Release Notes - August 2025

08/15/2025 11:33 am MDT

Here's a list of updates found in our short August 2025 release.

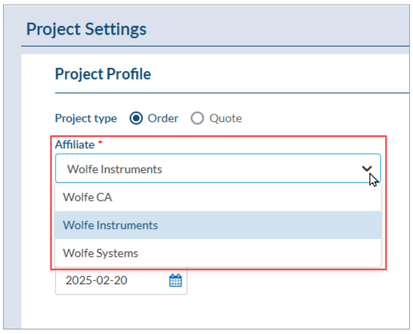
Projects (Individual)

Cover Page / Stamps Column in Card List Grid

The selected option for cover pages and stamps (per doc code) is now available to add as a column in the card list grid, making it easier to identify requirements. If modifications are required for individual cards, this can be done by updating the setting in the card form.

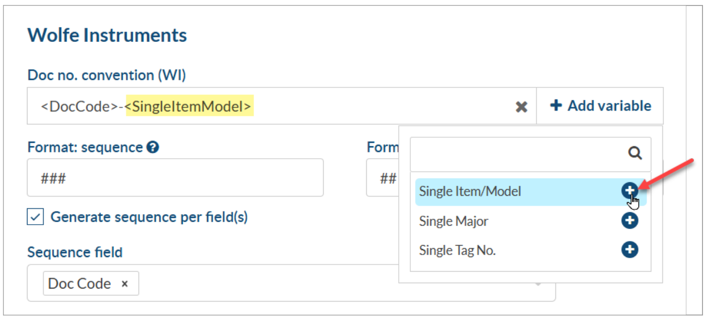
Update Affiliate

If required, the affiliate associated with a project (selected at project creation) can now be updated on project main and is no longer locked, increasing flexibility.



Document Auto-Numbering

There is a new document auto-numbering variable available that generates the Item/Model value for tagged equipment. This variable functions similarly to other "single" variable options, where the value will be included in the document number if there is a single tag, and will not be included if more than one tag.



Workflow - Start New Stage List

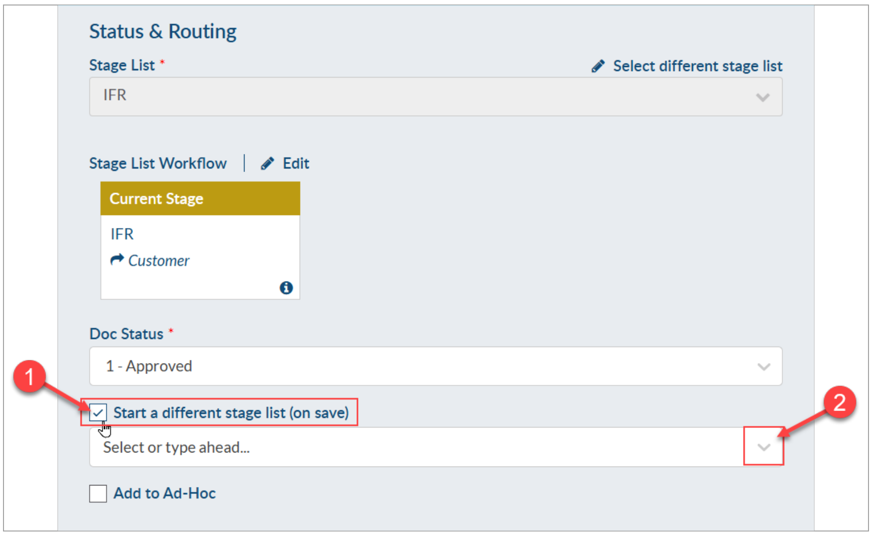
To increase flexibility with stage lists, it is now possible to start a new stage list upon assigning a complete status to a card (thus continuing further workflow after stage completion). This option is available when processing cards both individually and in bulk.

To start a new stage list, check the "Start a different stage list (on save)" box and select the new stage list from the drop-down. If there are many stage lists available, begin typing the name to filter the list. Once selected, click save and the card will move into the first stage of the selected stage list.

When is this useful?

Sometimes, it can be difficult to pre-establish the workflow required for a document, or the workflow takes a different path than what was set up initially. In cases like this, a new stage list can be selected after completing a stage, giving you the flexibility you need.

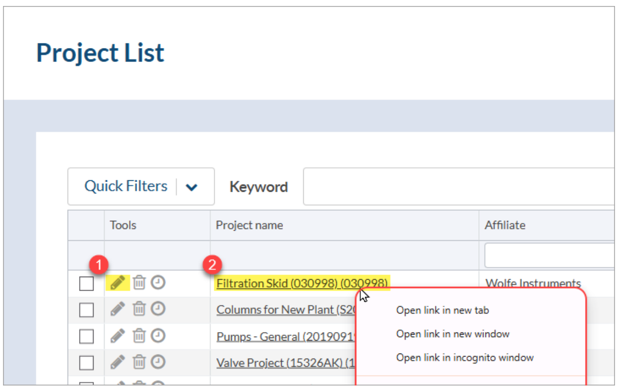
For example, if you have multiple single-stage stage lists created, you can choose the next stage for a document following the completion of the current stage. While this requires manual input, it can be desirable in non-prescriptive situations.



Projects (All)

Project List - Open in New Tab/Window

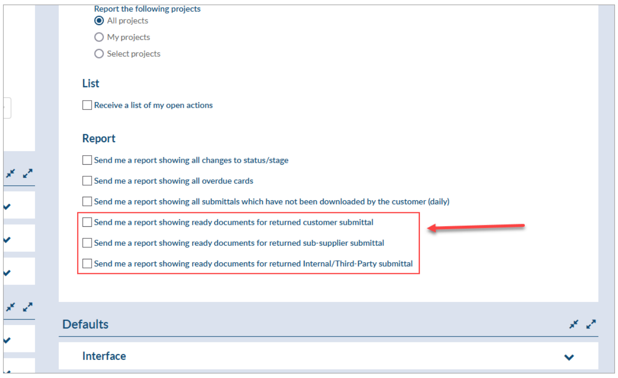
There are now two ways to opened in a new tab or window from the Project List grid, making it easier to open multiple projects quickly:
1. By right-clicking on the pencil icon under the "Tools" column
2. By right-clicking on the project name



Report for Incoming Submittals

When a submittal has been received into DocBoss and the files have been assigned to their corresponding cards (via individual or bulk match), a report can be emailed outlining the details of the completed submittal. This option (available in the "Email Notifications" section of the user profile) can be enabled for individual users (**System Menu > Users > Manage Users**).

The reports are source specific. If a user would only like to receive reports about submittals from a specific source (e.g., customer), simply enable the appropriate report and leave the others disabled.



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.