

Release - July 2019

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Unlimited Equipment Fields

You may now add an unlimited number of global and project specific equipment fields.

[Details are available here.](#)

Data Inheritance

Inherit data from Major Tag columns to Tagged Equipment units

Inherit data from Tagged Equipment columns to Steel units.

[Details are available here.](#)

Manage Translations

Auto-create (and manage) secondary cards to store translated versions of documents.

[Details are available here.](#)

Reports

New Email report for overdue cards

New Email report for submittals not downloaded by target

Email Notifications ^

Alert

Receive an email for each action assigned to me.

Receive an email for each internal approval action assigned to me.

List

Receive a list of my open actions

Report

Send me a report showing all changes to status/stage

Send me a report showing all overdue cards

Send me a report showing all submittals not downloaded

[Save](#)

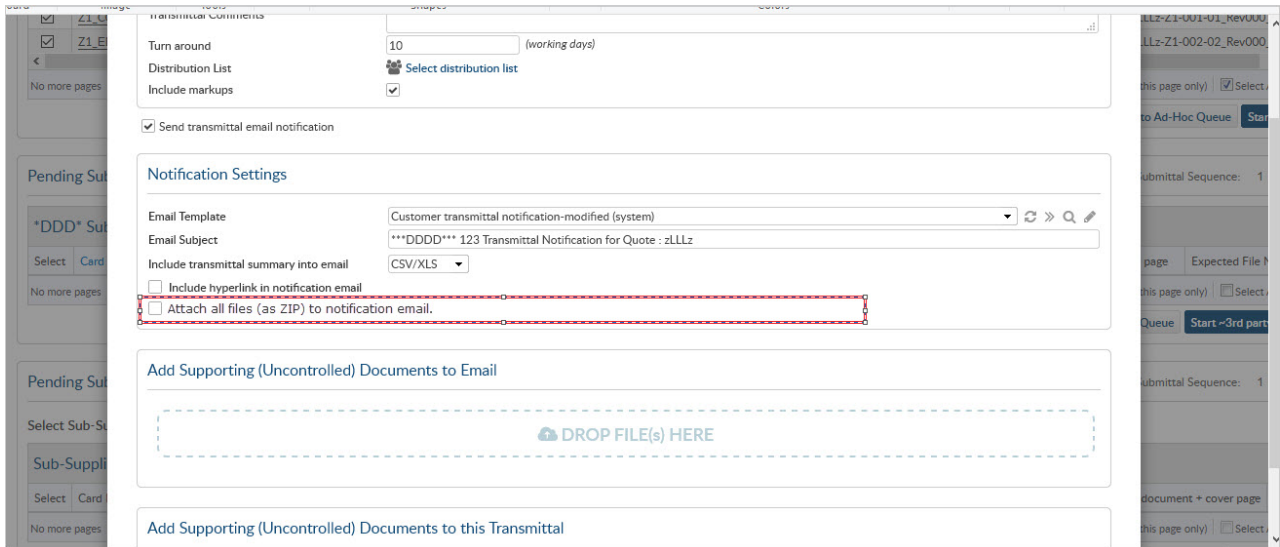
Packages

Users may now automate the creation of mini-compilations for a specific document code. This is helpful when your customer wants all documents included in one file (with table of contents). For details about creating the packages, [details are available here.](#)

You can now also define a default format for packages - either at the admin level, or on the project. [Details are available here.](#)

Outgoing Submittals

Include documents as zip in email notification



Note 1: The FTP (the hyperlink option) is more secure, and validates receipt

Note 2: If your customer's system has a file size limit, the email may simply be blocked. You may not receive any notification that they did not receive the files (this is managed on the customers side, not by DocBoss).

Add your logo into the email transmittal template

Assign a different cover page to any document code. Generally valuable with translations when you need the language specific cover page to be applied to the language specific card. Or - if the document list has a different cover page.

Upload files on email pop up. If your customer wants you to take a screenshot of the uploaded submittal, and submit as part of your email, you can now add files directly to the outgoing email.

Incoming documents

Manage cover page and comment page counts from bulk assign process

Make copies of files directly in the incoming file list. In some cases, you must submit same file more than once. Now you can just make the copy of the file in the incoming files area (vs uploading the document a second time).

Templates

New variables

- **Continue tag lists on second page in XLS templates.** In cases where tag lists may exceed available space, you

can add a continuation variable to put remaining tags on a second page (previously available in LaTeX)

- **In submittal history - show only specific status formats.** For cases where you must manage approval codes from two sources (i.e. the engineering company and the end user) you can combine status lists into one list. Whomever provides the final judgement will have "normal" status codes, where the secondary statuses should have some identifier adder (i.e. "." or "*"). The codes with the identifier will be ignored when displaying submittal history outputs.

If document is XLS, embed XLS cover page as first worksheet in file If customer wants their datasheets submitted in excel format, but wants the first tab to be the cover page. This allows you to create the cover page, and have it automatically embedded into the excel file as the first worksheet.

Admin

Define mandatory roles. On the setting grid, you can now define which roles must be completed on a project. In cases where you are not using all roles, you no longer have to complete roles 1,2,4.

Add tag list (any list variable) to file names.

Change default status values (i.e. use alternate letter from X for first upload)

Select Project Hub as default landing page for roles.

Project dashboard summaries are now called tiles (vs cards) to avoid confusion with document cards.
