Release - March 2020

Unpack

Upon receiving the return of a DocBoss created package, users can now automate the re-allocation of each document to is original card. Full details are available here.

To review how to create packages, click here.

Workflow

Incoming docs

When a card is complete, but a change has been made, there is sometimes a need to re-issue the card to the customer. Now when uploading a file to a COMPLETE card, you will have the option to reset the status to X, and re-queue for submittal. This eliminates the need to change the status of the card prior to upload.

We've added a "Show NULL only" option on the incoming cards grid.

The Secondary Rev# in now editable in the Status & Routing grid of the Bulk Assign process.

Stages

We have added a new option for stages. The stage can now DEFAULT a DocBoss stage auto-complete if the status received is "approved and re submit" (based on the checkbox column on the status grid).

Manage Recurring Submittals

We now add a color to cards in the outgoing grid which are not yet due. This helps avoid resubmitting a document index when it is due monthly. We have also added a column (and filter) for due date, so you can filter specifically for cards which are due/overdue.

Output documents

Add cover page bookmarks to each doc

Users who want to bookmark the cover page on outgoing documents can now make that setting on their projects

SDI Report

On SDI template, if a customer has returned a document twice, prior to you sending another version (i.e. they changed their mind/made a change, and included it on a separate return transmittal), we now show both results in a second row in the excel output.

Submittal 2							
Transmittal #	Transmittal date	Stage	Rev	Due date from customer	Date returned from customer	Document status	Customer Transmittal #
T-008	12/23/2019	IFR	1	1/6/2020	12/30/2019	2	CR-105
					1/5/2019	3	CR-106

You can toggle this output on/off for any given card from the history tab "Show in history return"

XLS Variables

We have added the following variables in this release
- StageAbbr variable for Index->Transmittals History
- SubSupplierName variable for cover pages and transmittal templates

Compilations

Bulk actions on codes

User can now use CTRL and SHIFT to select multiple codes for adding, moving and deleting codes within a compilation.

Page Numbering

Users can may now edit the page numbering format inside compilations.

The option to numerate cover pages (in the compilation) has been moved into the cover page row in the grid.

Included in / secondary codes

We have added some options, and changed some of the screen formatting to better manage included in / secondary codes in compilation TOC.

1. Users may now append secondary codes to each card.

2. User may now append 'included in' codes to CODE in the TOC/Bookmarks.

☐ Append Included In Codes to Primary Code (if applicable) using suffix:

(Includes <includesincodelist>)

Setup

File name adders

Users may now change the file name adders used for native and comment files from the main setup screen. just edit the file name format area, and enter the updated values.

Outgoing File Name Format ✎

Type of Format	Single Pattern
File Name Format	<DocWolfePA>_r<WolfePARev>.pdf
Suffix added to all comment files	_Comment
Suffix added to all native files	_Native

Header/Footer

Customer Line# list, Customer PO# List, Customer PO Rev List are all now available as variables for headers/footers.

Markup

Remove 'sticky note' comment icon when flattening files

DocBoss flattens all files on upload. As part of the standard flattening process, the stickynote image (red bubble) is converted to an image, while the text remains as a comment. Generally this is fine (no noticeable difference as a user). However - if you want DocBoss to remove all markups on final submission, the image will NOT be removed.

If your customer is using stickytype drawing markups, update this setting to remove the images prior to flattening - then no images will be included if you remove markups.
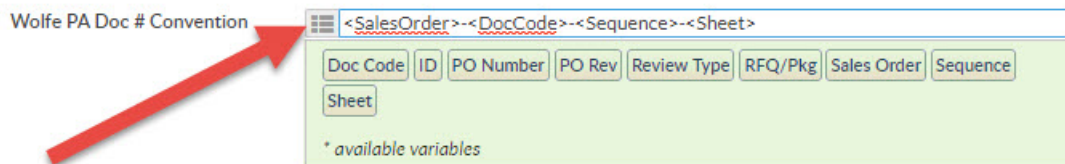
Project Settings

Default EQ Number	Tag ▼
Default Level	Order ▼
Enforce Sub-Supplier Selection	Yes ▼
Allow Sub-Supplier Access	No ▼
Enable Internal Approval Statuses	No ▼
Doc Contol role is mandatory	Yes ▼
Engineer role is mandatory	Yes ▼
Drafter role is mandatory	No ▼
Manager role is mandatory	Yes ▼
Remove sticky note drawing from PDFs ❓	No ▼

Interface updates

Variable buttons

We have simplified the interface with respect to fields containing variables. The buttons used to load variables have been replaced by a new interface. Fields which contain buttons will have a new icon inside the field. When clicking into the field, the variable buttons will appear.

Note that these buttons have now been put into an alphabetical listing to simplify search.

Managing grids

We have added some functionality to all grids.

1. When you click the dropdown on any column, you now can move the column to the first row. This is useful if you want to show the column on screen, especially if the column is well off screen.

2. You can search for column names. This will filter the available columns to help you quickly find the field you need.

Addresses

When adding addresses, we have remove the "required" fields. You may now enter the applicable pieces of the address without DocBoss forcing specific entries.

Project / Multi Project List

New columns & filters for End User and Customer Full Name

We have updated the **Select Projects** drop down control to allow type ahead/search.

Equipment Upload

We have now added the Customer Line#, and Customer PO Rev to the MultiQTY CSV upload file. Be aware if you use this upload that you will now have a slightly modified template.