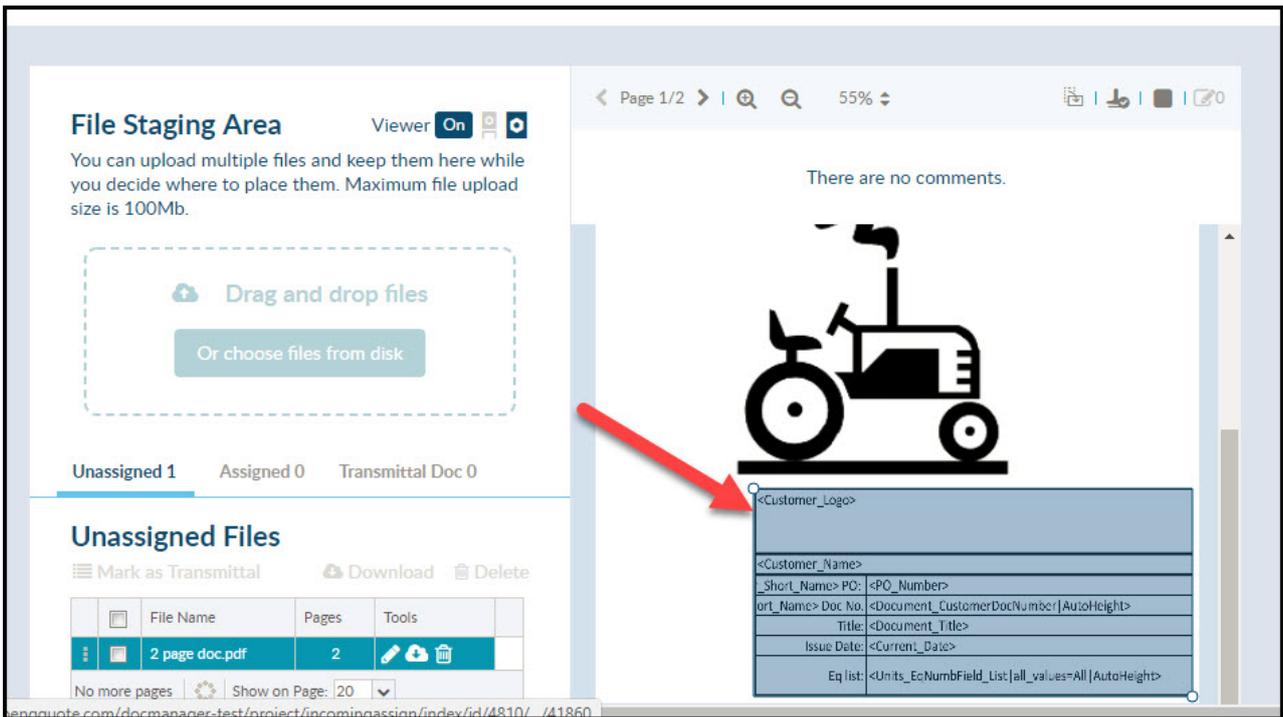


Release – March 2018

07/17/2024 1:52 pm EDT

Preview Stamp

DocBoss now allows you to see the stamp while you are placing it on the document. This will include the variables (until it has actually been assigned)



Once it has been assigned to the card, the variables will populate with applicable information! Allowing you to view exactly how it will look on output.

There are no comments.

2 page doc.pdf
Viewer **On** **View file** Compare

ValveCo

Certified Drawing

Order Number: Order123
Model: GV1234



Test Company Ltd	
Test Co. PO:	PO12354
Test Co. Doc No	PO12354-B01-0001-001
Title	GA Drawing
Issue Date	03/01/2018
Eq list	Tag1, Tag2, Tag3

New file to put in this document card

2 page doc.pdf

Document Info

Document Title
GA Drawing

Document Codes

Primary code
B01

Tags

Tag(s) List
Tag1, Tag2, Tag3, Tag4

Pages in Document

Total pages in incoming document
2

How many of them are cover pages?
0

Status & Routings

Current Stage *

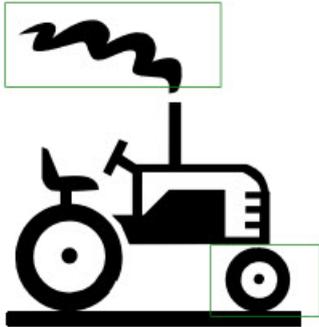
Including markups in outgoing submittals and compilations

Markup notes can now be included in the outgoing submittal. A page will be added to the outgoing document with a list of the comments (numbered). This is to ensure that recipients are aware of all annotations. By option, this will be available on the outgoing submittal screen but by default, they will NOT be included in compilations (can be added)

ValveCo

Certified Drawing

Order Number: Order123
Model: GV1234



Test Company Ltd	
Test Co. PO:	PO12354
Test Co. Doc No:	PO12354-B01-0001-001
Title:	GA Drawing
Issue Date:	03/02/2018
Eq list:	All

Summary of Comments on RE SALES 5-B01-0001-001_REV0.pdf

Page: 1			
1	Author: Rachel Eskrick	Subject: Rectangle	Date: 1909-12-31 17:33:38
This line needs to be bigger.			
2	Author: Rachel Eskrick	Subject: Rectangle	Date: 1909-12-31 17:33:38
Add space between "Valve" and "Co"			
3	Author: Rachel Eskrick	Subject: Rectangle	Date: 1909-12-31 17:33:38
Add more detail			

Option to include comments page on submittal

A new option is available in the Transmittal section of the output settings area of the main project setup. You have the option to include (on not) the comment pages.

Output Settings

Stamp

Test Co. Stamp XLS: Default Stamp Template [XLS] (system)

Cover Pages

Test Co. Cover Page PDF: Default Cover Page (system) CSV/XLS: --- No Template Selected ---

Sub-Supplier Cover Page PDF: Default Sub-Supplier Cover Page (system)

Transmittals

Test Co. Transmittal PDF: Tundra Cust Line No (Rachel Eskrick) CSV/XLS: --- No Template Selected ---

Sub-Supplier Transmittal PDF: Default Sub-Supplier Transmittal Template

Internal Transmittal Uses the Sub-Supplier transmittal templates

Delivery Medium Email Show Delivery Medium in Transmittal Popup

Send transmittal email notification

Include summary into email: PDF

Require Name for Doc Access: Yes

Add Comments Page to Document on Submittal

[Transmittal Numbering Format](#)

Option to include comments page on Compilation

For the Compilation, you have the option to Include Markups (only) or Include Markups add the Comments Page. By default it will not include either. You will not see the Add Comments Page option unless the Include Markups is checked.

Save Compilation (local only) Back to List

Compilation Info

Name: New Book

Description:

Coversheets: Ensure every doc has coversheet

Respect coversheet suppression for each card

Include Markups **Add Comments Page to Document(s)**

Regenerate ENTIRE compilation during transmittal process:

Compilation Layout

Table of Contents and Bookmarks sections options

TOC Level: 3 Depth of Bookmarking:

Max level for TOC numbering: TOC page numbering

TOC/Bookmark pattern:

Project Name	PO Number	Job	Doc Code	Doc Ref	Doc Name	Title	Status	AMEC Doc #	RPE Rev #
DEMO - RE Line # List	Other Data1	Other Data2	Other Data3	Other Data4	Other Data5	Other Data6			
Parent Tag List	Document Comments								

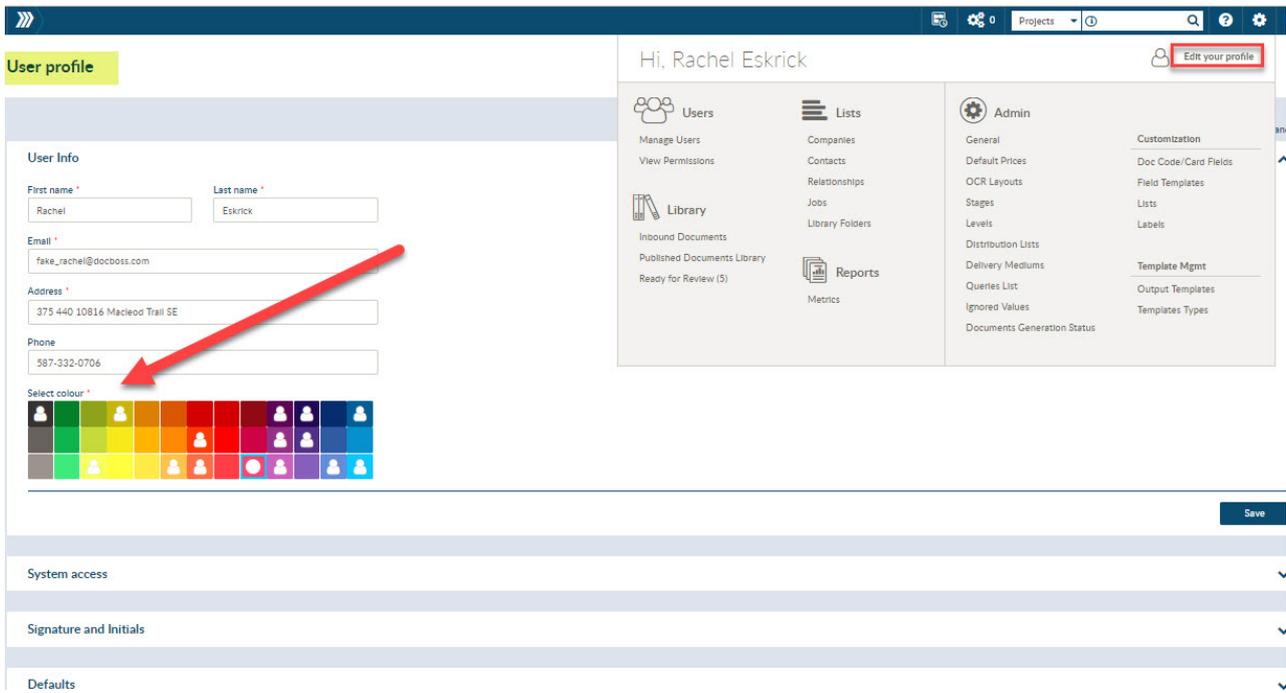
<DocRef>

Suffix for NON-PDF files: * [Not a PDF doc]

Suppress Cards in TOC:

User Profile

The look of the User Profile screen has been updated. All data/functions remain the same, with the addition of the user colour selection.



Colour Assignment -

Each User now has to be assigned a colour, these will reflect on any markups that are added to documents. (View Users do not have a colour assignment). The "circle" in the colour box indicates the current user being assigned and the white figure image indicates colours that are assigned to other users.

Card List

Status Columns

There are new status columns and filters, that break down the now Status(combined). By default we will not show these columns in your grid, but you can still use the filters.

Status(Combined)

- This is the combination of all the current workflow statuses (this is the same field we are used to using and have grown to love).

<Customer>Status

- This is current status as per the customer (does not include any queuing or next step status)

Location

- This is where the document is in within a workflow.

Routing

- If any routing has been assigned it will be displayed here. As always routing takes priority and any queuing is put on hold until the action is complete.

Card List

Test Co. Doc Code: Reference: Level: Tagged Units: Sub-Supplier:

Stage: Test Co. Status: Internal Status: Transmittal: Internal Code:

Location: Routing:

Due to Test Co.: Expected Return to DEMO - ...

Days since last request: Keyword:

Grid Rows Colors | How to use auto-generated values for Test Co. Doc # and DEMO - RE Doc # | Add to Ad-Hoc | Set Date | Generate Request

Required	DEMO - RE Doc #	Doc Code	Doc Code Description	Status (Combined)	Test Co. Status	Location	Routing	Tools	Test Co. Doc #
<input checked="" type="checkbox"/>	RE SALES 5-B01-0001-001	B01	GA Drawing	2+	2	+			PO12354-B01-0001-001
<input checked="" type="checkbox"/>	RE SALES 5-D2-0003-001	D2	Electrical Connection Diagrams/Wi...	X+	X	+			
<input checked="" type="checkbox"/>	RE SALES 5-AD-0001-001	AD	Additional DocCode	X(+).a	X	(+)	.a		
<input type="checkbox"/>	RE SALES 5-D2-0004-001	D2	Electrical Connection Diagrams/Wi...	X(+)	X	(+)			

Show queue in brackets for cards with .atdc

If there is routing assigned on a card, it will still show the next step queue in brackets. The process remains the same, Routing will always happen first, then will queue accordingly.

For example, an action is assigned to the admin on the project and to be sent to the customer, the Status(Combined) will reflect 2(+).a

Grid Rows Colors | How to use auto-generated values for Test Co. Doc # and DEMO - RE Doc # | Add to Ad-Hoc | Set Date | Generate Request

Required	DEMO - RE Doc #	Doc Code	Doc Code Description	Status (Combined)	Test Co. Status	Location	Routing	Tools	Test Co. Doc #
<input checked="" type="checkbox"/>	RE SALES 5-D2-0003-001	D2	Electrical Connection Diagrams/Wi...	X+	X	+			
<input checked="" type="checkbox"/>	RE SALES 5-AD-0001-001	AD	Additional DocCode	X(+).a	X	(+)	.a		
<input checked="" type="checkbox"/>	RE SALES 5-B01-0001-001	B01	GA Drawing	2(+).a	2	(+)	.a		
<input type="checkbox"/>	RE SALES 5-D2-0004-001	D2	Electrical Connection Diagrams/Wi...	X(+)	X	(+)			

Document Icon will navigate to the History

When you click the document icon (under the Document column) it will now open the History of the card in a new tab. By default your viewer will be On, and if you view the document and still need to download you can.

Card List

Test Co. Doc Code: Reference: Level: Tagged Units: Sub-Supplier:

Stage: Test Co. Status: Internal Status: Transmittal: Internal Code:

Location: Routing:

Due to Test Co.: Expected Return to DEMO - ...

Days since last request: Keyword:

Grid Rows Colors | How to use auto-generated values for Test Co. Doc # and DEMO - RE Doc # | Add to Ad-Hoc | Set Date | Generate Request

Required	DEMO - RE Doc #	Doc Code	Doc Code Description	Status (Combined)	Test Co. Status	Location	Routing	Tools	Document	Test Co. Doc #
<input checked="" type="checkbox"/>	RE SALES 5-D2-0003-001	D2	Electrical Connection Diagrams/Wi...	X+	X	+				
<input checked="" type="checkbox"/>	RE SALES 5-AD-0001-001	AD	Additional DocCode	X(+).a	X	(+)	.a			
<input checked="" type="checkbox"/>	RE SALES 5-B01-0001-001	B01	GA Drawing	2(+).a	2	(+)	.a			PO12354-B01-0001-001
<input type="checkbox"/>	RE SALES 5-D2-0004-001	D2	Electrical Connection Diagrams/Wi...	X(+)	X	(+)				
<input checked="" type="checkbox"/>	RE SALES 5-2-0001-002	2	Master Document List & Schedule	NULL	NULL					

It will open in new tab.

File History

Move active file to a different card Edit Card

View	Recorder	User	Stage	Status	Internal Status	Original Doc Link	Dist-CP Link	Test Co. Comments	Sub-Supplier Comments	Internal Comments	CP Only	Cover Page / Stamp	Dist to Test Co	Test Co. Doc #	DBI	
⊕	2018-03-02 16:42:16	rachel-demo	IFI	2(+)	A	RE SALES 5-B01-0001-001_REV0.pdf	RE SALES 5-B01-0001-001_REV0.pdf				N	Stamp, etse cover page	2018-03-16	10	PO12354-B01-0001-001	000
⊖	2018-03-02 15:58:15	rachel-demo	IFI	2(+)	A	RE SALES 5-B01-0001-001_REV0.pdf	RE SALES 5-B01-0001-001_REV0.pdf				N	Stamp, etse cover page	2018-03-16	10	PO12354-B01-0001-001	000
⊖	2018-03-02 15:31:48	rachel-demo	IFI	2(+)	A	RE SALES 5-B01-0001-001_REV0.pdf	RE SALES 5-B01-0001-001_REV0.pdf				N	Stamp, etse cover page	2018-03-16	10	PO12354-B01-0001-001	000
⊖	2018-03-02 15:30:59	rachel-demo	IFI	2(+)	A	RE SALES 5-B01-0001-001_REV0.pdf	RE SALES 5-B01-0001-001_REV0.pdf				N	Stamp, etse cover page	2018-03-16	10	PO12354-B01-0001-001	000
⊖	2018-03-02 08:44:45	rachel-demo	IFI	2(+)	A	RE SALES 5-B01-0001-001_REV0.pdf	RE SALES 5-B01-0001-001_REV0.pdf				N	Stamp, etse cover page	2018-03-16	10	PO12354-B01-0001-001	000
⊖	2018-03-01 16:29:43	rachel-demo	IFI	2(+)	A	RE SALES 5-B01-0001-001_REV0.pdf	RE SALES 5-B01-0001-001_REV0.pdf				N	Stamp, etse cover page	2018-03-16	10	PO12354-B01-0001-001	000
⊖	2018-03-01 16:28:27	rachel-demo	IFI	2(+)	A	2_sprms_000.pdf	2_sprms_000.pdf				N	Stamp, etse cover page	2016-10-05	10	PO12354-B01-0001-001	000
⊖	2018-03-01 16:26:27	rachel-demo	IFI	2(+)	A	RE SALES 5-B01-0001-001_REV0.pdf	RE SALES 5-B01-0001-001_REV0.pdf				N	Stamp, etse cover page	2018-03-16	10	PO12354-B01-0001-001	000
⊖	2018-03-01 16:24:22	rachel-demo	IFI	2(+)	A	2_sprms_000.pdf	2_sprms_000.pdf				N	Stamp, etse cover page	2016-10-05	10	PO12354-B01-0001-001	000
⊖	2018-03-01 16:23:33	rachel-demo	IFI	2(+)	A	RE SALES 5-B01-0001-001_REV0.pdf	RE SALES 5-B01-0001-001_REV0.pdf				N	Stamp, etse cover page	2018-03-16	10	PO12354-B01-0001-001	000

Select Page: 2018-03-02 16:42:16 - 2018-03-01 16:23:33 Show on Page: 10

View 1 2018-03-02 16:42:16 (latest) Status: 2(+),a Rev: 000

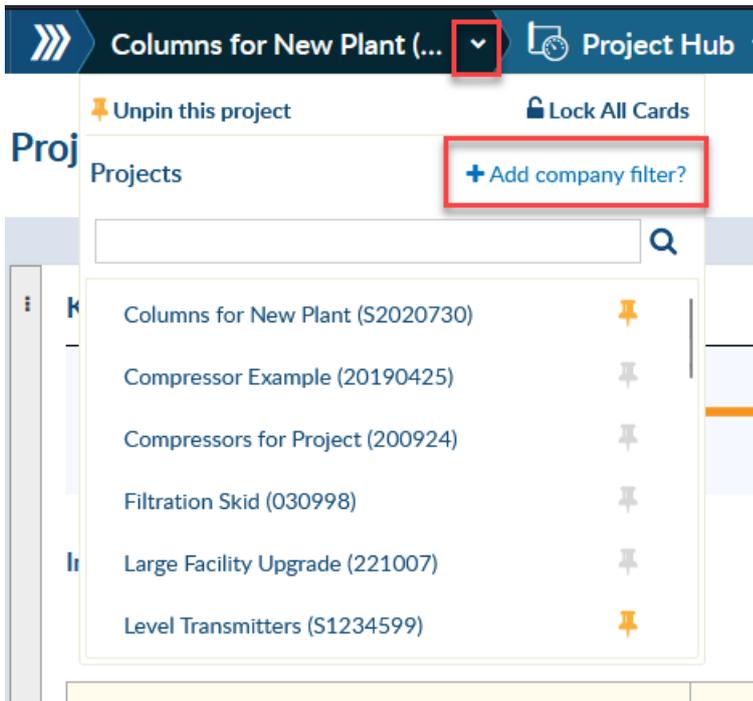
Page 1/1 55%

User Interface updates

Project menu search

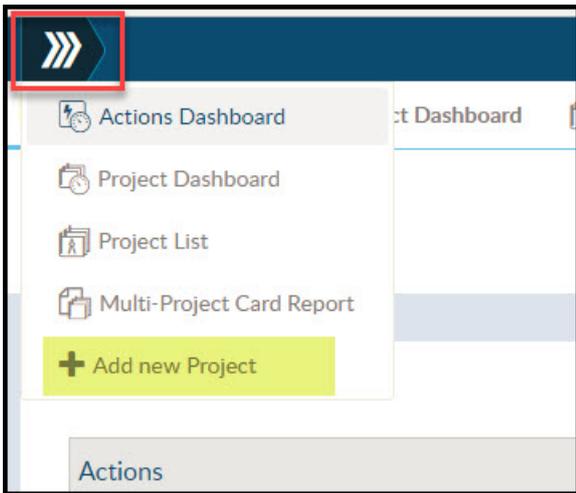
When you are in a project you can use the Project Drop down the search/navigate to other projects. We have added an optional filter to display only projects for the current customer.

You can remove that filter at any time and the next time you use the drop down it will reappear.



Main Menu - Add Project

You can now add a new project from the main menu drop down.

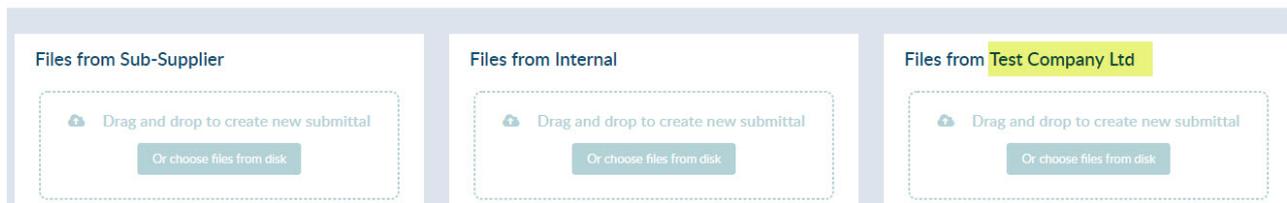


Submittal Pages

Incoming Docs Dashboard

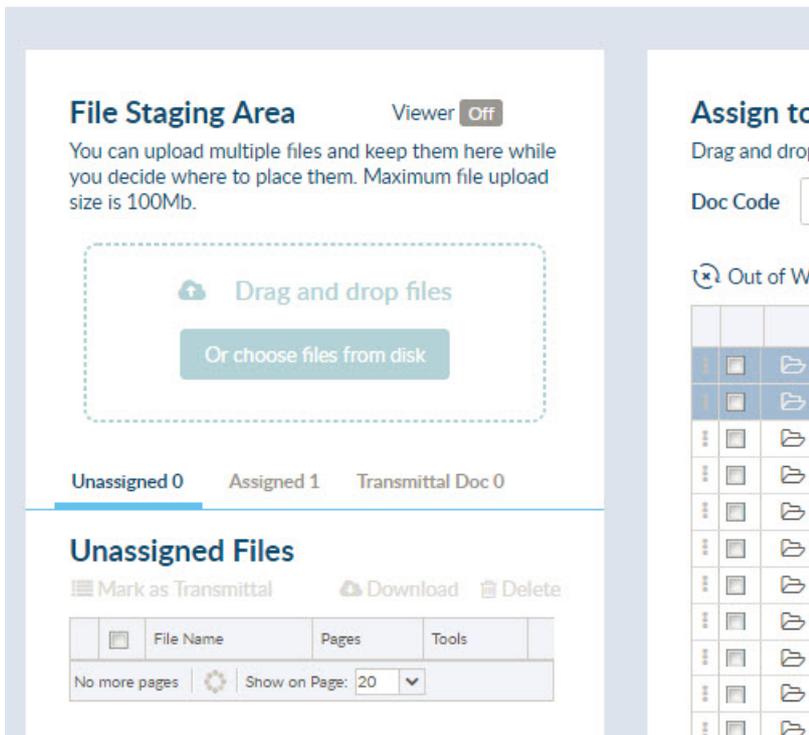
Shows Files from <Customer Name>

Cards In/Out
Incoming Docs Dashboard



Sub Supplier Submittal

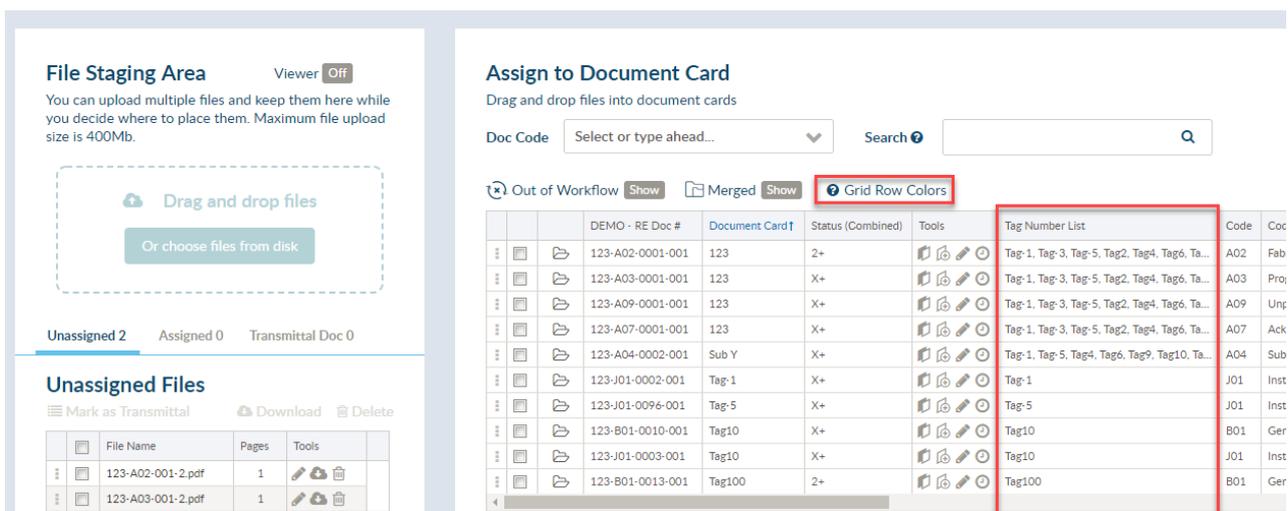
Inside any Sub-Supplier submittals, it will display the Sub-Supplier Name (assuming it was selected when creating the folder)



Assign to Document Card

We have added some additional grid row coloring to easily identify unlikely targets and newly added cards. Mouse over the Grid Row Colors for complete details.

In addition, this grid now includes any applicable List Columns. For example - Eq(tag) Lists, Major Tag List, and any Custom Lists.



Other updates

- We have increased security and do not allow to use system login/pw from different places (but you can still open multiple tabs)

