

Test Your Knowledge (DocBoss Topics List)

08/01/2024 9:33 am MDT

Use the list below to track which DocBoss features you want to learn more about, and click on the links to be redirected to the relevant articles. If you request advanced training from us, we can customize our course offerings based on your chosen topics.

Basics review

Topic	Description
Project setup	Initiate a project and fill out the Project Main fields
Equipment list setup	Add equipment to a project
Code list (requirements) setup	Input the documentation requirements to the project so DocBoss can automatically generate a list of documents
Send & receive documents	Make submittals through DocBoss and status returned documents from customers
Create & send supplier document lists and databooks	Set up Supplier Document Index and Databooks on your project for DocBoss to automatically fill in
Grids and filtering	Get comfortable navigating the grids and filtering card and equipment lists

Advanced

Topic	Description
Auto reclaim	Apply return status to documents when customer has not returned a copy of the file
Bulk match	Have DocBoss automatically match which documents should go in each card
Card history	Understand the way DocBoss tracks card history (for troubleshooting and revisions, if needed)
Card list queries	Set up logic to tell DocBoss which cards are required and which are not
Card to unit changes	Manage cards that were sent to customer prior to an equipment change order
Compilations – Advanced options for structuring	Learn how to format and structure databooks and databook table of contents exactly to customer specifications
Custom fields (card, equipment, etc.)	Create fields to store and use any information that isn't available in DocBoss by default
CSV edit (card list, equipment list)	Edit card list and equipment list via CSV, allowing fast bulk changes through Excel
Custom equipment types	Add additional equipment types (for example, steel) and cross-reference it with tagged equipment
eSignature	Digitally sign documents before submittal to customer
Expediting	Send reports to customers, sub-suppliers, and users listing coming due/overdue documents
Internal approval	Approve vendor documents internally before submitting them to your customer

Library (basic)	Store commonly used documents in a repository shared across all projects
Library (advanced)	Use queries to automatically populate project cards with library documents (useful for MTRs, weld certs)
Map customer codes to internal codes	Cross reference customer codes with your standard internal code list for easy cross-project searching and reporting
Markups	Add markups and comments to documents in the DocBoss viewer
MTR management	Store and manage your collection of material test reports (MTRs) in the DocBoss library for use across any of your projects
Native files	Attach native files (CAD files, etc.) to cards to send to customers along with the PDF versions
Obsolete cards	The "recycle bin" of DocBoss. Manage and restore deleted manual cards or auto generated cards which have had their linked equipment removed from the order.
Package documents	Manage documents like drawings and MTRs individually, but automatically package them into a single PDF (including bookmarks and hyperlinked table of contents) for submittal
Project Dashboard	Visual representation of document status and location across multiple projects
Project template	Configure project default settings and available fields
Recreate external history	Bring a project into DocBoss that was started externally, including full submittal history record
Reporting	Get KPIs on projects across your system
Routing	Assign files to other DocBoss users for review
Routing scenario	Automatically assign documents to different users for review based on situation/return status
Stage lists	Create workflows for document issue purposes (single stages like Issued for Approval; multi stages like Issued for Approval > Issued for Construction > Issued As Built, etc.)
Stamps	Apply stamps with automatically filled text (date, doc number, issue purpose, etc.) to documents in the DocBoss viewer
Templates (Email)	Fully customize (plain text or HTML) email templates for submittals, expedite emails, etc.
Templates (PDF/Excel)	Create and upload templates using variables so DocBoss can automatically fill in your cover sheets, transmittals, document indexes, and more (or have us do this service for you)
Temporary cards	Manage simultaneous workflows for a single document
Unpacking	Return packaged documents to DocBoss, automatically splitting up the contained documents back into their individual cards so they can be stuated individually, but sent to the customer as a single file
Vendor portal and customer portal	Give your vendors and customers access to download and make submittals directly through a simplified DocBoss portal