

Release – May 2017

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Document upload and assign workflow

A picture is worth 1000 words. Here the video of what we have changed.

Navigation

The navigation preview has been in place for a few months. We hope you're ready! Most of the structure has remained consistent, with the admin info moved under the gear on the right-hand side.



Other Items in release

Bulk attach library docs from requirements screen

For material certs or instruction manuals etc – you can now automate the attachment of library documents to document cards. Click the attach icon on the requirement page for any given doc code.

- **Single Match:**

This is the default auto-assign option. In this case – DocBoss will search all library document meta-data for the reference of the document card. The system is looking for a SINGLE match for this reference. DocBoss will then assign the library document to the card, and update the document card title to match. If two or more matches are located, not document will be assigned.

- **Multiple Match:**

In very specific scenarios, users may want DocBoss to search the library for ALL possible matches for a reference. When multiple files are found, DocBoss will create copies of the register (card) to allow each file to be assigned to its own card. Each new register is assigned a new number based on incrementing the sequence or sheet number (based on the auto-numbering setting).

Enable internal doc codes to be used in numbering

User who link customer codes to internal codes would like to be able to use those internal codes as part of their document auto-numbering. Now, if you have enabled internal codes – the option is available in the auto-numbering area of the system.

Enable other data fields for global search

Users may now search for projects (via global search) based on information entered into the “other data” fields. This is often useful if you have additional reference numbers you like to assign to projects, and would like to look up the projects based on those secondary numbers.

Enable filters across all projects

Previously, when grid filters were created, they only available on the source project. Now users can create filters which are available across all projects.

Add extended tag information to major tags (name, serial number, etc)

When using the major tags module, user may add supplemental information to the tag field. Each piece of data should be in the same order for all tags, and separated by a delimiter of your choice (default comma).

For example – you have two major tags (vessels in this case). The customer would like you to display the vessel name and the serial number on the cover pages. This was previously a complication in docboss. Now – you will enter the data as below:

V-101, Flare Knockout, SN12345

T-102, Water Tank, SN9999

If your card were linked to both tags, the following settings/outputs are available

<Document_MajorTagX_List | Split(“”,1)> = T-101, T-101

<Document_MajorTagX_List | Split(“”,2)> = BigVessel, LittleVessel

<Document_MajorTagX_List | Split(“”,3)> = SN12345, SN9999

Note that if only one of the tags is connected to a document, the list will display only the relevant data.

The default variable without the parameter will display the full set of data entered into the tag field ie.. **“V-101, Flare Knockout, SN12345”**
