

Multi-Project Tiles

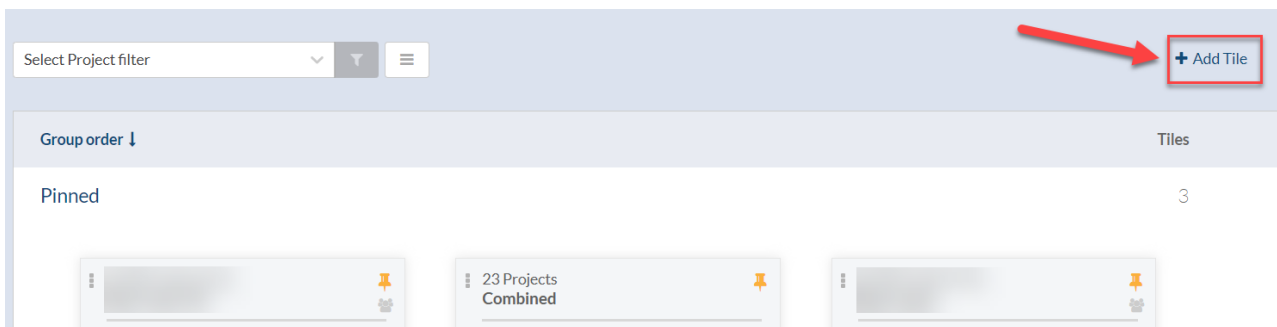
08/02/2024 1:35 pm MDT

DocBoss allows users to create a tile on the [Project Dashboard](#) which contains the data from many projects.

Create multi-project tile

On the [Project Dashboard](#), select [Add Tile](#).

Project Dashboard



Enter a name for the tile and select whether to add projects by dynamic selection, static selection, or both.

A screenshot of the 'Add Tile' form. At the top, there are three icons: a list icon labeled 'Start', a plus icon labeled 'Add Projects', and an eye icon labeled 'Preview'. Below these icons is a horizontal line. Under the line, there is a section titled 'Select tile name' with a text input field. Below the input field, it says '18 characters max'. Below that, there is a section titled 'Add Projects By' with two radio buttons: 'Dynamic Selection' and 'Static Selection'. The 'Dynamic Selection' radio button is selected.

If **Dynamic selection** is checked, users select applicable criteria. The list of projects assigned to the tile will be automatically updated as projects change. To preview the filter results, select the **View matching projects** option, on the bottom right of the page.

If **Static selection** is checked, users select each project to add to the card individually.

- Select the checkbox for the projects to include
- From the bottom right of the projects grid, select **Add projects**. A second grid will appear showing the selected projects. These can be removed if needed (but will still be included if they meet the requirements for dynamic selection).

Select **Save and continue**. A preview will appear showing three tabs:

15 Projects
Multiproject 1

Docs overdue with us: 1483
 Docs overdue with customer: 175

[Edit](#)

Progress | Projects | Query

■ Completed
 ■ Not Started
 ■ In Progress

Incomplete with Us Total: 1648

By Due Date ▾

Overdue	Scheduled	All
1483	143	1648

Incomplete with Customer

Overdue 175 | Scheduled 0

Docs ready to send 8
 Docs not yet downloaded by target 9

15 Projects
Multiproject 1

Docs overdue with us: 1483
 Docs overdue with customer: 175

[Edit](#)

Progress | **Projects** | Query

Manually added	0	^
Added by query	15	v

- Air Release Valves
- Deluge system
- Indicators
- ITS Prelim Project
- Large Order
- Mega Unit - Tx
- New plant order
- Plant Upgrade
- Project 1

The image shows a screenshot of a project dashboard tile. At the top left, it says '15 Projects' and 'Multiproject 1'. To the right of the title is a yellow pushpin icon. Below the title, there are two lines of text: 'Docs overdue with us: 1483' and 'Docs overdue with customer: 175'. Underneath this is a blue 'Edit' button with a pencil icon and a blue upward-pointing arrow icon. Below the edit button is a tabbed interface with three tabs: 'Progress', 'Projects', and 'Query'. The 'Query' tab is currently selected. The main content area of the 'Query' tab is empty, but it has a header section with the following text: 'Status', 'Open', 'Assigned User', and 'Just mine'.

Select **Done** to apply the changes and save. The new tile will be added to **Pinned** projects on the **Project Dashboard**.
