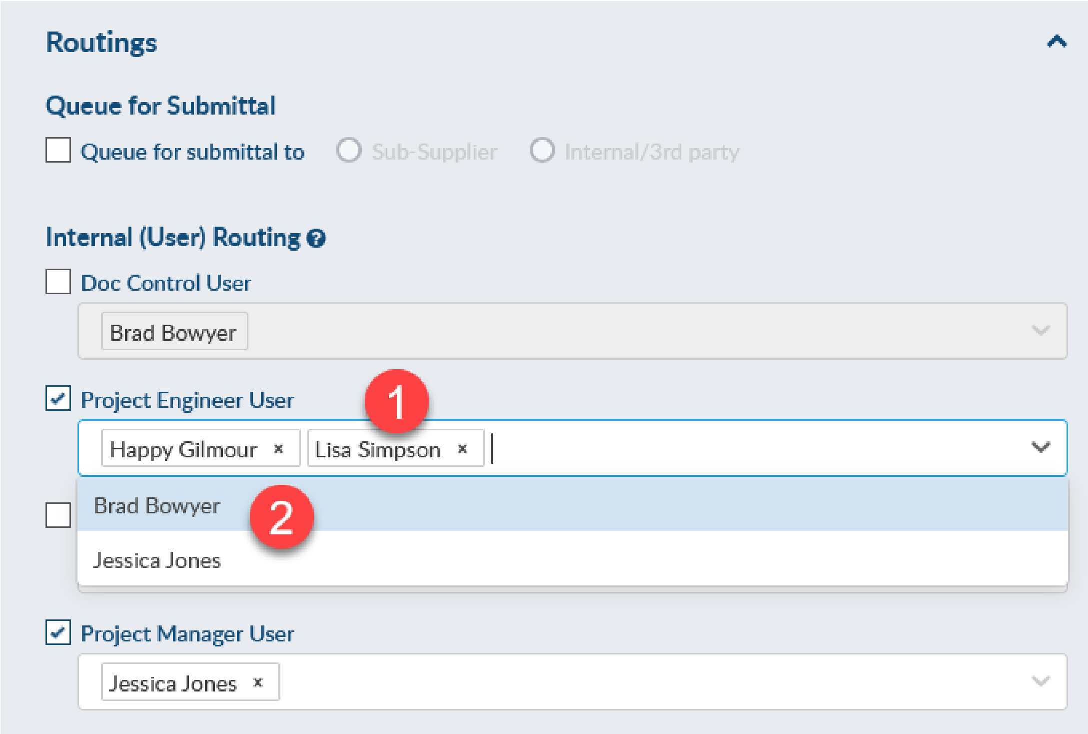
Release - Oct 2022

07/17/2024 1:47 pm EDT

Workflow

Parallel Routing: Select multiple users per role

Users may now assign routing to multiple people for each role. All users must complete the review for it to proceed to the next role.



1 - each user appears in a removable block.

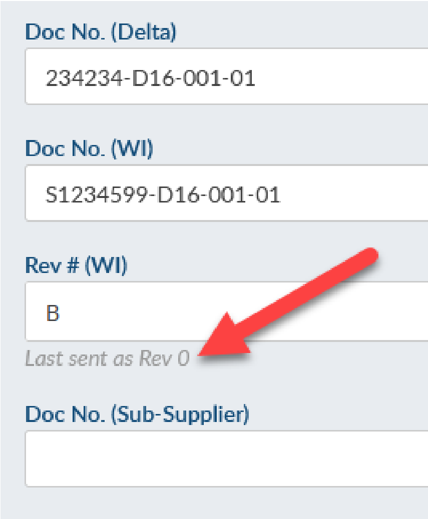
2 - click the drop down to add more users to the routing.

As always - the roles are sequential reviews.

Reminder that admins can change the role names - you may want to set role names to checker, reviewer, approver if you are using a formal process.

Show "Last Sent Rev" in edit/action screens

To assist users participating in workflows. we now show the rev number of the previous workflow. This helps user know if a new version of the file has already been uploaded to the system e.g. if rev 0 was last sent, and the card now shows rev A, users know the card has been updated.



Allow any assigned users to open action at any time.

From the actions dashboard, any user who participates on the action can click to open the action. Previously, the action could only be opened by the actively assigned user, which restricted visibility - maybe the last reviewer wants to see the current status, change the routing, or see if a new doc has already been uploaded.

Last Comment Files (Internal)

The internal comments area now displays the last comment file uploaded in the workflow. We have also added a column to the outstanding actions grid to display links to the last uploaded comment file for all fields.

Compilations

Build compilation by selecting individual cards, vs selecting doc codes

Why generally it is much more advantageous to build compilations based on document codes, we now offer an option to build a structure directly from the source cards if a Project has less than 250 cards. Our rule of thumb - if you have not called support, you should not build with individual cards (codes is just SO much more effective/easier/better).

Prompt user to attach compilation immediately

When a user selects "compilation" on their code list, we will immediately ask you to attach the compilation. This is a step many users forget, so we're just making it a bit more visible.

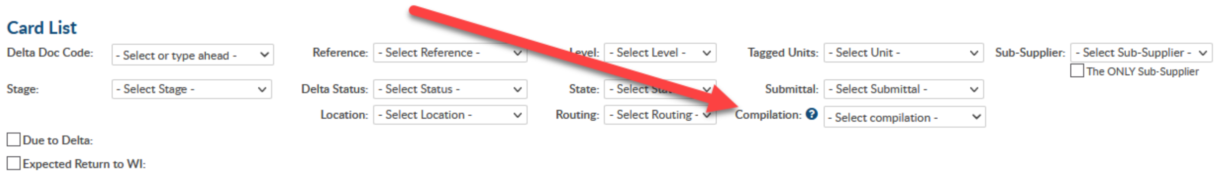
Option to generate table of contents when compilation is attached to code

Users can now generate the table of contents for all compilations from the configuration screen when the compilation is linked to a code. (it was always available prior to linking)

Identify all cards in a compilation (and see status etc)

A new filter has been added to the card list which allows user to select a compilation. The result will display all cards included in that compilation. It allows users to see any cards which may be incomplete, or missing from the compilation.

Note - it requires that the compilation has been generated.



Grids

New Grid Rollout

We are transitioning to a new grid system. Details about the new grid is available here. To simplify the introduction of the grids, we have started with some administrative screens. The list of screens is available in the above link.

Hide private filters sets from admin drop downs

Previously, all filter sets (including "non-public" ones) would show in the admin interface causing unnecessary clutter. We have removed private filter sets from admin user drop downs.

Code Lists

When mapped, keep all field values from customer list.

By default, when users map codes to an cross reference list, DocBoss pulls all column values (except code/code name) from the cross reference list. When this option is checked on the new list (customer list), DocBoss will NOT pull values from the mapped codes. It will use the values from the source list.

Code List

Clear code data if CSV field is empty (not recommended)

An option is available when uploading a CSV file to the code list now allows users to clear the custom fields (and internal code) when uploading a CSV file to the code list. Custom checkbox fields are not cleared (consistent with the same option for the card list)

When adding new codes, if the option is set - we leave the fields empty.

Units

Export history of unit changes

A new report is available on the equipment list (top right corner by the change spelling option). Clicking will download a CSV report showing all changes to the equipment list from the project start.

For more information, see Edit Equipment List.

Submittals

Update defaults when changing submittal settings

When users make changes to outgoing submittals, they typically want those setting reflected on future submittals. While defaults can be set in DocBoss, we now bring those functions directly to you. If you edit the following fields during a submittal, we'll ask if you want to update the defaults (so your changes appear on subsequent submittals). This only updated the project specific defaults (not admin).

- Turn around time
- Include markups
- Send submittal email notification
- Email type
- Email template
- Include transmittal in email
- Include files in email
- Include hyperlink in email

Templates

Allow variables to be used inside excel formulas

Users may use DocBoss variables inside Excel formulas. To do so, wrap the variable in quotation marks.

No: =if(A22=”HelloWorld”,<Document_CustomerDocNumber>,<Document_PrimaryRevNumber>)

Yes: =if(A22=”HelloWorld”,"<Document_CustomerDocNumber>","<Document_PrimaryRevNumber>")

Using different stage names/abbreviations for resubmittal from a stage

2 new new columns have been added to the stage grid both on the admin screen, and inherited to projects. they default as blank, and are for use when your customer wants different text when resubmitting from the stage.

- Stage Name (Resubmittal)
- Stage Abbr (Resubmittal)

During a submittal, if:

1. These values are populated on the stage

2. AND REV is NOT EQUAL to "reset to rev#" value on the stage (i.e. if this is a resubmittal)

Then:

The text from the appropriate "Resubmital" column will be used on templates INSTEAD OF the original Stage Abbr / Stage Name when variables. No changes to the stage name/abbr variables is required. Just add the data to the stage.

Variable updates

- New CP, Transmittal, Index variable for supplier line number
- Changed logic for Last_Customer_Status variable: Now always shows the last value assigned by customer

even if current status is X, Z or NULL

- Items Count variable for transmittal
- Auto-Height:
  - Added a new start parameter "AutoHeight". This auto-sizes all rows independently. This is a new function as the current autoheight variable (deployed directly in row variable) sets all rows to the SAME height, matching the max value discovered on any row. This variable should be added to any template using autoheight in the rows.
  - DocBoss now ignores Autoheight parameter if it is in a hidden column (on a row).

Expedite

Expedite NULL cards option update

When "Expedite NULL cards" is enabled on expedite reports, we now show all NULL overdue cards only. If the user ALSO checks "Expedite coming due" we THEN include both overdue and coming due NULL cards.

Admin

Removing stage lists from the admin screen

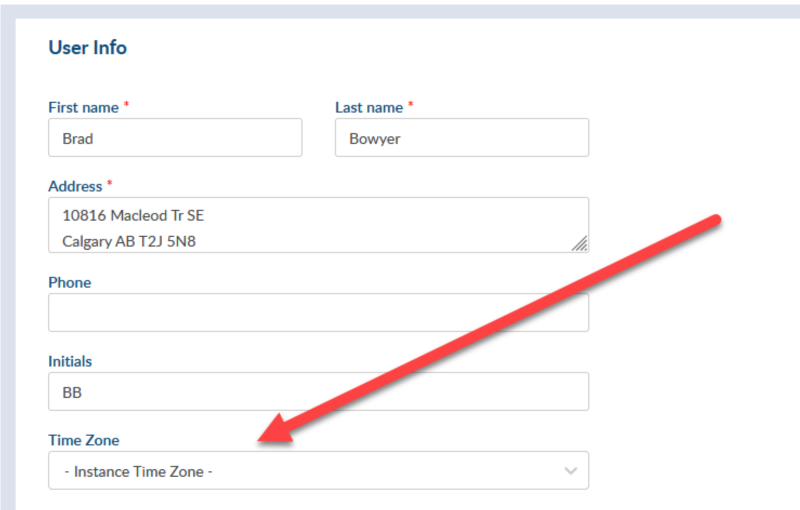
Stage lists can now be deleted from the admin window. First, it must be removed from any customer code lists. By clicking on delete, we display where it is being used, and provide links so it can easily be removed. Once no usage is identified, the delete icon will delete the list.

For more information, see Stage & Stage Lists.

User management

User Time Zone

Each user may now select their own time zone on their user profile. The default is to use the instance time zone.



Set default global permissions to FULL for new Full users

Originally, new users needed to have permission assigned after the creation of the user. Now we assign full permission to new full users by default. These permissions can be changed immediately after the user has been created.

Identify commercial and support eligible users.

Admin users may now identify the user who are eligible for support, and the user who is responsible for commercial changes (add users, contract renewals).

Add affiliate column to the permissions screen

For instances with affiliates, the affiliate is now displayed as a column (beside the project name). It allows admins to review permission by affiliate, by project.

Allow user to choose date format on each upload form (for CSV).

To minimize the complexity of uploading dates to various system locations, we now show the user what date format is expected (based on user/project settings), and allow the user to change the format to match their upload document.

Library

Multiple folders on auto-attach query

When using auto-attach query from the doc code (for type=published), allow the user to select multiple folders to be included in the search

Other Minor Updates/Fixes

1. When adding an SDI template to a project, users no longer need to select both PDF and XLS output options. Also - we have removed the warning when user have a different CSV than PDF selection.

2. Removed the word 'default' from various settings on the main project screen.

3. Inside the submittal pop up, we now identify the email impact of starting the submittal. Button names have changed to

    - Start (no email)

    - Start (and send email).

4. A new default for the "Include Markups" is now available on the main page.

5. In history, it was not possible to revert to a row where a card had transitioned to a new stage. This is now possible. Note that the card will still be pushed into the next stage, but if you have edited the stage list, that is desired outcome (move into new stage with file intact)