Release Notes - September 2025

09/24/2025 4:15 pm MDT

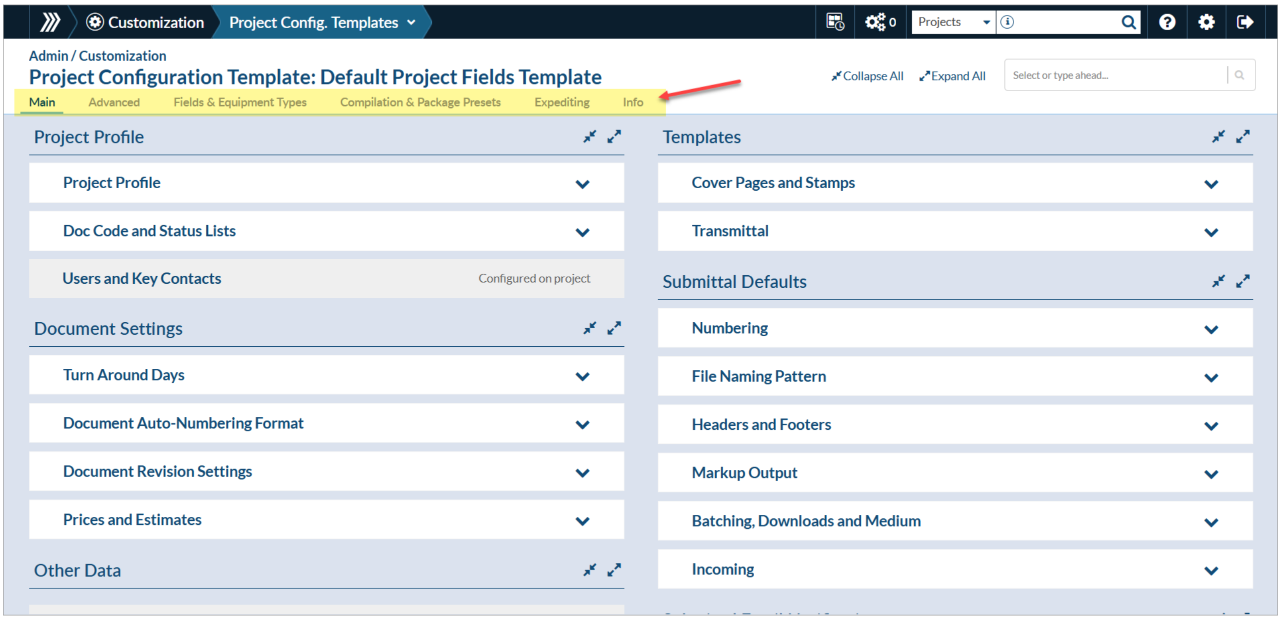
Here's a list of updates found in our September 2025 release.

Project Template Updates

To simplify the user experience and improve consistency across the DocBoss system, the project template interface has been refreshed to display sections in the familiar side-by-side layout, as well as include other related setting options in one centralized location.

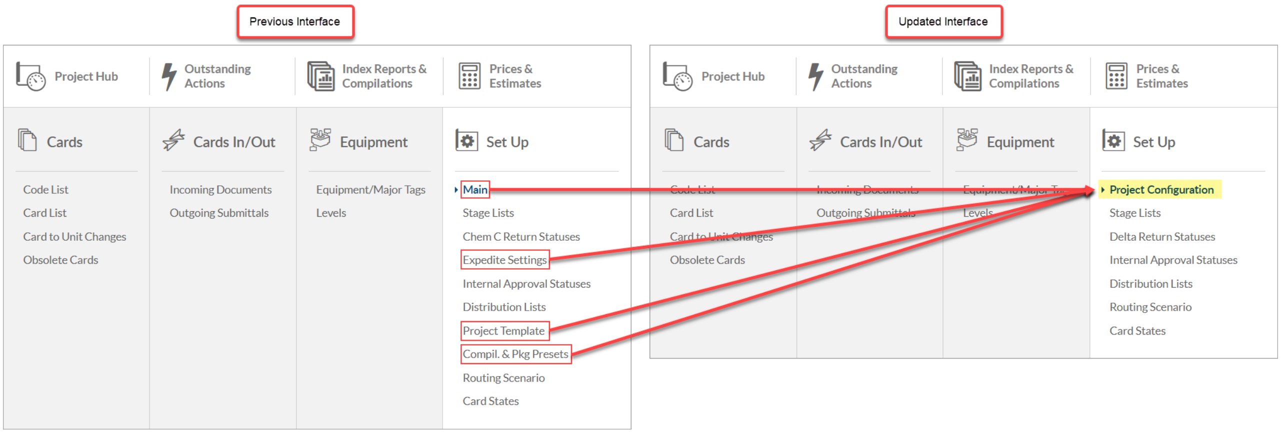
From Admin

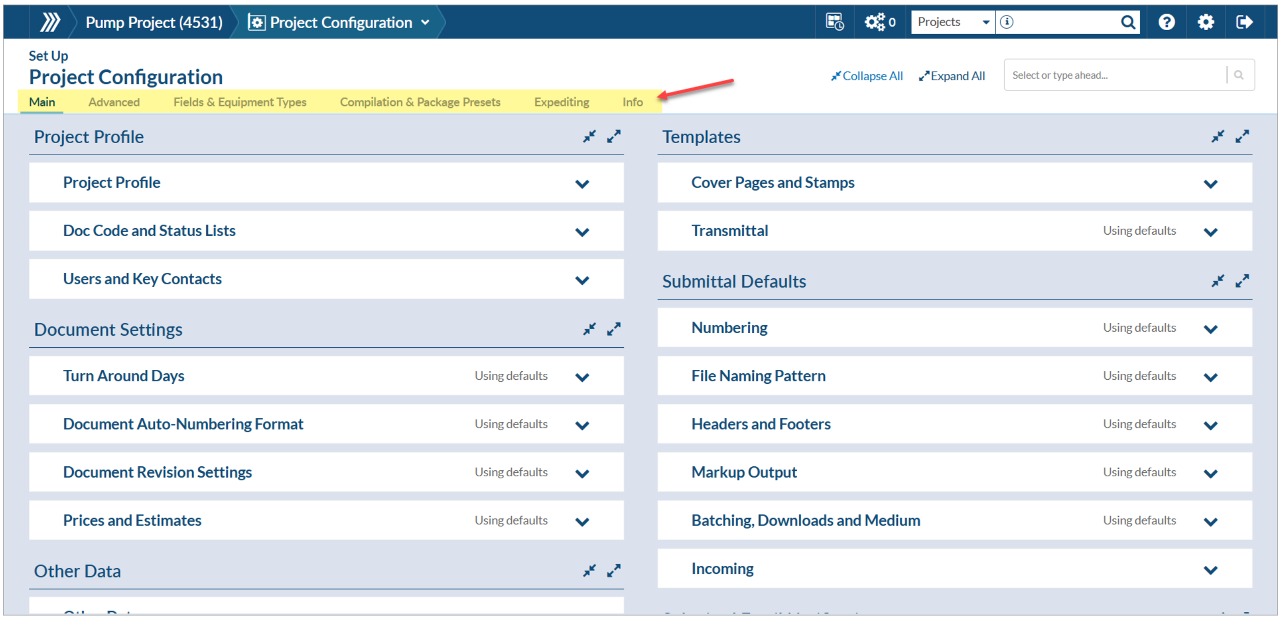
The "Project Templates" page has been renamed to "Project Config. Templates." The same options will be available, but configured in the side-by-side format with different setting categories in different "tabs." Expediting options can also now be added to a project template from the "Expediting" tab, reducing the need for manual configuration on individual projects.



From Project

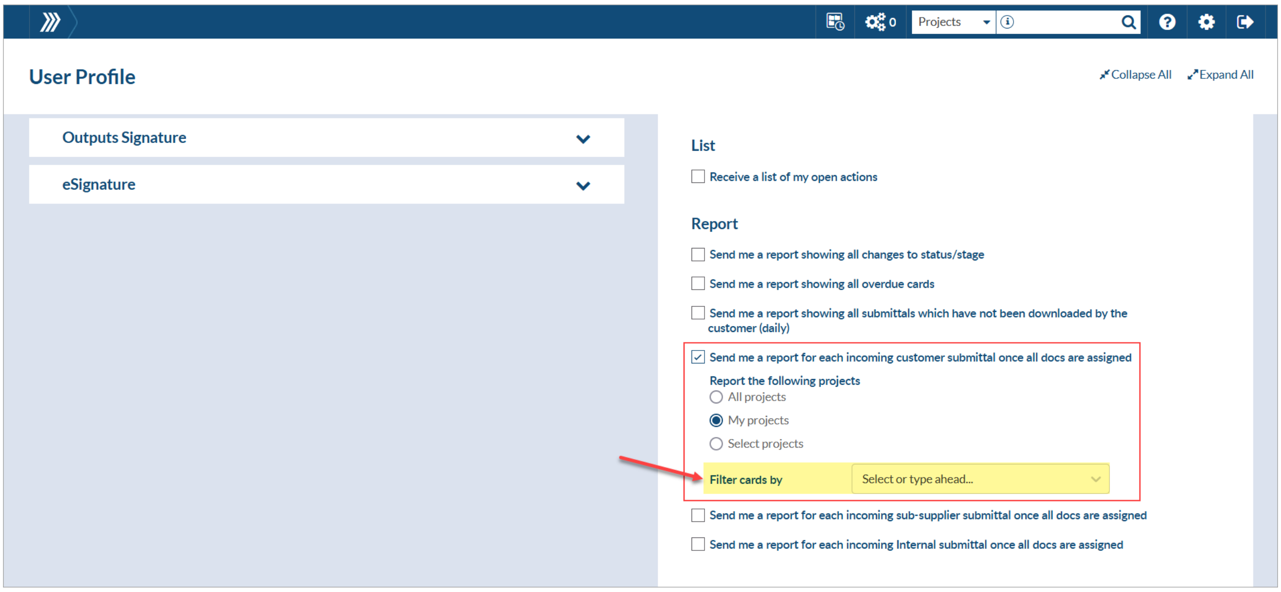
The "Main" page has been renamed to "Project Configuration." The new interface will now include the main configuration options (under the "Main" tab), as well as the options previously available on the "Project Template" and "Compil. & Pkg Presets" pages. Expediting options will also be available from the "Project Configuration" page under the "Expediting" tab.





Reporting

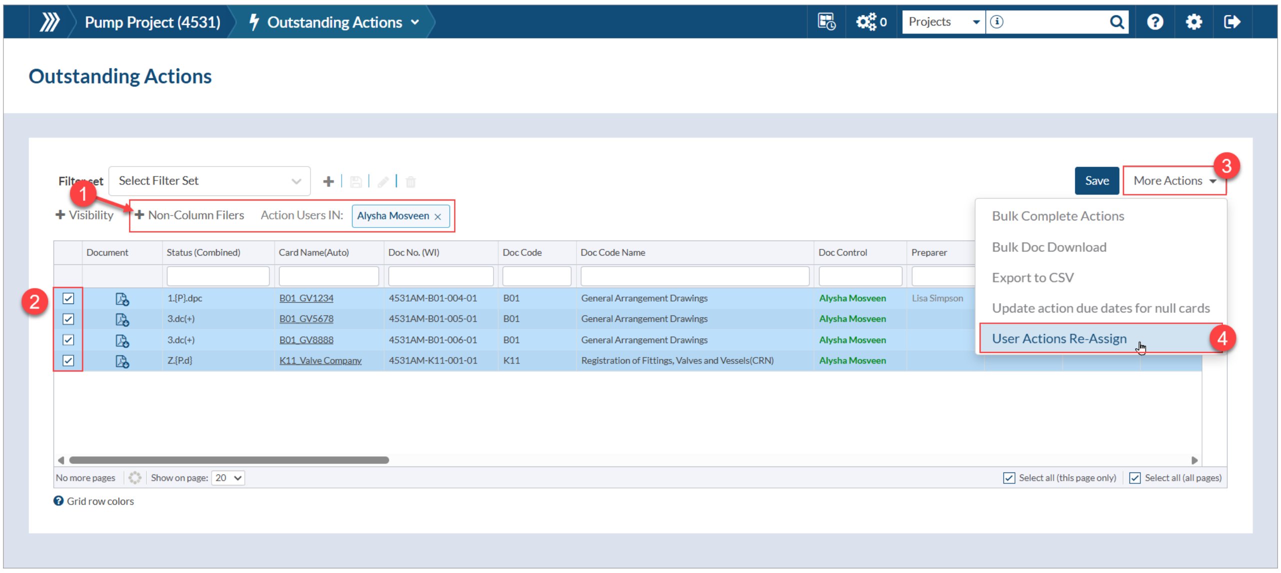
Incoming submittal report: Email reports for incoming submittals (available from the user profile) can now be filtered by a pre-established multi-project card report filter set, focusing the report to only show the data you need. In addition, the report will now also include submittals that have been created using the auto-reclaim option.



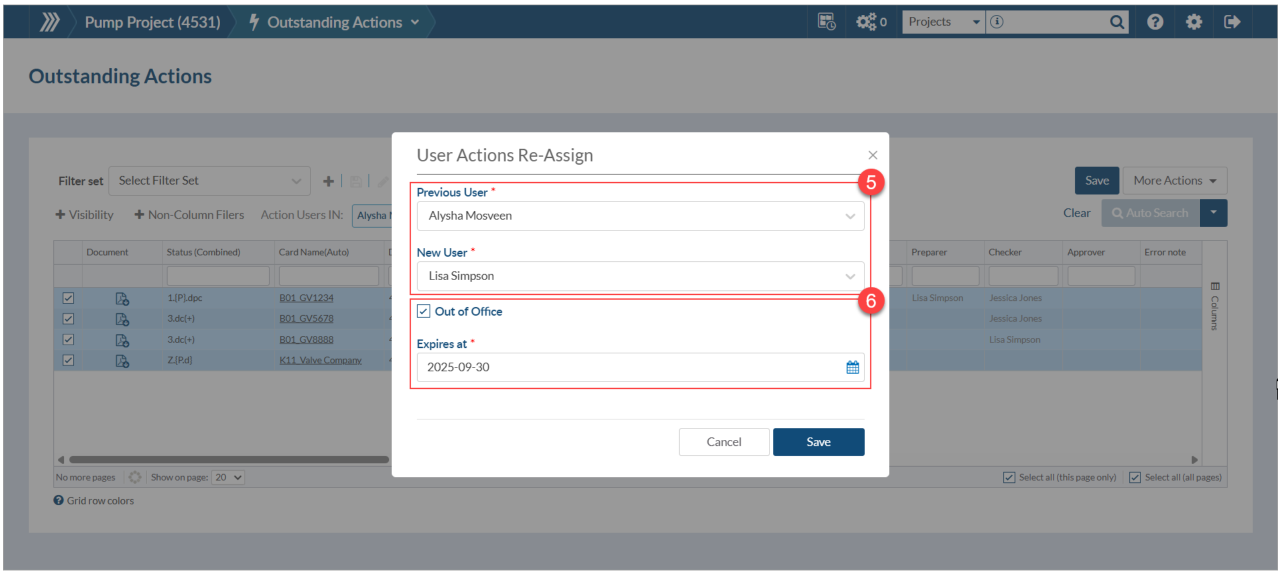
Out of Office

Actions currently assigned to one user can be re-assigned to another user. Action re-assignment can be done on individual projects (Project Menu > Outstanding Actions), or from the Actions Dashboard (Logo Menu > Actions Dashboard). Potential uses could be to manage extended vacations by assigning open actions to another user.

To re-assign actions, filter the grid by the user in question (+ Non-Column Filters > Action Users). Once filtered, select the actions, open the "More Actions" menu and choose the "User Actions Re-Assign" option.



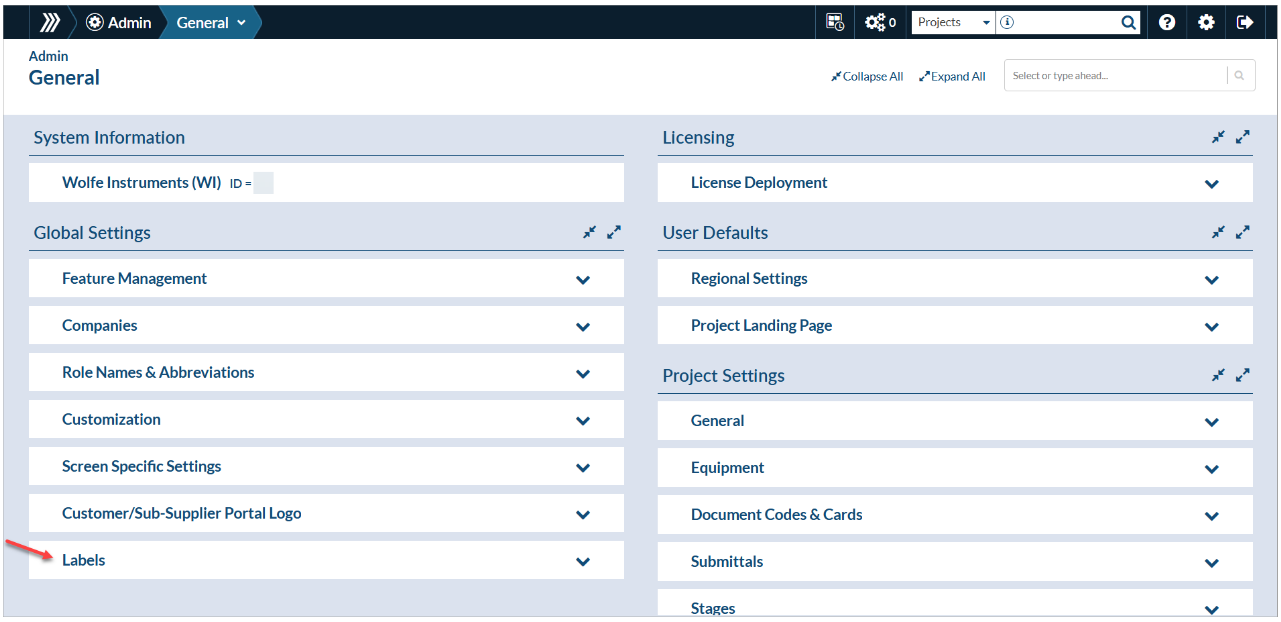
From the pop-up, select user that will be away, and the new user who will take over their actions. Then, check the "Out of Office" box and set the date that the user will return (i.e., when the out of office will "expire"). Once the original user returns, any actions that remain incomplete will be re-assigned back to them to complete.



Note: This feature can also be used to simply re-assign actions in bulk. If the actions should be re-assigned to another user indefinitely, simply leave the "Out of Office" box unchecked.

Other UI updates

Admin general: In alignment with the interface updates to the project template (see above), the "General" settings page (System Menu > Admin > General) has been refreshed to display sections in the familiar side-by-side layout. In addition, the options available on the "Labels" page (previously available under the "Customization" section) are now available on the "General" page.



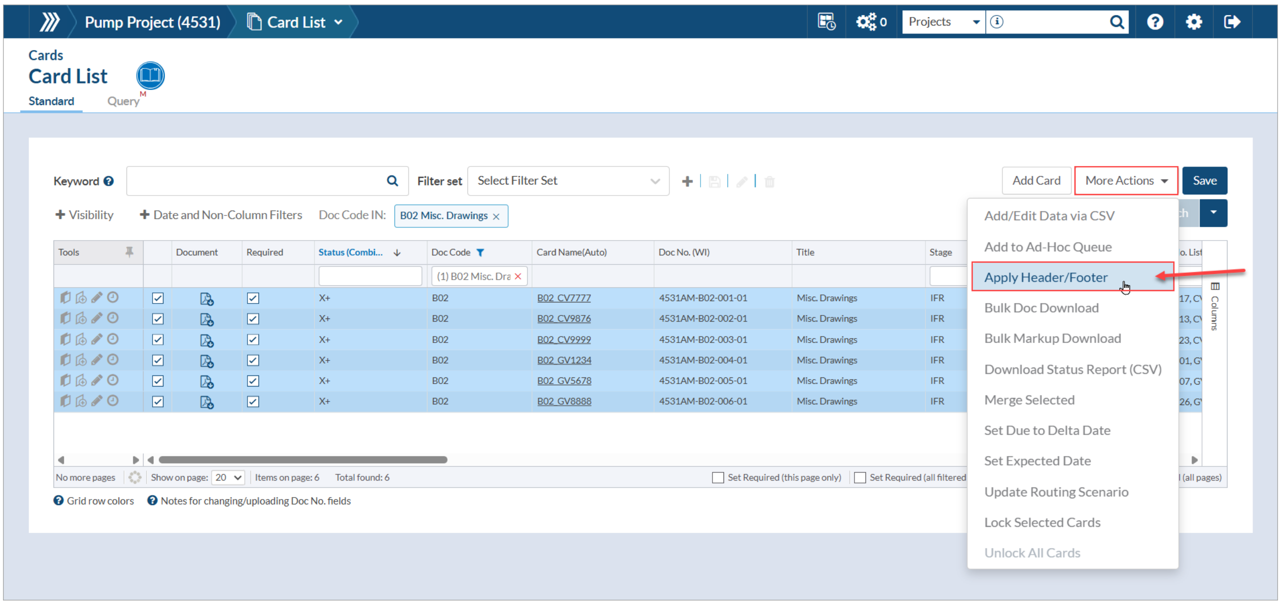
Admin banner: When making admin-level changes, the banner will now appear in black. This visual indicator is intended to remind the user that they are in the admin section of DocBoss and prevent changes from being made that are intended to be made at the project level.

Custom doc code/card fields: To increase simplicity, custom doc code/cards fields that are enabled on a project can now be used in patterns (e.g., header/footer pattern, doc number pattern, etc.) by default and no longer need to be enabled individually.

Manual header & footer application

Apply header/footer from card list: It is now an option to apply headers/footers to individual cards on the card list. This allows for additional flexibility, as cards do not need to be submitted in order to apply headers/footers. Some additional details are as follows:

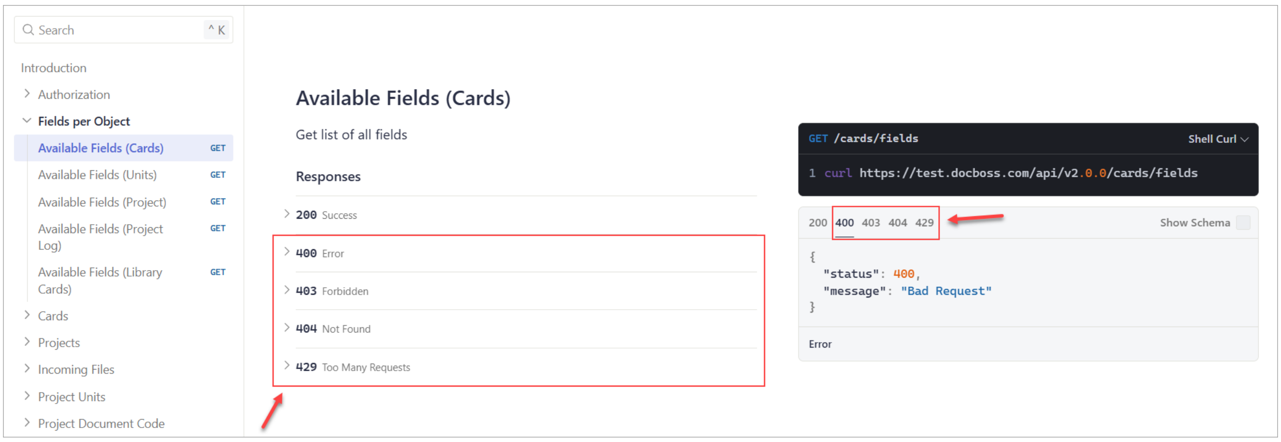
- If a card has been submitted with headers/footers already applied, using this feature will **overwrite** the pre-existing headers/footers.
- If a header/footer pattern is applied to the individual files and the pattern is then changed on the Project Configuration page, the **original** header/footer will remain. The header/footer will only be updated to the new pattern if/when:
  - (a) the card is selected and headers/footers are re-applied on the card list,
  - (b) a new file is attached to the individual card, or
  - (c) the card is submitted with the "Add Header/Footer" option selected



> ### When is this useful?
>
> This feature is useful for cards which need to be included in the final data book, but will not be submitted. To set page numbering per card, select each card from the card list, open the "More Actions" menu, and select the option to apply headers/footers. The headers/footers set on these cards will not be overwritten in the compilation, and pagination (if included) will be applied alongside the headers/footers.

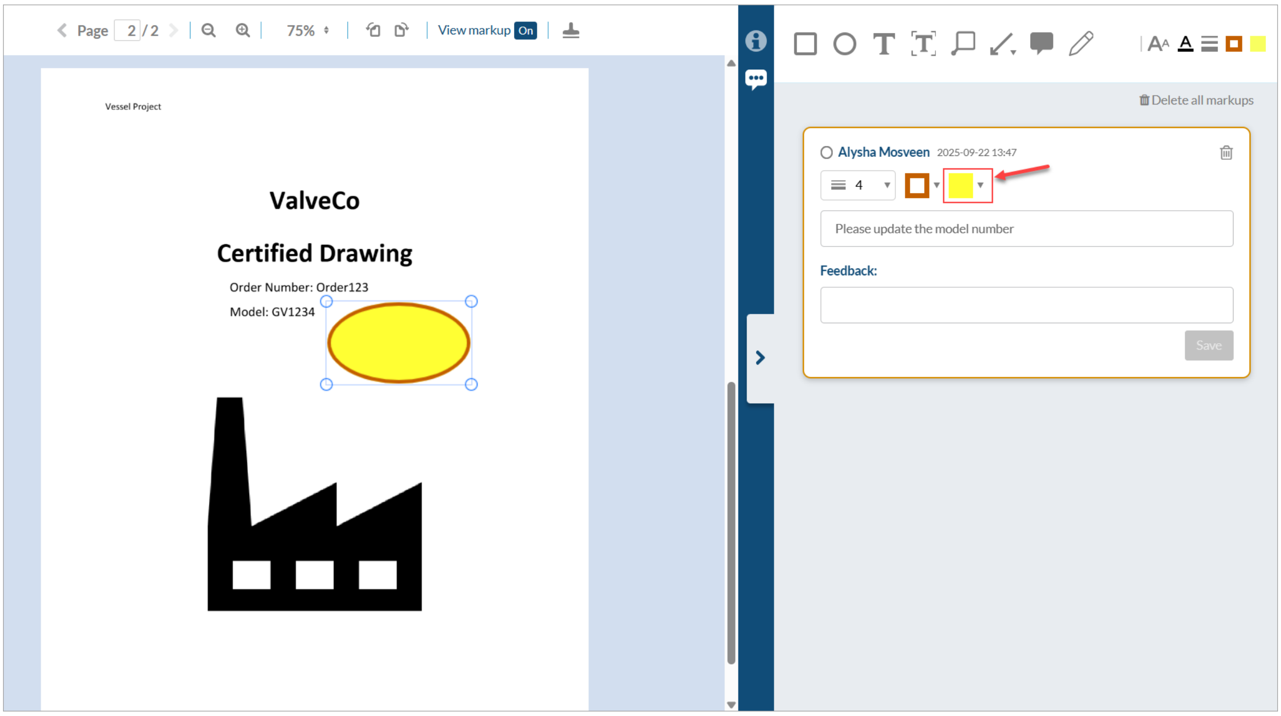
API

Error messages: To improve clarity, the API documentation page will now outline all potential 400-level error messages that could be received for any given call, making it easier to understand what went wrong, and how to move forward.



Markup

Circle shape fill colour: If a fill colour was selected for a circle markup, this colour will now also appear on files when submitted (if the "Include markups" option is enabled at the time of submittal).

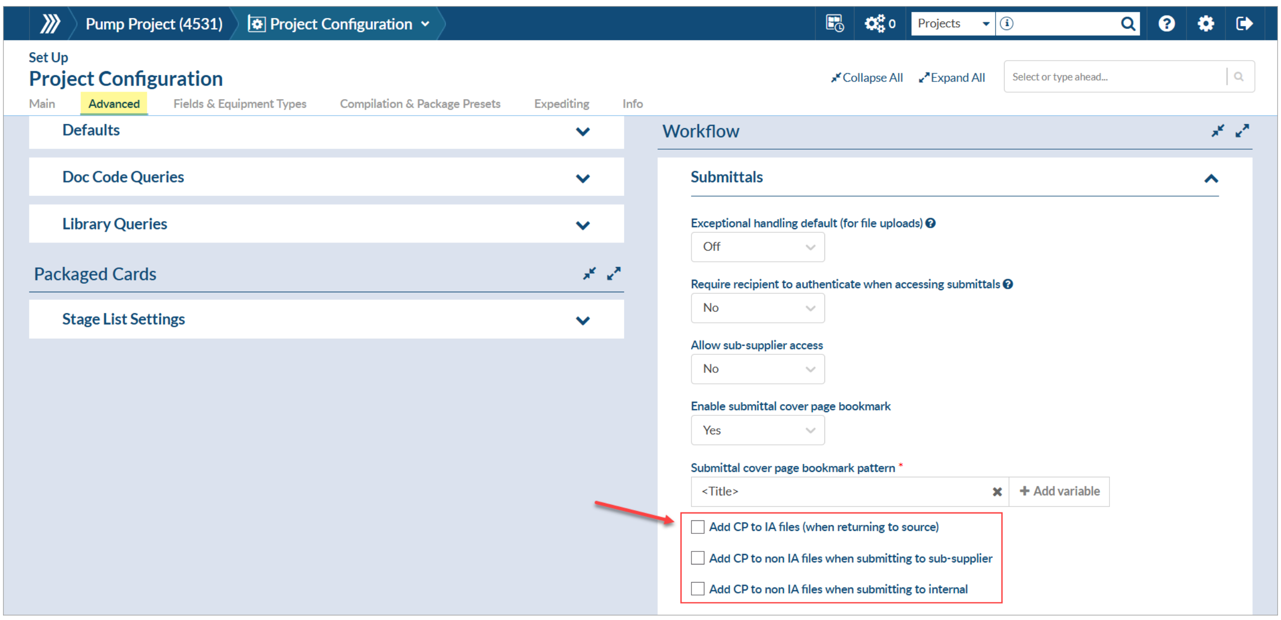


Minor Updates

Header/footer font size: To increase flexibility, the font size for headers and footers can now be set as small as 6px, making it easier than ever to meet your customers' unique requirements.

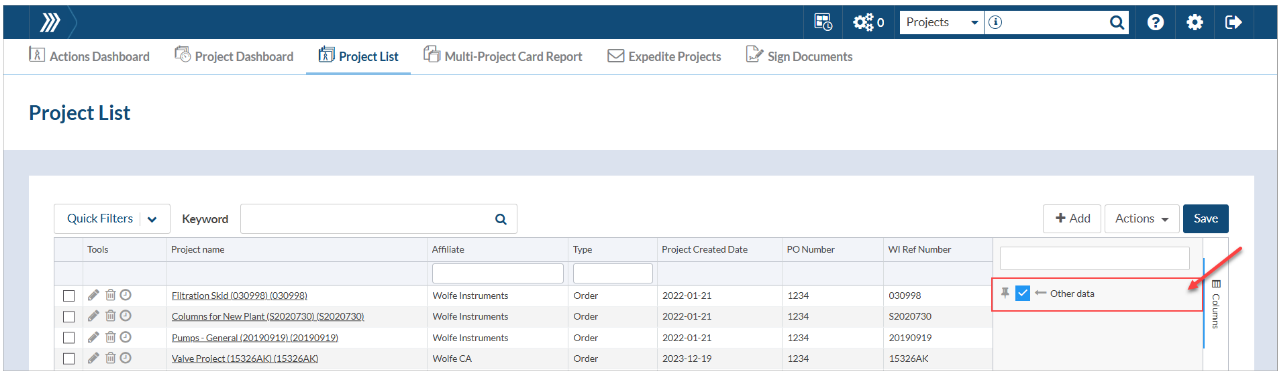
Stage list history: A record of the stage list is now visible from the card history, making it easy to identify if/when the stage list was changed on a card. This column can be added by selecting it from the "Columns" bar on the right of the grid.

Add cover page (default setting): When submitting documents internally or to a sub-supplier, there is now the option to automatically add a cover page by default. If enabled from the "Project Configuration" page (Project Menu > Set Up > Project Configuration > Advanced > Workflow), users will no longer need to manually check the box to add a cover page at the time of submittal, saving you time and manual work. This option can also be set on project templates, reducing manual configuration on future projects.

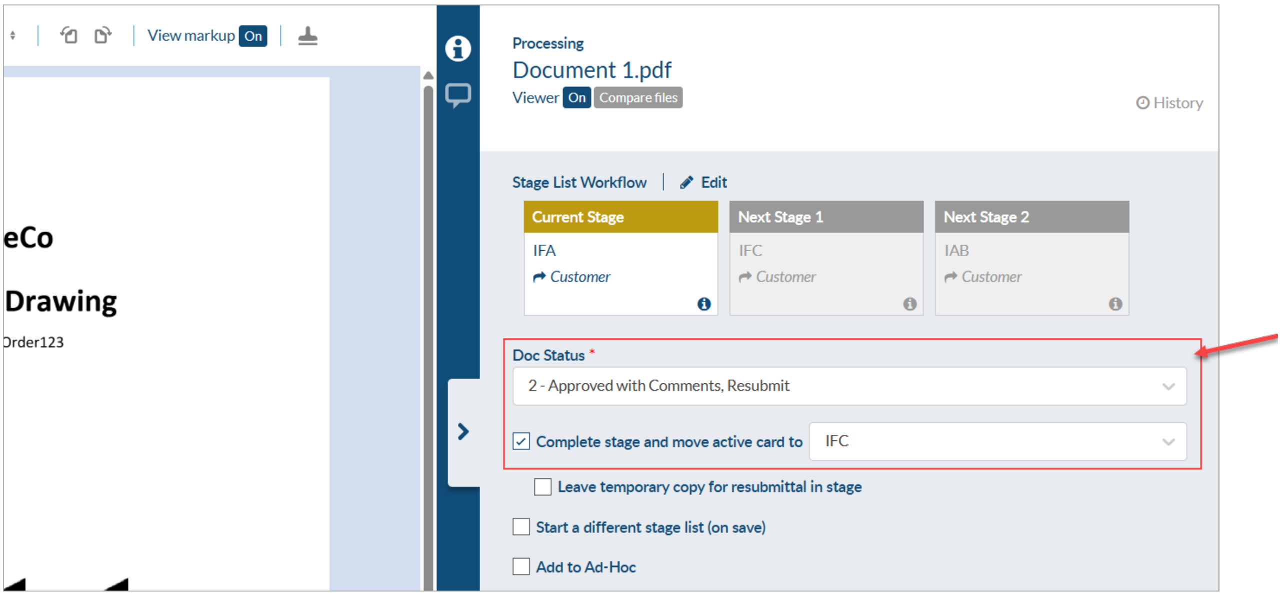


Support access to new affiliate: If a new affiliate is added to your system, the DocBoss support user account will automatically be provided with access. This change reduces the need for manual configuration, and makes it easier for us to support you.

Other data available in project list: Keeping track of information in the "Other Data" project field? A new column has been added to the project list that allows you to sort projects by the data in this field. If custom project (main) fields have been created, these columns will also still be available on the project list.



Routing scenario updates: If a card receives a customer status that is considered "incomplete" by the system, but the stage is manually completed using the "Complete stage and move active card to [stage name]" option, the ***When status is NOT "stage complete"*** routing scenario will now be selected to facilitate additional workflow on the file.



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.