

Release - September 2019

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Add new data types to projects

While DocBoss supported 3 type of units (Major Tags, Tagged Equipment and Steel), users may now add additional unit/data types to their projects. You may then allocate equipment columns to the appropriate tabs.

Typical examples include the NDE log and the Weld log, allowing users to automate the creation of quality packages for each tag.

[How to add new equipment types](#)

[Use an NDE log to build quality packages](#)

[Use an Weld Log to build weld cert/procedure packages](#)

Change the unit type for a card

If a card is created as a major tag card you can now change it to link to minor equipment (and vice versa)



Edit Card

Link Manual Card to:

- Major Tags
- Equipment Units

Major Tag(s)

Vessel Tag *

V-101 x V-103 x

Select Stage List from Card Edit/Assign Screen

To date, users could edit the stage list on a card from the edit/assign window, but could not simply select a different existing stage list. We have added that option to the edit/assign pop in.

Status & Routing

Stage List * [Select different stage list](#)

IFA/IFC/IAB

Stage * [Edit Stages](#)

IFA

Doc Status * [Edit Stages](#)

NULL - NULL status

* Status can only be set when there is an active document.

Other updates

Manage Header/Footer per doc code: If you need to suppress the header and footer for specific document codes, you can now toggle the default setting from the code list.

Set date format for project: You can control the date format through template variables, but you can now choose a date format on the project, and the default variables will use that format.

Bulk delete: You may now bulk delete manual cards and major tags from their respective grids. Be careful!

Renaming: "Hide Registers from Customers" has been updated to reflect our new nomenclature. It is now "Hide Cards from Customers"

Show current stage group: A new option for cover pages - if you need to limit the history on a cover page to show only entries for the current stage (or a group of stages including the current stage), you can define that as a parameter in the history variable.

Various improvements to mail sending / tracking processes.

Enjoy!
