

Comments (workflow specific)

09/16/2024 1:15 pm MDT

There is a distinction in DocBoss between **Comments** and **Markups**.

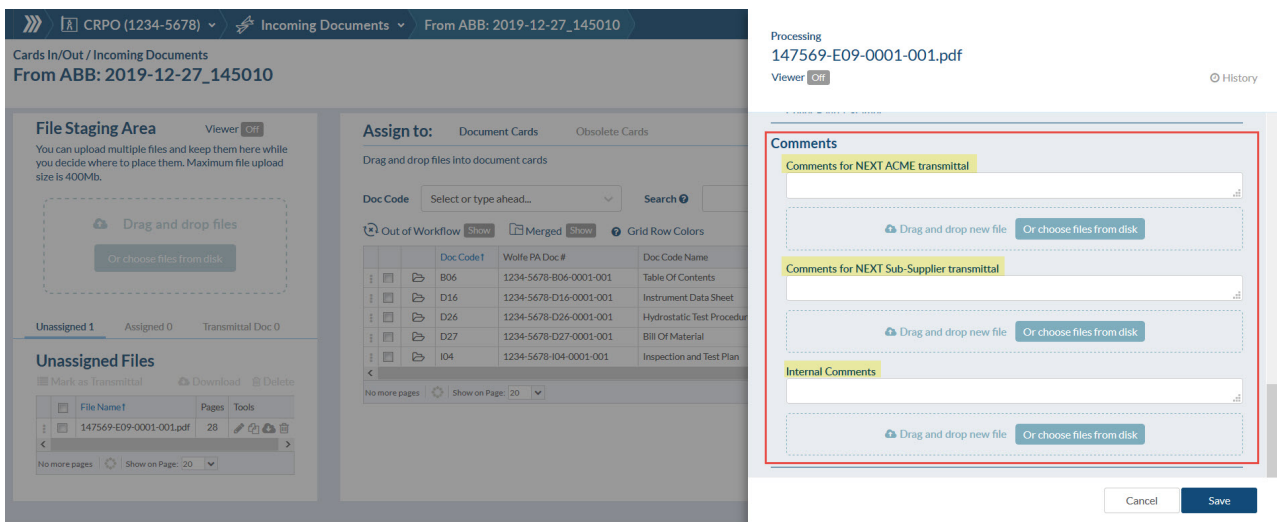
Comments are not embedded in the document. They are a generic area to add descriptive text about the file. If specific reference to the document is required, markups are a better tool.

After the submittal is finished, the comments are pushed into a historical area. they are not shown directly on the assign screen.

There are 3 comment fields:

CUSTOMER and SUB-SUPPLIER comments are designed to be added to cover pages/transmittals.

INTERNAL comments are NEVER included in submittals (even internal submittals). They are for internal record keeping/communication only.



Customer and Sub-supplier Comments

If you wish to add additional information (i.e. explain changes made to the document), users can insert their comments into these field and they will be added into the cover page template.

CRPO (1234-5678) Incoming Documents From ABB: 2019-12-26_162030

Cards In/Out / Incoming Documents
From ABB: 2019-12-26_162030

File Staging Area Viewer Off
You can upload multiple files and keep them here while you decide where to place them. Maximum file upload size is 400Mb.

Drag and drop files
Or choose files from disk

Unassigned 1 Assigned 0 Transmittal Doc 0

Unassigned Files
Mark as Transmittal Download Delete

File Name	Pages	Tools
1234-5678-D16-0001-001.pdf	28	

No more pages Show on Page: 20

Assign to: Document Cards Obsolete Cards

Drag and drop files into document cards

Doc Code Select or type ahead... Search

Out of Workflow Show Merged Show Grid Row Colors

Doc Code	Wolfe PA Doc #	Doc Code Name
B06	1234-5678-B06-0001-001	Table Of Contents
D16	1234-5678-D16-0001-001	Instrument Data Sheet
D26	1234-5678-D26-0001-001	Hydrostatic Test Procedure
D27	1234-5678-D27-0001-001	Bill Of Material

No more pages Show on Page: 10

Processing
1234-5678-D16-0001-001.pdf
Viewer Off History

Comments

Comments for NEXT ACME transmittal

Section 2 - Modified as per comments

Drag and drop new file Or choose files from disk

Comments for NEXT Sub-Supplier transmittal

Drag and drop new file Or choose files from disk

Internal Comments

Drag and drop new file Or choose files from disk

Custom Field(s)
Document Comment

Document Comment

Cancel Save

Client Contract No 2019/1234567	Project Title: CRPO Project	Doc. No. 1234-5678-D16-0001	Rev. 0
End User PO No. 442085	Doc Title: Instrument Data Sheet	Sheet 2 Of 28	Date: 27.12.2019

REVISION RECORD SHEET

Rev	Date	Description	Brief Description of Change
0	27.12.2019	Issued For Information	Section 2 - Modified as per comments

Variables available for cover page templates are:

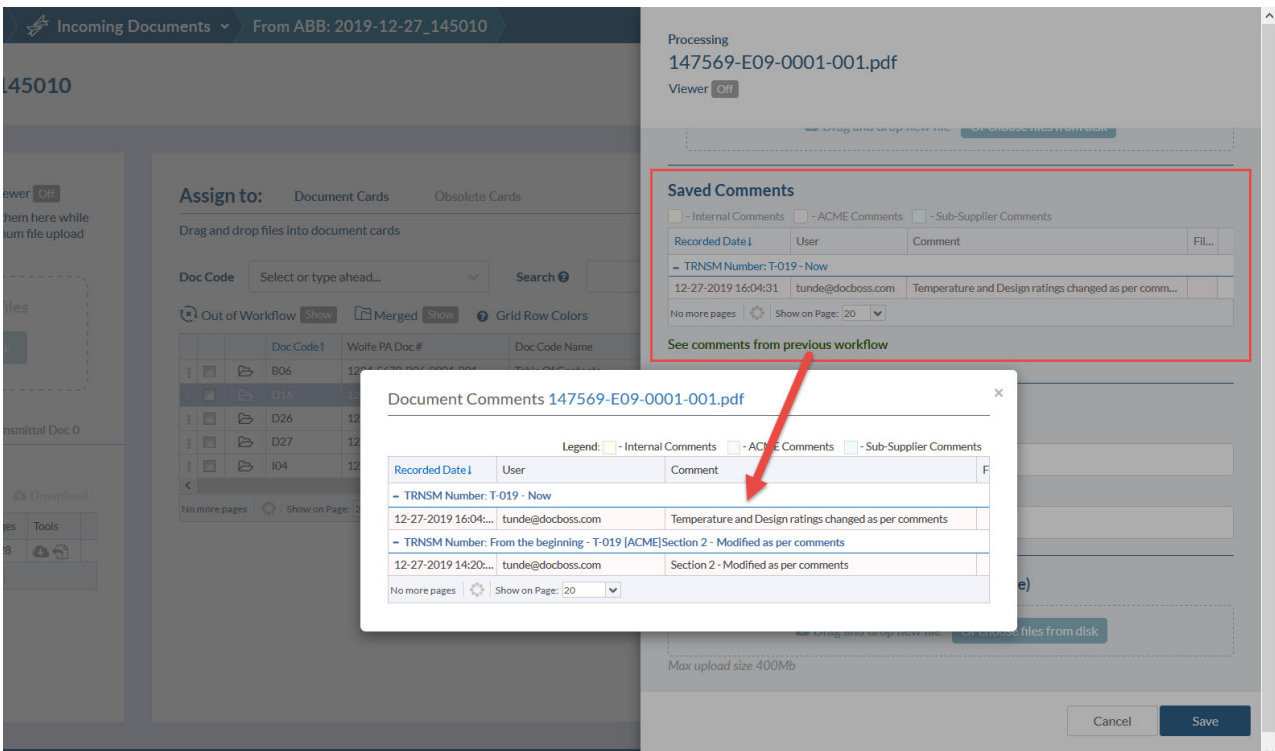
- <Document_CustomerComment> for customer field.
- <Document_SubSupplierComment> for sub-supplier field.

When to add comments

Comments can be added during the assign process, directly on the Card through the "Edit" button or while completing an action on the Outstanding Actions grid.

Note that all of these Comment Fields are designed to be cleared after each submittal, so you can add new comments for each revision.

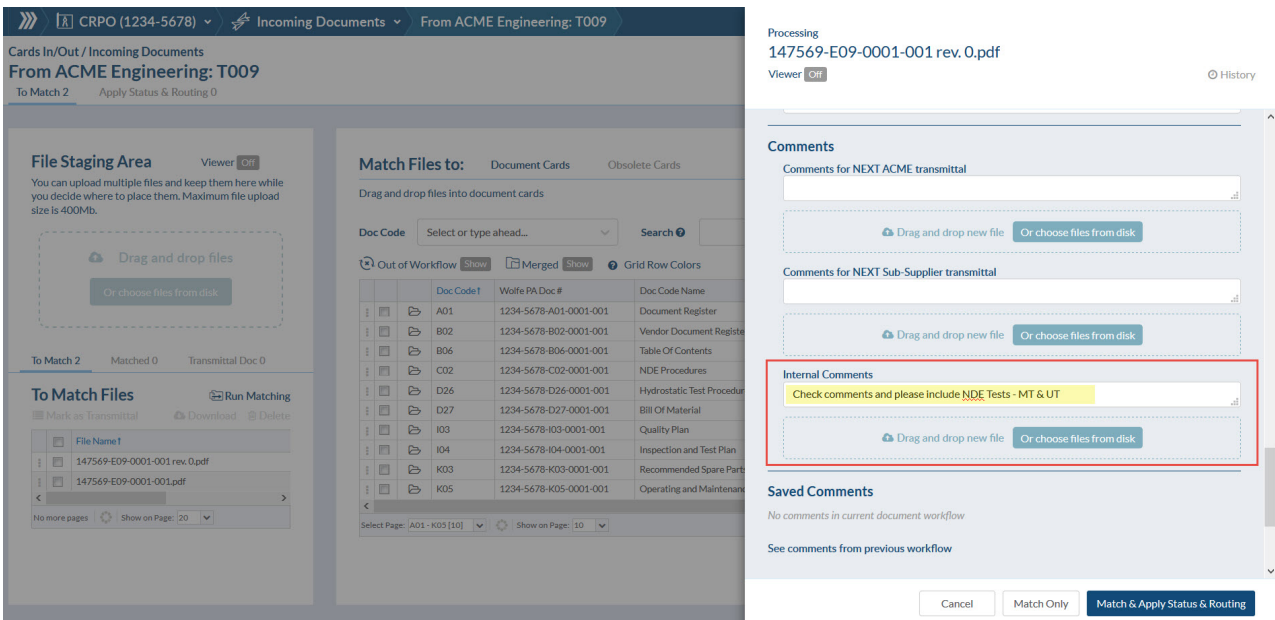
Be assured the comments won't disappear, they are specific to a workflow, so once the submittal is created they are moved to "Saved Comments".



Internal Comments

Internal comments can be used to add additional information that your team can see when receiving the document through workflow.

These comments too are moved to "Saved Comments" once the document is sent internally.



NOTE: If you are looking for a "Standing Comment" you should enable a custom field for the card. It will keep whatever comment is added forever (until changed).

A typical use case for this kind of comment would be "This document supersedes document XX". This comment should remain for the entire life of the document.

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History

Comments

Comments for NEXT ACME transmittal

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Comments for NEXT Sub-Supplier transmittal

Drag and drop new file Or choose files from disk

Internal Comments

Drag and drop new file Or choose files from disk

Custom Field(s)

Document Comment

Revision 2: Modified points 3.5, 3.6 and 3.7 Design and Temperature Calculations

Cancel Save