

Release - July 2022

07/17/2024 1:47 pm EDT

User options

Allow admin to define which users can access extended support

Admin users are now able to choose which users have access to DocBoss Extended Support through the **Manage Users** screen.

Users
Manage Users

[Send outstanding actions reports](#)

User accounts Extended Support: 1 / 1 Admin/Full: 7 / 100 Reviewer: 1 / 100 Viewer: 1 / 100 Total users: 9 / 300

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

Colour	Name	Tools	Role	Receive outstanding actions report	Receive outstanding actions alert	Receive Internal approval actions alert	Security Permission	Commercial Contact	Extended Support Access
			admin	N	N	N	Y	N	N
			admin	N	N	Y	N	N	Y
			view	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			reviewer	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			admin	N	N	Y	Y	N	N

No more pages [Show on Pages: 20](#)

Define user responsible for contract

On the **Manage Users** screen, admin users can designate the **Commercial Contact** (the user within their company responsible for the contract with DocBoss).

Users
Manage Users

[Send outstanding actions reports](#)

User accounts Extended Support: 1 / 1 Admin/Full: 7 / 100 Reviewer: 1 / 100 Viewer: 1 / 100 Total users: 9 / 300

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

Colour	Name	Tools	Role	Receive outstanding actions report	Receive outstanding actions alert	Receive Internal approval actions alert	Security Permission	Commercial Contact	Extended Support Access
			admin	N	N	N	Y	N	N
			admin	N	N	Y	N	Y	Y
			view	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			reviewer	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			admin	N	N	Y	N	N	N
			admin	N	N	Y	Y	N	N

No more pages [Show on Pages: 20](#)

Submittals

Allow users to default "Send submittal email notification" for each target

Under project **Main** settings, in the **Submittal Notification Emails** area, users can define whether or not to send an email notification of submittals to each target (internal, sub-supplier, customer, and Ad-Hoc).

Submittal Notification Emails

ACME 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 Contact Info

Email settings

	Send notification	Include hyperlink	Include files	Include transmittal
ACME	No	Yes	No	NONE
Internal/3rd party	Yes	Yes	No	PDF
Sub-Supplier	Yes	Yes	No	PDF
Adhoc	Yes	Yes	No	PDF

Attachments size limit (Mb)
Please set this value to 50% of your customer size limit. Files attached to emails grow in size by about 40% [...]

Other

Estimation

Previously, this was only available as a default to apply to all targets.

Obsolete cards

Added bulk process option to apply changes in bulk to obsolete cards

If cards were moved to **Obsolete Cards** in error (for example, if the doc code level was changed by accident), it is possible to revert the process with using **Bulk Re-Attach**.

Cards which are eligible for this will be highlighted in green.

Cards
Obsolete Cards

Document Code: Keyword: Cards: Match by:

Grid Rows Colors

Obsolete Cards

Tools	Doc Code	Doc Code Name	Card Name(Auto)	Reference	Title	Doc No. (ACME)	Rev # (KT)	Doc No. (Alpha)	Doc No. (Sub-Supplier)	Doc No. (End L
	D16	Instrument Data Sheet	D16_CV-101	CV-101	Instrument Data Sheet		0	000021-D16-001-01		
	E02	Cross Sect Dwg / Exploded View Diagram	E02_CV-101	CV-101	Cross Sect Dwg / Exploded View Diagram		0	000021-E02-001-01		
	E88	Misc Drawings/Descriptive	E88_CV-102	CV-102	Misc Drawings/Descriptive		0	000021-E88-002-01		

No more pages Items on page: 3 Select All (this page only) Select All (all pages)

For full instructions, see [here](#).

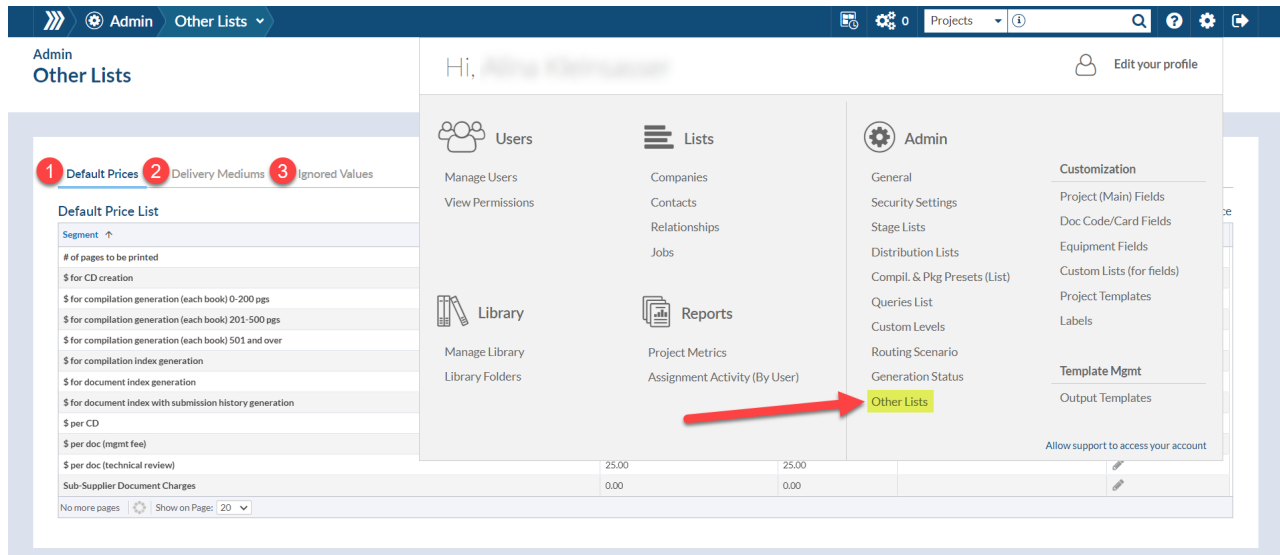
System Menu Update

Renamed & reordered some menu items

The names of some menu items were updated to better reflect their purpose. Some items were re-ordered as well.

Consolidated some menu items

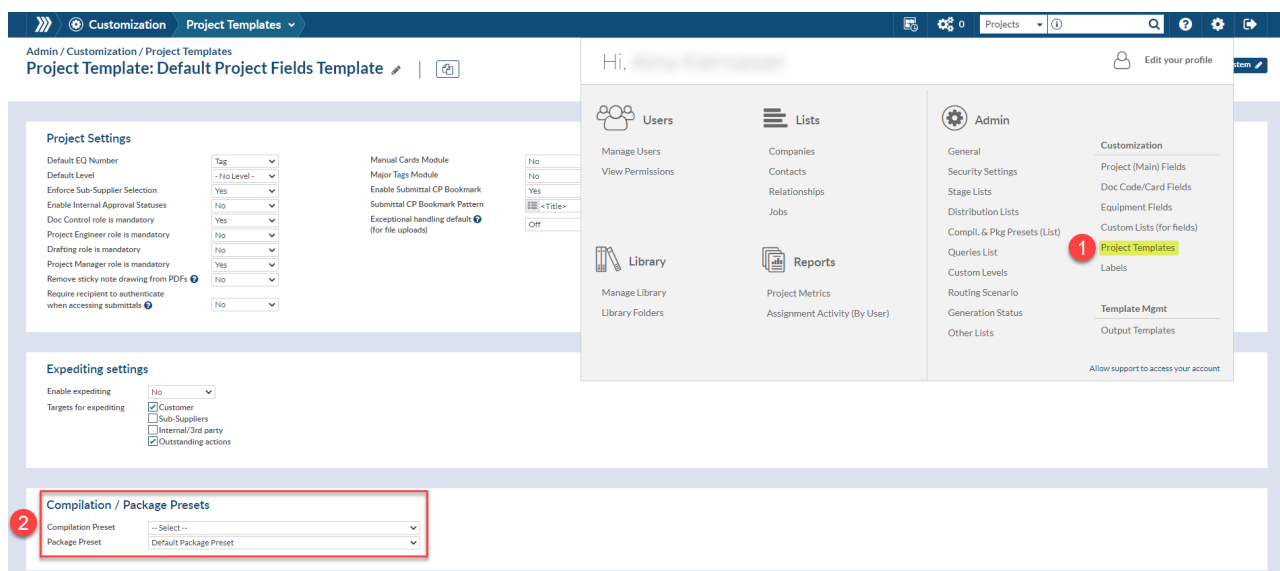
Default Prices, Delivery Mediums, and Ignored Values have been consolidated into the **Admin > Other Lists** screen.



Compilation and Package Template

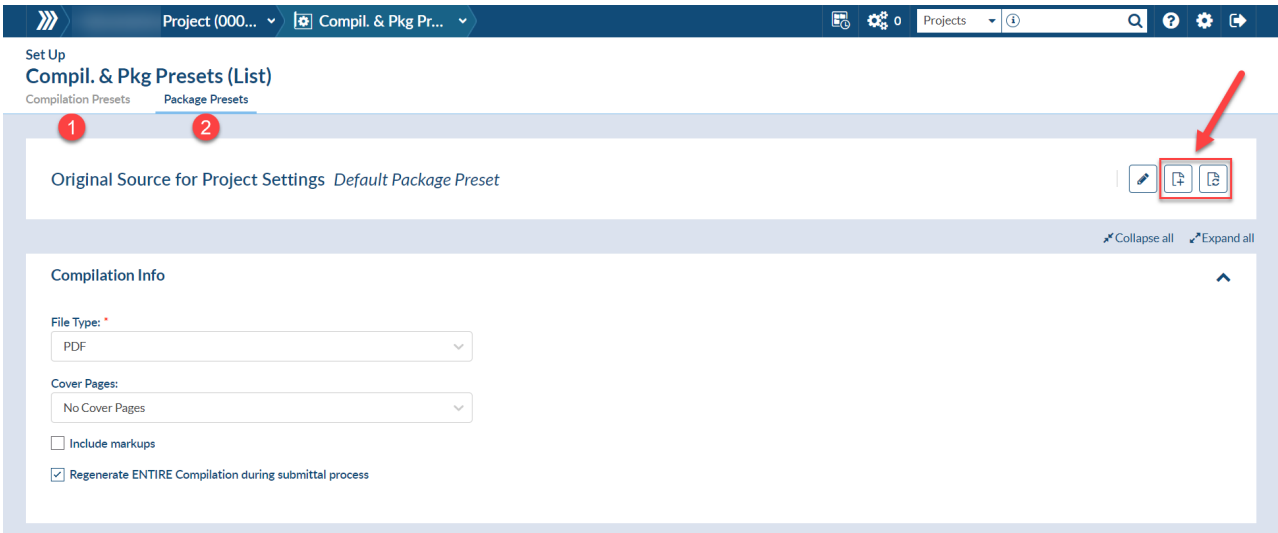
Choose compilation and package presets on project template

Users can select presets for compilations and packages as part of project templates.



Allow changes on project to be saved back to admin

Changes made within projects to compilation presets and package presets can be saved back to **Admin > Compil. & Pkg Presets (List)**, either by creating a new preset or updating the original preset.



Bulk matching

Allow filtering/matching based on internal code (vs just primary/customer code)

Previously, if a doc code was required for bulk matching, only the main codes used were available for selection. Now, if customer codes are mapped to internal codes, the internal code is also an option for bulk matching.

Matching Uploaded Files to Document Cards

Files that could not be matched
Unmatched files will remain in the staging area.

File Name	Pages	Error	Tools
No more pages			

Give unmatched files another chance
You can change the split parameter, or edit the file name, and re-run the matching process.

The files you already matched will not be affected.

Define split parameters:
*Values must be inside quotation marks e.g. " "
*Separate multiple values by a comma e.g. " , "
" " Re-run matching

File only has the Reference? (like Tag No for Tag level)
Select code here ?
 Main Code List Cross Reference (Internal) list
 DS Instrument Data Sheets X ▼

Matching Files
Suggested file-document card matches will appear (with values highlighted) if the file name matches with the document card info.

Unmatched files will remain in the staging area. Unmatch

	File Name	Card Name(Auto)	Doc No. (ACME)	Doc No. (Alpha)	Doc No. (End User)	Doc No. (Sub-Supplier)	Tools
<input type="checkbox"/>	GV-102.pdf	D16_GV-102		000021-D16-004-01			
<input type="checkbox"/>	GV-103.pdf	D16_GV-103		000021-D16-005-01			
<input type="checkbox"/>	GV-107.pdf	D16_GV-107		000021-D16-009-01			

No more pages Show on Page: 20

Cancel Accept Matches

Routing

Added an "Add to Ad Hoc" checkbox to assign screens

Users can now queue documents for [Ad-Hoc submittal](#) directly from the card assign screen.

Processing
Data sheet CV-102.pdf
Viewer Off History

Status & Routing

Stage List * Select different stage list

IFI

Stage List Workflow | Edit

Current Stage

IFI
Customer

New Stage *

IFI

Review Queue for ACME submittal

Queue for Submittal

Queue for submittal to Sub-Supplier Internal/3rd party

Add to Ad-Hoc

Cancel Save

Doc Codes List

Allow type ahead/search for internal code fields on Code List










Users may now type ahead or search for internal code fields on the [Code List](#).

Cards

Code List (Requirements)

Grid Rows Colors

Code List (Requirements)

Select	Tools	Doc Code ↑	Doc Code Name	Level	Required	Stage List	Type
<input type="checkbox"/>	  	B02	Sort Ascending	Order	<u>1/1</u>	IFI	SDI Report
<input type="checkbox"/>	  	D16	Sort Descending	Tag (TE)	<u>9/9</u>	IFI	Generated (Sub-Supplier)
<input type="checkbox"/>	  	E09					Generated (Sub-Supplier)

No more pages | Show on Page: 20

Columns

- Fit to header
- Fit to content
- Auto fit
- Set as 1st column

- St
- Stage List
- Est. pgs
- Cover Page / Stamps

