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# Major Feature - Approve Supplier Documents

In addition to tracking customer status for each card, you can now manage an internally focused approval process for supplier documents. You define a set of statuses, and when documents arrive from your suppliers, the documents will be routed to your team for a status. The docs automatically queue for return to your supplier (let them know if they have been approved/rejected), and then can queue for submittal to your customer.

Details are available here

# Submittal Management - Incoming

## Add Data to Internal Submittals

We have changed the "incoming from internal" submittal creation pop up. Users can now select a company, and assign a submittal number if provided.

## Disable Bulk Process screens when all docs are processed

when you want to speed up the receipt of documents, you can use the bulk processing process. But - once you have processed all documents, it can be confusing to see the documents in the match/status sub-tabs. To avoid confusion, we now turn OFF the bulk submittal interface for each submittal, once all documents have been fully processed.

## Open assigned docs tab for completed submittals

When opening the incoming submittals screen, documents are listed in 2 tabs - "Unassigned" and "Assigned". On submittals where all documents have been processed, we will default to displaying the "assigned" tab.

## Display comments on INCOMING documents

DocBoss allows users to apply markups to documents, which are then encoded as adobe comments. We now extract the same type of comments/markup from INCOMING documents. If you customers have added comments/markups to their documents, when you bring them into DocBoss they will be be pulled into the normal DocBoss viewer for you to review.

# Submittal Management - Outgoing

## Keep customer cover page option added to outbound to

## supplier grid

When documents are received back from your customer, and you wish to forward them to your supplier for review - you have the option to maintain the customer cover sheet, or remove it. However - this option is only available from the assign screen when the document is first received. We have added this option to the outgoing grid - so you can now make this decision later in the process.

# Administration

## Permission auto-added

If you are using project access permissions, DocBoss now automatically adds project permission for each user identified in a role drop down. So - if you assign one of your users to a role, you no longer need to specifically enable their access on the project.

## Option to Change Internal Target to Custom Text

DocBoss has 3 outgoing targets for documents. They are currently titled Customer, Supplier and Internal. Due to user request, we now allow you to edit the target title" "Internal" to a user defined text. Some instance admins may choose to set this title to "Engineering contractor" or "Fabricator" or "Inspector" (or simply "3rd party"), making it clear that the "internal" target is not restricted to use inside the organization.

## System rename of Status List to Customer Return Status List

To make room for new features, and to maintain consistency among features, we have renamed the Status List to Customer Return Status List. We feel the name is more reflective of the actual function, and will allow use to differentiate from Internal Approval; Statuses.

## System rename of Internal Status to Card State

With the introduction of internal document approvals, and to maintain consistency among features, we have renamed **Internal Status** to **Card State**. Card State (more info here) tracks whether a card is active, void, cancelled, superseded etc. The card state list is available on each customer, and is copied to the projects (s with other lists).

## Templates

### *Variables*

New transmittal variable for "complete/incomplete" status of card.

New cover page variable for submittal history - to display customer status.

New variables for sub-supplier cover pages to indicate internal approval status.

### *Template List*

A new filter allowing you to filter by template type has been added to the list of available templates. i.e. Maybe you only want to see the cover page templates in the grid.

# Reporting

## User Activity Report - NEW

Download a list/summary of all documents uploaded and assigned by each user by date. The new report can be accessed from the metrics section of the admin area.

## Multi User Report - Background generation

The creation of multi projects reports can take some time to run. As a result - we have moved this process to the server side. You will be notified by pop up when the report is complete, and ready for download. You no longer have to stay on the screen while the report generates.

## Index Generation - Optimization

There are instances with the creation of document index reports can take longer than expected. We have optimized the generation process, and hope users will see reduced report generation time.

## Metrics Report (Per Project)

### Due in Future - A new column has been added to the metrics report indicating which documents would have been due in future for each reporting period.

## Metrics Report (Summary)

New KPI's have been added to the summary report indicating the total number of new, open and closed projects which existed during any given period.

# Card management

## Manually process obsolete cards

In the obsolete grid, we have added an option to "process" the cards which appear there. This is simply to identify which cards have been newly moved to the grid, and to clear them from view once.