

Release – Jan 2018

07/17/2024 1:53 pm EDT

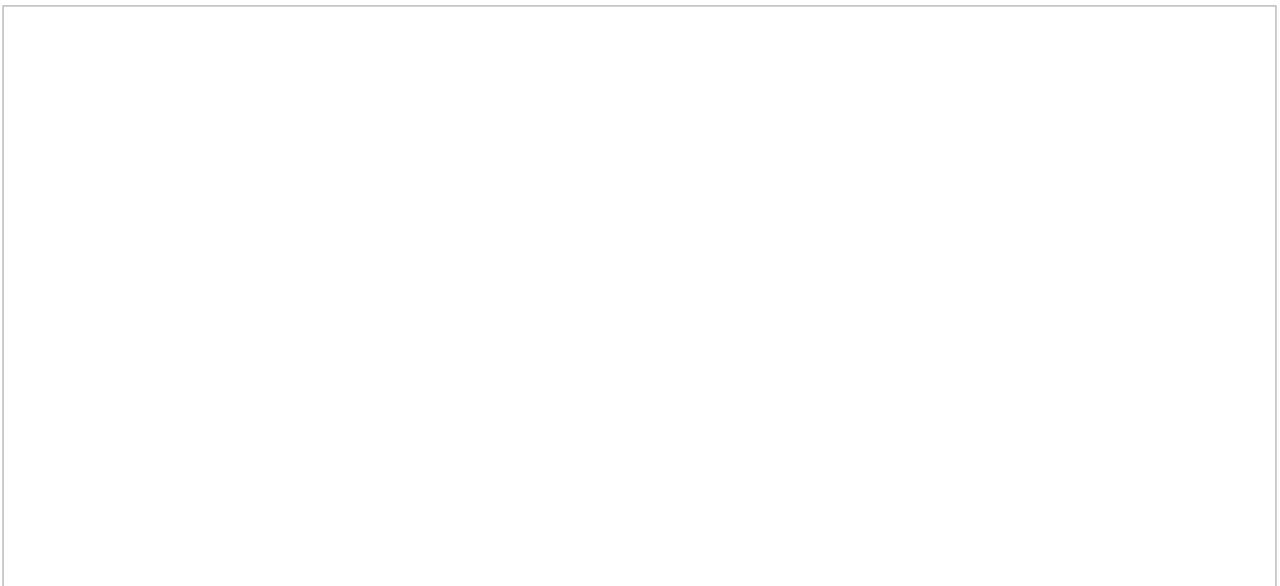
Add stamp to document

In some cases, customers require that stamps are placed directly onto the document, rather than the addition of a cover page. DocBoss now allows users to upload stamp templates, and stamp documents. The same variables as used on cover pages can be used in stamp templates.

Upload stamp template to admin area

Stamp templates are uploaded to the templates area (the same place other templates are located), in the admin/Template management area.

1. Choose the new “stamp” option.
2. Define the default size of the stamp.



NOTE: On submission, DocBoss will notify the user if the data filled stamp will occupy a larger space than the default size. This can occur if a field has “auto height” to accommodate variable tag lists.

Select stamp template on project

A new option is available in the output settings area of the main project setup. To use a stamp on a project, you must select the stamp here.



Define preference for each doc code

Users can define the metadata method for each doc code. In the past – the default was to add a cover page to each document, and a column existed on the code list to suppress that behavior (“Suppress CP”). Now – users have additional options

- Cover page (no stamp behavior is the standard behavior (unchanged).
- Stamp, else cover page: System will prompt the user to place a stamp. If the user decides it is not possible (i.e. there is no space), the user can indicate that the stamp cannot be placed. On submittal, DocBoss will add a cover page to the outgoing document.
- Stamp and cover page: DocBoss will prompt for a stamp. Even if the stamp is placed, DocBoss will still add a cover page.
- No stamp, no cover page.

Apply stamp

1. Ensure the viewer is enabled. Stamps can only be applied in the viewer (either in the thumbnail, or the full document view).
2. Click the stamp icon to enter stamp placement view
3. The yellowed box shows the default stamp size and allows the user to place it on the document. The stamp can be resized IF assigned in the full view.
4. If the system is requesting a stamp, the user can select “No space for a stamp, or Stamp not required” to satisfy the stamp request. Also – if you wish to remove and re-apply the stamp, choose “Remove stamp”.



Stamp sizing when tag list is too long for available space

If the stamp needs to be larger than the default to accommodate a larger than anticipated auto size field (i.e. tag list), a warning will be provided on submittal. The user will be provided with a new stamp size, and be asked to replace the stamp.

Additional time required on submittal

The analysis of the stamp size and the application of the stamp can add some time the submittal processing.

Individual Page Assign

DocBoss allows the user to select individual pages from a larger pdf, and assign them to separate cards.

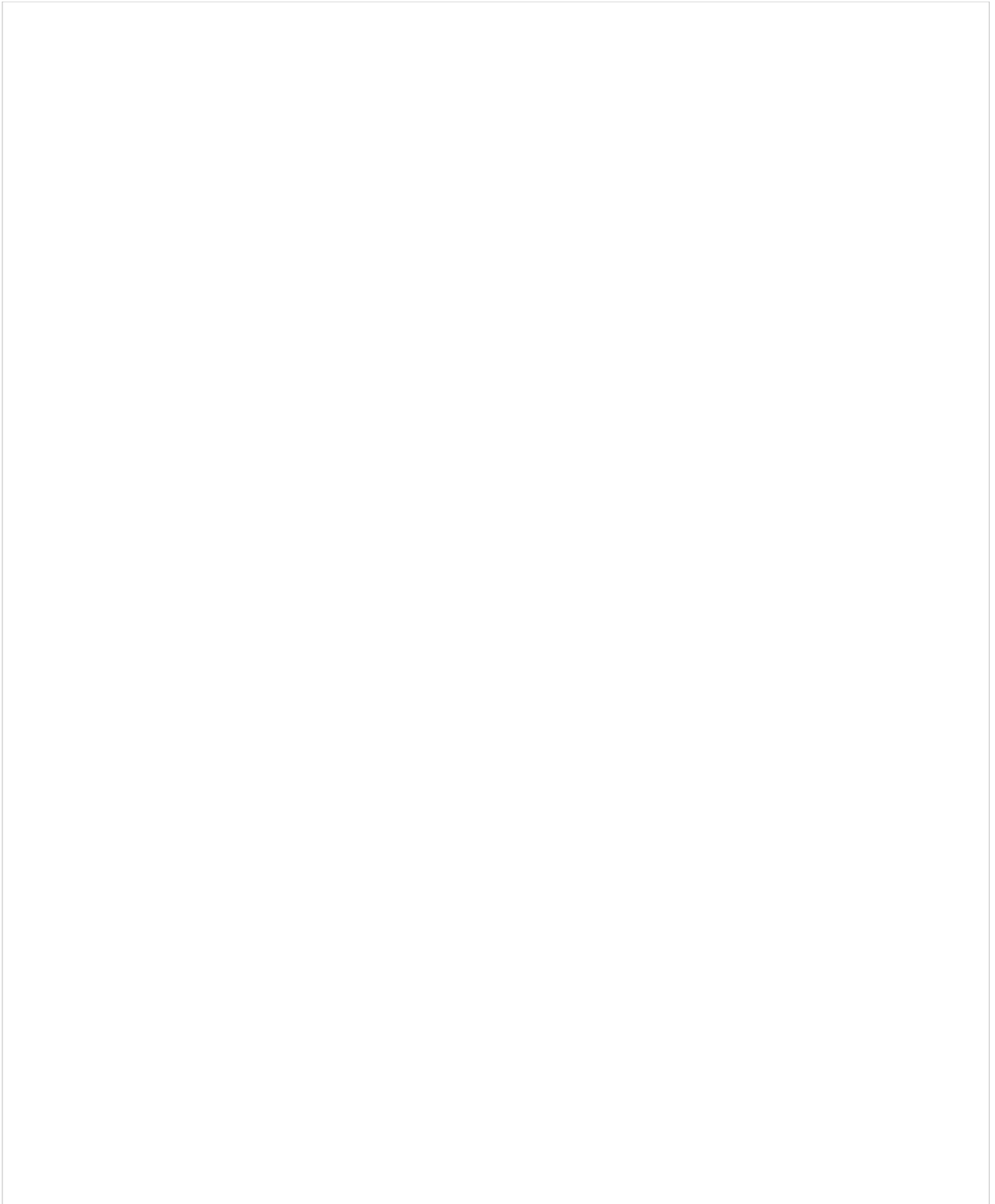
Select and assign

- 1 & 2. Select the pages to include in the assign from the thumbnail viewer. Multiple pages can be selected.
3. The selected pages will have a yellow border.
4. As you drag the pages across to the card list, the number of selected pages is identified in a drag tip.

Once you release the drag, a new file will be created. You will see a warning while the file is being created.



During this time the SAVE icon will be greyed. Once the processing has completed – the new file will appear in the viewer, and the save icon will be enabled.



Upon return to the incoming submittal screen – notice that the assigned pages have been grouped into a green accordion.

1. You can expand the accordion to view the assignments.
2. You can UNDO the assignment. This will reverse the assign, and make the pages available to reassignment.
3. You can REMOVE any page of a document. If you are not going to assign a page, it must be removed to allow the file to be marked as complete.

4. You can rotate pages from the viewer.

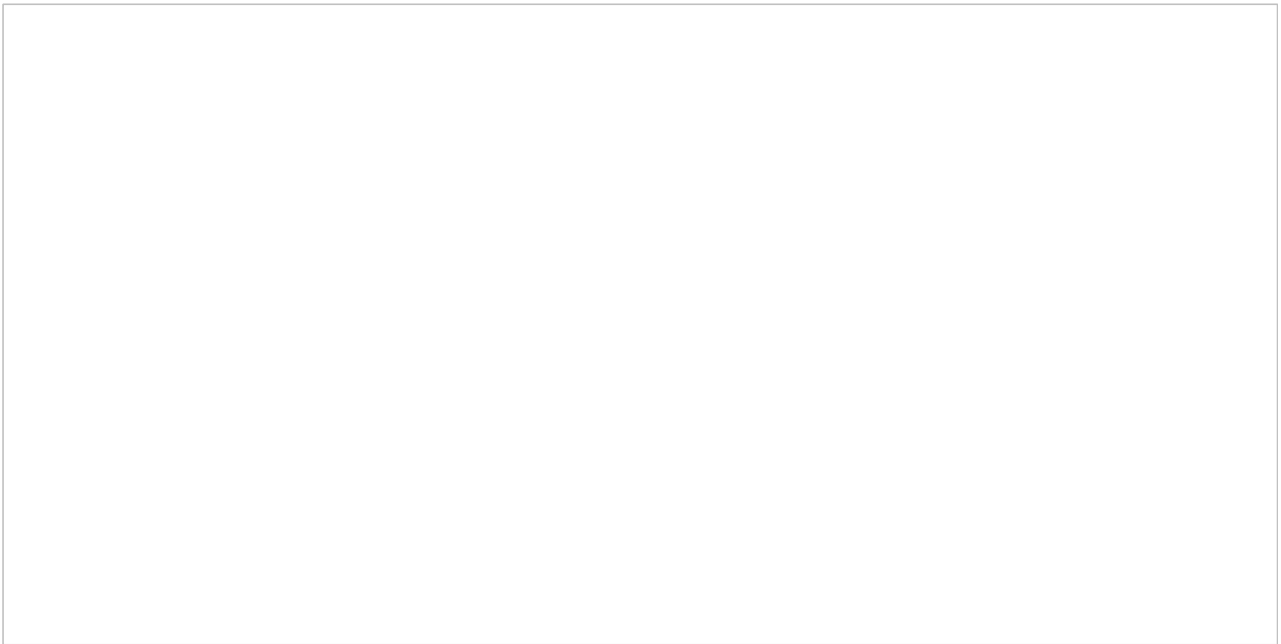


Progress of Individual Page Assignment

If any pages of a file have been individually assigned, all pages must be processed. The entire file will remain in the “unassigned” tab until EVERY page has either been assigned or removed.

1. Number of pages in the file
2. Number of pages which have been assigned

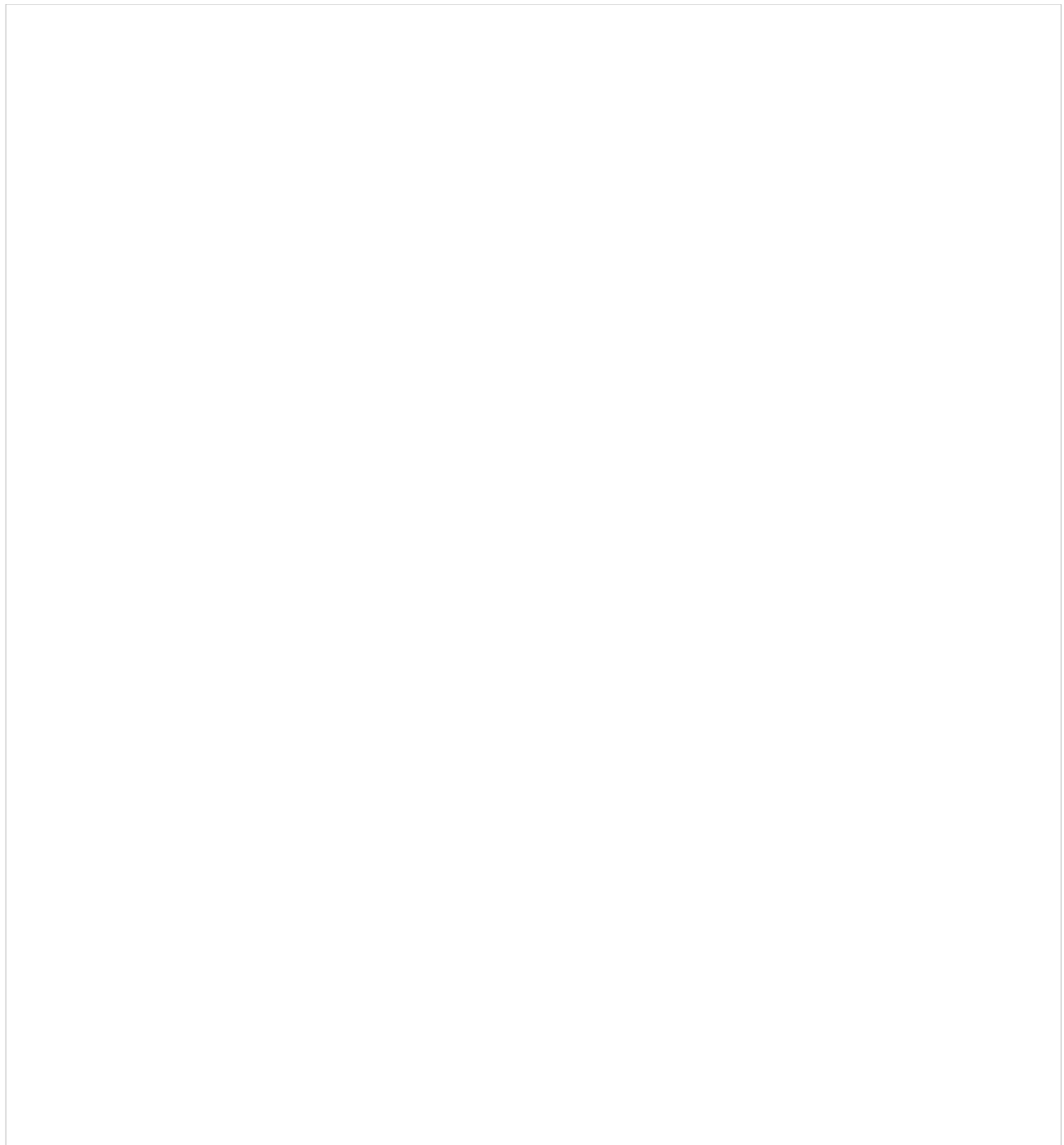
3. Number of pages which have been removed.



Markups (annotations and comments)

We have introduced the ability to add markups to most files. These consist of annotations (the vector drawing) and comment.

1. Markups are only available in the full viewer
2. Click the box to enable the markup interface
3. Click and drag on the document to create the annotation. Note that the box is the only annotation style available. The color is specific for each user. The color is designated on the user profile. This option will be available in January 2018.
4. Enter a comment if desired.
5. To save your comment, click the checkbox. To delete the entire annotation, click the garbage can. To simply escape without a comment (but leave the annotation) click the x.



Viewing markups

Users can cycle through comments from other users.

1. Icon showing the number of comments on this version of the document
2. Cycle through markups/comments
3. User/timestamp of markup
4. Edit comment / delete markup. To remove comment only – edit, delete text and save.
5. The highlighted annotation is related to the viewed markup. The number and the size of the number box help indicate the relevant annotation.



Including markups in outgoing submittals and compilations

By default, markups WILL be included in the outgoing submittal. They will appear as numbered markers in the PDF file (WITHOUT the associated box/annotation). A page will be added to the outgoing document with a list of the comments (numbered). This is to ensure that recipients with less capable pdf viewers are aware of all annotations. There will be an option to hide all markups on outgoing submittals. This will be available on the outgoing submittal screen (Feb 2018) By default, annotations will NOT be included in compilations. This is an option which can be changed on the edit compilation screen.

Screens which support annotations

The assign screen, the assign pop up, and the outstanding actions interface all support annotations.

Card Management

Merge

Copy history when unmerging a card

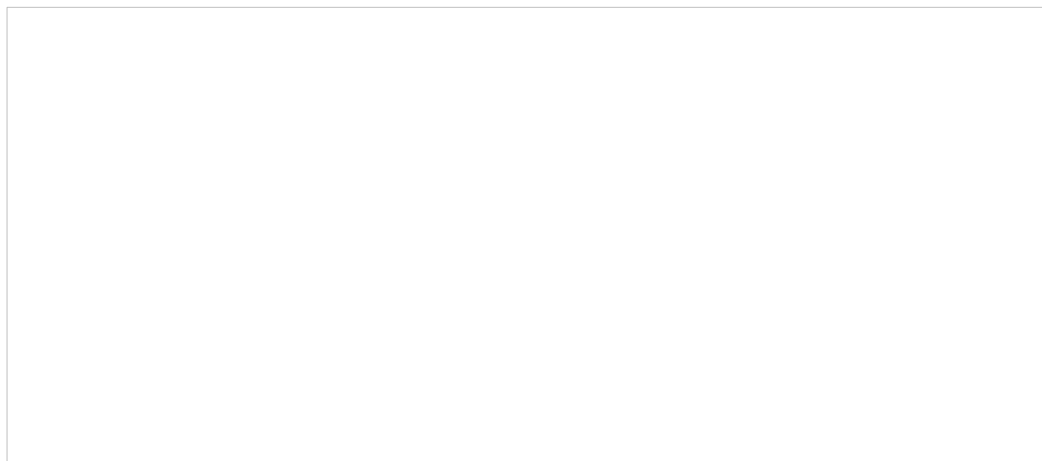
When a user disassembles a merged card, there is now an option to move history along with the file.

Change merge set after duplicate

In the past – when a user duplicated a merged card, future changes to the merge were disabled. Now – users can edit merged cards, regardless of whether duplicates have been created.

Pending changes to Equipment List fields

When changes are made to the equipment list, but the impact on cards has not been applied by users, the status list columns will show pending equipment in grey.



Rollback latest assignment from the assigned docs tab

After a document has been assigned (incoming submittal), the user can navigate to the “assigned” tab where an icon for rollback will appear. This is effectively an undo button for assigned documents.

Stages

New stage option “Complete on upload”

DocBoss has a stage list called “No individual submission”. It allows users to upload documents which will not queue for submittal. We have extended this function such that it can be applied to a single stage inside a user generate stage list. A typical example – the user submits documents to the customer for IFA/IFC stages, but As build documents need only be included in the final compilation. In this case – the user can enable the “complete on upload” for the as-built stage and the docs will not queue for submittal. Previously – the user had to create a fake submittal and auto-reclaim.

Equipment

Equipment List history of changes

DocBoss stores a history of changes made to items in the equipment list. It records the change, the user, and timestamp to enable reconstruction of events.



User Interface updates

Reports / Grids

Add prefix search filters to the assign screen

Users can search for cards in the assigned area using the same prefixes which are available on the full card list (i.e. "t:" to search only tags)

Add "Other data" fields to multi-project report

Users may now search/view the project "other data" fields from the multi-project grid/excel download.

Update grids to newest format

We have updated all grids to our newer grid format.

Admin

Change name of Project and Job fields

Under Admin / Customization / Label, the admin user can change the default naming convention for “Project” and “Job” across the entire system.

Option to hide Custom List Items from future dropdowns

Under Admin / Customization / Lists users can create and add items to a custom list. Users can now remove items from these lists.

Change password complexity rules

To keep up with changing standards in the area of web security, DocBoss has updated our password complexity rules to comply with the newest standards. The password rules are now as follows:

- at least 1 uppercase character (A-Z)
- at least 1 lowercase character (a-z)
- at least 1 digit (0-9)
- at least 1 special character (punctuation)
- make it at least 10 characters (now we have minimum 8 characters)
- not more than 2 identical characters in a row (e.g., 111 not allowed) (that is a new rule)

Add color to user profile/new user profile screen

Immediately following our Jan 2018 release, we will be adding the color selector to the user profile screen. The color selected will represent the user on various colored screens. Specifically – it will be used as the user’s markup color.



Other

Rename Sys Gen to SDI Report

We have updated the name of the Index report grid to “SDI Reports”. The previous phrase “System Generated” has been depreciated.

Update default SDI reports to more functional version

The default SDI report has been updated to reflect a more useful/typical version of the SDI report.

Add viewer to edit / outstanding actions form

We have replaced the EDIT document interface with a scroll-in screen. This helps maintain consistency, as well as provide access to the viewer/compare functions in that interface.

Templates

Include current submittal data into the document history

By default, the history of submittals on cover sheet would require 2 sections. One line for the “current” information being created as a result of the submittal, and a separate section for the previous submittal history. “Include Current” is a new parameter now available for the Start_Document_History variable.

Other updates

- Ability to change “current stage” for card when re-attaching document with “move history” option
 - Doc History Page: Add back the option to re-attach file to another register
 - Change default index template on servers
 - Add Project Description to Copy Project popup
 - Move deleted duplicated register to obsolete (vs destroy)
 - Assembly by Line should group after the first “.”
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