

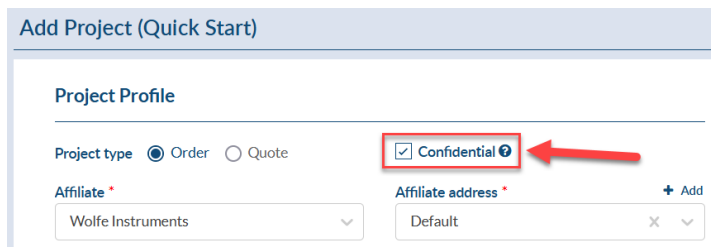
Release Notes - March 2025

03/26/2025 5:45 am MDT

Here's a list of updates found in our March 2025 release!

Highlights

Confidential projects: this option on Project Main blocks access to the project unless a user is specifically added to it under their user Permissions page. (Please note that Admin users can add these permissions for themselves as long as they have the appropriate affiliate access.) For more information, see [Confidential Projects](#).

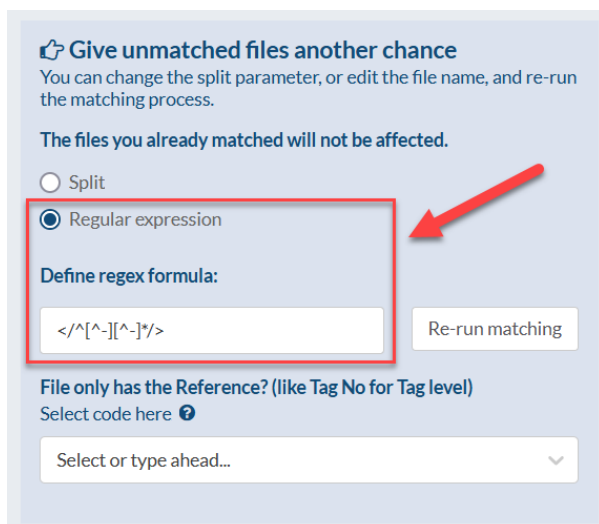


The screenshot shows the 'Add Project (Quick Start)' form. Under the 'Project Profile' section, the 'Project type' is set to 'Order'. The 'Confidential' checkbox is checked and highlighted with a red box and a red arrow. Below this, the 'Affiliate' is set to 'Wolfe Instruments' and the 'Affiliate address' is set to 'Default'.

Groupings for SDI Reports: group document index templates by Major Tag list or custom card fields using the `highOrderFilter(GroupSdi)` parameter. For full details, refer to our template instructions sheet, which can be downloaded directly from DocBoss.

Pen tool for markups: draw directly on PDF documents in the viewer with our new pen style [markup tool](#).

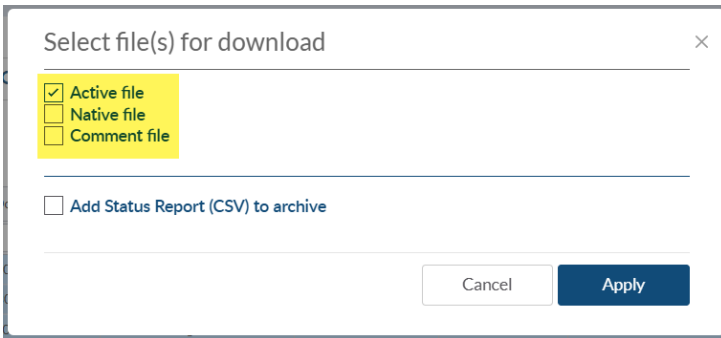
Regular expressions for bulk match: this new (optional) feature for Bulk Match gives more flexibility in matching files to cards in situations where a simple split parameter won't do the job. For information on how to format these entries, see [Using Regular Expressions](#).



The screenshot shows a dialog box titled 'Give unmatched files another chance'. It explains that users can change the split parameter or edit the file name and re-run the matching process. The 'Regular expression' option is selected and highlighted with a red box and a red arrow. Below this, there is a text input field containing the regex formula `</^[^-][^-]*>` and a 'Re-run matching' button. At the bottom, there is a section for 'File only has the Reference? (like Tag No for Tag level)' with a 'Select code here' dropdown menu.

Scrolling grid style in Incoming Documents: we've adjusted the grid style in Incoming Documents to scroll inside the grid. We hope this makes it easier to bring in documents to projects with large card lists!

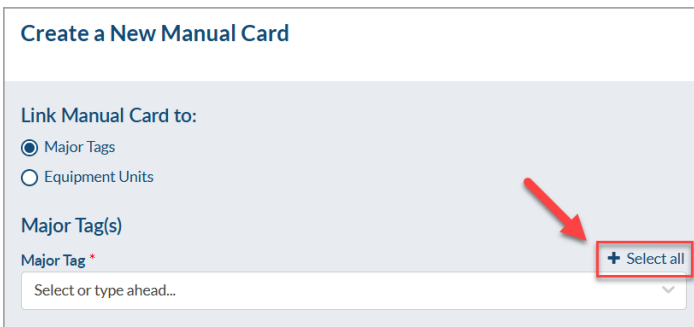
Bulk download native and comment files: when using the "Bulk doc download" option (under "More Actions") on the Multi-Project Card Report and project Card List, choose which type(s) of files to include: active, secondary/native, and comment.



Projects (Individual)

Doc Codes and Cards

Manual card units simplified: we've added a "Select All" units option for [creating manual cards](#) with major tags. This option is available to select in the user interface, or if using CSV, simply enter "ALL" in the Major Tags field to use.



Better tracking for Card to Unit Changes: we've added a history record entry that appears when [Card to Unit Changes](#) are processed, noting that the card's linked units have changed.

File Name on CSV Edit: the file name of the most recent active file uploaded to a card is available on the CSV edit. Makes it easy to copy/paste document titles.

Apply markups to file on download: markups will be applied to files when downloaded from DocBoss, even if not part of a submittal. This option will be available under the card history screen as well for previous markups.

Code List CP/stamps option reminder: when changing the Cover Page/Stamps option on a doc code, DocBoss will now ask users if they want these changes.

Incoming and Outgoing Documents

Incoming Documents

Last customer status available: the incoming file assign grid now has "Last [Customer] Status" available to add.

Filter cards by routing scenario: on the Card List, an in-column filter is available for the Routing Scenario column (in the text box below the column header, as with our other filters of that style).

Special characters in submittal number: all special characters are allowed in the incoming submittal name, even if they aren't typically allowed in file names. This provides more flexibility in naming.

Flexible defaults for including submittal number on upload: in the Project Template, users can define which incoming sources they want to include a submittal number for by default.

Outgoing Submittals

Doc title visible in submittal queues: the card "title" field is now available in the Outgoing Documents submittal queues, making it easier to identify which documents you want to send.

Change header/footer start page: "Starting on page" option now available from Project Main > Headers and Footers.

Headers and Footers

Font size: 8

Margin top: 0

Margin bottom: 0

Show header/footer on cover pages

Header/footer starting on page: 3

Header/footer output:
 One column
 Three columns

Index Reports & Compilations

Compilations

Compilation structure by individual cards limit increased: the option to build a compilation structure using individual cards is now available on projects with up to 1000 cards (previously 250).

Outstanding Actions

"Save for Later and Notify" option: when editing a card from the Actions Dashboard or Outstanding Actions, users now have an option to notify other users, even if they do not need to complete an action.

Title: Outline Dimensions

Rev # (WI): 0

Save for later

Save for later & notify

Cancel Save for later Complete action

Set Up and Configuration

Project Main

End User templates available: you can now choose output templates (cover pages, transmittals, etc.)

Projects (All)

Expedite Projects

Report format updated to XLS: the [Expedite Projects](#) report is now in XLS format for a cleaner result to provide your suppliers and customers. To make adjustments to the default template, refer to the "Reports" tab of the template variables instructions sheet. *Note: this cannot be added as a new template, but the existing "Expedite Report" template can be adjusted under Output Templates.*

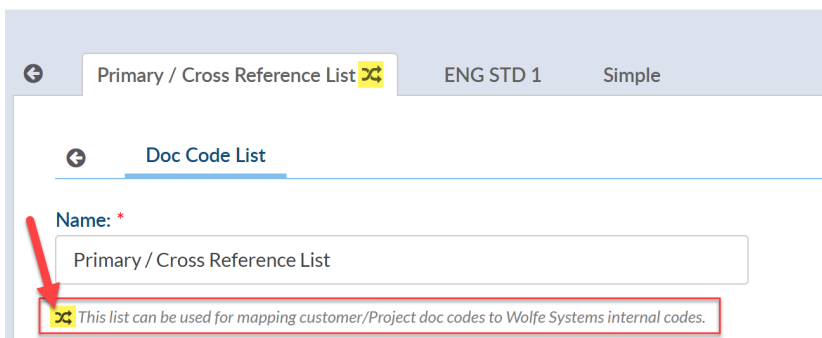
Admin


Affiliates

Clearer indication of Primary/Cross Reference list: the doc code list used for [mapping to internal codes](#) is now more clearly identified on the affiliate's doc code list screen.

Lists / Companies / Wolfe Systems

Doc Codes




Primary / Cross Reference List  ENG STD 1 Simple

Doc Code List

Name: *

Primary / Cross Reference List

 This list can be used for mapping customer/Project doc codes to Wolfe Systems internal codes.

Companies

Bulk add status lists: we've added an add/edit via CSV/XLS option for return status lists. (Note - in projects, this is listed on the Return Statuses screen under "More Options".)

View log of changes: for companies, contacts, and relationships, changes are logged and visible in the user interface.

Library

Changes to fields: the library fields have been updated so there are fewer mandatory fields to fill out.

Additional file types: you can now attach non-PDF file types to library cards.

Reporting

Generate Multi-Project Card Report exports per user: previously, the generated result was shared with other users on your system. Now, this is generated and saved per user to prevent issues if multiple users are trying to access the report at the same time with different filtering.

Overdue cards report: the format of the "Overdue Cards Report" users can subscribe to from their profile is now provided in XLS format. To make adjustments to the default template, refer to the "Reports" tab of the template variables instructions sheet. *Note: this cannot be added as a new template, but the existing "Overdue Cards Report" template can be adjusted under Output Templates.*

System

API

Get project templates: new API call added to get a list of the project templates available in your system.

Templates

Output Templates (XLS/CSV/PDF)

New document history variable: added *Document_History.RoleX_ActionCompletedDate*

SDI "Exclude Voided" filter: parameter available for document index templates which excludes voided cards from the output. For full details, refer to our template instructions sheet, which can be downloaded directly from DocBoss.

Added line break separator: we now allow the text ",\n" as a value for separator="X" parameter. This creates a line break after each item that is listed.

Email Templates

End User variables for email templates: "End User Name/Short Name" and "End User Reference" are now available for email templates.

User Management

Updated interface: we've moved some things around on the [User Profile](#) screen so you have to scroll less and can find what you need faster.

General Updates

Email Alerts

New look for actions email alerts: the email templates for new routing action, change to card, and internal approval have been redesigned.

Hello Alina,
You have a new action required in DocBoss, due 3/5/2025.

[Open card in Actions Dashboard](#)

DOCUMENT
New internal approval action for Project: Valve Project (000032)
Doc title: Outline Dimensions
Doc code: F13-Outline Dimensions
Card name: F13_T-101

COMMENTS
Internal comment: Please revise per customer comment - see pg. 2.

DOWNLOAD LINKS
Active file: <https://docboss.com/content/>

New email alert for received sub-supplier/customer portal submittals: previously available in the user interface only, we now have email alerts available for received portal submittals. You can choose to receive email notifications for sub-supplier portal submittals, customer portal submittals, or both.

User Interface

Made navigation bar sticky: the navigation bar now stays visible at the top of the screen, even when scrolling down.

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.
