

Multi-Project Tiles

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

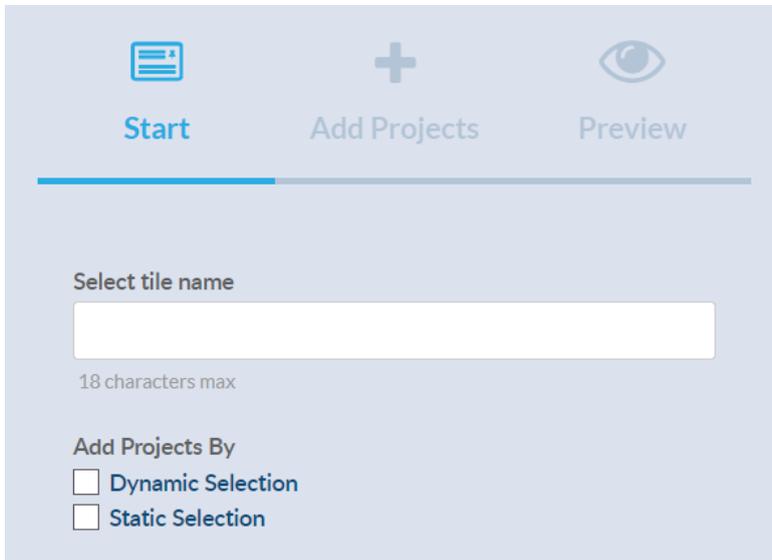
Create multi-project tile

1. On the **Project Dashboard**, select **Add Tile**.

Project Dashboard



2. Enter a name for the tile and select whether to add projects by dynamic (define a query) or static (pick specific projects) or both.

A screenshot of the 'Add Projects' form. At the top, there are three icons: a document icon labeled 'Start', a plus sign labeled 'Add Projects', and an eye icon labeled 'Preview'. Below the icons is a horizontal line. Under the line, there is a 'Select tile name' label followed by a text input field. Below the input field, it says '18 characters max'. Underneath that, there is a label 'Add Projects By' followed by two radio button options: 'Dynamic Selection' and 'Static Selection'. Both radio buttons are currently unselected.

2a. If **Dynamic selection** is checked, a screen will appear to define your criteria.

Start **Dynamic** Preview

< **Dynamic selection**
 Projects will be added or removed to your multi-tile automatically.

Filter by status
 All
 Open
 Complete
 Hidden

Filter by assigned user
 All
 Just mine
 Selected

Filter by due date
 Project due in days
 Overdue

Project due date based on
 Latest equipment shipment date (Default)
 Latest document due date
 Other Data5
 Other Data6

Filter by project notes
 Job
 Customer
 End User
 Affiliate

View matching projects

Delete Cancel Save and continue >

To preview the filter results, select the **View matching projects** option, on the bottom right of the page.

2b. 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**. The tile preview will appear showing two or three tabs (the query tab only shows if a dynamic query was set).

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
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, it displays '15 Projects' and 'Multiproject 1' with a yellow pushpin icon. Below this, it shows 'Docs overdue with us: 1483' and 'Docs overdue with customer: 175'. There is an 'Edit' button with a pencil icon and an upward arrow icon. Below the text are three tabs: 'Progress', 'Projects', and 'Query'. The 'Query' tab is selected. The main content area is a large empty box 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**.
