

# Release - October 2023

09/03/2024 2:49 pm MDT

In the October 2023 release of DocBoss, we're introducing a range of options to further customize your outputs and save you time. These updates focus on streamlining your workflow and include improvements such as bulk user management, expanded filtering and reporting options, and increased customization of defaults.

## Admin

### Reactivate user accounts through UI

Reactivate user accounts seamlessly through the user interface. No need to contact support anymore!

Extended Support is N/A and Technical Support: 3 / 3

Total Roles 9 / 18 Admin/Full 7 / 8 Reviewer 1 / 5 View 1 / 5

1 Inactive accounts [Show](#) + Add user

Receive internal approval actions alert	Security Permission	Commercial Contact	Technical Support Access	Tools
Y	Y	N	N	
N	N	N	N	
Y	N	N	N	
Y	N	N	N	
Y	N	N	N	
N	Y	Y	Y	

### Import/Export Users via Excel

Admins can bulk edit users effortlessly using the Excel import/export feature.

Total Roles 9 / 18 Admin/Full 7 / 8 Reviewer 1 / 5 View 1 / 5

Inactive accounts [Show](#) [+ Add user](#)

Receive internal approval actions alert	Security Permission	Commercial Contact	Tech
Y	Y	N	N
Y	N	N	N
N	Y	Y	Y
Y	Y	N	Y
N	N	N	Y
N	N	N	N
N	N	N	N
Y	N	N	N
N	Y	N	N



# Assign

## Add comments on bulk assign

Enhance your efficiency with the ability to add comments on bulk assign, just like when you assign files individually to cards.

The screenshot displays a software interface for document management. On the left, a table titled "Assign Status to Document Cards" shows a list of documents with columns for Rev # (W/I), Stage, Status, File Name, Doc Code, Doc Code Name, Level, Reference, Sheet, and Title. Three documents are listed, all with a status of "X-". A "Process" button is visible at the bottom right of the table. On the right, a "Set Status And Routing" panel is open, showing "Processing 3 cards where: Stage with Target = 'Customer'". It lists the file names and references for the three documents. Below this, there are "Comments" sections for "NEXT Delta submittal" and "NEXT Sub-Supplier submittal", each with a text input field and a "Drag and drop new file" or "Or choose files from disk" button.

# Defaults

## More defaults available in Project Template

Enjoy more default options in the Project Template, giving you more control over your projects.

New defaults available at project and template level:

- Default stage list
- Default option for the "stamps/cover page" doc code/card field

New defaults available at template level (remaining on project **Main** screen at project level):

- Document auto-numbering format
- Submittal numbering format
- Outgoing file name format

## Cover Page defaulting for Ad-Hoc submittals

When creating ad-hoc submittals, select from these cover page options: no cover pages, send exactly as last received/submitted, or apply target cover page.

# Expediting

## Excel option for Expediting report

Get your expediting reports in the format you prefer: HTML or Excel.

# Library

## Custom fields

Add custom fields to the library to better manage file meta data. Use the fields to execute searches from your projects.

## Enhanced Query

Use wildcards in queries when auto-attaching library files to project cards.

# Reports

## Export card history for all cards on a project

From the **Index Reports & Compilations** screen within a project, you can export the history for all cards on the

project.

## Project Metrics

### New Metrics

- Average days to first submittal from order date (only when period = ALL)
- Average re-submittal turn around days (TAD). This is from customer return until resubmitted to customer and is based on the dates in the submittals (vs actual date)
- Metrics for stages where **For Approval Only** is checked.
  - Instance on-time delivery
  - Average days overdue (only for overdue docs)
  - Count of overdue cards

### New Filters

- Filter by Internal Code

## Routings


### Assign documents to print queues

Using routings, assign documents to one or more queues for printing. This function leverages our actions functionality and a new setting on a user profile (converting a review user into a print queue).

## Compilation

### Option to add received comment pages

Choose whether you want to enable received comment pages in compilations.

 Save Compilation (current compilation only)

#### Compilation Info

---

Name:\*


Description:

File Type:

Cover Pages:

Respect cover page suppression for each card

Include Markups

Add Comment Page to Document(s) 


Regenerate ENTIRE Compilation during submittal process

# Submittal


## Custom FROM email address per project

The **Email FROM Address** can now be entered as a custom email address per project.

**Submittal Notification Emails**

Delta  Customer submittal notification (s: ▼ Ad-Hoc Ad-Hoc submittal notification (sys ▼  
Sub-Supplier Sub-Supplier submittal notificatio ▼ Internal/3rd party Internal submittal notification (sy: ▼

Email FROM Address Use specific name/email address ▼ Contact Info Use user name/email address ▼  
Name   
Email

Email settings 

	Send notification	Include hyperlink	Include files	Include transmittal
Delta	No	Yes	No	PDF
Internal/3rd party	Yes	Yes	No	PDF
Sub-Supplier	Yes	Yes	No	PDF
Adhoc	Yes	Yes	No	PDF

## Choose how you want to be included on submittal emails

You can select your email inclusion preference under **User Profile > Defaults** for the submittals you send, whether it's CC, BCC, or not at all.

**Defaults**

**Dashboard settings**

Dashboard Landing Page

Default Tile Layout for "Incomplete with us"

**Project setting**

Project Landing Page

Track Changes on page

CSV Delimiter

Notify me about received sub-supplier submittals

Add me to the recipients list when I send submittal emails

## Templates and variables

## New variables for email templates

You can now use the following variables in email templates: Document Stages, Document Stages Abbreviation, and Delivery Medium.

## Outgoing file name format date formatting options

The date format parameter can now be used within the outgoing file name format.

## Excel parameter to show changes on SDI report

A new parameter in document templates can highlight changes in data since the last SDI report submission.


# User Interface

## Rename default tagged equipment fields


In the **Project Template**, Tag and Item/Model equipment fields can be renamed.

## Filter Project List by pending submittals

The **Project List** now includes a checkbox to filter pending submittals to customers, making it easy to see which projects have documents ready to go out to customers.

 Grid Row Colors

Projects				
Select	Project name	Type	Affiliate	WI Ref Number
<input type="checkbox"/>	<a href="#">Chemical Company Expansion (15325AK)</a>	Order	Wolfe CA	15325AK
<input type="checkbox"/>	<a href="#">Level Transmitters (S1234599)</a>	Order	Wolfe Instruments	S1234599
<input type="checkbox"/>	<a href="#">PT replacement (S220727)</a>	Order	Wolfe Instruments	S220727
<input type="checkbox"/>	<a href="#">Pump Package (S12087)</a>	Order	Wolfe Instruments	S12087
<input type="checkbox"/>	<a href="#">Shelters (S220222)</a>	Order	Wolfe Instruments	S220222

No more pages |  Show on Page: 10 | Items on page: 5

- Show hidden projects
- Show completed projects
- Show only my projects
- Show only projects with unprocessed sub-supplier submittals
- Show only projects with unprocessed customer submittals
- Show only projects with pending submittals to customer

We hope you'll find these new features valuable. If you have any questions, don't hesitate to contact our Support team. We're here to help!

