DocBoss System Navigation

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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.

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Project List									Customer 🔫	🛞 Tur	n on len:	ses	٥
🛱 Multi-Project Card Report													
Expedite Projects	~ т	=						+ Add T	ile 🧳 Collapse All	Files (🖌 Expai	nd All	Tiles
Sign Documents													
+ Add new Project								Tiles	Open Act	tions			~

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

🕅 Actions Dashboard 🚺	ct Dashboard	Project List
Review Dashboard		
Project List		
🛱 Multi-Project Card Report	4	
Expedite Projects	· T	=
Sign Documents 6		
+ Add new Project 7		

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.

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Project Hub	Project Hub	Outstanding Actions	Index Reports & Pr Compilations Est	ices & timates
Key Metrics for Cards Document Card Progress	Cards Code List (Requirements) Card List	Cards In/Out Incoming Documents Outgoing Submittals	Equipment List Levels	Set Up - Main Stage Lists
Incomplete cards with us	Card to Unit Changes Obsolete Cards Request Cards from Supplier			ACME Return Statuses Expedite Settings Internal Approval Statuses Distribution Lists
Location ActuatorCo (Awaiting first receipt				Project Template Compil. & Pkg Presets Routing Scenario Card States

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

Project Hub 1 9 Outstanding 2 Index Reports & 3 Estimates 4							
Cards 5	Cards In/Out	Equipment 7	Set Up				
Code List (Requirements)	Incoming Documents	Equipment List	Main				
Card List	Outgoing Submittals	Levels	Stage Lists				
Card to Unit Changes			ACME Return Statuses				
Obsolete Cards			Expedite Settings				
Request Cards from Supplier			Internal Approval Statuses				
			Distribution Lists				
			Project Template				
			Compil. & Pkg Presets				
			Routing Scenario				
			Card States				

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

<u>3) Lists</u>

- 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