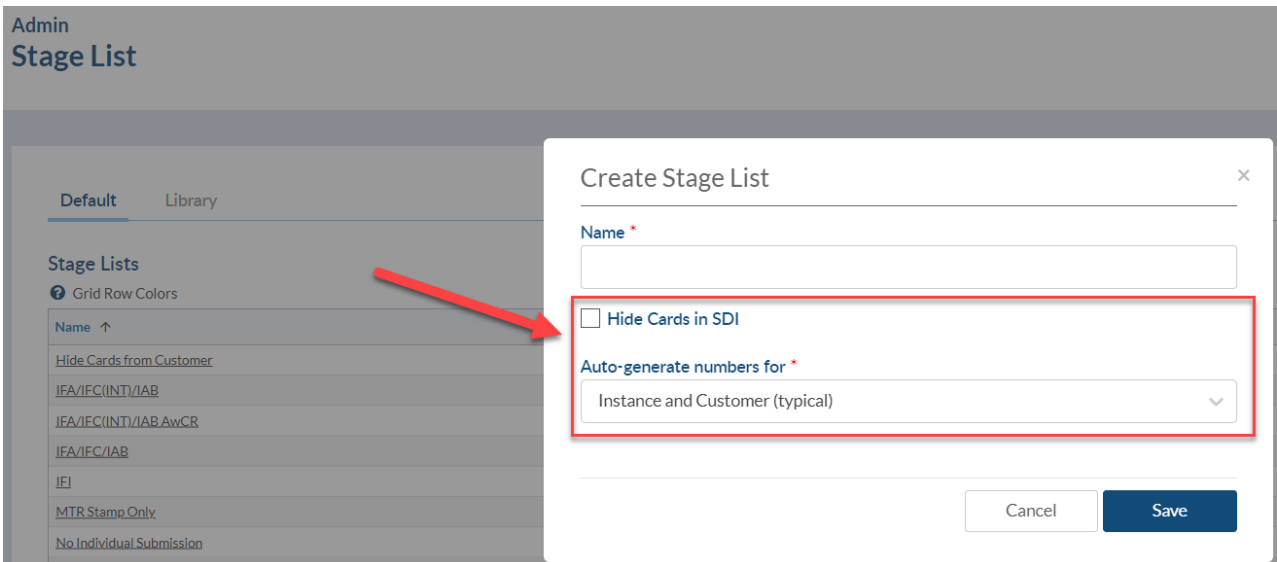
Stages

New options for stage list

Hide Cards in SDI: This will hide cards which use this stage list from SDI reports. (The parameter "filter=hr" will add these back to the output.)

Auto-generate numbers: Allows the user to choose which numbers (customer will be auto-generated for cards assigned to this stage list.

New option for individual stage

Do not submit to customer: This is an option for stages with Customer target. If selected, cards in that stage will not appear in the *Outgoing to customer* grid.

Actions & Routing

Action due date for NULL cards

The method used to calculate due dates for NULL cards which have been assigned routings has been improved. When a card is routed to a user, if the customer due date is empty, the due date for the action will be the current date + action turnaround days for the project. If the customer due date is NOT empty, the customer due date will be copied to the action due date.

Project Settings

Allow multiple users per role on project main

To allow multiple users to quickly find projects on which they are involved, DocBoss now permits selecting multiple users for each role on the main project setup. See this article for details.

Header/footer

A new variable is available to add the **Item/Model** list to the header/footer.

Reporting

Project Metrics by user

From the **System menu** > **Reports** > **Project metrics** page, a usage report per user account is now available. For instructions, see Project Metrics.

Submittals

Variable based naming convention for native/comments files

DocBoss now allows users to define a separate naming convention for native/comment files using the same concept as other file naming formats (variable based). For details, see Outgoing File Name Format.

Previous revision column

A new column is available on the **Outgoing Submittals** grid which displays revision value from the previous submittal.

Templates

Output templates

New variables

Transmittal templates:
- *<Documents.Reference>*: To output card reference on transmittal templates.

SDI Report/Document Index templates:
- *<DocumentsByIndex.Only_Customer_StatusName>*: To output the customer status description on document index templates. (DocBoss statuses are ignored.)

Section Title Page templates:
- *<Section_Documents.SupplierDocNumber>*
- *<Section_Documents.Title>*

Data from Library Cards:

When pulling data from cards which have had files attached from the library, DocBoss will maintain a link between the library card and the project card to allow pulling custom library field metadata into Excel templates with the following variables:
- *<Document_CustLibraryFieldX>*: Cover page
- *<DocumentsByIndex.CustLibraryFieldX>*: Document index

Native files

There is now an option to add a cover page worksheet embedded into secondary files (typically the native file) that are in Excel format.

Email templates

File Name (without file extension) is now available as a variable for email templates when separate submittal per file is used.

Other

Additional updates that have been made:
- Sub-Packages options are available in the compilation layout settings under company profiles.
- The global search for projects now supports searching by Job number.
- The status messages showing results of CSV import on the Equipment List now display the date of the last completed CSV import.
- The UI for the Equipment List Import popup has been redesigned.
- Instance Admin now allows setting 3 columns for the Header/Footer pattern.
- Learning Mode: new option enabled under **User Profile** > **Defaults** which adds an icon linked to relevant support articles on various pages (beta).