

Release - September 2018

07/17/2024 1:51 pm EDT

Manual Cards for Tagged Equipment

Add Manual cards (link to either major tags or tagged equipment)

Manual cards allow users to add (or upload) cards, while manually selecting the appropriate doc codes, and tags. This function has existed strictly for use with the Major Tags module, but now - users can create manual cards using the units from the tagged equipment list.

This was a debated option within DocBoss, as the manual cards circumvent the structure imposed by Auto-Generation. As a result, you must enable the option to create manual cards on the admin menu, as well as the main setup screen of the project.

[Click here](#) to add manual cards for equipment units.

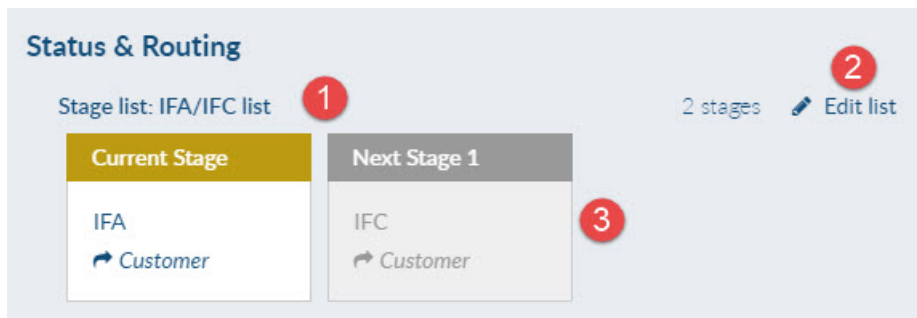
Edit tag list on auto-generated cards

If you find yourself in a position of needing to edit the tag list of an Auto-Generated cards, you can now convert the card into a manual card and make the required edits. All data will be transferred to the manual card including all history, files, numbers, title, etc. The original auto-generated card will continue to exist but it will fade into the background (it will be marked as not required).

Working with Cards

Change the stage list from the assign screen

We have built an entirely new interface to allow users to see and change the stage data while assigning a card. Users no longer have to create the stage list prior to editing, and they can edit directly on the card while assigning.



1. The name of the stage list
2. The option to edit the stage list directly

3. Box for each stage, with the abbreviation and target. If you scroll over, more detail will appear.

On Edit:

Edit stage list for card: SO123-M05-0007-001

Add or drag a stage to the new list ➡ Current position in the workflow

Stage list name *

IFA/IFC

↓ Active Stages List

IFA IFC

➡ IAB

+ Add New Stage

Cancel Apply to current card Apply edits to multiple cards

1. This marker identifies the current stage. If you want to change the stage, move this.
2. Edit the details of the stage
3. The stage library (available in admin>stages>library) is a list of pre-defined stages you can drag into your existing stage list.
4. the three dots allow you to change the order of the stages.
5. the user can add a NEW stage y clicking this button
6. Action - choose whether you want to apply these stage ONLY to this one card, or apply the changes to other cards. Note that the other cards must have the same original stage list, and be in the same current stage.

[Click here](#) to learn more.

Upload file to comments area

We have seen more requests from customers to send comment files along with the PDF documents. We now allow users to upload files into the comments area of the assign screen. The file will be included with the next submittal, and are available historically from the comments interface.

Comments

Comments for NEXT Customer transmittal

Drag and drop new file Or choose files from disk

Maximum file upload size is 40Mb.

Comments for NEXT Sub-Supplier transmittal

Drag and drop new file Or choose files from disk

Maximum file upload size is 40Mb.

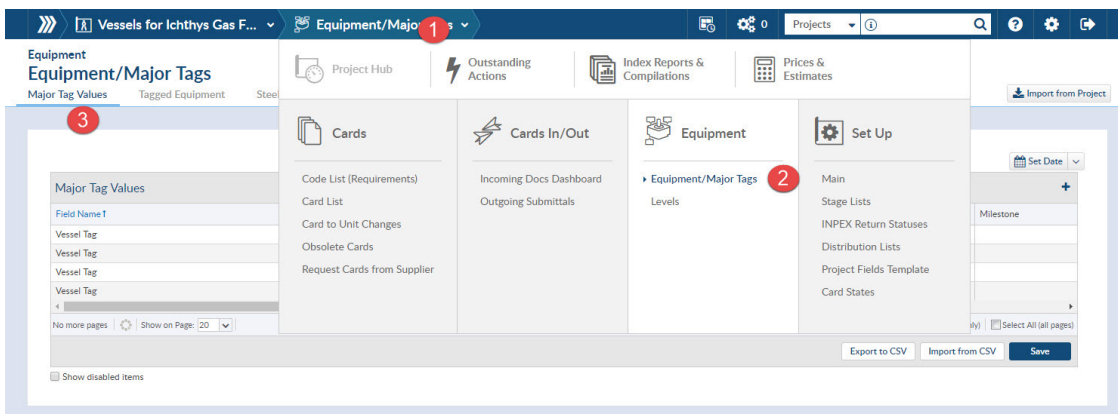
Internal Comments

Drag and drop new file Or choose files from disk

Maximum file upload size is 40Mb.

Combine screens for the Equipment List and Major Tags

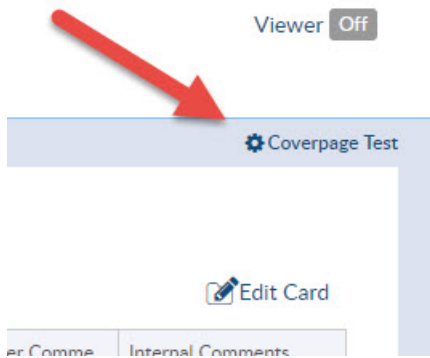
We have brought all equipment related data together into one screen



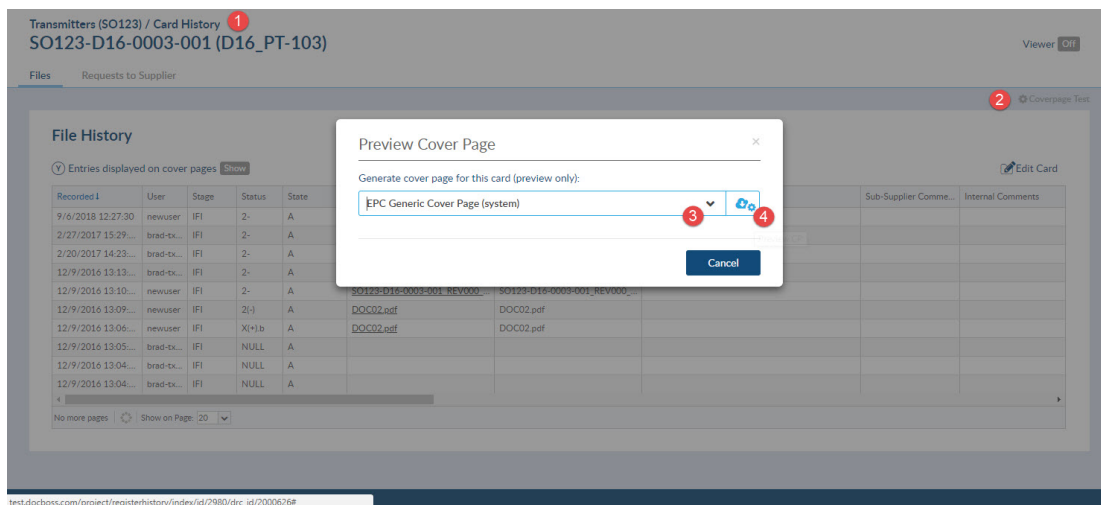
Templates

Test Cover Pages

You can now test cover pages from the history screen of any document. There is a small text link in the upper right corner.



When you click, you can choose the template and create a coversheet with the cards data. this allow syou to test with various cards. i.e. many tags, long doc numbers etc..

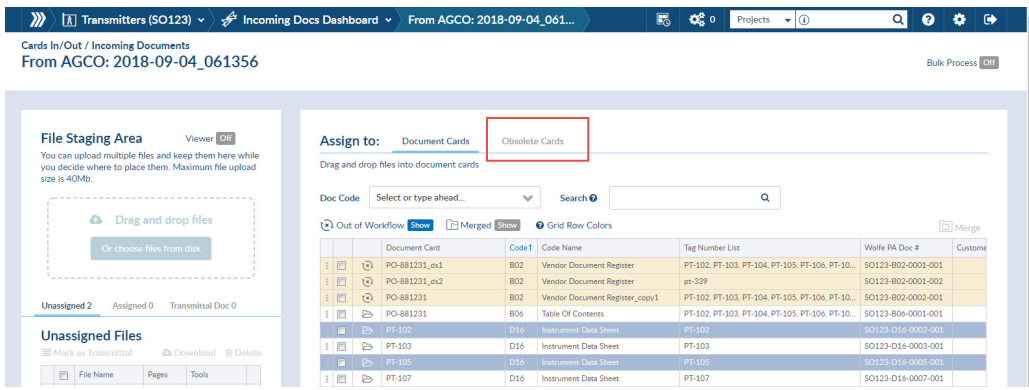


1. Open the card history
2. Click Cover page Test
3. Select the cover page template
4. Generate the PDF.

Working with Cards

Uploading obsolete cards

There are some occasions when an old document must be uploaded to the system, but the card has become obsolete. We now allow users to upload documents to obsolete cards.



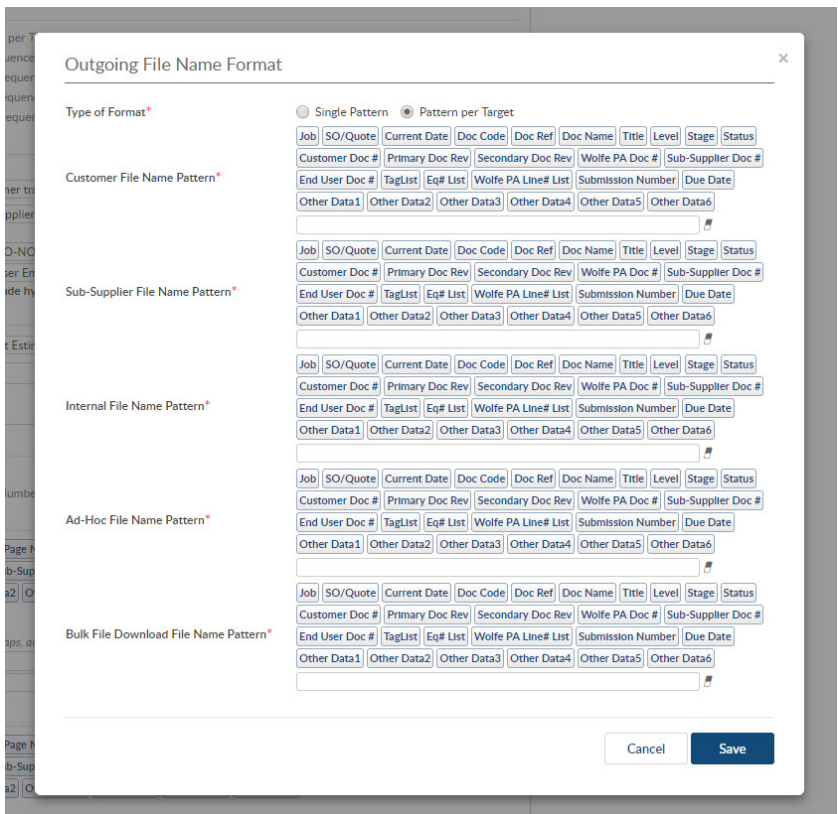
Set the supplier for any given card

There are times when a card is linked to units from more than one supplier. You may now choose a sub-supplier overwrite value which will be used in reports.

Project Setup

File Naming by Target

Users can now choose to name outgoing files with a different pattern depending on the submittal target. For example, you can use the sub-supplier doc number in the file name when sending to sub-suppliers, while using the customer doc number when sending to customers.



We also now verify that all variables used in the file naming protocol are populated in the system, to ensure accurate file naming.

Remove the mandatory flag for the customer address. This is defined on the project field template.

Edit and copy default templates (including email notification)

Date has been added to main screen of Quote projects.

Other items in this release

- Allow users to permanently remove project field templates from the admin list.
 - Filter Dashboard by Project type (Order, Quote or Both)
 - Users may now fully delete manual cards (with no history) vs mark as not required.
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