

# Release Notes - September 2024

09/13/2024 1:28 pm MDT

Here's a list of updates found in our September 2024 release!

## Updated Support Site

We've remodeled our support site (where you're reading this article). All the same articles are here, but we've improved navigation and function of the site for a better user experience. [\[Learn More\]](#)

## Projects (Individual)

### Doc Codes and Cards

#### Code List (Requirements)

- **Option for No Initial Due Date:** users can set a Reference Date of "N/A - Not Applicable" for doc codes, which leaves their initial due date blank. Useful for documents that don't have a clear due date.

#### Card List

- **New Look for Card List Filters:** filters and filter sets on this screen have been adjusted. [\[Learn More\]](#)
- **Auto and Manual Search Options:** users can decide between "Auto" search, which applies filters automatically, or "Manual" search, which applies filters only when the user clicks the search button.

#### Card to Unit Changes

- **Language Simplified:** the available options for Card to Unit Changes are listed with new terms. The function remains the same. [\[Learn more\]](#)

Old	New
Update EqList; Keep Current Status	Do Not Resubmit
Update EqList; Set to X	Resubmit
Split Cards	Submit Separately

## Incoming and Outgoing Documents

### Incoming Documents

- **Bulk Match Native Files:** bulk matching is available for native files now too! Simply match the files as usual, and then select "Assign as Native Files to Matched Cards".

**Matching Files**  
Suggested file-document card matches will appear (with values highlighted) if the file name matches with the document card info.

Unmatched files will remain in the staging area. Unmatch

	File Name	Doc No. (Delta)	Card Name(Auto)	Doc No. (WI)	Doc No. (End User)	Doc No. (Sub-Supplier)	Tools
<input type="checkbox"/>	1234-035.xlsx	1234-035	M08_VL-4099	S210715-M08-009-01			🔗
<input type="checkbox"/>	1234-036.xlsx	1234-036	M17_VL-4099	S210715-M17-005-01			🔗

No more pages | Show on Page: 20

Assign as native files to matched cards

Cancel

Accept Matches

## Outgoing Submittals

- **Submittals Grid Renamed:** the last grid on the Outgoing Submittals screen is now called Submittal History to more accurately describe its contents.
- **"From" Column in Submittal History Grid:** a new column, "From" is available in the Submittal History grid. This column lists the name of the user who made the submittal, making it easier to manage projects which have multiple doc control users are making submittals.

Submittal History

Grid Row Colors

Number	Created	Created By	Submittal Date	Contained Documents	# Of Extra Files	To
T-006	5/14/2024 12:03:50	Alina Sonke	5/14/2024 12:03:46	2	0	Customer

- **Stamps for Sub-Supplier and Internal Submittals:** stamps, if added to cards in the viewer, are now applied when making sub-supplier or internal submittals. Previously only available for customer submittals.

## Index Reports & Compilations

### Compilations

- **Zip compilation improvement:** option to generate cover pages for files when generated as a zip compilation.
- **Additional Filters For Generating Compilations:** the "Select Cards to Generate Compilation" popup now has fields to sort/view by tag list and custom equipment field lists

## Set Up and Configuration

### Project Main

- **Project Quick Start:** a simplified version of the **Project > Main** screen is now available for starting new projects.

**Profile**

Project Type  
 Order  Quote

Affiliate \*  
 Wolfe Instruments

Affiliate Address \* + Add  
 Default

Customer \* + Add  
 -Select Customer-

Customer Address \*  
 -Select Address-

Project Name \*

WI Sales Order \*

PO Number \*

Order Date \*  
 03-Sep-2024

Initial Guess for Drawing Approvals \*  
 01-Oct-2024

**Default Users/Lists**

WI Doc Control User \* + Add  
 Select or type ahead...

Use Code Lists from  
 Customer Lists  
 WI Lists  
 End User List

Doc Code List \*  
 Select or type ahead...

Use Status Lists from  
 Customer Lists  
 WI Lists  
 End User List

Customer Return Status List \*  
 Create on Project

Show all settings Quick start

- **Project Main Redesign and Improved Search:** the Project > Main screen now has a search feature (1) and accordion sections (2) for an easier-to-navigate interface.

Set Up  
Main

1 Select or type ahead...

2 Collapse all Expand all

Profile

Default Users/Lists

Settings

"Job" Variable for Document Numbering: a variable for Job is available in the document auto-numbering format pattern.

## Project Template

- **Date Format Per Project Template:** available from the System > Customization > Project Templates > Project Settings.

General

**Project Settings**

Doc Code/Card Fields

Major Tag Field

Additional Unit Types

Combination Fields

Equipment Fields

Project (Main) Fields

Doc Code Queries

Expediting Settings

Compilation / Package Presets

Output Templates

Numbering

**Project Settings**

Default EQ Number  
 Tag

Stage List  
 IFI

Default Level  
 Order

Default Cover Page / Stamps  
 Cover page only (no stamp)

Enforce Sub-Supplier Selection  
 Yes

Allow Sub-Supplier Access  
 No

Enable Internal Approval Statuses  
 No

Manual Cards Module  
 No

Major Tags Module  
 No

Enable Submittal CP Bookmark  
 Yes

Submittal CP Bookmark Pattern  
 <Title>

Exceptional handling default (for file uploads)  
 Off

Horizontal unit upload; sub-unit lettering  
 Dedicated by Column (skip letter if column is empty)

**Date Format**  
 dd-MMM-yyyy

## Stage Lists

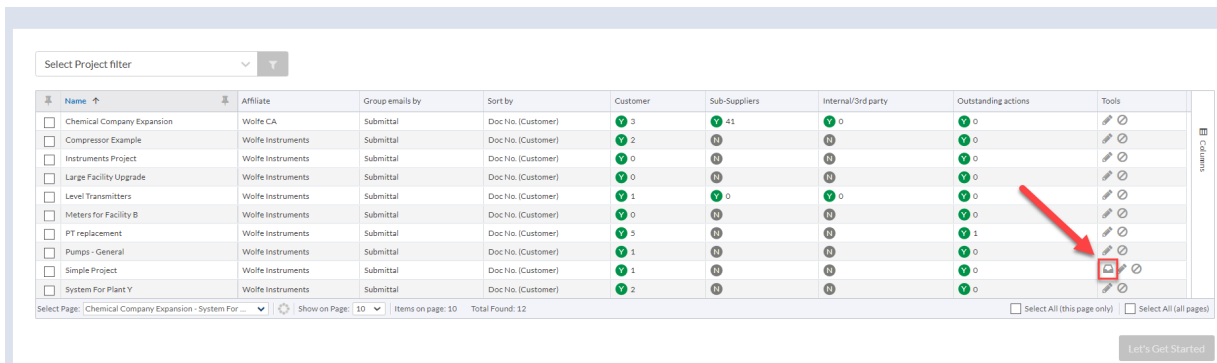
- **Exclude from Overdue Cards Report:** new option to exclude cards (per stage) from the report of overdue cards (from user profile).

# Projects (All)

## Expediting

- **Log of Expedited Emails:** From the Expedite Projects screen > Tools, a log of all sent expedited emails will now be available.

### Expedite Projects



Name	Affiliate	Group emails by	Sort by	Customer	Sub-Suppliers	Internal/3rd party	Outstanding actions	Tools
<input type="checkbox"/> Chemical Company Expansion	Wolfe CA	Submittal	Doc No. (Customer)	3	41	0	0	
<input type="checkbox"/> Compressor Example	Wolfe Instruments	Submittal	Doc No. (Customer)	2			0	
<input type="checkbox"/> Instruments Project	Wolfe Instruments	Submittal	Doc No. (Customer)	0			0	
<input type="checkbox"/> Large Facility Upgrade	Wolfe Instruments	Submittal	Doc No. (Customer)	0			0	
<input type="checkbox"/> Level Transmitters	Wolfe Instruments	Submittal	Doc No. (Customer)	1	0	0	0	
<input type="checkbox"/> Meters for Facility B	Wolfe Instruments	Submittal	Doc No. (Customer)	0			0	
<input type="checkbox"/> PT replacement	Wolfe Instruments	Submittal	Doc No. (Customer)	5			1	
<input type="checkbox"/> Pumps - General	Wolfe Instruments	Submittal	Doc No. (Customer)	1			0	
<input type="checkbox"/> Simple Project	Wolfe Instruments	Submittal	Doc No. (Customer)	1			0	
<input type="checkbox"/> System For Plant Y	Wolfe Instruments	Submittal	Doc No. (Customer)	2			0	

## Multi-Project Card Report

- **Filter for Status (Combined):** added filter for column in grid.
- **New look for filters and filter sets:** see [Doc Codes and Cards](#).
- **CSV Data Export Moved:** it is now located under the More Actions dropdown (top right of grid)
- **Bulk Download File Name Pattern:** this now uses the instance setting from **Admin > General**. Previously this used the project-specific settings for each card.
- **Last Upload Date:** this column is now available on the Multi-Project Card Report

## Admin

### Library

- **Save query search patterns per folder**
- **Unique Value Required For Custom Fields:** new option for library custom fields where use can choose if value for field must be unique

### System

#### API

- **Create Project:** new call available
- **Search Project Method Updated:** existing projects can be searched via a variety of fields (affiliate, PO, Sales Order, etc. - if the project ID is not known)
- **Upload File to Library Card:** it's now possible to upload files directly to library cards via API, using the *Library > Upload file to card* call. Related calls for a status report per card and a log by date is available as well.

For additional details, refer to our [API documentation](#).

## SSO and Identity Management

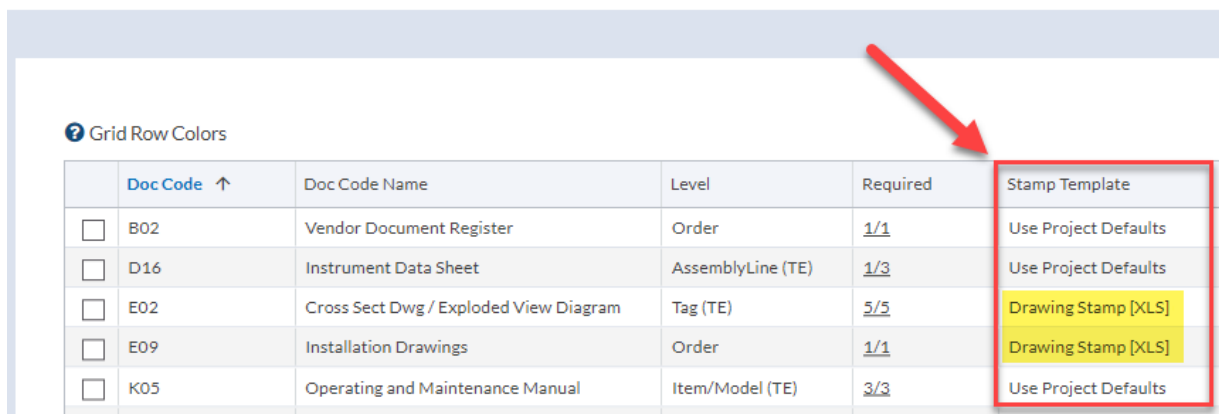
- **User Provisioning:** Adding on to our Single Sign-On feature, now user provisioning via an external identity provider is now possible in DocBoss. Ask your IT group about this.

# Templates

## Output Templates (XLS/CSV/PDF)

- **Enhanced approval tracking:** a new set of variables using <Document\_History.RoleX> enable cover page history array to output more specific profile information. The variables output name, signature, etc. from the last user to complete a routing action on the document at time of each document history record. (If not applicable, outputs value from Project Main Role 1-4 users at the time each of document history record.)
- **Set stamp template per doc code/card:** Available under the Code List (Requirements) screen or from the Card List > Stamp Template field in the grid.

## Code List (Requirements)



Grid Row Colors

	Doc Code ↑	Doc Code Name	Level	Required	Stamp Template
<input type="checkbox"/>	B02	Vendor Document Register	Order	<u>1/1</u>	Use Project Defaults
<input type="checkbox"/>	D16	Instrument Data Sheet	AssemblyLine (TE)	<u>1/3</u>	Use Project Defaults
<input type="checkbox"/>	E02	Cross Sect Dwg / Exploded View Diagram	Tag (TE)	<u>5/5</u>	Drawing Stamp [XLS]
<input type="checkbox"/>	E09	Installation Drawings	Order	<u>1/1</u>	Drawing Stamp [XLS]
<input type="checkbox"/>	K05	Operating and Maintenance Manual	Item/Model (TE)	<u>3/3</u>	Use Project Defaults

## User Management

- Admins can send an invitation out to new users.
- Only Admin users can update user login and email addresses.

## General Updates

### Learning Mode

- **Expanded Learning Mode:** many additional screens have Learning Mode links added to them. These icons direct users to the relevant help articles on our support site when clicked. [\[Learn more\]](#)



## Additional Notes

- Field Name hidden for projects with a single major tag.
- The Overdue Cards Report Overdue cards report format changed from html to xlsx.
- Header/Footer now has option to wrap output.

If you have any questions or feedback regarding our latest release, please reach out to our Support team and we'll be happy to assist.