# Getting Started (for New Users)

09/16/2024 1:59 pm MDT

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

Below we have compiled a guide to jumpstart your progress.

## Sign in

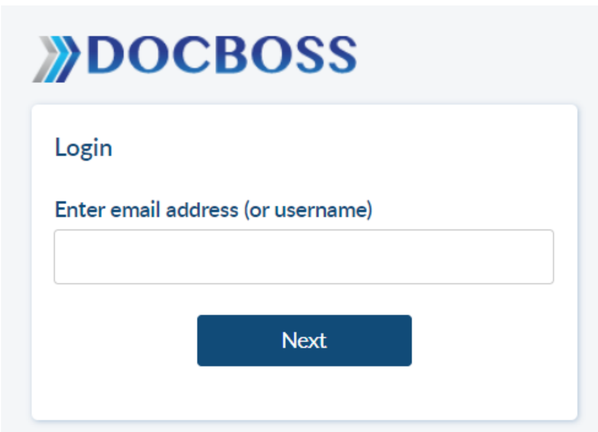
If you haven't yet signed into DocBoss, expand the section below for a walkthrough:

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

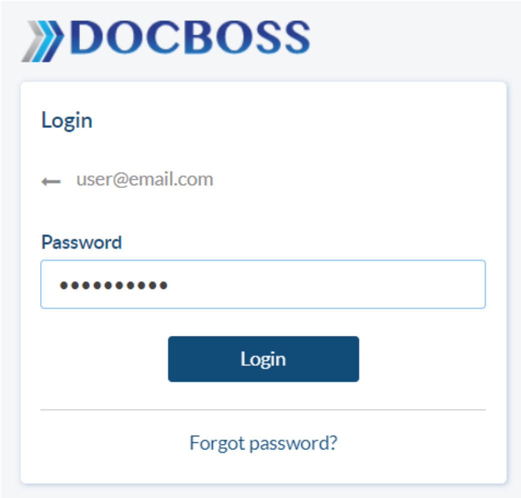
- Your username (typically an email address)
- Your temporary password
- The DocBoss system (1-4) you'll log onto

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):




Select **Next**. On the following screen, enter your password and select **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:

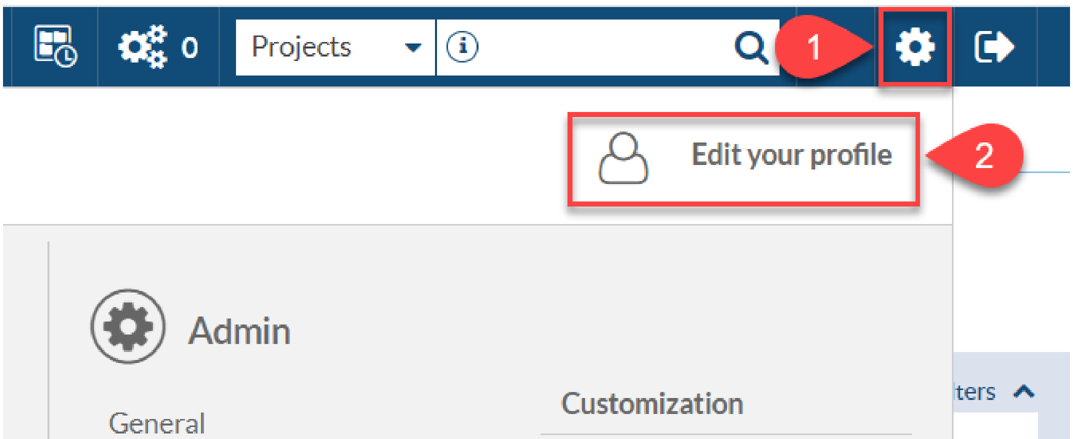
Anywhere this icon appears in DocBoss, click on it to view the relevant articles on our help site.

# 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, expand the section below.

The sections below walk through the DocBoss features in the order they are found in the menus.

There are three menus you'll be working out of:

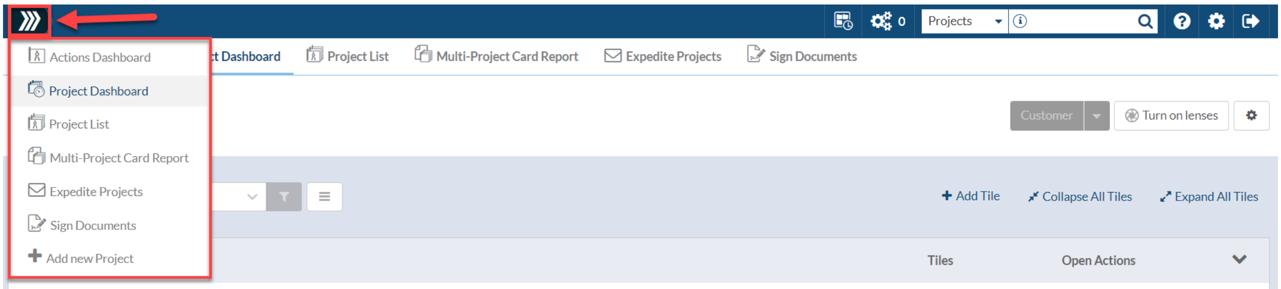
- **Logo menu** (from the DocBoss logo on the top left of all screens)
- **Project menu** (on the top left of all screens when working inside a project)

- **System menu** (from the gear icon on the top right of all screens)

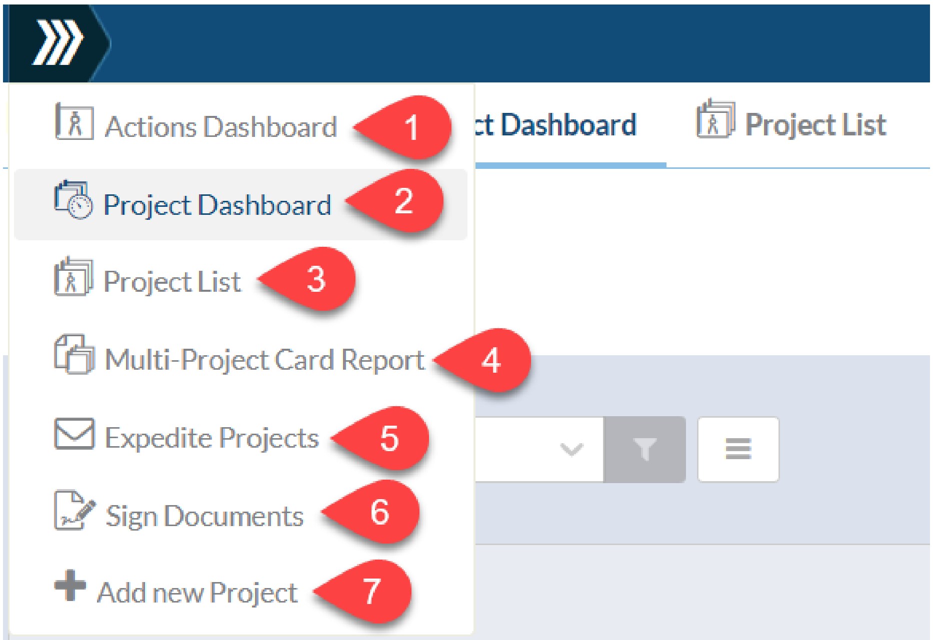
*A note on cards: In the explanation of our menu items and features below, you will see many references to* ***cards****. In DocBoss, a card acts like a folder for all the different versions of a document throughout its lifecycle. Each card stores its document's metadata (document number, status, due dates, and much more), current file, and a historical record of previous metadata and files.*

## Logo menu

To access the logo menu, hover over the DocBoss logo in the top left of any screen.




The logo menu is a quick navigation for any screens relating to projects.




*Note: depending on your user role (admin, full, review, or view) you may only see some of the options shown here.*

Here, users can access the following screens:

### 1) Actions Dashboard

- View pending actions assigned to yourself and other users across all projects

### 2) Project Dashboard

- View all projects in visual tiles

## 3) Project List

- View all projects in a grid

## 4) Multi-Project Card Report

- Search and filter for documents across all projects

## 5) Expedite Projects

- Send requests to sub-suppliers, customers, and more with a list of due/coming due documents

## 6) Sign Documents

- If using DocBoss's eSignature feature, review and sign documents before they are sent to customers

## 7) Add New Project

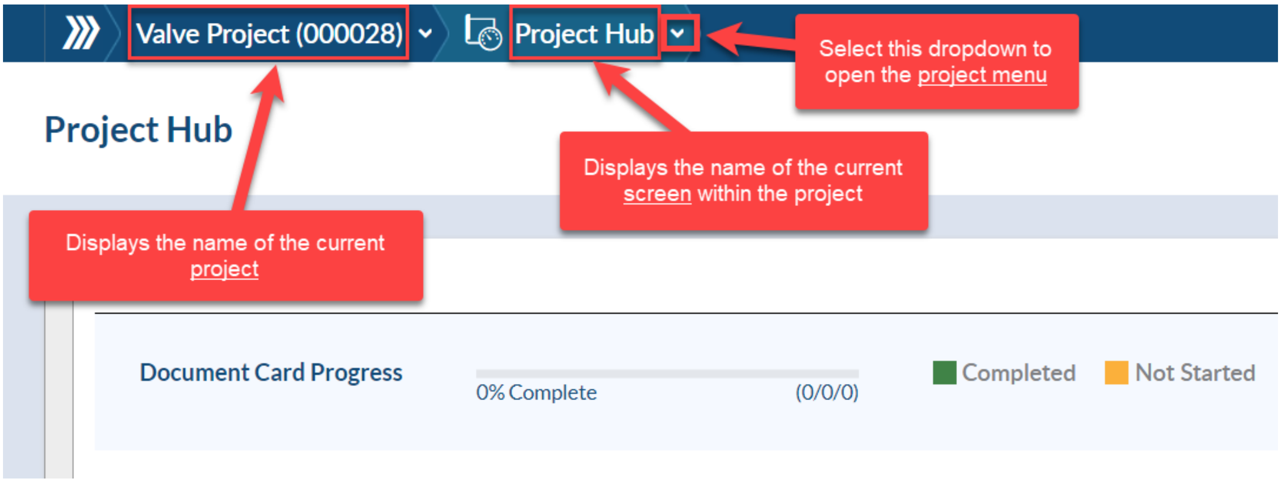
- Start a new project

# Project menu

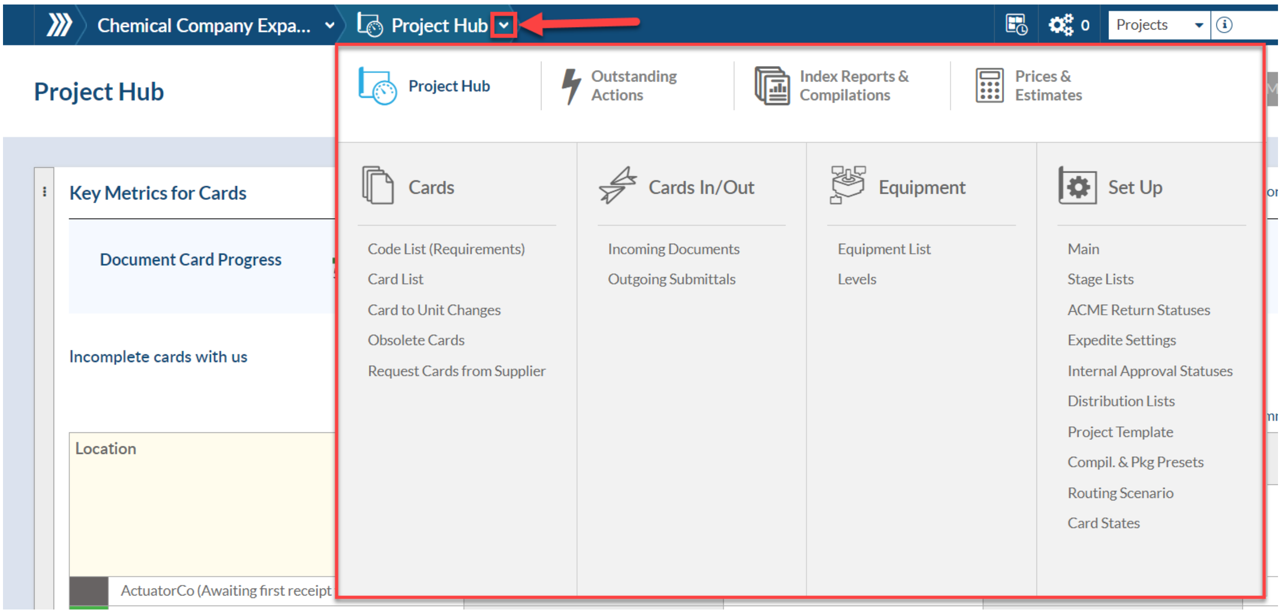
The **project menu** serves as navigation inside individual projects. To access this menu, you'll first have to navigate to a project.

Ways to open existing projects in DocBoss:
- Search for the project in the search bar on the top right of any screen, then click on the project's name from the search results
- From the Project Dashboard, click on the project's name on its tile
- From the Project List, click on the project's name inside the grid

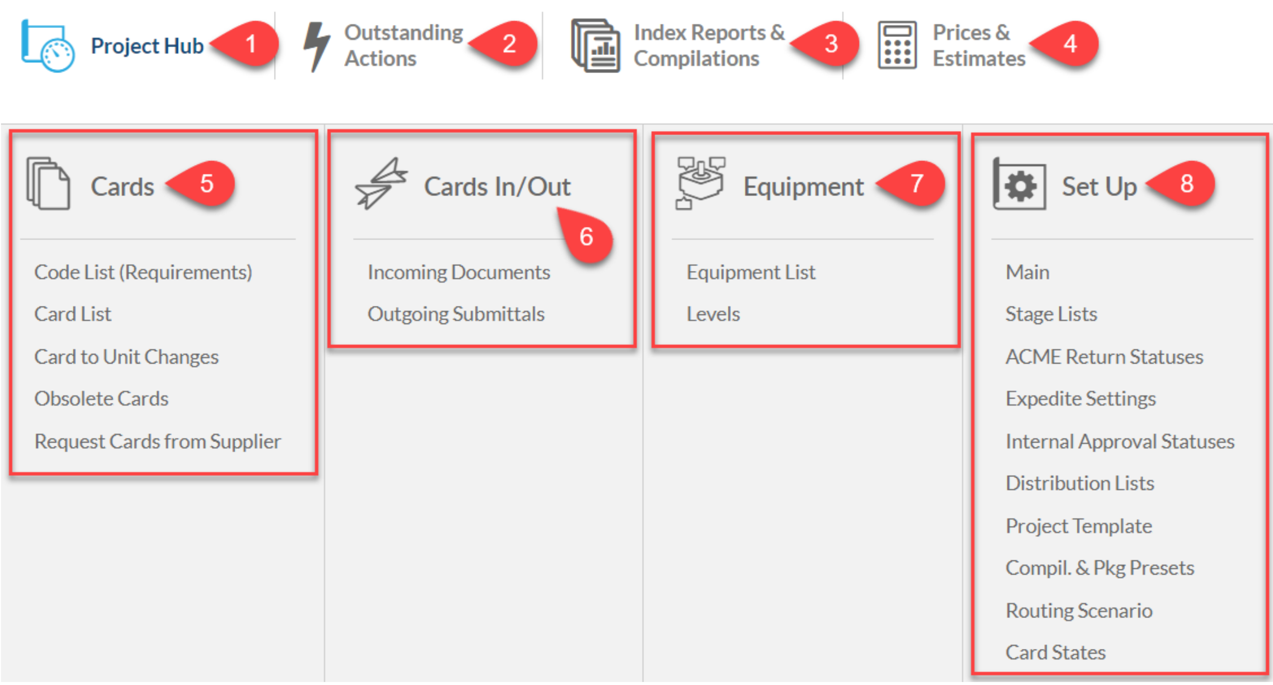
This will take you to the screen that is selected as the project's landing page (by default, the **Project Hub**). Whatever screen you are on, the navigation bar inside a project functions the same:




Selecting the rightmost dropdown arrow inside the project navigation bar opens the **project menu**.




The **project menu** lists screens specific to the currently open project:




Here, users can access the following screens:

## 1) Project Hub

- A visual overview of the project, targets, and KPI's

## 2) Outstanding Actions

- View pending actions assigned to yourself and other users, specific to this project

## 3) Index Reports & Compilations

- Create databooks, packages, and supplier document indexes

## 4) Prices & Estimates

- Generate a quote to charge your customer for documentation

And the following groups:

## 5) Cards

- Create and manage the list of documents on the project

## 6) Cards In/Out

- Bring files into DocBoss and send them out in submittals

## 7) Equipment

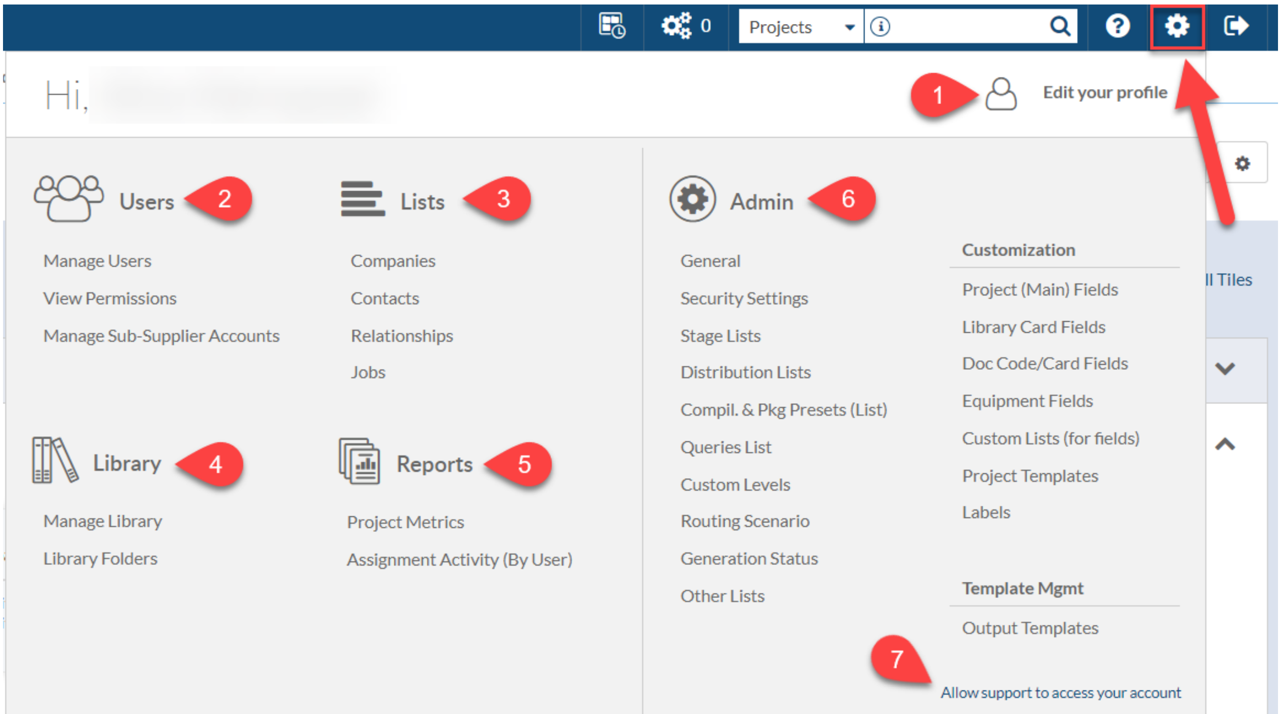
- Manage the list of equipment related to the project

## 8) Set Up

- Customize the project's setup

# System menu

The **system menu** is where you'll access information related to your DocBoss system as a whole, rather than specific projects. Most options in the system menu are related to users, lists, settings, and customization.




*Note: depending on your user role (admin, full, review, or view) you may only see some of the options shown here.*

Some commonly used functions available from each section called out in the image above:

## 1) Edit your profile

- Update login information
- Change email notifications
- View your user role type

## 2) Users

- Add, edit, or remove other DocBoss users

## 3) Lists

- Manage internal company profile
- Manage company profiles for sub-suppliers, customers, and end users
- Add doc codes, return statuses, and more to company profiles

## 4) Library

- Store and organize documents that will be used across many projects (for example, IOMs)

## 5) Reports

- Generate reports with KPIs on projects and individual users

## 6) Admin

- Set defaults for your system
- Create custom fields and project templates
- Manage output templates (cover page, transmittal, document index, submittal email, etc.)

## 7) Allow support to access your account

- Temporarily grant the DocBoss support team access to your system

# 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.