Release - January 2019

Equipment List

Create combination columns

There are times when the data from your system exists in 2 columns. Rather than combine it prior to upload, DocBoss now allows you to concatenate existing data into a new column result. On the project template, you select the source columns (and add text if you wish) to build the structure of a new column.

Usage ideas include:

1) **Skids with replicated tags**. Assume that you are building 2 duplicate skids. As a result, the tags for the transmitters are exactly the same for each skid (i.e. T-101), but the skid tags are different. If you must provide calibrate certificates for all transmitters (by tag), DocBoss would previously have grouped the 2 duplicate tags together. Now, you could create a combination column with "Skid:<skid> Tag:<tag>". This results in 2 unique values.

2) **Data from your system is in 2 columns, but you need to combine it to make unique values.**A classic example is a level transmitter with varying length of probe. If the model number and length exist separately, you can upload each data piece to its own column. Then have DocBoss create a a combination column of "Model:<model> Length: <length>". Now you have a column you can use for drawings where a different drawing is supplied for each probe length, while also keeping the original "model" column for use for instruction manuals etc..

All configuration for combo columns is available on the project fields template. Once created, the column is available as a level.

Enable fields for Major Tags

Users may now enable the item/model field, along with any other custom fields for use with major tags from within the project fields template. Provides a nice place to add a description of the unit (e.g FKOD, Tank, etc) which can then be pulled into the output templates.

Option to show tag numbers (as dropdowns) in steel tab

Along with the above, users may now enable the tag column on the steel tab. This provides a drop down of all tag values from the tagged equipment grid.

Library interface upgrade

The library has received an interface refresh. It now aligns more closely with the typical assign process. You can preview documents, drag and drop, and edit documents more easily.

Restrict card auto-generation to using one equipment tab

We have added tab specific options when selecting levels. So - if you have both major tags and tagged equipment, and you want to auto-generate the cards but ONLY for the tagged equipment (as opposed to cards for the item/models of the major tags), you can select "Item/Model [TE]" vs "Item/Model [All]"
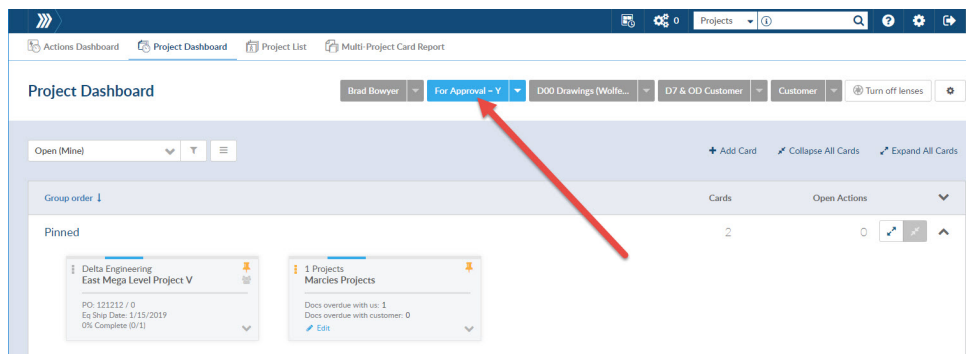
Working with Cards

Stage management

New "For Approval" checkbox on stage

On the stage lists, users can now enable a single checkbox called "For Approval".

This has a singular purpose: On the project dashboard, there is a new lens called For Approval. If you mark off your for approval stage, you can filter your project dashboard for all documents which are in that stage.

Set default revision values for each stage

While DocBoss has always supported a single default revision, you may now associate a new default revision number with each new stage.

Set revision on compiled docs

DocBoss will now remind users to update the revision number on their compiled documents during the submittal process. This happens only if the compiled document has been re-generated.

Add ability to upload supporting native files

Users may now upload the original native file directly to the card, without replacing the "active" pdf file. The native files are uploaded directly from your computer, into the native file area on the card.

Note - the ability to upload a native file AS THE ACTIVE DOCUMENT remains. This new function simply allows you to provide the native file IN ADDITION to the pdf record.

Document Numbering: Sequences by any field, plus ordering options

We have extended the auto-numbering options for doc numbers. Originally, sequences could only be grouped by doc code, and the assignment of sequence numbers was based either on the card's references or the line numbers of attached equipment. Now, users can define the grouping field (or multiple fields if grouping should be more specific), as well as select a pre-sort field.

This is often requested when a customer has a complex numbering pattern which you wish to auto apply.

1) Enable the field to appear in doc numbering area (from project fields setup)

2) On the main setup screen of your project, in the document numbering area, enable generate sequence per field. You will get a pop up of doc code, plus all custom fields enabled on project fields tempalte (previous step)

3) Select fields to use to define unique groups. If you choose multiple fields, the system will use all fields to determine uniqueness.

4) Lastly - choose the field you wish to use to pre-sort the group members. By default, we use the doc code + doc code name. The last sort is always either the reference or the line number (as you have already selected).

Sending Documents

Add cards to ad-hoc queue from the outbound submittal screen

There are cases where documents must be forwarded to a 3rd party after submission to your target. Rather than remembering which documents must be included in the ad hoc submittals, you can now tell DocBoss to place outgoing cards into the ad-hoc queue, directly from your outgoing submittal.

System Settings

On User Profile

Users can now set their own csv export delimiter (override the admin default)

Uses can choose "project list" as dashboard landing page, vs the projects or actions dashboards.

In Admin Settings

Instance can change the password reset interval. Note that such a change may reduce the security of your system.

You can now change the system label for "Sales order"

Templates

Cover Sheets

Allow each sheet of a multi-sheet XLS workbook to be printed as additional cover pages.

Stamps

Users can now test stamps on the cards history page (previously only cover pages were testable)

Document Index

Filtering a worksheet in an index report

We have expanded the filtering options for each tab of an index report.

New filters include:

With_Sub-Supplier
Overdue
Due_In(x)
Late

Expected_In(x)
Is_Drawing=Yes\No
For_Approval=Yes\No

Create a separate worksheet for each unique list value

This function would typically be applied if you are managing multiple customer orders within one DocBoss project. In the context of that example, It allows you to create one index, but to list all cards relative to one order on one worksheet, and another order on another worksheet.

Use a variable in the worksheet name

This will be helpful when creating a separate worksheet for all values of a list.

Transmittals

One row per tag

WE have added a new parameter to the taglist variable which creates a new line in excel after every X value in the list. This will help with page breaks on large projects.

Doc code title page

An option has been added which will display a N/A DCTP instead of normal DCTP if there are no cards for a code

Section title page

A new option for section title pages has been added.

List of new variables for Excel template:

Cover Pages

<Document_CombinationUnitX_List>

<AllUnits.CombinationUnitX>

Transmittals

<Documents.CombinationUnitX_List>

Document Indexes

<DocumentsByIndex.CombinationUnitX_List>

<DocumentsByIndex.DaysLate>

<DocumentsByIndex.Transmittals.<TransmittalsCount.Index>.DaysOut>

<DocumentsByIndex.TransmittalsByStages.<TransmittalsByStagesCount.Index>.DaysOut>

<DocumentsByIndex.FinalTransmittal.DaysOut>

Small updates/patches

1. Change default stage list name "For Info / Review" to "IFI" to better reflect the contained stage,

2. Allow IFI stage to be copied

3. Added the end user reference into the project grid, and as an option in "Last Projects" naming