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.

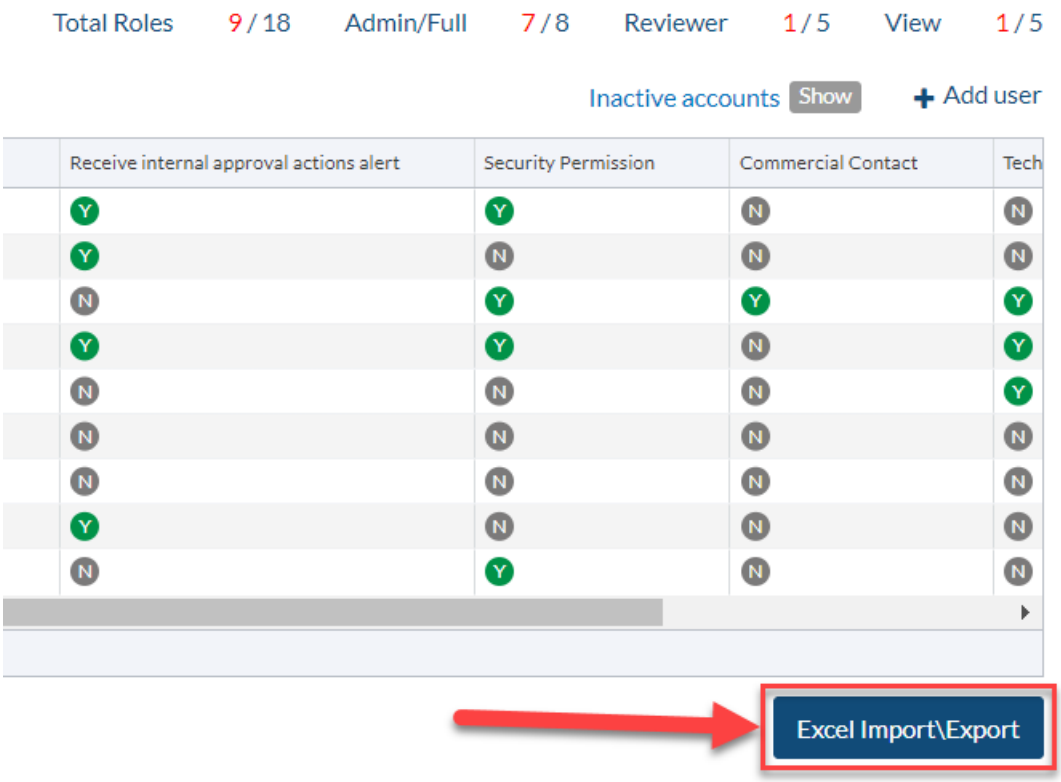
Admin

Reactivate user accounts through UI

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

Import/Export Users via Excel

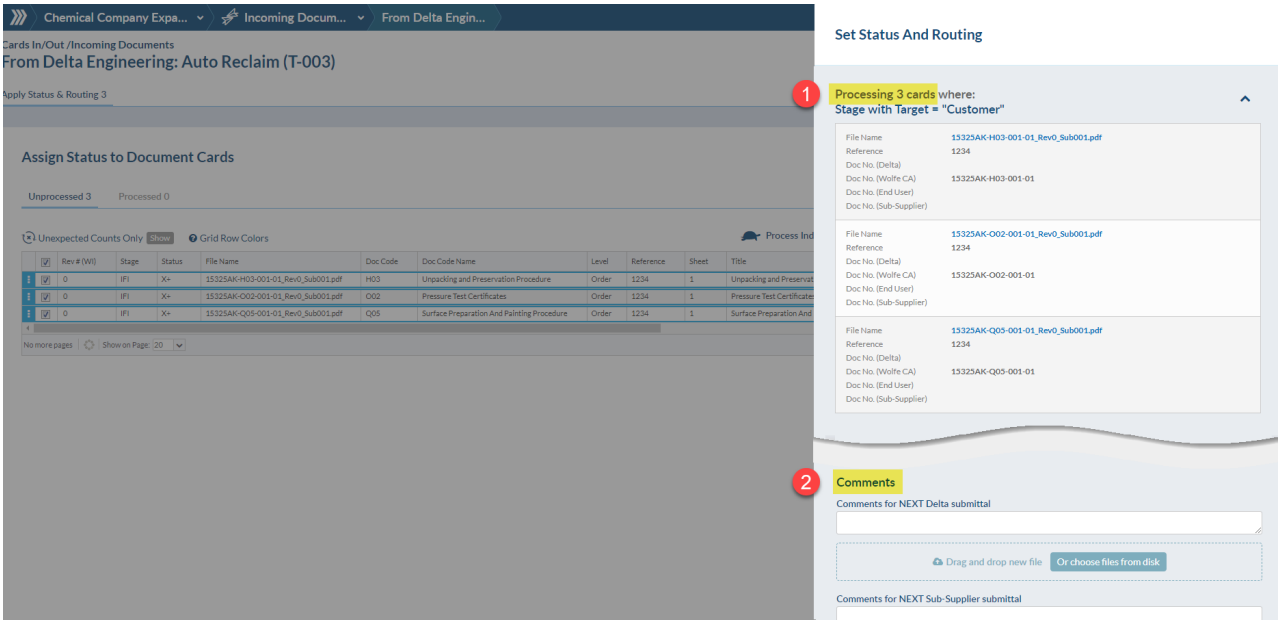
Admins can bulk edit users effortlessly using the Excel import/export feature.



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.



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

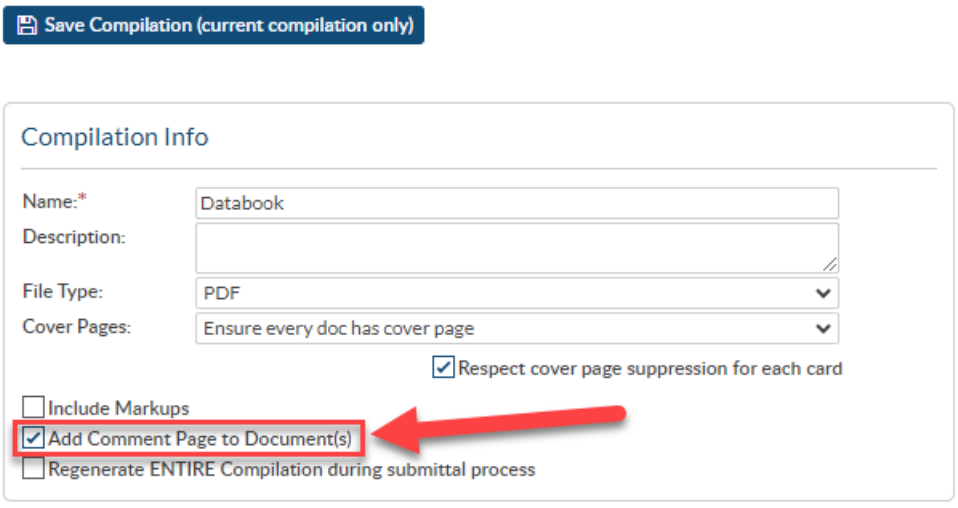
Assign documents to print queues

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

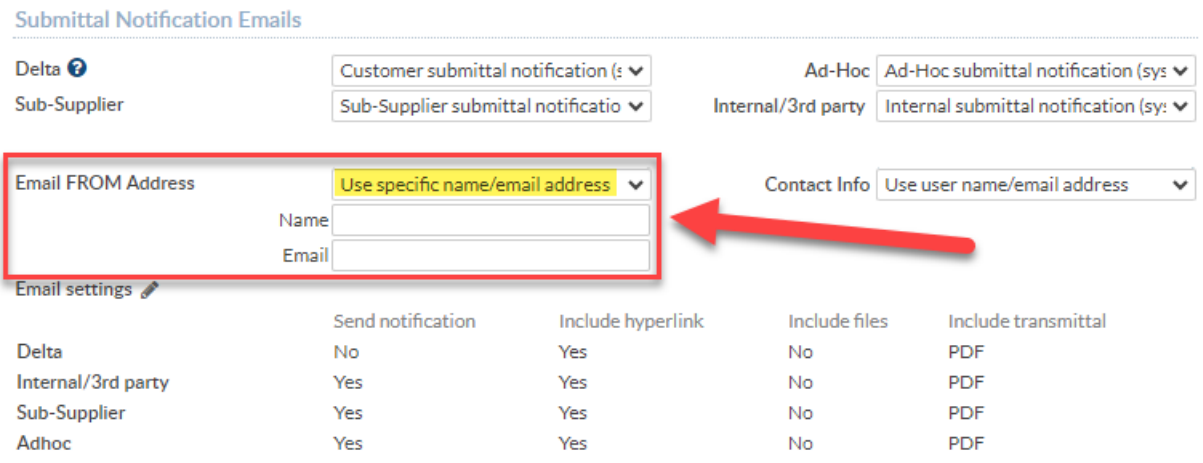
Choose whether you want to enable received comment pages in compilations.



Submittal

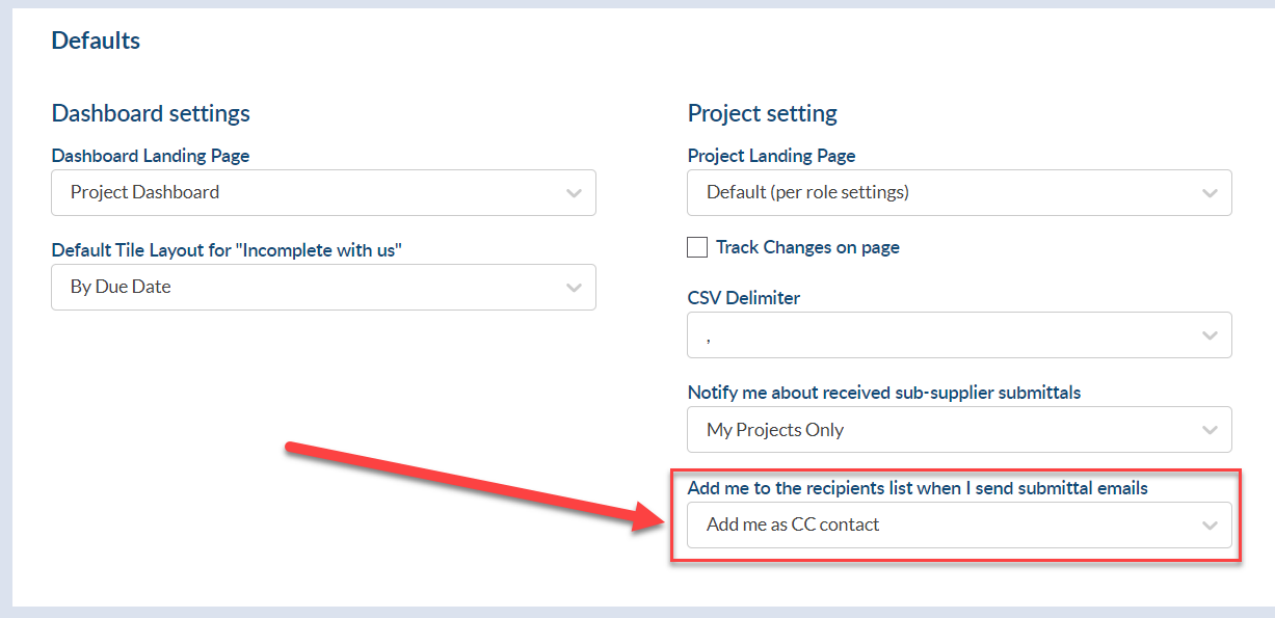
Custom FROM email address per project

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



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.



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.

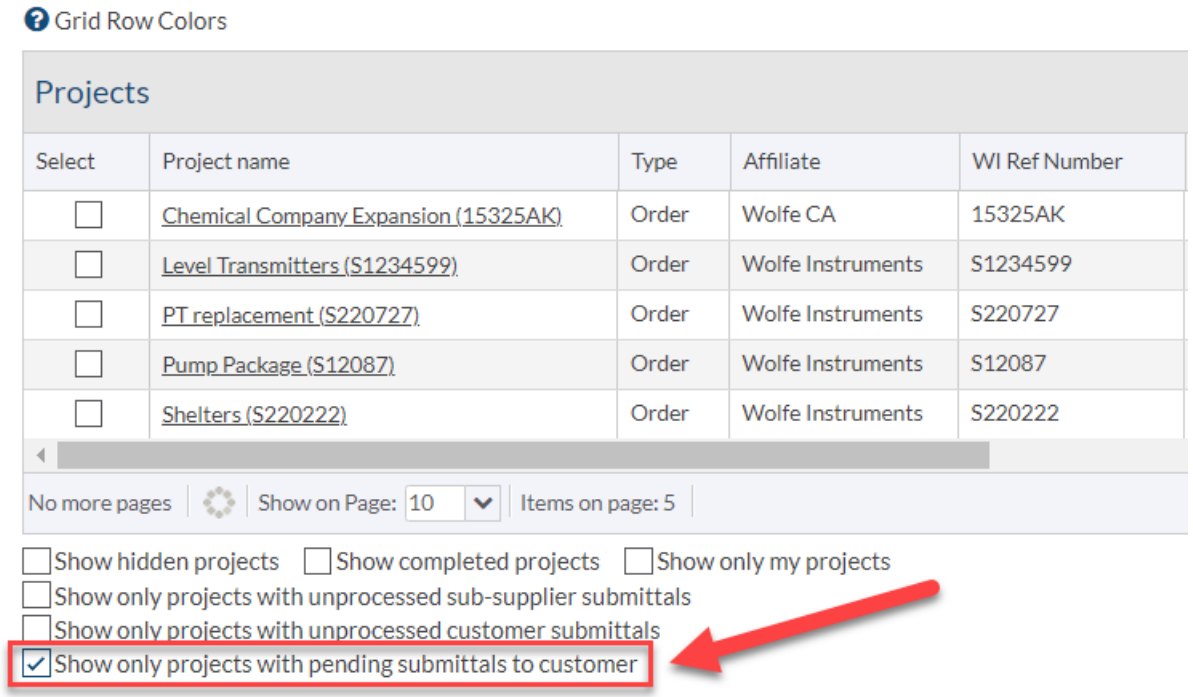
User Interface

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.



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!