

Release Notes - August 2025

08/15/2025 11:33 am MDT

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

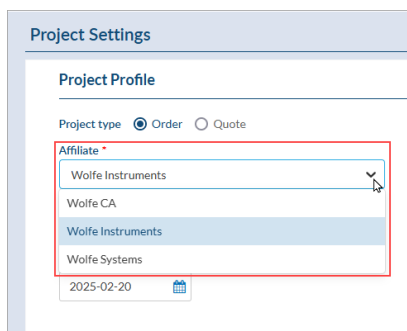
Projects (Individual)

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

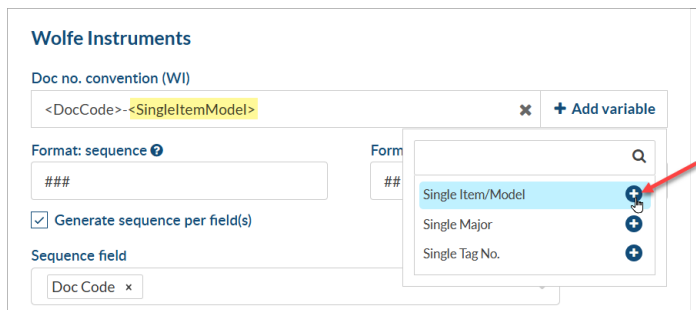
If required, the affiliate associated with a project (selected at [project creation](#)) can now be updated on [project main](#) and is no longer locked, increasing flexibility.



The screenshot shows the 'Project Settings' form. Under the 'Project Profile' section, there is a 'Project type' selector with 'Order' selected. Below it is an 'Affiliate' dropdown menu. The dropdown is open, showing a list of options: 'Wolfe Instruments' (highlighted), 'Wolfe CA', 'Wolfe Instruments', and 'Wolfe Systems'. A red box highlights the dropdown menu.

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.



The screenshot shows the 'Wolfe Instruments' document auto-numbering form. The 'Doc no. convention (WI)' field contains '<DocCode>-<SingleItemModel>'. The 'Format: sequence' field contains '###'. The 'Generate sequence per field(s)' checkbox is checked. The 'Sequence field' dropdown shows 'DocCode'. A dropdown menu is open, showing options: 'Single Item/Model' (highlighted), 'Single Major', and 'Single Tag No.'. A red arrow points to the 'Single Item/Model' option.

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.

Status & Routing

Stage List * [Select different stage list](#)

IFR

Stage List Workflow | [Edit](#)

Current Stage

IFR
↪ Customer

Doc Status *

1 - Approved

☒ Start a different stage list (on save)

Select or type ahead...

☐ Add to Ad-Hoc

Projects (All)





Project List - Open in New Tab/Window

There are now two ways to open 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

Project List

Quick Filters | Keyword

Tools	Project name	Affiliate
<input type="checkbox"/> 	Filtration Skid (030998) (030998)	Wolfe Instruments
<input type="checkbox"/> 	Columns for New Plant (S2)	
<input type="checkbox"/> 	Pumps - General (2019091)	
<input type="checkbox"/> 	Valve Project (15326AKI (1	

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.

Report the following projects

☒ All projects
☐ My projects
☐ Select projects

List

☐ Receive a list of my open actions

Report

☐ Send me a report showing all changes to status/stage
☐ Send me a report showing all overdue cards
☐ Send me a report showing all submittals which have not been downloaded by the customer (daily)
☐ Send me a report showing ready documents for returned customer submittal
☐ Send me a report showing ready documents for returned sub-supplier submittal
☐ Send me a report showing ready documents for returned Internal/Third Party submittal

Defaults

Interface

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.