Getting Started (for New Users)

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Welcome to DocBoss! We're glad to have you on board.

Below we have compiled a guide to jumpstart your progress.

Sign in

If you haven't yet signed into DocBoss, expand the section below for a walkthrough:

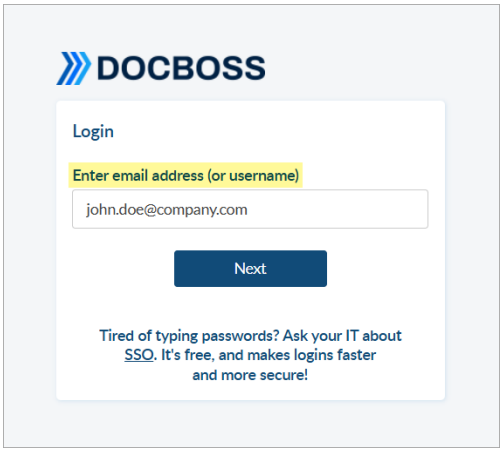
Before you sign in, you'll need some basic information, which your system administrator will be able to provide:

- Your username (typically an email address)
- Your temporary password
- The DocBoss system (1-4) you'll log into

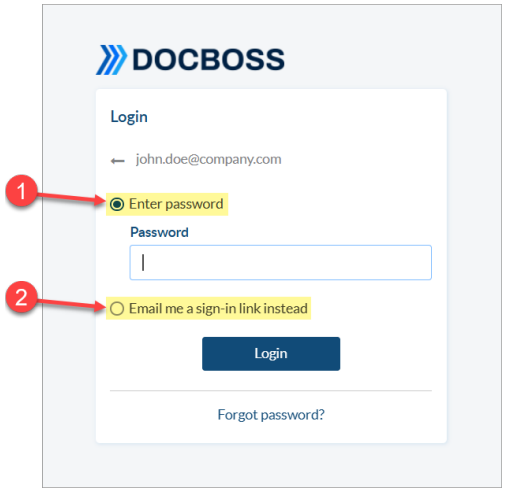
From docboss.com, select **Client Login** and choose your system, or use the link provided to you by your system administrator if applicable.



On the login screen, enter your **email address** (or your username, if it is different):



Click **Next**. On the following screen, login using the password associated with your account. You may also choose to login using an email sign-in link (if available for your system). Once your preferred option is selected, click **Login**.



If you can't remember your password, select **Forgot password?** and follow the prompts, or take a look at our article on resetting your password for help.

Learning mode

Learning mode is indicated by the following icon:



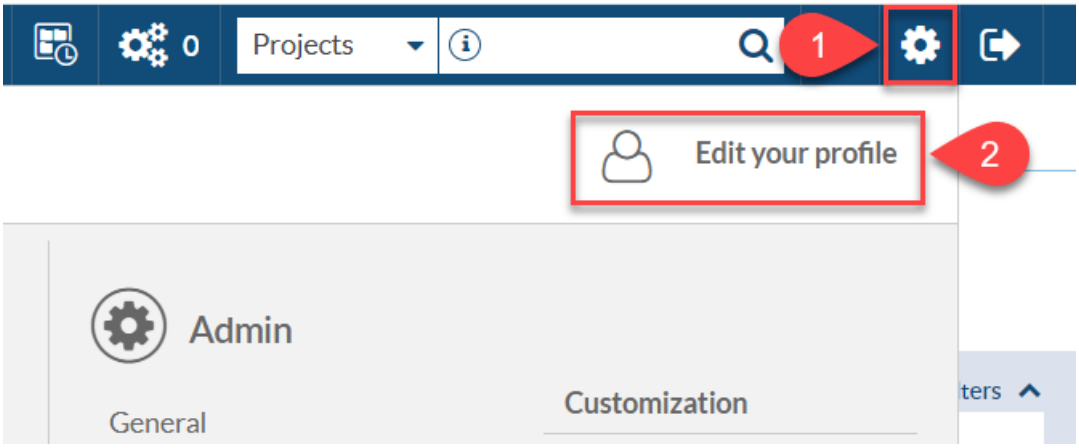
Anywhere this icon appears in DocBoss, click on it to view the relevant articles on our help site.

Next steps

The way you use DocBoss will in part be determined by your user role. The lists below offer suggestions for getting started, depending on your user role.

If you're not sure which user role you have, you can check this under your user profile:

1. From the system menu (gear icon) on the top right of any screen, click on **Edit your profile**.



2. Expand the **System access** section and check the **Role** field for your user type (admin, full, review, or view).

Here are some suggested next steps, based on typical use for each role:

Admin users

Admin users have full access to DocBoss and are able to manage the list of users and customize the way the system works for all other users in their company. They may or may not manage projects directly.

- Create and manage your first project using our list of quick steps
- Can also complete Review and View user functions (see below)

Full users

Full users create and manage projects. They are often document controllers or project coordinators.

- Create and manage your first project using our list of quick steps
- Can also complete Review and View user functions (see below)

Review users

Review users participate in the internal workflow and review of documents within DocBoss, but do not have access to manage entire projects or make submittals.

- Watch this short video on Outstanding Actions (applicable section starts at 0:59), which is the main function review users complete within DocBoss
- Learn more about how outstanding actions work in our Outstanding Actions article
- Learn how to complete outstanding actions, assign actions to other users, and remove actions which are no longer required.
- Can also complete View user functions (see below)

View users

View users have limited access. They are often managers or supervisors who require access to metrics and to view the projects that their teams are working on, but won't be participating in document control or document workflow directly within DocBoss.

- Learn how to use the Actions Dashboard for an overview of pending documentation tasks assigned to DocBoss users
- Learn how to use the Project Dashboard to view KPI's on your team's projects
- Learn how to use the Multi-Project Card Report

For more detail on user role types and access, see our article on user roles.

Navigation and Features

For an overview of all of our navigation and features, see our support article: DocBoss System Navigation.

Have questions?

- Reach out to your system administrator if you need help. They'll be familiar with how your company is using DocBoss, and can connect you with the DocBoss support team if needed.
- Click the **help icon** from the top right of any screen in DocBoss to open the support site, which contains hundreds of articles on setting up projects, document workflow, creating databooks, system customization, and troubleshooting.

