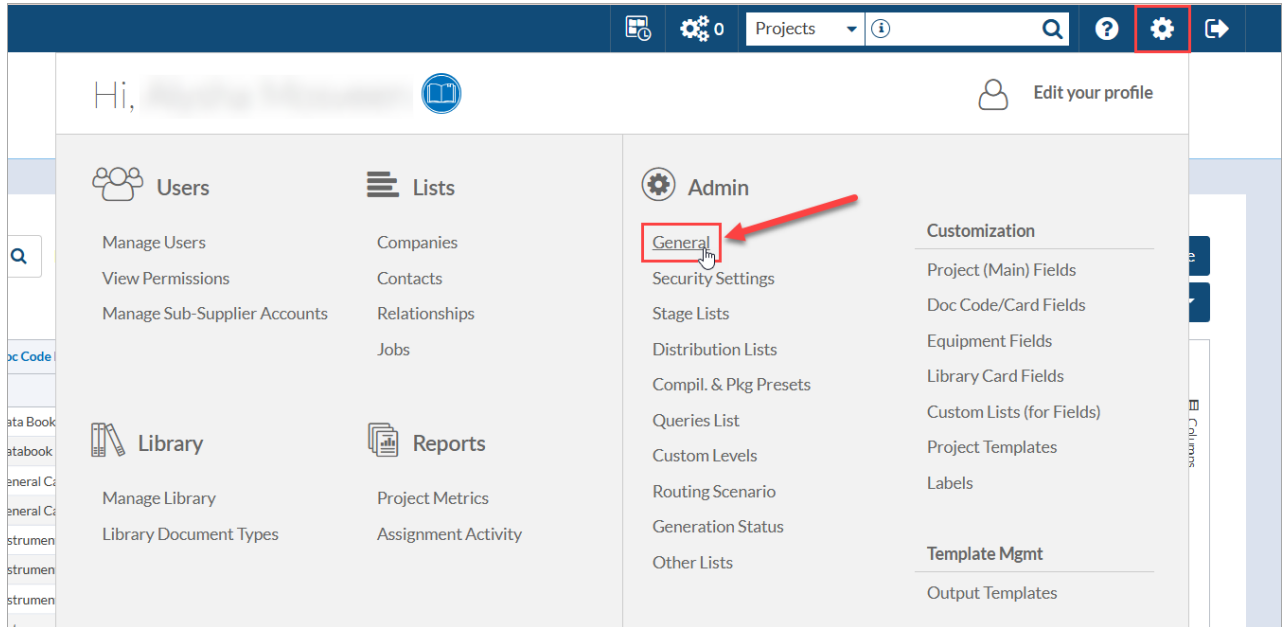


# Instance Default Settings General

07/04/2025 12:33 pm MDT

These settings allow you to customize DocBoss to suit your company needs. The default settings will automatically populate your projects accordingly however, changes can be made on individual projects as required.

To review/edit the default settings, navigate to **System Menu > Admin > General**.



## General

This section provides the option to update the date format, as well as the delimiter that appears between multiple values on CSV exports. Use these options to adhere to common formatting requirements.

A screenshot of the 'General' settings page for 'Omega Supply (Omega), ID = 14'. The page has a light blue header with the title 'General' and an upward arrow. Below the header, there is a checkbox labeled 'Use contact address data' which is unchecked. To the right of this checkbox is a 'Time zone' dropdown menu showing '(GMT-05:00) Eastern Time (US & Canada)'. Below the checkbox is a 'Date format' dropdown menu showing 'yyyy-mm-dd'. To the right of this dropdown is a 'CSV delimiter' dropdown menu showing a comma character. The page has a light blue footer.

## User Licenses

This section identifies information pertaining to DocBoss user licenses. This information provides a snapshot of the number of different licenses being used.

### User Licenses

#### License Deployment

Total	11 / 45
Admin/Full	6 / 15
Reviewer	3 / 15
View	2 / 15

## Project Options

This section provides the option to update naming patterns, numbering standards, font sizes, and margins. In addition, turn around days for documents can be set. Use these options to help manage documents, as well as adhere to common formatting requirements.

## Project Options

### Defaults

Last Project pattern \*

<ProjectName> (<SalesOrderQuote>)



+ Add variable

Stage list

IFA



Project template

Default Project Fields Template



Page size for output documents

ANSI A



Instance turn around (working days) \*

10

Customer turn around (working days) \*

10

Stage delivery days (working days) \*

10

Action turn around (working days) \*

5

Submittal count format

###

Primary doc rev value

0

Primary doc rev format

Secondary doc rev format

Primary doc rev warning

Warn if not changed



Primary doc rev name \*

Rev # (Omega)

Secondary doc rev name \*

Rev # (Customer)

Handling duplicates from card to units changes

Increase sheet



Status for stage auto completion

System final status (Z)



☒ Allow single tag for multi qty CSV upload

Format of CSV units upload

Single quantity



☒ Enable mapping to internal codes

☐ Force mapping on code list

Copy Project

☐ Copy units

☐ Copy compilations/SDI

Incoming bulk match delimiter \*

" "

☒ Enable internal approval statuses

### Outgoing File Name Format

Type of format

☒ Single pattern

☐ Pattern per target

Pattern \*

<DocNoCustomer>OR<DocNoOmega>\_Rev<RevOmeg



+ Add variable

Customer pattern \*

<DocNoCustomer>OR<DocNoOmega>\_Rev<RevOmeg



+ Add variable

Sub-Supplier pattern \*

<DocNoSubSupplier>OR<DocNoOmega>\_Rev<RevOm



+ Add variable

Internal/Third-Party pattern \*

<DocNoSubSupplier>\_Rev<RevOmega>\_Sub<Submittal



+ Add variable

Ad-Hoc pattern \*

<DocNoSubSupplier>\_Rev<RevOmega>\_Sub<Submittal



+ Add variable

Bulk doc pattern \*

<DocNoSubSupplier>\_Rev<RevOmega>\_Sub<Submittal



+ Add variable

Comment file pattern \*

<CardPattern>\_Comment



+ Add variable

Native file pattern \*

<CardPattern>\_Native



+ Add variable

### Document Header/Footer Settings

Font size

8



Margin top

0

Margin bottom

0

Header/footer output

☒ One column

☐ Three columns

Header text

<ProjectName>



+ Add variable

Header align

Left



Footer text

Document: <DocNoOmega> Page: <PageNumber> of <1



+ Add variable

Footer align

Left



# Doc Code Options

This section provides the option to update the default level, type, and delivery information on doc codes. Use these options to help expedite the setup of the doc code list at the beginning of a project.

### Doc Code Options

**Doc level**  
Order

**Doc type**  
Generated (Sub-Supplier)

☒ Delivery output

**Delivery days \***  
10

**Delivery reference**  
AO: After Order

**Unit level format**  
Line

**Assembly line field**  
Line No. (Omega)

**Assembly model field**  
Line No. (Omega)

**Stage for NULL status routings**  
Apply NULL routing to all stages

☐ Doc no. override (sub-supplier)

## Project Landing Page

This section identifies the default landing page for each user role. Use these options to change the landing page for different roles and help facilitate the work that each role performs (e.g., Reviewer = Outstanding Actions).

### Project Landing Page

**Admin**  
Project hub

**Full**  
Project hub

**Reviewer**  
Project hub

**View**  
Project hub

## Dashboard Tile Settings

This section identifies the information communicated on tiles from the Project Dashboard. Use these options to highlight the most useful/important information to your company.

### Dashboard Tile Settings

**Title line 1 pattern \***  
<CustomerFullName> ✕ + Add variable

**Title line 2 pattern \***  
<ProjectName> ✕ + Add variable

**Title line 3 pattern \***  
<PONumber> / <PORevNumber> ✕ + Add variable

**Title line 4 pattern \***  
<ProjectDueDate> ✕ + Add variable

**Title line 5 pattern \***  
<Completeness> ✕ + Add variable

ACME Engineering  
Instruments  
1234 /  
Eq Ship Date: 2025-03-01  
18% Complete (23/131)

# Submittals Options

This section provides the option to update the sender information, attachment/link settings, and naming patterns for submittals. Use these options to help manage submittals, as well as adhere to common requirements.

Submittals Options

Outbound generic email address

Outbound generic email name

Email FROM address settings

Use do-not-reply@docboss.com

Contact info

Use user name/email address

Attachments size limit (Mb) ⓘ \*

15

Link expiration period (days) \*

7

☒ Require name for doc access

Download grace period (days) \*

5

☐ Show delivery medium

Delivery medium

Email

☒ Enforce sub-supplier selection

☒ Add comments page to document on submittal

Position of comment/markup pages (on submittal)

End

Email settings

	Send Notification	Include hyperlink	Include files	Include transmittal
Customer	<div>Yes</div>	<div>Yes</div>	<div>Do not include</div>	<div>PDF</div>
Internal/Third-Party	<div>Yes</div>	<div>Yes</div>	<div>Do not include</div>	<div>PDF</div>
Sub-Supplier	<div>Yes</div>	<div>Yes</div>	<div>Do not include</div>	<div>PDF</div>
Adhoc	<div>Yes</div>	<div>Yes</div>	<div>Do not include</div>	<div>PDF</div>

Submittal Numbering Format

Type of format

☐ Single pattern

☒ Pattern per target

Submittal pattern ⓘ \*

TRANS-<Sequence###>

✕

+ Add variable

Customer submittal pattern ⓘ \*

T-<Sequence###>

✕

+ Add variable

Sub-Supplier submittal pattern ⓘ \*

T(S)-<Sequence###>

✕

+ Add variable

Internal/Third-Party submittal pattern ⓘ \*

T(I)-<Sequence###>

✕

+ Add variable

Ad-Hoc submittal pattern ⓘ \*

T(A)-<Sequence###>

✕

+ Add variable

Transmittal file name pattern ⓘ \*

Transmittal # <SubmittalNo>

✕

+ Add variable

## Reviewer Roles

This section provides the option to update the name and suffix for each user role. Use these options to have DocBoss adhere to your company's naming standards.

#### Reviewer Roles

Role 1 name \*

Doc Controller

Role 1 suffix \*

d

Role 2 name \*

Preparer

Role 2 suffix \*

p

Role 3 name \*

Checker

Role 3 suffix \*

c

Role 4 name \*

Approver

Role 4 suffix \*

a

## Library Query Settings

This section provides the option to update the query that matches library documents to doc codes. Use these options to improve the auto-matching functionality for library documents.

#### Library Query Settings

Match

☒ Single

☐ Multiple

Searching fields

Any field

## Document Auto-Numbering Format

This section provides the option to update the document auto-numbering convention, as well as how the numbers are sequenced, ordered, and formatted. Use these options to help manage documents, as well as adhere to common formatting requirements.

### Document Auto-Numbering Format

#### Customer

☐ Make doc no. (customer) required

Convention

[+ Add variable](#)

Format: sequence

Format: sheet

☐ Generate sequence per field(s)

Start sequence from

Sequence ordering, then reference

#### Omega

Convention

[+ Add variable](#)

Format: sequence

Format: sheet

☒ Generate sequence per field(s)

Sequence field

Start sequence from

Sequence ordering, then reference

#### Common

☐ Use line no. order for generating sequences

## Customer/Sub-Supplier Portal Logo

This section provides the option to update the logo that is displayed on the customer/sub-supplier portal. Use this option to replace the DocBoss logo with your company logo on the portal.

### Customer/Sub-Supplier Portal Logo

This logo will be displayed on the customer/sub-supplier portal. For best results, upload a white logo with a transparent background (200x30 pixels).

 Drag and drop new image

[Or choose files from disk](#)