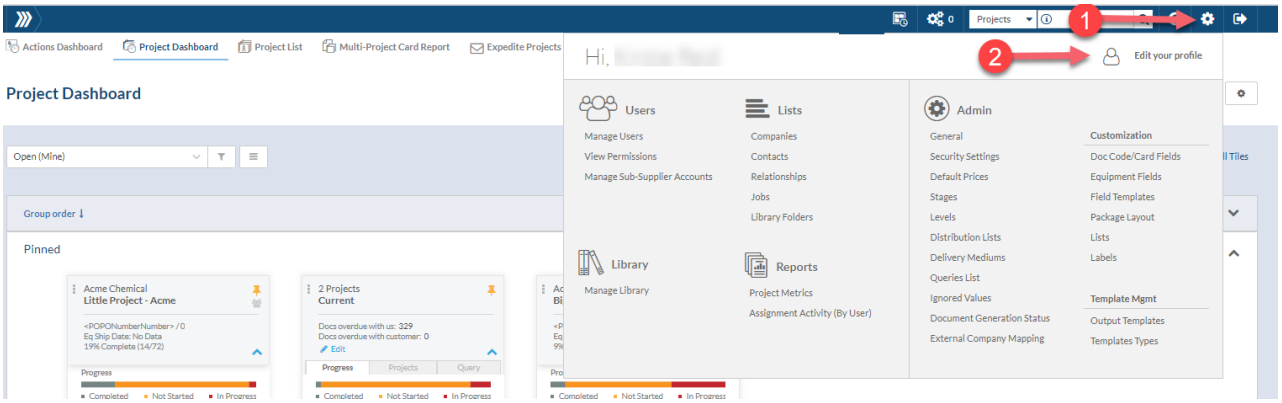
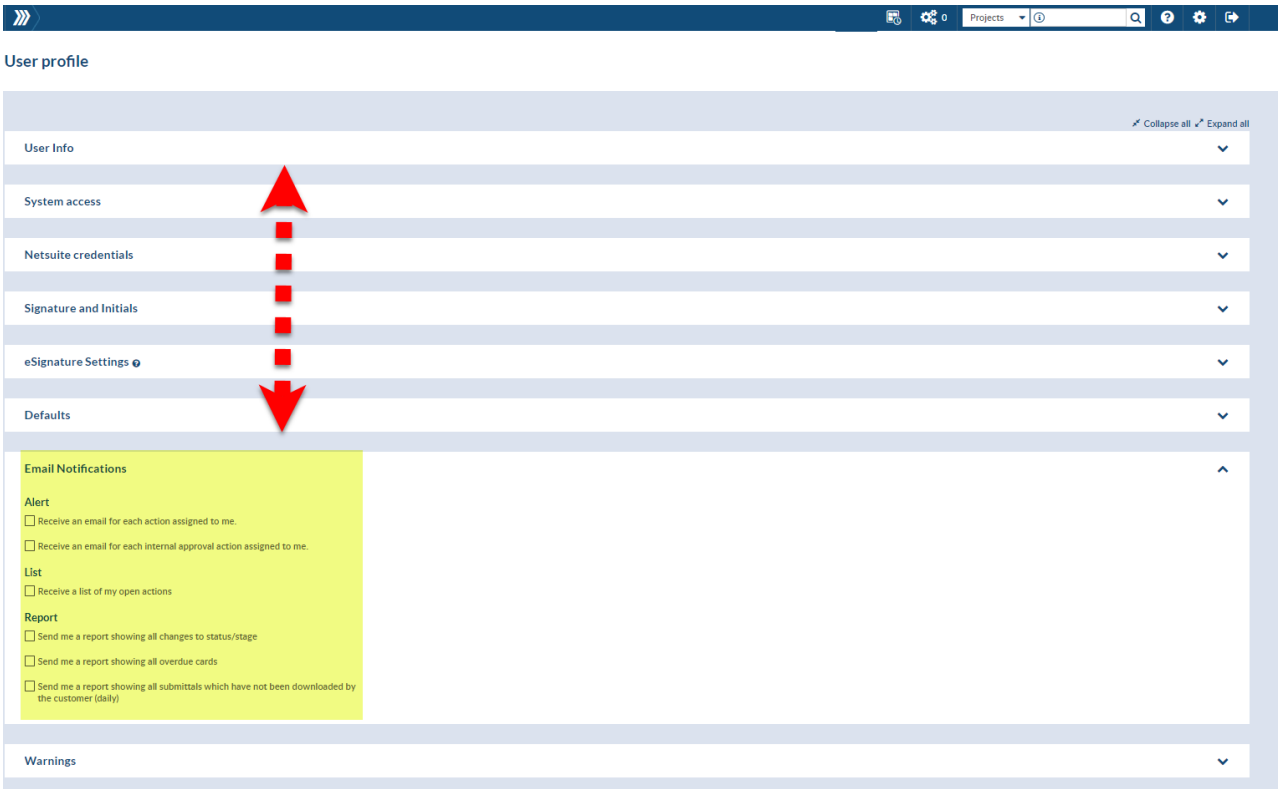
Automated email reports from user profile

09/16/2024 1:31 pm MDT

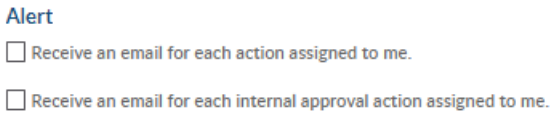
To view and enable automated email reports, first navigate to your User Profile



Scroll down to the Email Notifications area where several reports can be enabled and sent to you by email.

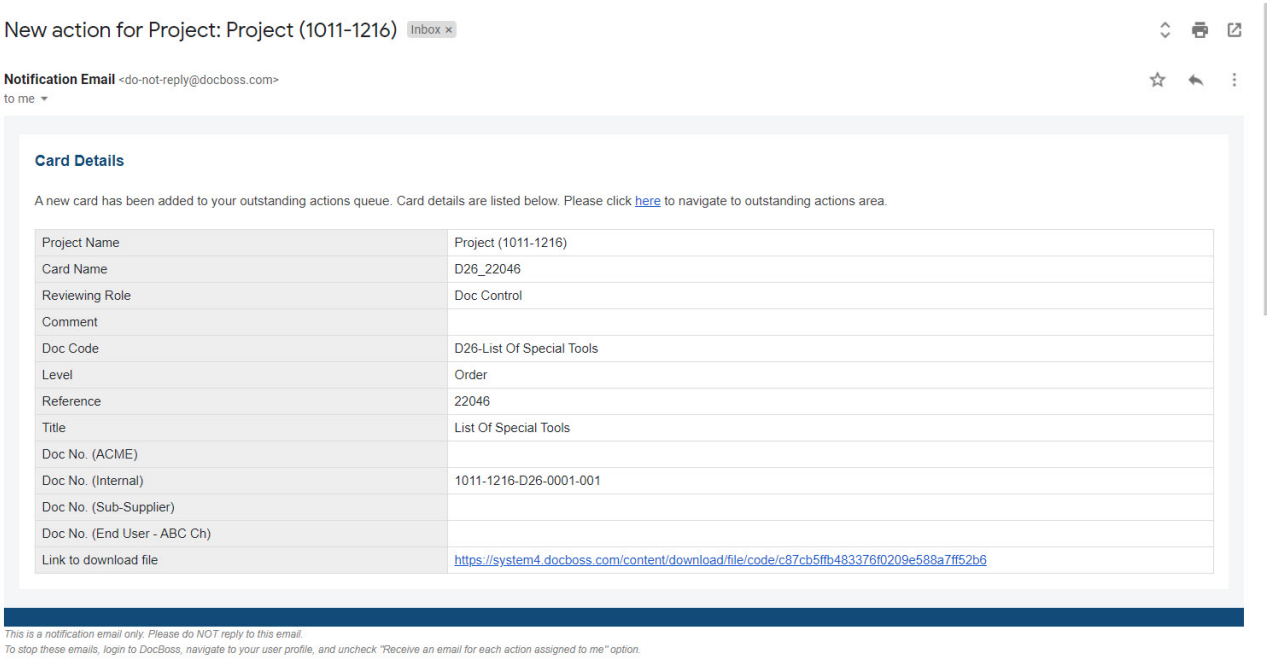


Alerts



Action Alert

Action email notifications are sent immediately when an action has been assigned to you.



New action for Project: Project (1011-1216) Inbox ×

Notification Email <do-not-reply@docboss.com>
to me

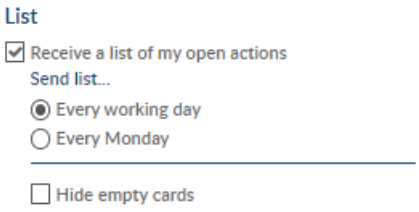
Card Details

A new card has been added to your outstanding actions queue. Card details are listed below. Please click here to navigate to outstanding actions area.

Project Name	Project (1011-1216)
Card Name	D26_22046
Reviewing Role	Doc Control
Comment	
Doc Code	D26-List Of Special Tools
Level	Order
Reference	22046
Title	List Of Special Tools
Doc No. (ACME)	
Doc No. (Internal)	1011-1216-D26-0001-001
Doc No. (Sub-Supplier)	
Doc No. (End User - ABC Ch)	
Link to download file	https://system4.docboss.com/content/download/file/code/c87cb5ffb483376f0209e588a7ff52b6

This is a notification email only. Please do NOT reply to this email.
To stop these emails, login to DocBoss, navigate to your user profile, and uncheck "Receive an email for each action assigned to me" option.

Outstanding Action Report



List

☑ Receive a list of my open actions

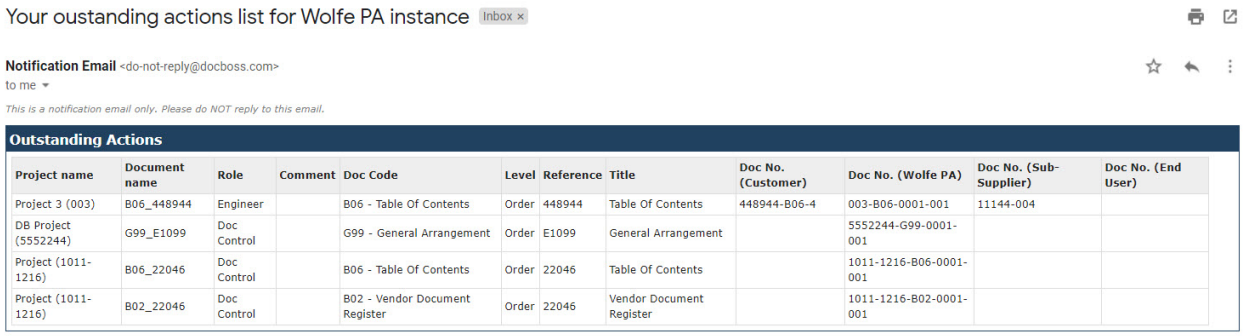
Send list...

◉ Every working day

○ Every Monday

☐ Hide empty cards

A report with all the open actions can be sent daily or weekly to your email by subscribing to the Outstanding Actions Report.



Your oustanding actions list for Wolfe PA instance Inbox ×

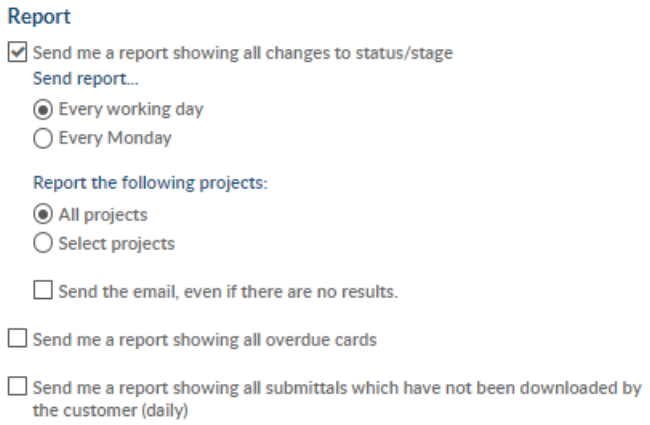
Notification Email <do-not-reply@docboss.com>
to me

This is a notification email only. Please do NOT reply to this email.

Outstanding Actions

Project name	Document name	Role	Comment	Doc Code	Level	Reference	Title	Doc No. (Customer)	Doc No. (Wolfe PA)	Doc No. (Sub-Supplier)	Doc No. (End User)
Project 3 (003)	B06_448944	Engineer		B06 - Table Of Contents	Order	448944	Table Of Contents	448944-B06-4	003-B06-0001-001	11144-004	
DB Project (5552244)	G99_E1099	Doc Control		G99 - General Arrangement	Order	E1099	General Arrangement		5552244-G99-0001-001		
Project (1011-1216)	B06_22046	Doc Control		B06 - Table Of Contents	Order	22046	Table Of Contents		1011-1216-B06-0001-001		
Project (1011-1216)	B02_22046	Doc Control		B02 - Vendor Document Register	Order	22046	Vendor Document Register		1011-1216-B02-0001-001		

Changes to status/stage Summary Report



Daily or weekly report showing all actions on all documents on your choice of projects. Typically for project managers and document control.

Actions Update Report For Period: 08/10/2019 - 20/01/2021

Project: CRPO(1234-5678)

Doc code: D01 - General Arrangement Drawings, level: Tag (TE)

Title: General Arrangement Drawings

Date	User	Stage	Status	Internal Comment
2020-07-07 15:52:09	Brad Bowyer	IFI		NULL

Project: M Project (118822 5)

Doc code: F02 - Pressure Test Certificates, level: Order

Customer Doc#: F02118822 5, Title: Pressure Test Certificates

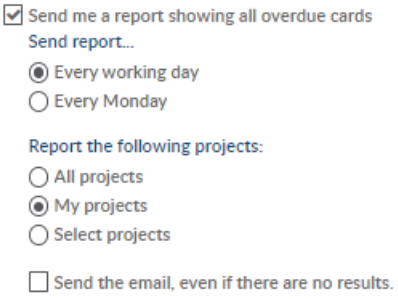
Date	User	Stage	Status	Internal Comment
2019-10-10 06:36:17	Brad Bowyer	IFI		X(+)
2019-10-10 06:36:06	Brad Bowyer	IFI		X
2019-10-10 06:36:05	Brad Bowyer	IFI		NULL

Doc code: M05 - Material Test Certificate, level: Order

Customer Doc#: M05118822 5, Title: Material Test Certificate

Date	User	Stage	Status	Internal Comment
2019-10-10 06:37:12	Brad Bowyer	IFI		X
2019-10-10 06:37:11	Brad Bowyer	IFI		NULL

Overdue Cards Report



This report includes all the overdue cards from various projects and can be generated daily or weekly.

Overdue Cards Report

Project: 1234

16 to ∞ days overdue

Doc Code	Doc No. (ABC Ch)	Due to ABC Ch	Expected date	Days overdue	Doc No. (Wolfe PA)	Title	For Approval?	Stage	Status
M01		2019-12-16		400	1234-M01-0001-001	MTR Packages	N	IFI	X
M01		2019-12-16		400	1234-M01-0002-001	MTR Packages	N	IFI	X

Project: Big Project - Support

16 to ∞ days overdue

Doc Code	Doc No. (Support)	Due to Support	Expected date	Days overdue	Doc No. (Wolfe PA)	Title	For Approval?	Stage	Status
AC	1234-AC-7-1	2020-06-05		228	4529 DS-AC-0006-001	General Arrangement Drawings	N	IFI	NULL
AC	1234-AC-6-1	2020-06-05		228	4529 DS-AC-0005-001	General Arrangement Drawings	N	IFI	NULL

Project: DB Project

16 to ∞ days overdue

Doc Code	Doc No. (ACME)	Due to ACME	Expected date	Days overdue	Doc No. (Wolfe PA)	Title	For Approval?	Stage	Status
B14		2019-05-23		607	5552244-B14-0001-001	Vendor Sub-Orders	N	IFA	NULL
B14		2019-05-23		607	5552244-B14-0002-001	Vendor Sub-Orders	N	IFA	NULL

Project: M Project

16 to ∞ days overdue

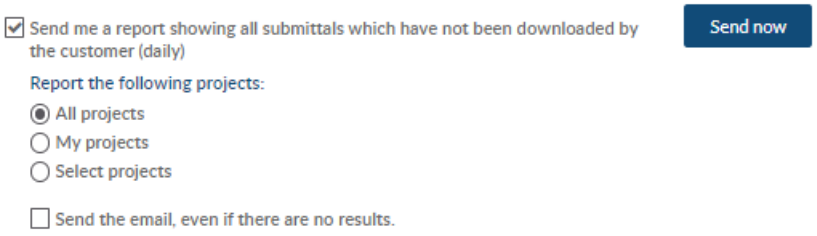
Doc Code	Doc No. (ACME)	Due to ACME	Expected date	Days overdue	Doc No. (Wolfe PA)	Title	For Approval?	Stage	Status
B02	B02118822	2019-05-01		629	B02-0001	Vendor Document Register	N	IFA	NULL
D16	D16118822	2019-05-01		629	D16-0001	General Arragement Drawings	N	IFA	NULL

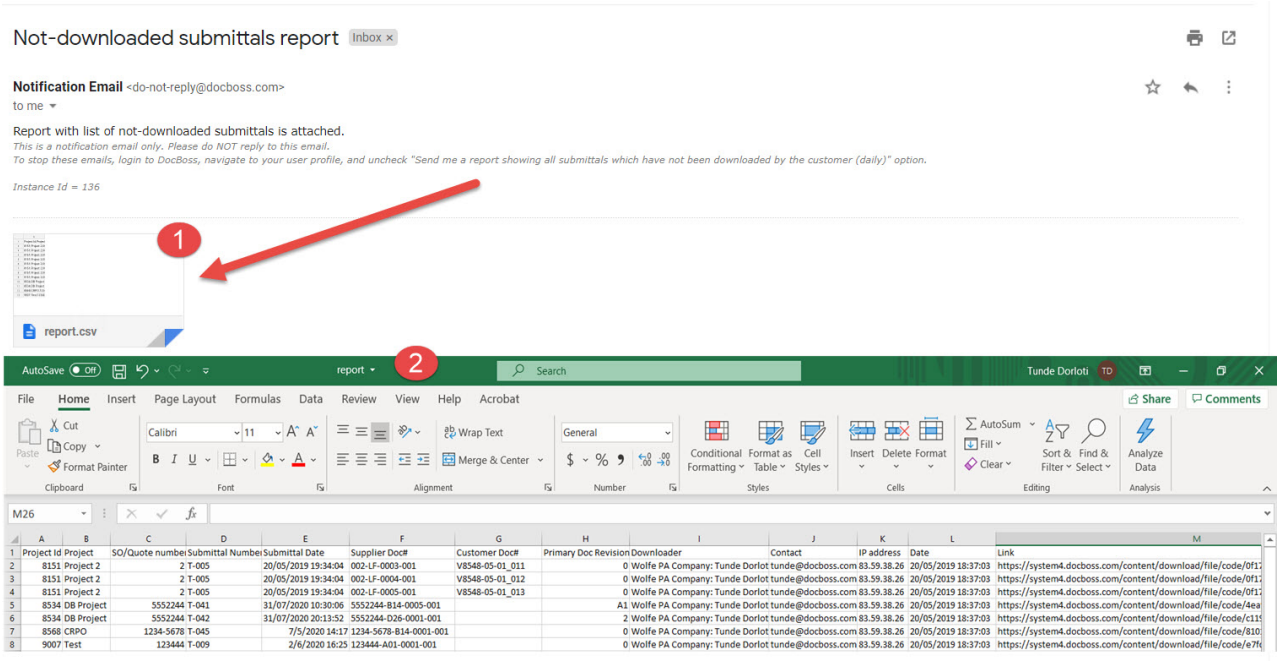
Project: Test Project

16 to ∞ days overdue

Doc Code	Doc No. (Test C)	Due to Test C	Expected date	Days overdue	Doc No. (Wolfe PA)	Title	For Approval?	Stage	Status
DWG		2020-07-10		193	5467Q-DWG-0002-001	Drawings	N	IFI	NULL
ITP		2020-08-06	2020-08-06	166	5467Q-ITP-0001-001	Inspection Test Plan	N	IFI	2

Not downloaded submittals report



The email sent from DocBoss to you will attach a (1) CSV file listing all submittals. If you download this you can open it in (2) excel for more detail.

For more information about Links not downloaded by Target, see our article "List of Completed Submittals" here.