Release Notes - July 2025

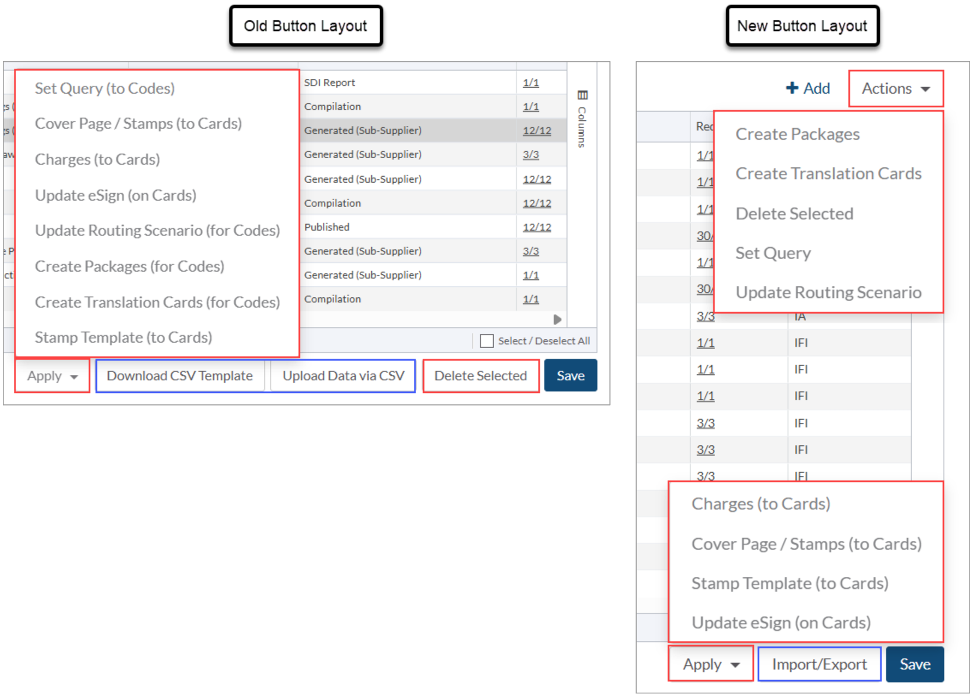
07/07/2025 1:45 pm MDT

Here's a list of the updates found in our July 2025 release. This release is packed with many small updates - read on for more info!

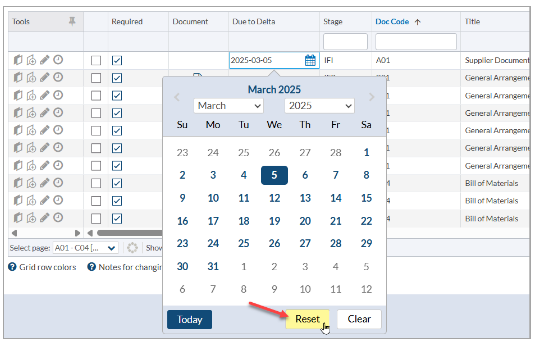
Projects (Individual)

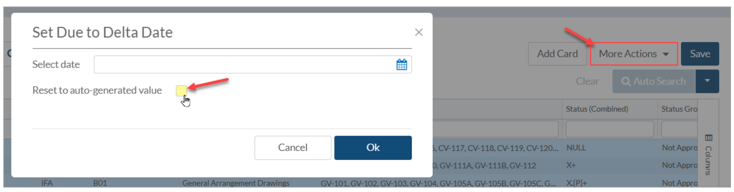
Doc Codes and Cards

Button relocation on code list: Some of the options previously available under the "Apply" button (or as a separate button) are now available under a new "Actions" button (above the grid). This relocation groups related options together, improving usability. The download/upload options are also now available under one button, matching the UI of other grids.



Reset due date now available: If a due date was manually changed, it is now possible to reset back to auto-generated values. Re-automating these values helps to reduce manual work and keep due dates on track. To reset to auto-generated values, simply click on the manual date in the grid (indicated with a small "M") and choose "Reset" from the calendar pop-out. Once changed, click save above the grid. This process can also be completed in bulk by selecting multiple cards, clicking "More Actions," and choosing "Reset to auto-generated value."

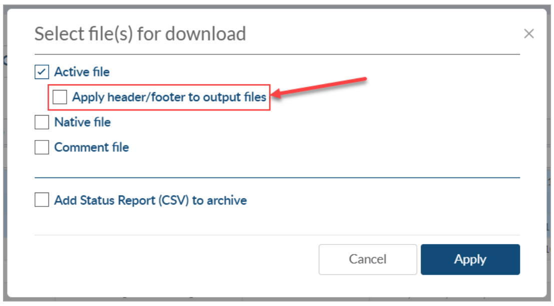




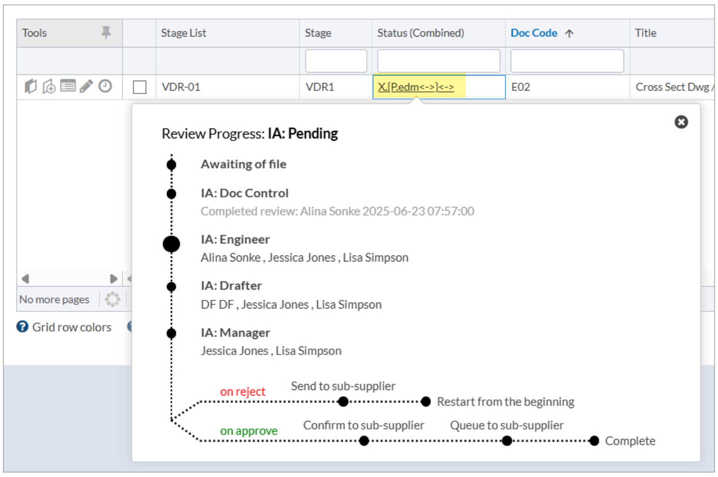
Visibility settings maintained after clearing filter set: When a filter set is cleared from the card list, it removes visibility filters, too. With this update, the visibility settings will remain in place, helping ensure you see only the files you need.

Auto-attaching from library to code: It is now possible to clear all library document types that are automatically filled into the auto-assign query, making it easier to choose only the relevant document types.

Apply header/footer to bulk download files: When bulk downloading files from the card list, the option to add headers/footers (as set on project main) as now available, improving consistency with files that are sent for submittal (via Outgoing Documents).

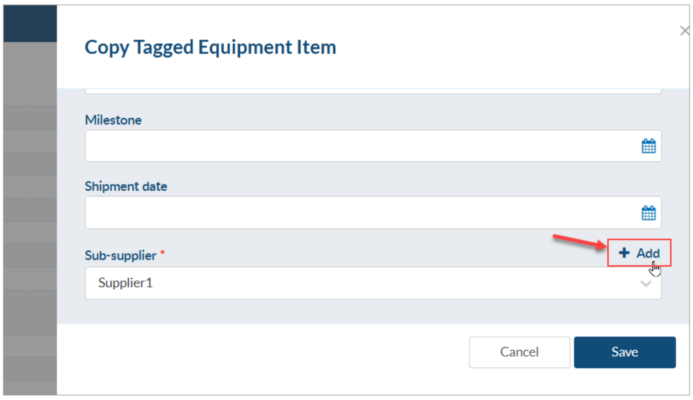


Status (Combined) column updates: The "Status (Combined)" column now provides more information than ever before! Clicking on the value will show the details of the workflow (see details below). In addition, any/all routing associated with internal approval will be included (including confirm to source Y/N), and the status suffix will specify whether a return is expected (denoted with symbol in brackets ( )) or no return is expected (denoted with symbol in angle brackets < >).

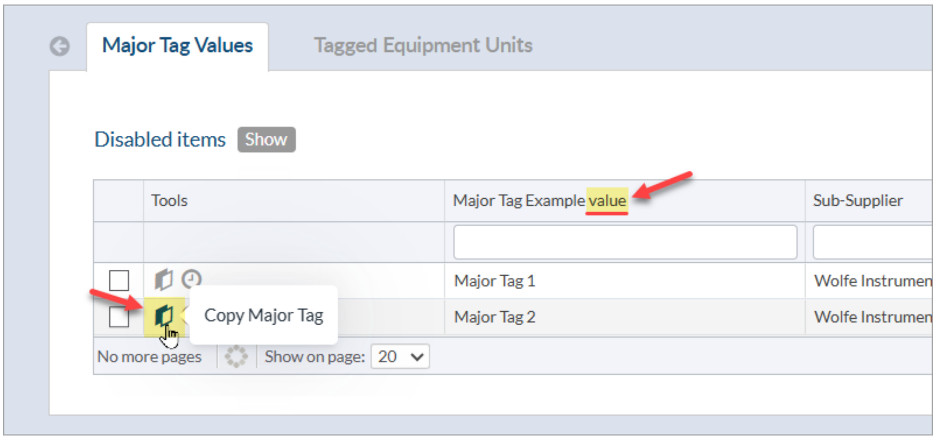


Equipment List

Add new sub-supplier via equipment copy form: A new sub-supplier can now be added when copying a tagged equipment unit, major tag, and/or additional unit type.



Major tag improvements: If using major tags on a project, the tag values can now be duplicated (in the same way that tagged equipment units and additional unit types can be). In addition, the major tag value (as set on the project template) will now show the word "value" at the end, helping to distinguish the major tag value from other columns.

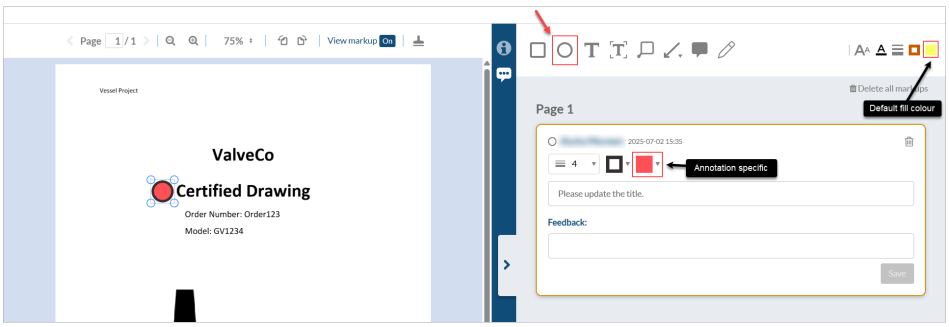


Incoming and Outgoing Documents

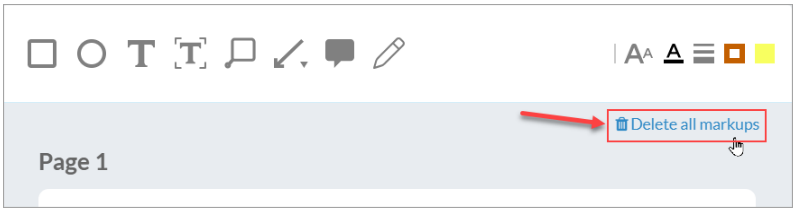
Incoming Documents

New allowable file type: Files created using Autodesk ReCap (i.e., .rcs files) can now be uploaded to DocBoss as a secondary (native) file.

New markup tools available: Additional markup options include a circle-style annotation and fill colours, helping to facilitate improved communication.



Delete all markups: The option to bulk-delete all markups is now available, removing the need to delete markups one by one.



Outgoing Submittals

Auto-reclaim pop-up: When reclaiming a submittal, a file that has already been reclaimed (but not yet processed) will appear highlighted in green. The option to be redirected to the submittal in question is also available. These changes help to improve transparency and traceability.

Index Reports & Compilations

Compilations

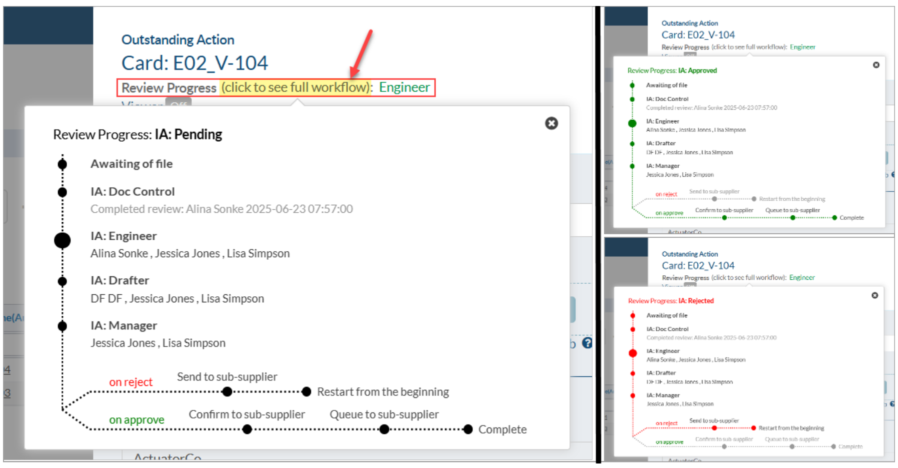
Out-of-sync compilations/packages: If a compilation or package is out-of-sync with the project defaults, it appears highlighted in the compilations list grid. To improve clarity, a grid row color identifier has been added to indicate this. There will no longer be an alert icon showing for this situation.

Hide empty doc codes: It is now possible to hide empty doc codes and sections from the compilation without having to use sub-packages. This update gives you increased flexibility on what to include and what to omit from the compilation, allowing you to better adhere to the requirements of your customer.

Outstanding Actions

Workflow progress bar: When completing an action, the progress of the workflow now provides additional details, helping to improve transparency and traceability. The pop-up reflects the same information as the "Status (Combined)" pop-up (as discussed above).

Specifically, clicking to see the full workflow opens a popup that outlines (1) each user that the card is routed to, and (2) the workflow that will occur after either being rejected or approved. After one reviewer has applied a status to the file, the progress pop-up will highlight the *expected* path. If the next reviewer provides a different status, the path will change to reflect the most recent status.



Filter by last in submittal: The same "Last In Submittal" column on the card list is now available in the outstanding actions grid, allowing you to sort and filter by the latest incoming submittal.

Set Up and Configuration

Internal Approval

Source information available on card: Information pertaining to the source of the file is now visible on the card form, and can be modified, if required. The option to confirm an approved file back to the source (setting defined by the stage) is also displayed and adjustable, improving transparency and flexibility.

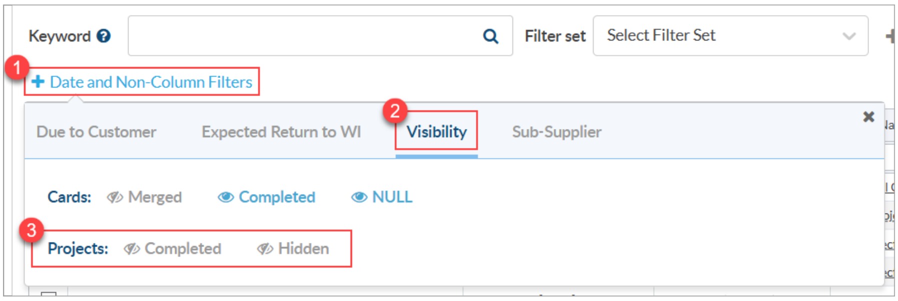
Up-to-date IA statuses: When a card moves into a new stage with internal approval enabled, the previous IA status will be cleared. Similarly, if a new file is uploaded to a card that has completed an IA workflow, the status will be cleared and the workflow will restart (also resetting the file from status Z → X). These changes better reflect the way you work, and will make workflows more intuitive and user friendly.

Failsafe's throughout IA workflow: To ensure the internal approval process runs smoothly, the following failsafe's have been added:
(1) when the status is "Pending," there must be at least one reviewer assigned.
(2) the last reviewer in the workflow is required to status the file.
(3) files still in "Pending" status cannot be completed via bulk complete.
(4) files still in "Pending" status will not show in the outgoing submittal grids.

Projects (All)

Multi-Project Card Report

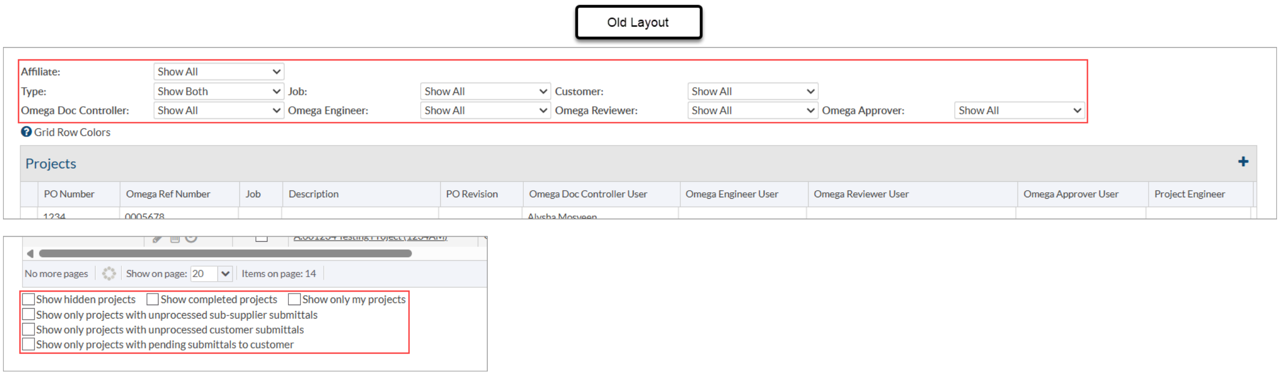
Visibility of cards and projects: The option to view cards from completed and/or hidden projects is now available on the multi-project card report, making it easier to review ALL cards in one place.

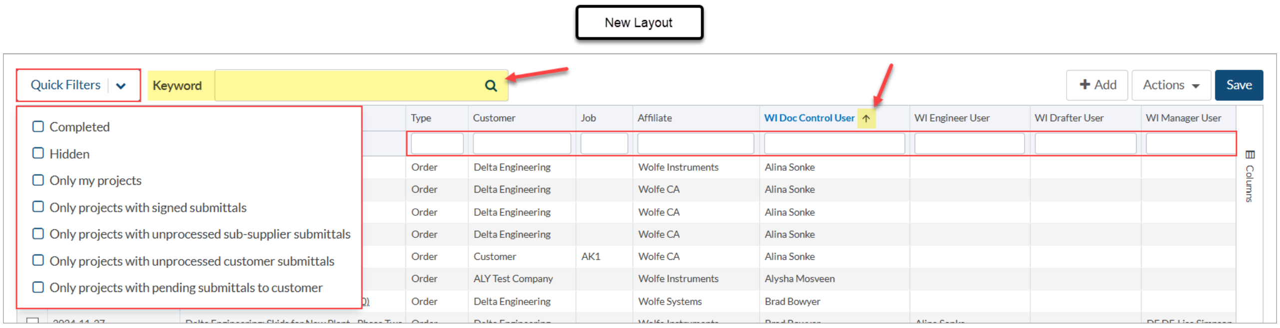


Project List

Filtering & sorting improvements: In addition to an updated grid (see note below), the filtering options (previously available above the grid) are now available directly in the grid. In addition, you can now sort the list by role, and search the list by keyword, making it easier to see what you need, when you need it.

Note: Quick filters (previously available below the grid) have also been moved to a button above the grid (to the left of the *keyword search).*





Admin

Companies

Company-specific templates: Stamp templates can now be added directly to the company profile. In addition, email templates can be created and modified per company, making it easier to keep templates organized and reduce clutter on the main output templates page.

System

API

New API endpoints: Several new API endpoints have been added to increase functionality.

- Get details about individual units
- Add new contacts (and export a list of contacts)
- Add new relationships (and export a list of relationships)
- Add, edit, and/or delete doc codes from the project

Modifications to pre-existing API endpoints: Adjustments have been made to the following API endpoints:

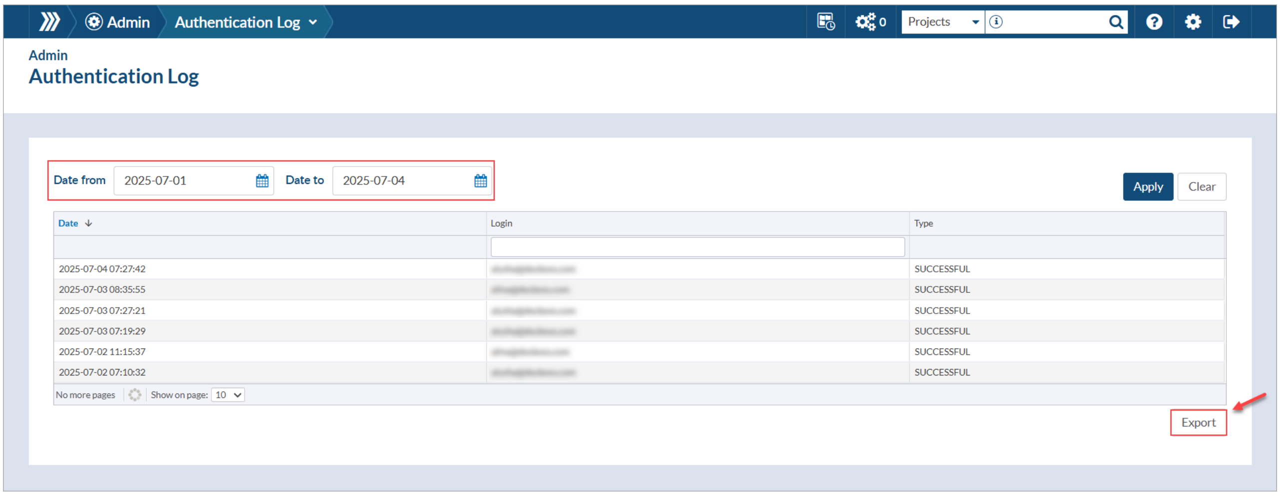
- Project Unit > Download/import CSV with units: Option to include unit ID
- Projects > Create Project: Additional fields added

Security

Review access history: A new "Authentication Log" page has been added to provide additional transparency, allowing you to see who has accessed DocBoss, the date access was attempted, and whether or not login was successful. The grid can be filtered by date, and the data can be exported. To access this page, navigate to **System**

Menu > Admin > Authentication Log.

Note: This page is only available to admin (+ security) users.



Templates

Output Templates (XLS/CSV/PDF)

Horizontal revision history layout: For customers who require the revision history to appear horizontally on the cover page, it is now possible to do so with variables (no excel formulas required!). To show revision history horizontally, <CPrint_Document_History> can be used to start the array, and <CEndPrint_Document_History> to end the array. Within the array, the regular Document_History variables can be used.

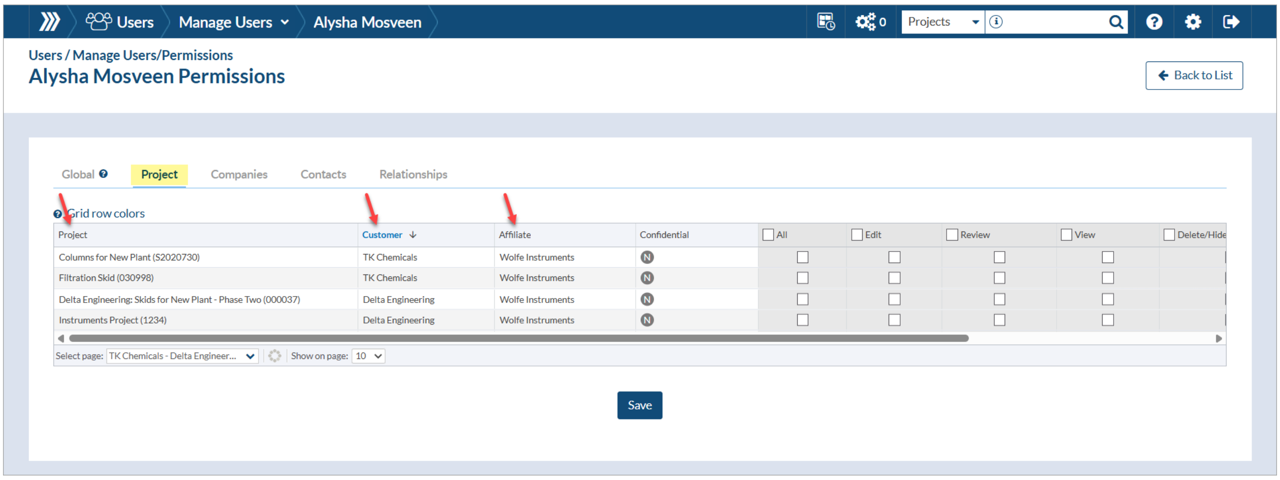
Note: The minRows parameter cannot be used with the <CPrint_Document_History> array starter, so the necessary number of rows must be available (and empty) within the print area.

A	B	C	D	E	F	G	H	I	J
	HORIZONTAL REV HISTORY LAYOUT - EXAMPLE								
		<CPrint_Document_History|IncludeCurrent>							
	Rev.	<Document_History.PrimaryDocRev>							
	Date	<Document_History.Date|Autoheight>							
	Status	<Document_History.StageName|Autoheight>							
	Submitted By	<Document_History.Role1.User_Initials>							
		<CEndPrint_Document_History>							

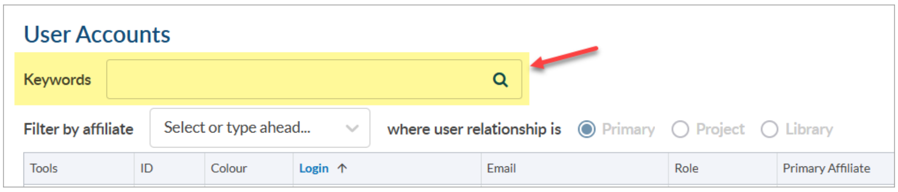
Additional variables added: Variables for supplier, customer, and end-user phone and fax numbers are now available for use on all template types. These variable can be found under the "General Variables" tab of the template variables instruction sheet.

User Management

Manage user permissions grid: The customer and affiliate associated with any given project are now listed in the grid of individual permissions (under the "Project" tab), along with the project name now being listed under the "Project" column.

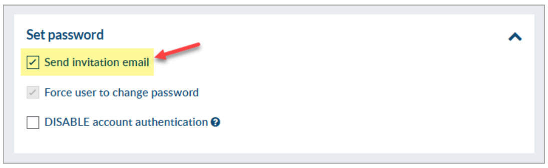


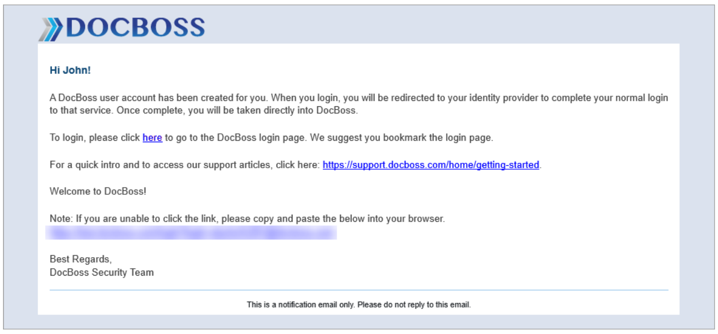
User account keyword search: The "Manage Users" page can now be filtered using a keyword search, making it easier to find users in the list.



Commercial contact / technical support access: We've added a restriction to only allow admin (+ security) users to allocate/revoke commercial contact and/or technical support access status.

Manage Sub-supplier accounts: Sub-supplier portal accounts can now be created/edited via .xlsx export, making the process more efficient. In addition, invitation emails can now be sent from the account creation form, and can be re-sent from the account editing form.

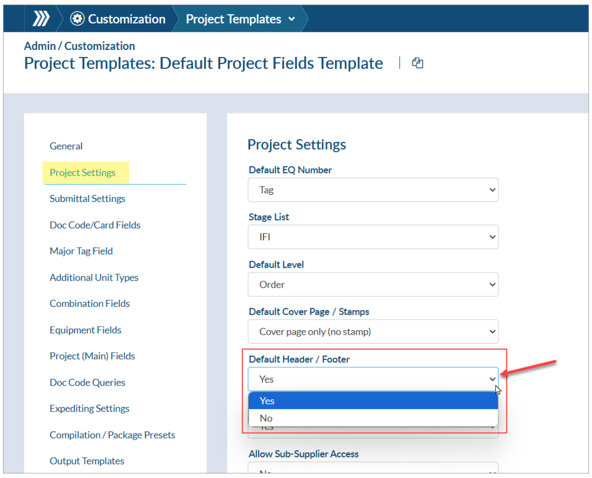




Customization

Project Template

Apply Header/footer default setting to project template: We've added the option to apply header/footer defaults (as set from System Menu > Admin > General) to project templates. Have specific requirements that don't match the defaults? Set the option on the project template to "No" and set the pattern(s) directly on the project!



Annotation handling: If vital information is added using "Add text comment" tools in an external editor and should be flattened into the document (rather than added as "comments"), it is now possible to do so by choosing to "Flatten text annotations on upload" from the project template (project settings section).

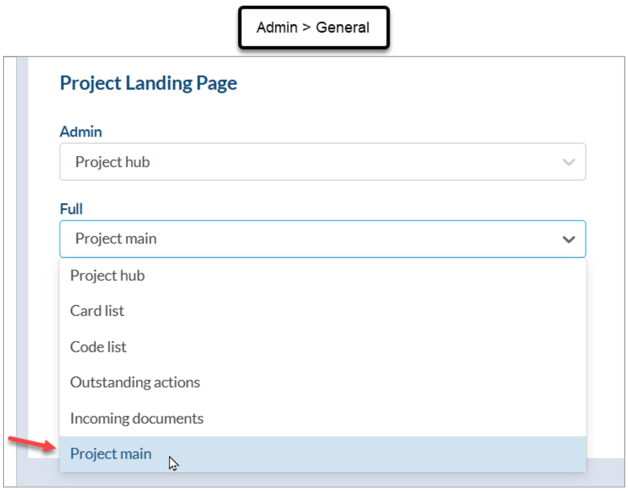
General Updates

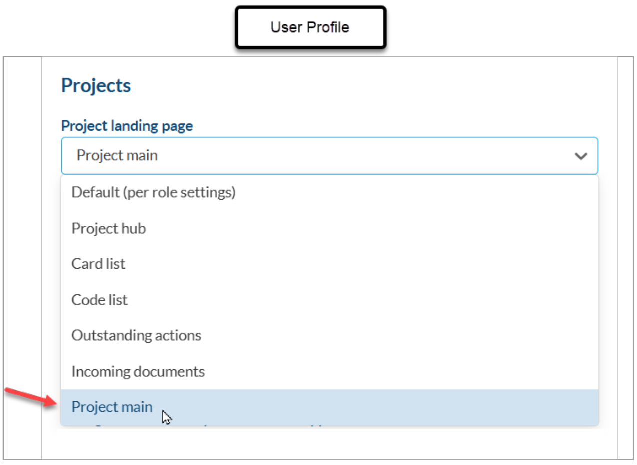
User Interface

Modern grid UI: Many different grids have been updated to the modern UI, which provide improved filtering and sorting capabilities. These subtle but impactful changes help to improve usability and consistency across pages. The areas that you will see the updated grids are as follows:

Home	Project List	-
Project	Cards	Card to Unit Changes
		Obsolete Cards
	Equipment	Levels
	Set Up	Stage Lists
System	Library	Manage Library

Project main as landing page: For users who like reviewing details on project main before getting started, it is now possible to set project main as the project landing page. This setting can bedefaulted for all role types (System Menu > Admin > General), be adjusted per-user by an admin user (System Menu > Users > Manage Users), or adjusted by the user themselves (System Menu > Edit your profile).





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.