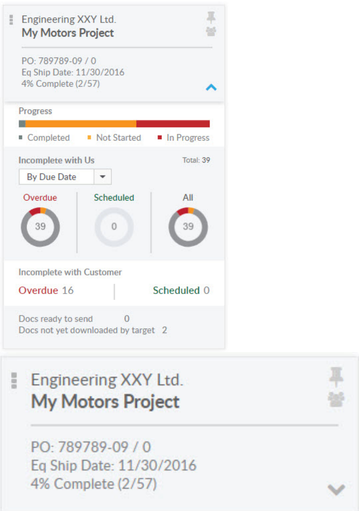
Project Dashboard Overview and Tile Layout

08/02/2024 1:38 pm MDT

The project dashboard displays summary information for every project in the system. Note that you can filter, group and apply lenses to this data, to maximize the value of the presented data.

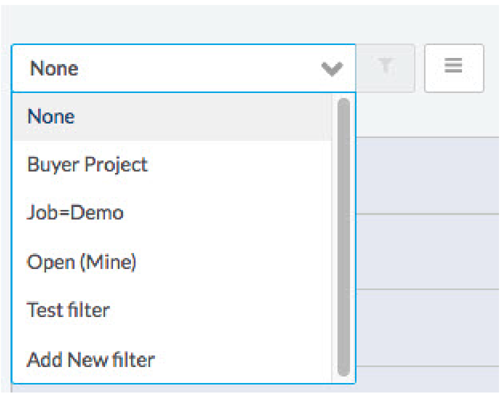
The Project Summary Tile

DocBoss summarizes key performance information about each project (or multi project) into tiles. Each tile can be displayed in an expanded or compressed form.



Filtering tiles on the dashboard

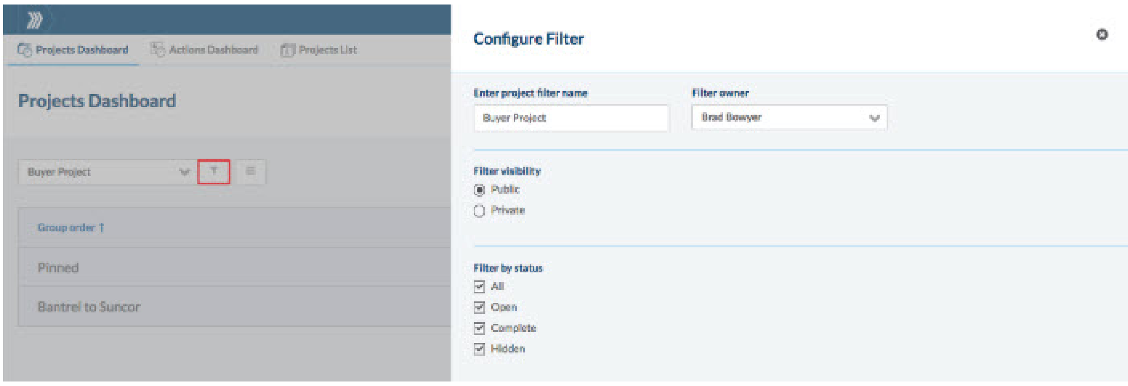
The projects which appear on the dashboard depend on the filter setting you have selected. If no filter is selected all projects will appear.



To add a new filter

Select **Add New Filter** option at the bottom of the list.

To edit an existing filter



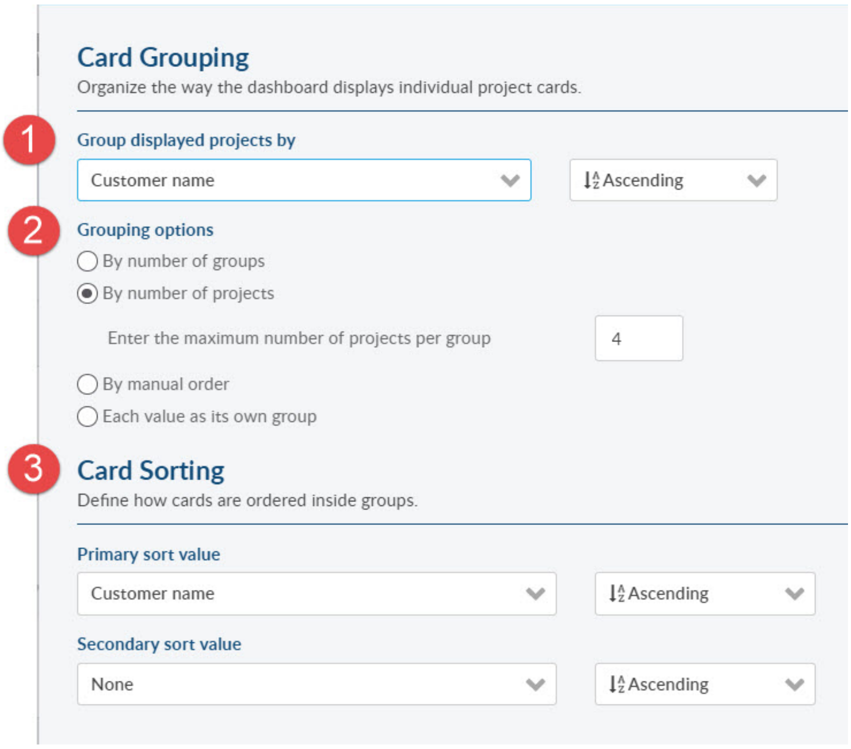
Click the funnel icon.

Make changes and SAVE. This just edits the existing filter.

Note that if you would like to save your changes as a NEW filter - just CHANGE THE NAME of the filter AND click SAVE AS. A new filter will be created with the new name and the original filter will remain.

Grouping Project Tiles

Click the grouping icon to open the grouping configuration panel.



1. This determines how projects will be grouped. You can group by customer, by job, by due date and many other fields. Note you can group by the custom ORDER DATA fields also, if you want to establish a custom sorting.

2. Grouping allows you to define the SIZE and NUMBER of groups.

- Ex. I want only 10 groups, regardless of group size. [**Number of groups**]

- Ex. I want 4 projects in each group, regardless of the number of groups. [**Number of projects**]

- Ex. I want to make my OWN groups. You can define the start and end point of your groups. note they will still be autofilled. [**Manual order**]

- Ex. I want a group for every customer (regardless of the size of the group). [**Each value as own group**]

3. The sort values determine sorting INSIDE each group.

- Ex. Inside by customer group, I want the projects ordered by End User Name [**primary sort**], then PO number [**secondary sort**].

Special group "Pinned"

This groups displays all pinned cards, as well as all multi project cards.

Tile Detail

Collapsed View

1. Drag point If the card has been dragged out of its default order, this icon will turn yellow. If clicked, the card will be returned to its default position

2. Customer Name (default line 1*)

3. Project Name (default line 2*)

4. Click to add tile to pinned group. Click again to unpin.

5. Click to show the list of roles, and assigned users.

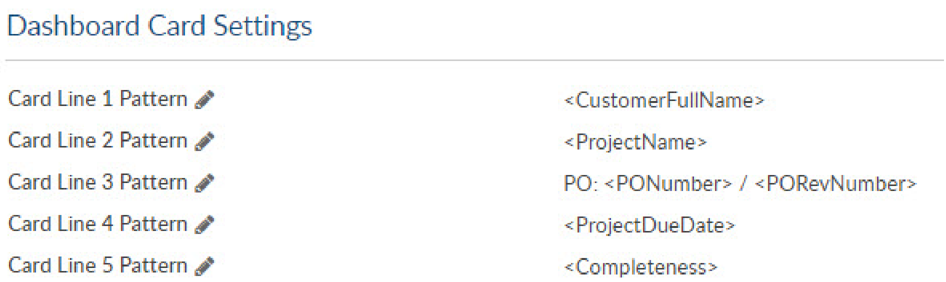
6. PO / PO Rev number (default line 3*)

7. Date. Last equipment ship date (default line 4*). Other options include Last Document Due Date, or Other Data 5/6.

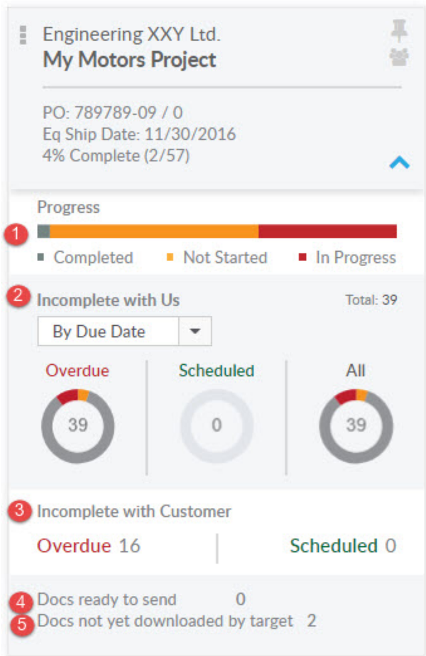
8. % complete (default line 5)*. This is the number of cards in “Stage Complete” status, vs the total number of cards.

9. Click to expand tile.

* Default data settings can be changed on the admin / general screen (see below from admin screen).



Expanded view



1. This bar shows the overall status of documentation, from complete (stage complete) to in progress, to not started (Null) documents.

2. This represents cards which are the USERS RESPONSIBILITY to submit. The user can choose to display by due date, or by location.

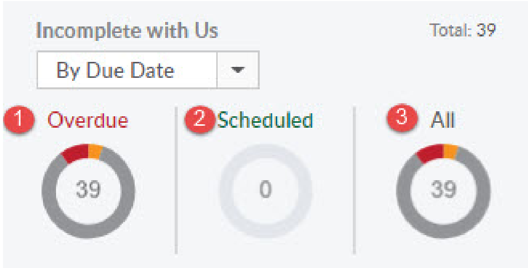
3. These documents are WITH THE CUSTOMER. Again – we show those which are overdue, and those which are scheduled to be returned (i.e. not overdue)

4. Shows any documents which are in the outbound queues, but have not been issued to the customer/supplier.

5. Identifies documents which have not yet been downloaded by the customer. You can clear these warnings

from the transmittal list if desired.

Incomplete with us: By Due Date

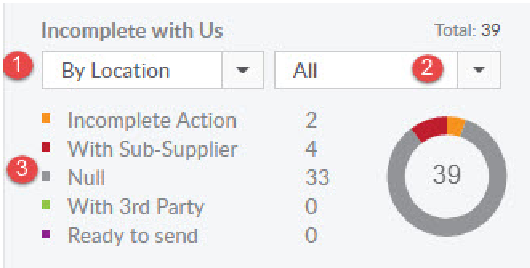


1. Documents which are overdue to the customer. Colors in this circle will show the location of such documents. More detail is available by scrolling over the circle.

2. Documents which are NOT YET DUE. We introduce a new term “Scheduled” to represent these documents. i.e. They are scheduled to be submitted but are not yet due.

3. Total of incomplete documents which remain our duty to submit.

Incomplete with us: By Location



1. If you prefer to see the data by location, you can change the setting in this dropdown. (*this can be set as default in your user profile)

2. You can view all documents, or you can further restrict the data by overdue or scheduled documents.

3. You can see where the documents are – i.e. how many of the documents are in NULL status.