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.

	ccounts				Extend	led Support: 1 / 1 Admin/Full: 7 /	100 Reviewer: 1)		
Account								Inactive accounts	
Colour	Name	Tools	Role	Receive outstanding actions report	Receive outstanding actions alert	Receive internal approval actions alert	Security Permission	Commercial Contact	Extended Support Access
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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								
Jser a	accounts				Extend	ed Support: 1 / 1 Admin/Full: 7 /	100 Reviewer: 1 /	7 100 Viewer: 1 / 1	
Colour	Name	Tools	Role	Receive outstanding actions report	Receive outstanding actions alert	Receive internal approval actions alert	Security Permission	Commercial Contact	Extended Support Access
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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).

ACME 🚱	Customer submittal r	notification (s 🗸	Ad-Hoc	Ad-Hoc submittal notification (sys 🗸		
Sub-Supplier	Sub-Supplier submitt	upplier submittal notificatio 🗸 Internal/3		Internal submittal notification (sy: 🗸		
Email FROM Address	Use do-not-reply@do	ocboss.com 🗸	Contact Info	Use User Email Address		
Email settings 🖋 📥						
	Send notification	Include hyperlink	Include file	es 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) 🚱	15					
	Please set this value to :	50% of your customer siz	ze limit. Files			
		in size by about 40% [
Other						
Estimation	Default Estimate Ten	anlate (syster 🗸				

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.

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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.

ⁿⁱⁿ : her Lists	Hi,				Edit your profile
Default Prices 2 Delivery Mediums 3 Ignored Values Default Price List Sement ↑ # of pages to be printed 5 for CD creation 5 for compliation generation (each book) 0-200 pgs 5 for compliation generation (each book) 501 and over 5 for compliation index generation 5 for document index generation 5 for document index with submission history generation 5 for document index with submission for document index with submission history generation 5 for document index with submission for document index with submission for document index with submission history generation 5 for document index	Manage Users View Permissions Library Library Library Folders	Companies Contacts Relationship Jobs Project Metr Assignment J	s rts	Admin General Security Settings Stage Lists Distribution Lists Compil. & Pkg Presets (List) Queries List Custom Levels Routing Scenario Generation Status Other Lists	Customization Project (Main) Fields Doc Code/Card Fields Equipment Fields Custom Lists (for fields) Project Templates Labels Template Mgmt Output Templates
\$ per doc (mgmt fee)					Allow support to access your account
\$ per doc (technical review)		25.00	25.00		Ø
Sub-Supplier Document Charges		0.00	0.00		din .

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.

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Compilation / Package Presets							

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.

Project (000 🗸 🐼 Compil. & Pkg Pr 🗸	E C Projects V	Q 😯 🌣 🕞
Set Up Compil. & Pkg Presets (List) Compilation Presets Package Presets		/
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Original Source for Project Settings Default Package Preset		
		⊀ Collapse all ∠ *Expand all
Compilation Info		^
File Type: * PDF V		
Cover Pages: No Cover Pages		
Include markups		
Regenerate ENTIRE Compilation during submittal process		

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.

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ile t	Name	Pages	Error	Tools	C? Give unmatche	ed files another chan	ce
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					The files you already n	natched will not be affecte	ed.
					Define split parameter *Values must be inside *Separate multiple valu	quotation marks e.g. "_"	
					12		Re-run matching
					Select code here C Main Code List DS Instrument Data	Cross Reference (Intern Sheets	al) list × ~
Jgg		ment card matches i I remain in the stagi		lues highlighted) if the file	name matches with the	e document card info.	S Unmatch
ugg	ested file-docu			lues highlighted) if the file Doc No. (Alpha)	name matches with the Doc No. (End User)	e document card info. Doc No. (Sub-Supplier)	ි Unmatch Tools
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ugg	ested file-docur atched files wil File Name	l remain in the stagi Card Name(Auto)	ing area.	Doc No. (Alpha)			Tools

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	~
Current Stage	~
Review Queue for ACME submittal	
Queue for Submittal Queue for submittal to Sub-Supplier Internal/3	3rd party
	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)

Code L	ist (Requirement	ts)							
Select	Tools	Doc Code 1	• [Doc Code Name		Level	Required	Stage List	Туре
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