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Compilations

Optimize compilation generation

We have refactored the generation process for compilations. The largest improvements will be noticed for compilations where DocBoss is adding cover pages to all documents, but general speed improvements of 20-25% should be noticed overall.

Choose which compilations to generate when level is not ORDER.

When a compilation code is set to generate more than one compilation (i.e. one compilation per pump, when there are 9 pumps, or per shipment when multiple shipments), users will be asked to select which compilations to generate.

1. Click (Re)Generate

2. Select which compilations you want to generate (or choose select all)

3. Click to Start generation

Note that by default, we hide the cards which are ineligible for regeneration (i.e. out with customer).

Workflow

Stages

Reset due date on recurring submittals

When a card is assigned to a recurring submittal stage, and they make a submittal, the system will now reset the due date for that card using the "deliver days" on the CODE LIST. So - if you have set the code to 10 days AO and make a submittal, the due date will be reset to 10 days form the LAST SUBMITTAL.

Identify stages which may be edited/deleted

Stages may only be edited when the are have never been used in a card workflow. We now identify the situation of each stage list, so users better understand the reason they cannot edit/delete a stage in the list.

You can also choose to HIDE based properties which make a stage not editable (i.e. if it has been used in history).

Bulk Processing

Add Revision (editable) and Status columns

User may now change the revision of cards on upload, and see the current status of the card.

Package Defaults

Added several default options for packages

1. Allow user to set page numbering options

2. Option to include compilation cover page in package (and choose template)

3. If a compilation cover page is enabled in the package layout - when a package is created from the code list,

cover page setting on the original code will be changed to "No cover pages" (to avoid duplicates).

4. Changes to template selections on packages will now trigger option to resave the package layout.

Reporting

New Status Group Column (and variable)

A new field / variable is available for card reports (project and multi project). It groups customer codes into 3 categories.

- Complete
- Approved but resubmit with changes (based on status with this checkbox enabled)
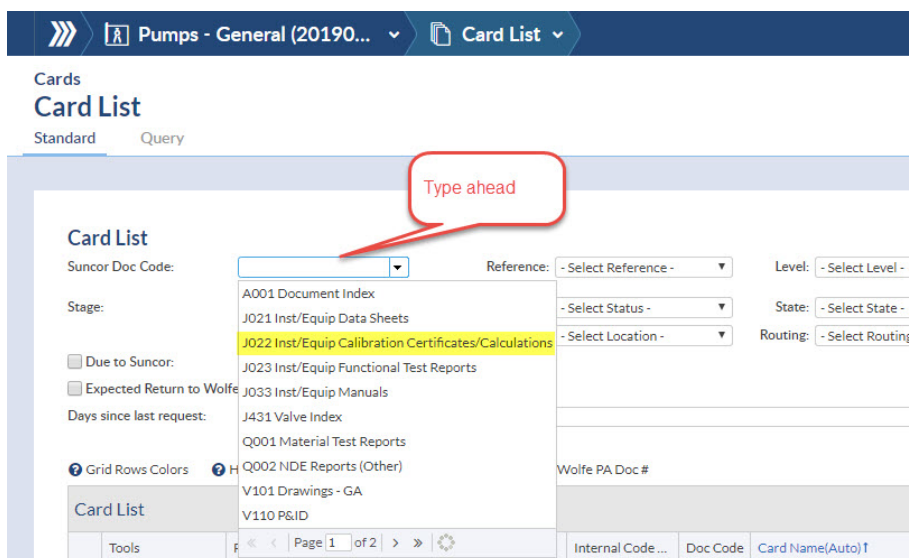- Not Approved (NULL/Rejected) - (Re)Submit

This consolidation provides a simple feedback tool for users across many projects.

Other new fields
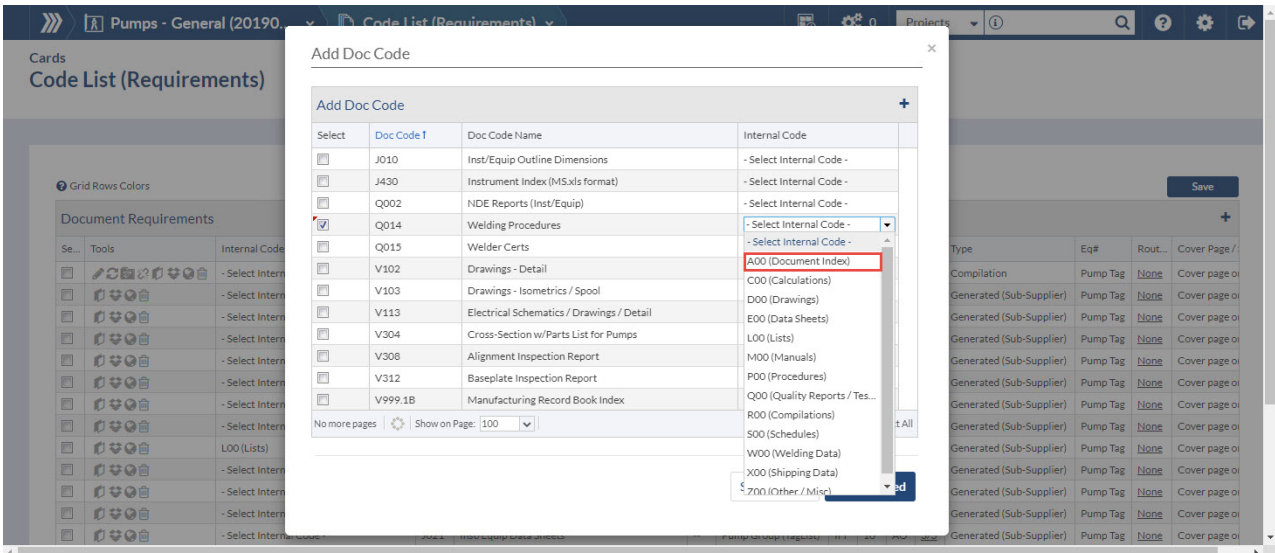
- End User Full Name
- Customer Full Name
- Sales Order number

User Interface Updates

Update Doc Code Dropdown - add type ahead, resize results box.

When using internal codes, add code name to drop down, and allow saving linkages

Add grid coloring

When expected return date is later than customer due date- color the row red.

Note: This is only applied to instances that have NOT defined custom grid colors. To apply custom coloring to your grid - please contact support with HEX numbers for coloring and the desired logic.

Manually Set column on card list

This column identifies compilations which have been uploaded manually. These compilations will NOT regenerate because a modified file has been uploaded by the user. This setting can be changed by editing the card, and unchecking the "generate compilation" checkbox.

Templates

1. On XLS templates, users can restrict the size of an array. For example - if 100 tags, you may want only to show 10 tags in the first page, and put the remaining tags on a second page. Now - you can add some supplementary text to at the end of the 10 tags you display i.e. tags continued on next page

2. On XLS templates, if you choose to carry tags onto a second page, you can decide whether to include or exclude the second page based on whether there is additional data to display.

3. On XLS templates, you can filter the history array based on the revision numbers

Other Updates

Library: Allow user to select internal companies as sub-suppliers when uploading library documents.

Global search: Set show hidden/completed to Yes when showing global search results.

Multi-project status grid: We now disable the "download CSV" button when SEARCH is clicked, This avoid a smitake where user creates a new search, but doesn't regenerate the CSV export prior to downloading.

Outgoing Submittals: We have added the "due to customer" date in the outgoing grid

Binder cover page has been renamed to Compilation Cover Page.