

Release - February 2023

07/17/2024 1:47 pm EDT

User Interface

Update grid on the card list

The grid has been replaced on the card list. This includes the ability to pin columns, navigate the grid with arrow keys and many more functions. For more detail about our new grids, see [here](#).

Working with Cards

Routing Scenario

Users now have an option to apply default routings to specific doc codes or cards. These settings can be further customized by stage, where the document is being returned from (customer, sub-supplier, internal), and more.

For more information, see [here](#).

More edit options for merged cards

When users merge cards, it is now easier to modify the resulting cards.

For details, see [here](#).

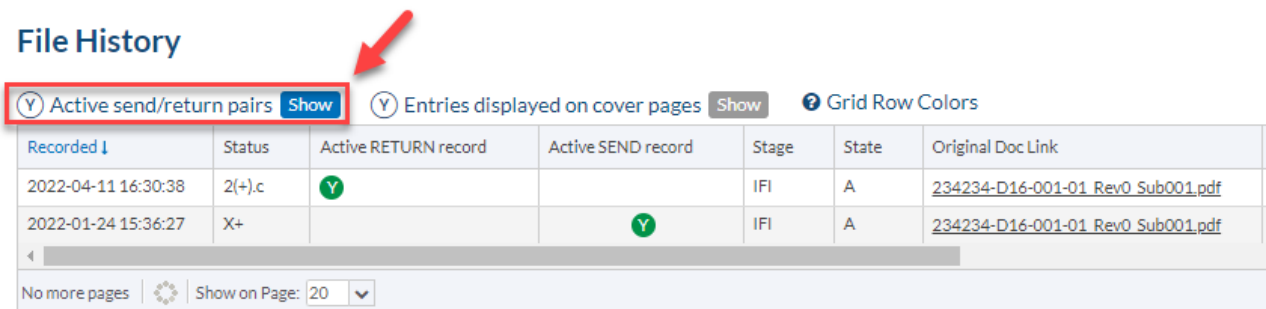
Auto-renumber cards when setting a query

When setting a query for a doc code, if document auto-numbering has been applied, DocBoss will automatically run auto-numbering on all non-locked cards with that code. This can minimize gaps in sequence numbering.

Filter card history to show active send/return pairs

Users can now filter the grid on the [Card History](#) screen to show only **Active SEND record** and **Active RETURN record** entries.

File History



The screenshot shows the 'File History' interface. At the top, there are three filter options: 'Active send/return pairs' (highlighted with a red box and a red arrow), 'Entries displayed on cover pages', and 'Grid Row Colors'. Below the filters is a table with the following columns: Recorded, Status, Active RETURN record, Active SEND record, Stage, State, and Original Doc Link. The table contains two rows of data. At the bottom, there is a pagination bar with 'No more pages', a refresh icon, and 'Show on Page: 20'.

Recorded ↓	Status	Active RETURN record	Active SEND record	Stage	State	Original Doc Link
2022-04-11 16:30:38	2(+).c	Y		IFI	A	234234-D16-001-01_Rev0_Sub001.pdf
2022-01-24 15:36:27	X+		Y	IFI	A	234234-D16-001-01_Rev0_Sub001.pdf

No more pages | Show on Page: 20

Working with Units

Unit upload can include sub-units as additional columns

Users working with equipment that has multiple components can now enter related units in one row in the unit upload file. This saves time for users who receive their data in this format.

For more information, see [here](#).

Display and allow users to update units via Unit_ID

Instead of using line number as the key identifier for a line, users can choose to use an internal ID value for unit modifications. This solves a problem when bulk uploads need to be made to line numbers (which generally are the key identifier for the line).

Import Tagged Equipment Units from CSV ×

Single Quantity Multiple Quantity

The uploaded file must contain the following fields in the specified order:
ID, Line No. (WI)*, Item/Model*, Tag No.*, Line No. (Delta), PO No. (Delta), PO Rev No. (Delta), Milestone, Ship Date, Sub-Supplier*, Shipment, Product Group

The first line is treated as a header and omitted. The rest of lines will be processed.

- Fields with an asterisk (*) are mandatory for units.
- The Sub-Supplier field accepts both the full name and short name of the sub-supplier company.
- Dates should be in the following format: m/d/yyyy

[Please see how to specify values containing commas or quotes if using Excel to edit a CSV file.](#)

The max allowed file size is 400Mb

Delimiter *
CSV File *
Date format for CSV uploads *
 Overwrite OK
 Use Database ID (not Line No) as key line identifier


Compilations

Removing doc code title pages bulk option

Instead of manually deactivating each doc code title page in the compilation structure, users now have an option to remove all doc code title pages by setting the **Doc Code Title Page** to **No Template**.

Templates

Compilation Cover Page:	Default Compilation Cover Page (system)	▼
Table of Contents:*	Compilation Table of Contents Template (system)	▼
Section Title Page:*	Compilation Section Title Page (system)	▼
Doc Code Title Page:*	No Template	▼
Sub-Package Title Page:	Compilation Sub-Package Title Page (system)	▼



Incoming Documents

Move Sub-Supplier file(s) to a different project

If using the supplier portal, there are times when a supplier may accidentally upload a file to the incorrect project. These files can now be moved to a different project by internal company users so that there is no need to ask the supplier to re-upload them.


Submittals


Do not show "downloaded by target" icon for submittal if email was not sent with hyperlink

If a submittal email notification does not include a hyperlink, the **Downloaded by Target** icon is no longer shown in the **Submittals** grid.

Submittals

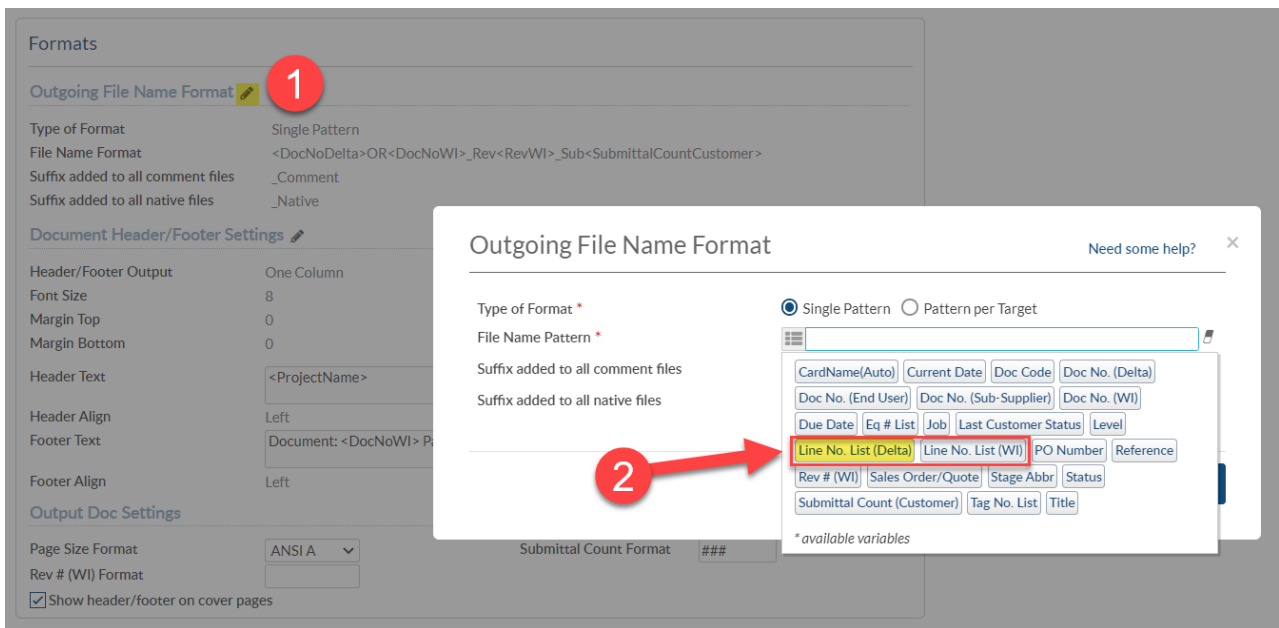
Grid Rows Colors

Number	Created	Submittal Date	First Accessed	Downloaded by Target	Contained Documents
001235-T-015	2023-02-10 13:40:02	2023-02-10 11:39:09			1
001235-T-014	2023-01-25 10:58:11	2023-01-25 08:58:08		<input type="checkbox"/>	2
001235-T-013	2023-01-25 10:43:29	2023-01-25 08:43:26		<input type="checkbox"/>	1
001235-T-012	2023-01-13 14:27:03	2023-01-13 12:26:57		<input type="checkbox"/>	1



Add Line No. (Customer) into File Name Format

Users may now add the customer line number (list) into the outgoing file name format (configured under project Main settings > Formats > Outgoing File Name Format).



Admin

Default option for exceptional handling (VDI-2770)

This is useful projects which must adhere to [VDI-2770](#) regulations. To enable, navigate to the **Project Template** screen from the project menu and change the **Exceptional handling default** to **On**.

Project Settings

Default EQ Number	Tag	Manual Cards Module	Yes
Default Level	Manual	Major Tags Module	No
Enforce Sub-Supplier Selection	No	Display Sheet Adder for Manual Cards	Yes
Allow Sub-Supplier Access	No	Display only when Multiple Sheets	No
Enable Internal Approval Statuses	No	Sheet Adder Pattern	(Sheet <Sheet> of <TotalSheets>)
Doc Control role is mandatory	Yes	Enable Submittal CP Bookmark	No
Project Engineer role is mandatory	No	Submittal CP Bookmark Pattern	<Title>
Drafting role is mandatory	No	Exceptional handling default (for file uploads)	On
Project Manager role is mandatory	No		
Remove sticky note drawing from PDFs	No		
Require recipient to authenticate when accessing submittals	No		

Permissions

Added selection of affiliates to Add User page

If affiliate companies are enabled, the option to assign which affiliates the user has access to is now available to select when first creating a new user's profile on the **Add User** screen. (This option is also available when updating [existing users](#).)

Create user account

Role ^{*}

admin (4/5) ▼

Change password

New password
Must contain 10 letters, including a capital, a number, and a symbol.

Confirm new password

Force user to change password

Enable Security Settings ⓘ

Affiliate Settings

Default Affiliate ^{*}

-- Select Affiliate -- ▼

Project Access

All

Wolfe Instruments

Wolfe Systems

Changing role on edit user - rules to assign affiliates

When upgrading a user role to full, affiliate permissions will be removed, and must be added back. Note that an admin user can only add affiliates to which they also have access. Admin users with the security permission have full access to add all affiliates.

On downgrade (from full to review/view), affiliates are not affected.

Security settings

If a user has the Security permission enabled under their profile, they are now able to enable the Security permission for other users (from the **System Access** section of the user's profile).

Change password

New password

Must contain 10 letters, including a capital, a number, and a symbol.

Confirm new password

Force user to change password

Enable Security Settings 



Affiliate Settings

Default Affiliate *

Affiliate Address

API

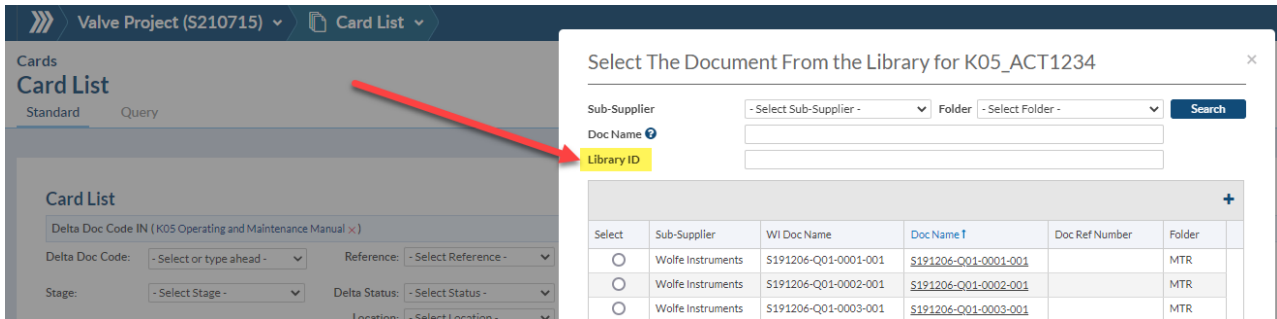
Upload files to project

The API now supports uploading files to the incoming documents area of a project.

Library

Library ID search field

A new search field, Library ID, is available when attaching published documents in the Card List.



The screenshot shows a 'Card List' interface with a 'Query' section. A dialog box titled 'Select The Document From the Library for K05_ACT1234' is open, showing a search form with fields for 'Sub-Supplier', 'Folder', 'Doc Name', and 'Library ID'. A table below the search form lists documents with columns for 'Select', 'Sub-Supplier', 'WI Doc Name', 'Doc Name T', 'Doc Ref Number', and 'Folder'.

Select	Sub-Supplier	WI Doc Name	Doc Name T	Doc Ref Number	Folder
<input type="radio"/>	Wolfe Instruments	S191206-Q01-0001-001	S191206-Q01-0001-001		MTR
<input type="radio"/>	Wolfe Instruments	S191206-Q01-0002-001	S191206-Q01-0002-001		MTR
<input type="radio"/>	Wolfe Instruments	S191206-Q01-0003-001	S191206-Q01-0003-001		MTR

For more information on attaching published documents to cards, see [here](#).

Template variables

UnitType parameter for All Units

If a project has [additional unit types](#) enabled, by default, the `<AllUnits>` array generates a list of all tagged equipment units and all additional equipment unit types. The `UnitType` parameter allows users to limit the array's output to units of a specific type (for example, to only show tagged equipment or to only show equipment from an additional unit type list).

DocCodeType variable now available for SDI reports

A new variable, `<DocumentsByIndex.DocCodeType>` is available for use in SDI reports (document index). This

allows users to include the value found in the **Type** column (compilation, published, generated - sub-supplier, etc.) in the document index array.

Small updates

- When a user changes a doc code's **Type** to **Compilation**, DocBoss will now reset the manual uploaded option to "No" for all cards belonging to that code.
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