# Release Notes - December 2025

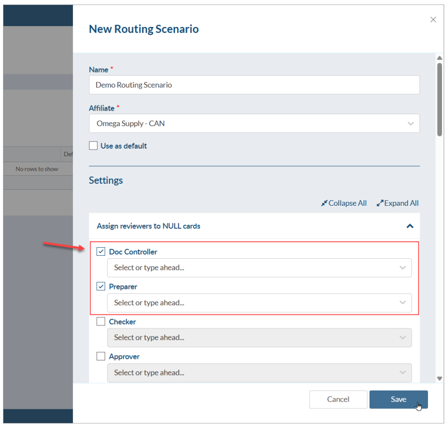
01/09/2026 9:33 am MST

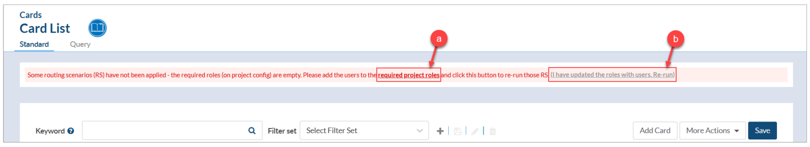
Here's a list of updates found in our December 2025 release.

## Highlights

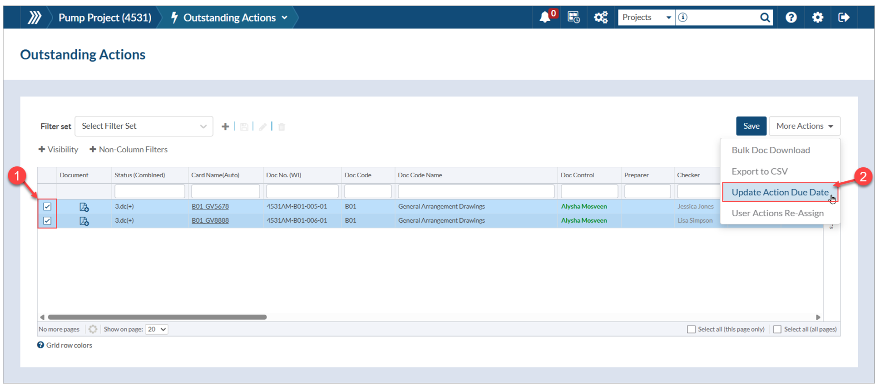
**Dynamic routing scenarios:** Routing scenarios can now have roles selected without choosing specific reviewers. When the scenario is applied, the current RoleX users from Project Configuration > Main are added if a role is selected, but blank.

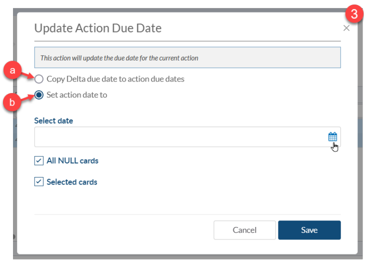
**Note: If using a NULL or internal approval routing scenario and there is no project user assigned to the role that is included in the routing scenario, a warning will appear to highlight the discrepancy and prompt an adjustment of the project users. This warning will appear above the grid on the Card List, as well as on the project's Routing Scenario screen. The warning will (a) indicate which role(s) require configuration, and (b) provide the ability to refresh the routing scenario once the required role(s) have been configured.*




**Action due date (bulk editing):** Previously only available for NULL cards, action due dates can now be updated for ALL cards. After selecting the cards from the grid, there is the option to either (a) use the same date as the due to customer date, or (b) select a specific date.

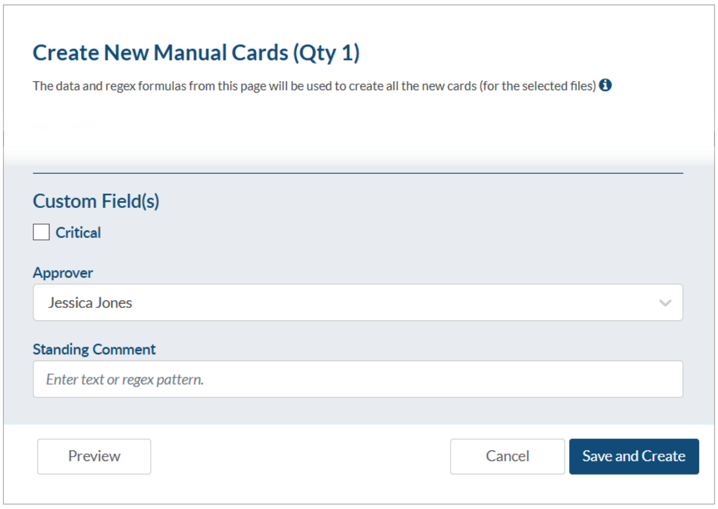



**Expedite NULL cards internally:** Cards with a NULL status that are internally generated are now included in as part of outstanding action expedite reports, making it easier to keep track of documentation from all sources.

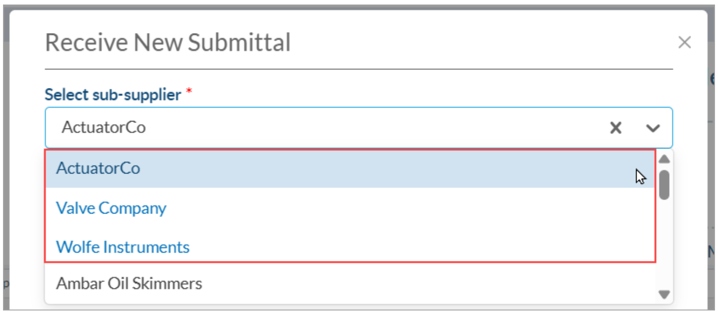
## Submittals

**Custom field data using create cards and match:** When creating new manual cards using the "Create cards and match" option, data can now be filled into custom fields, removing the need add this data to the card list later. If entering a value into a text field, either text OR a regular expression (regex) pattern can be used.



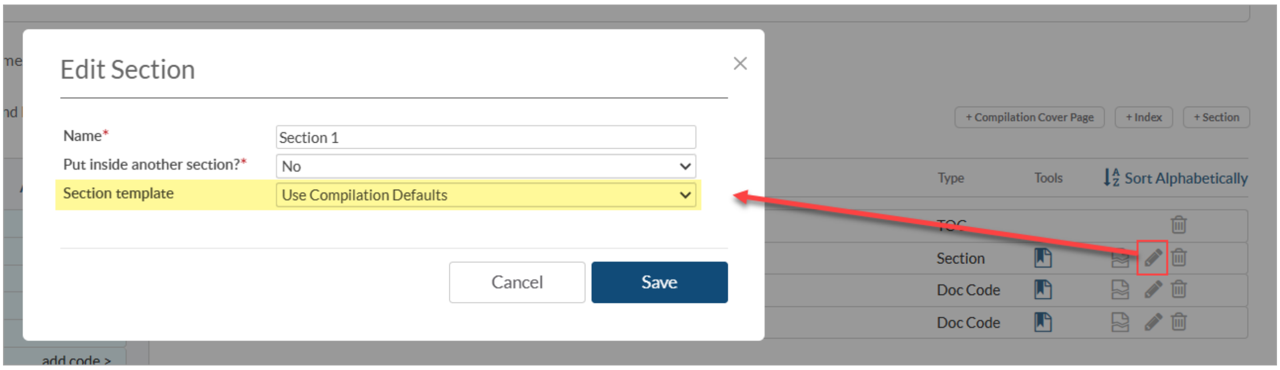

**Quick select "active" sub-suppliers:** When creating a new incoming sub-supplier submittal, the sub-suppliers that are the most likely to be selected are now displayed at the top of the list (in alphabetical order) and are displayed in blue text, making sub-supplier selection more efficient.

The sub-suppliers included at the top of the list are either (a) associated with equipment on the equipment list, (b) selected as the applicable sub-supplier on a card(s) via sub-supplier override, or (c) recipients of documents (sent via Outgoing Submittals) and/or senders of documents (received via Incoming Documents).




# Compilations

**Different section title pages:** The option to select a section title page template **per section** is now available. By default, the template for each section will match the section title page selected in the compilation settings. This feature is useful in cases where you are using a pre-established table of contents template and a title page is still required for each section.




**Compilation cover page:** Want to still include a document cover page on submittal even if a compilation cover page is added to the compilation structure? This is now possible using the new pop-up by selecting "Keep the submittal cover page" option. If instead the compilation cover page is sufficient, choosing the option to "Disable the submittal cover page" will automatically update the cover page setting on the doc code for the linked compilation to prevent a cover page from being added.

# Templates

**Use image-generating variables in formulas:** Variables that generate images (e.g., <RoleX_User_Signature>) can now be included in Excel formulas in the case that they should only be applied when other specific conditions are met.

**Example:** If the signature of the doc controller should only be added to the cover page when the document is issued as final (IAF), the formula may look something like this: =IF("<Document_StageAbbr>" = "IAF", "<Role1_User_Signature>","")

## New variables (section title page)

**Section has doc codes variable:** <Section_Documents.SectionHasDocCodes> variable is now available as part of the <Section_Documents> array. If the section has doc codes included within it, the output will be "Yes." If the section does **not** have doc codes included within it, the output will be "No."

**Current page variable:** The current page number can now be added as a variable to section title pages. The <Section_CurrentPage> variable can be included as part of the main template, or can be included in the footer.

**Note: If instead you would like to include page numbers on ALL pages included in the compilation (and not just on section title pages), use the pagination option (see article).*

# Doc codes and cards

**Delete doc codes from company list:** Doc codes that are no longer needed can now be deleted from company doc code lists by admin users. To delete a doc code, it must first be disabled and the option to delete will appear (an "X" button under the "Tools" column).

**Document numbering pattern per doc code:** In cases where cards associated with a specific doc code require a different document number pattern, it is now possible to set a unique document auto-numbering pattern for individual doc codes. This option removes the need to manually update document numbers for cards that do not fit the default pattern. To adjust the auto-numbering pattern for a doc code, use the new "Auto-Numbering Format" column on the code list to set a custom pattern (by default, all doc codes will adopt the default auto-numbering pattern unless a custom pattern is applied).

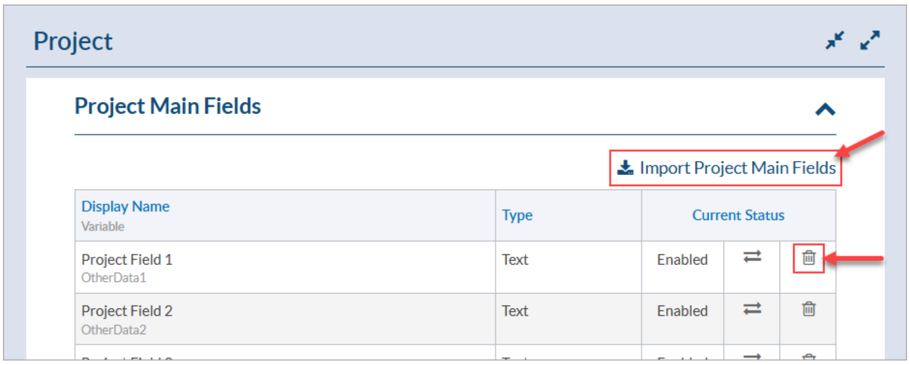
**Required/unrequired query change (impact warning):** When updating the query that sets cards are required/unrequired, there is now a pop-up to inform you of when the change may cause an impact to merge sets. This warning is intended to prevent changes that result in merge sets being moved to obsolete by mistake, which requires manual intervention to restore if done unintentionally.

**Default cover page/stamp option for SDI doc code:** The cover page/stamp option selected on the doc code will now match the option selected on the SDI attach form, making it easier to tell which cover page/stamp option will be applied to the associated card(s).

# Project configuration

**Add/delete project main fields:** Custom project main fields can now be removed from the the project configuration page (and/or project configuration templates) when they are not needed. If a new custom project main field should be added into the project/template, it can be brought in from admin using the "Import" button.

**Note: Removing the field from the project/project template will not delete it from admin.*




# User management

**Disable invitation email (XLS user account creation):** When creating DocBoss user accounts in bulk, new users are automatically sent an invitation email to get started. If instead the user should not yet be notified, you can now choose to disable the invitation email (by typing a "Y" ) from the "Disable invitation email" column for the appropriate user(s).

# User interface

## Project configuration

**Increased field width for custom fields:** In order to accommodate larger amounts of information, custom project main fields have been expanded to the full width of the section.

**"Other data" name change:** Consistent with it's typical use case, the "Other data" field on the project configuration page ("Main" tab) has been renamed to "Project notes." This adjustment also helps to differentiate between this field and custom project main fields (if applicable).


**Stage lists (advanced):** To contextualize to the settings related to packaged "each" cards, a note has been added to the "Stage List Settings" section on the project configuration page ("Advanced" tab). The option to hide "each" cards on the SDI has also been renamed to improve clarity.

## Code list

**SDI/Compilation regeneration icons:** Icons used to regenerate the SDI and compilation(s) have been updated to improve consistency. To regenerate, click the circular icon ( ) under "Tools." When regeneration is in-progress, the same icon will appear with three dots ( ).

**Total found items and "Select All" option:** Reflecting the same functionality as the card list, the code list will now display the total number of items (e.g. "Total found: X") as well as provide the option to select all items across multiple pages.

## Card list

**Setting cards as required/unrequired:** The option to set cards as required/unrequired manually (from the card list grid) has been renamed to "Set Required Y/N" to indicate that the option works in both ways (i.e., to set all cards as required OR unrequired). To set all cards (on the page OR all filtered rows) as required, click the box once. To set as unrequired, click the box twice.

## Companies

**Updated grid style:** To improve usability and consistency across pages, the grids the company profile (specifically the doc code and addresses grids) have been updated to reflect the modern grid style.

**Update custom affiliate admin settings:** If an affiliate company is using custom admin settings, they will see an updated interface to reflect the style of the recently updated project configuration page. In addition, the CSV delimiter can now be set per affiliate, automating this option for **new** users with this affiliate set as their primary affiliate.

**Note: Pre-existing users will retain the CSV delimiter selected on their user profile, and all users will continue to have the option to manually adjust the CSV delimiter from their user profile if required.*

# Security

**Require submittal recipient authentication:** Admin users with security permissions now have the ability to enforce submittal recipient authentication via security settings (System Menu > Admin > Security Settings > "Enable authentication option for submittal recipients (on PT)"). With this setting enabled, the option selected on the project template will be overridden. For more details, see this article: Multi Factor Authentication (MFA) for

Submittal Recipients.

# API

**Additional data added to "Project Data by Project Fields" endpoint:** Four new query parameters have been added to the "Project Data by Project Fields" endpoint: (1) Project completion date, (2) Project hidden date, (3) Total cards, (4) Completed cards.

# Misc.

**Longer company short names:** To allow for increased flexibility, the character limit for the company short name has been increased to 16 characters.

**Removed prices & estimates button:** The "PO Data" button on the prices & estimates page has been removed as it is no longer supported. If sub-supplier document charges passed through to your customer should be included in the quote, the "Sub-Supplier Document Charges" option can be selected from the "Actual Prices" grid.

**Equipment list - Exact-match filtering (by line no.):** The "Line No" columns on the equipment list have been updated to allow for exact-match filtering (e.g., if filtering by "1," only line number "1" equipment will be displayed [as opposed to all line numbers that include a "1"]) , making it easier to sort the grid and apply bulk adjustments (e.g., setting the shipment date) as needed.

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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.

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