

# Release - March 2020

07/17/2024 1:48 pm EDT

## Unpack

Upon receiving the return of a DocBoss created package, users can now automate the re-allocation of each document to its 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.

Processing  
RB1\_\_004(01)\_Rev000\_Sub002.pdf  
Viewer Off History

IFI  
Customer

New Stage \*

IFI

Review  Reset to status X and re-queue for KL09 submittal  Complete

Document Card Numbers

Is Drawing

KL09 Doc #  
I2::003(01)

SDF Doc #  
I2-001-01

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

The Secondary Rev# is 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"

### File History

Entries displayed on cover pages

Stage	Status	State	Original Doc Link	Doc+CP Link	Tools	In Tx Num	Show in history return	Re
IFA	3(+).e	A	20190318-E02-0011-001 r001...	20190318-E02-0011-001 r001...		CR-102	<input checked="" type="checkbox"/>	3/
IFA	2(+).d	A	20190318-E02-0011-001 r001...	20190318-E02-0011-001 r001...		CR-101	<input type="checkbox"/>	3/
IFA	X+	A	20190318-E02-0011-001 r001...	20190318-E02-0011-001 r001...		2020-03-2...	<input type="checkbox"/>	3/
IFA	X(+)	A	DOC03.pdf	DOC03.pdf		2020-03-2...	<input type="checkbox"/>	3/
IFA	X(+)	A	DOC03.pdf	DOC03.pdf		2020-03-2...	<input type="checkbox"/>	3/
IFA	X+	A	20190318-E02-0011-001 r000...	20190318-E02-0011-001 r000...		2020-03-2...	<input type="checkbox"/>	3/
IFA	X(+)	A	DOC02.pdf	DOC02.pdf		2020-03-2...	<input type="checkbox"/>	3/

No more pages  Show on Page: 20

## 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.

### Document Codes and Sections

\* You can hold **Ctrl** key and use left mouse click to select multiple codes

Name	Type	Tools
☰ Table of Contents	TOC	🗑️
▼ 1 Quality section	Section	📄 📄 ✎ 🗑️
📄 K05 Operating and Maintenance Manual (..Doc Code		📄 📄 ✎ 🗑️
📄 D16 Instrument Data Sheet (Each) (Tag (T...Doc Code		📄 📄 ✎ 🗑️
2 B02 Vendor Document Register (Order)	Doc Code	📄 📄 ✎ 🗑️
4 E02 Cross Sect Dwg / Exploded View Di...		📄 📄 ✎ 🗑️
5 F06 Instrument Termination and Hook U...		📄 📄 ✎ 🗑️
6 D16 Instrument Data Sheet (Order)		📄 📄 ✎ 🗑️
8 O02 Pressure Test Certificates (Tag (TE))		📄 📄 ✎ 🗑️
5 F06 Instrument Termination and Hook...	Doc Code	📄 📄 ✎ 🗑️
6 D16 Instrument Data Sheet (Order)	Doc Code	📄 📄 ✎ 🗑️
7 M02 Material Test Certificate (Tag (TE))	Doc Code	📄 📄 ✎ 🗑️
8 O02 Pressure Test Certificates (Tag (TE)...	Doc Code	📄 📄 ✎ 🗑️

## Page Numbering

Users can now edit the page numbering format inside compilations.

### Pagination

Page Number Position:

Page Number Pattern:

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

Name	Type	Tools
📄 Compilation Cover Page	Cover Page	📄 🗑️
☰ Table of Contents	TOC	Click to Numerate Binder Pages
▼ 1 Quality section	Section	📄 📄 ✎ 🗑️
📄 K05 Operating and Maintenance Manual (..Doc Code		📄 📄 ✎ 🗑️

## 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.

Append secondary codes (if they exist) to each card with suffix:

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

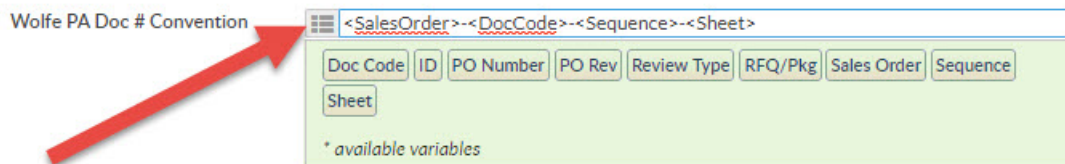
Default EQ Number	Tag
Default Level	Order
Enforce Sub-Supplier Selection	Yes
Allow Sub-Supplier Access	No
Enable Internal Approval Statuses	No
Doc Contol role is mandatory	Yes
Engineer role is mandatory	Yes
Drafter role is mandatory	No
Manager role is mandatory	Yes
Remove sticky note drawing from PDFs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

Doc Code	Card Name(Auto)↑	Stage List	Reference	Status (Combined)
8102	8102_Manifold 2701ve	Sort Ascending	Manifold 2701ve	NULL
8102	8102_Manifold 2701ve	Sort Descending	Manifold 2701ve	NULL
8102	8102_Seal 423	Columns		
8102	8102_Seal 476	Fit to header		
8102	8102_Seal 709	Fit to content		
8102	8102_TempElement 870	Auto fit		
8102	8102_Thermowell 500h	Set as first row		
8102	8102_Transmitter Differenc...	IFA/PC/MB		
8102	8102_Transmitter Differenc...	IFA/PC/MB		
8102	8102_Transmitter Gauge 01...	IFA/PC/MB		

The image shows a grid with a context menu open over the 'Stage List' column. The menu includes options like 'Sort Ascending', 'Sort Descending', 'Columns', 'Fit to header', 'Fit to content', 'Auto fit', and 'Set as first row'. A search box is also visible in the menu, and a list of columns with checkboxes is shown below it. Red circles with numbers 1 and 2 highlight the 'Set as first row' option and the search box, respectively.

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.

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