

DocBoss System Navigation

09/29/2025 3:24 pm MDT

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

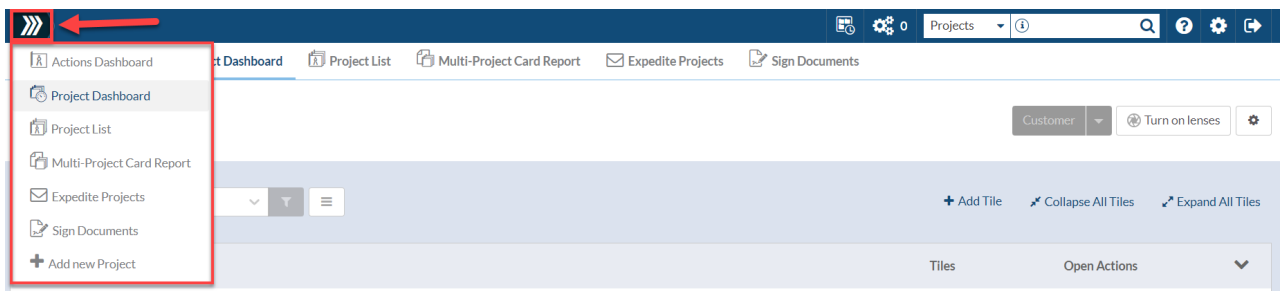
There are three menus you'll be working out of:

- **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)

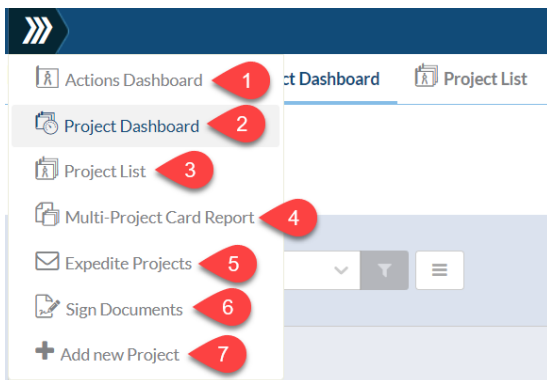
*A note on cards: In the explanation of our menu items and features below, you will see many references to **cards**. In DocBoss, a card acts like a folder for all the different versions of a document throughout its lifecycle. Each card stores its document's metadata (document number, status, due dates,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

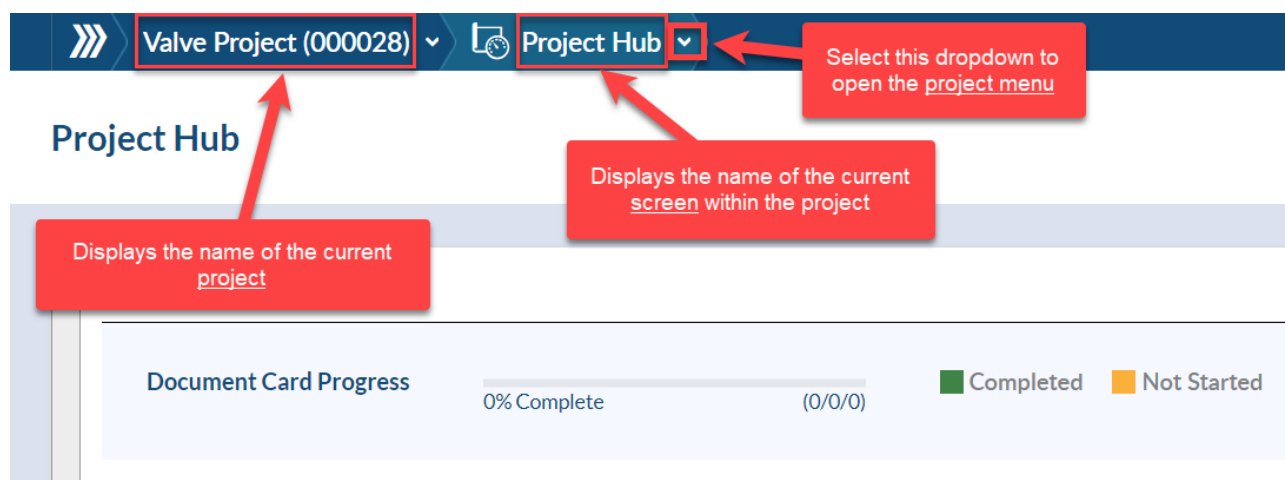
Project menu

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

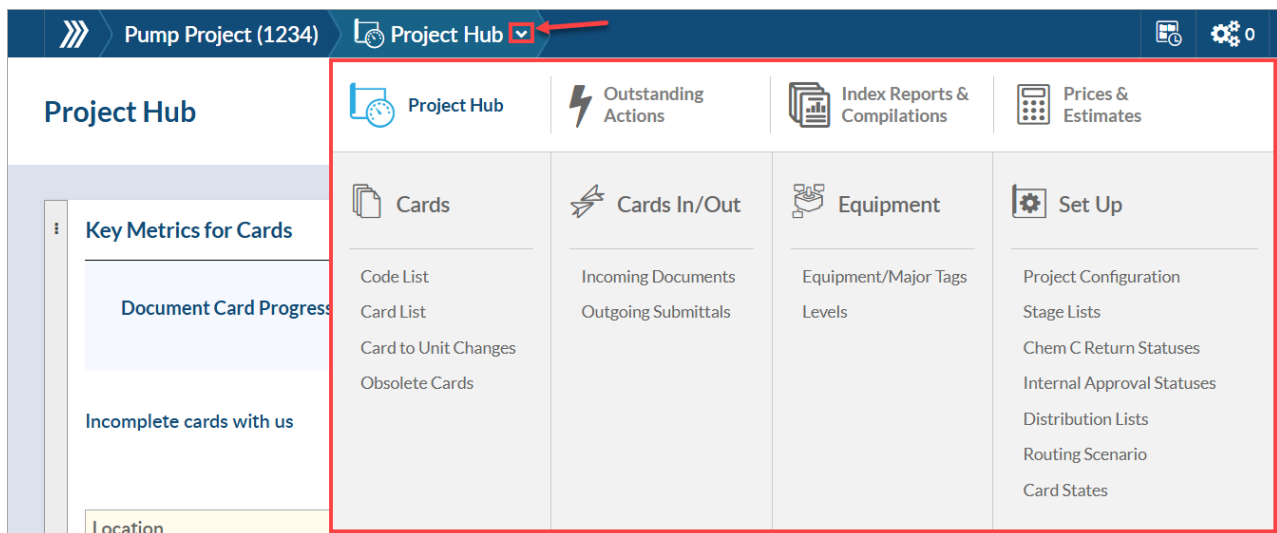
Ways to open existing projects in DocBoss:

- 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

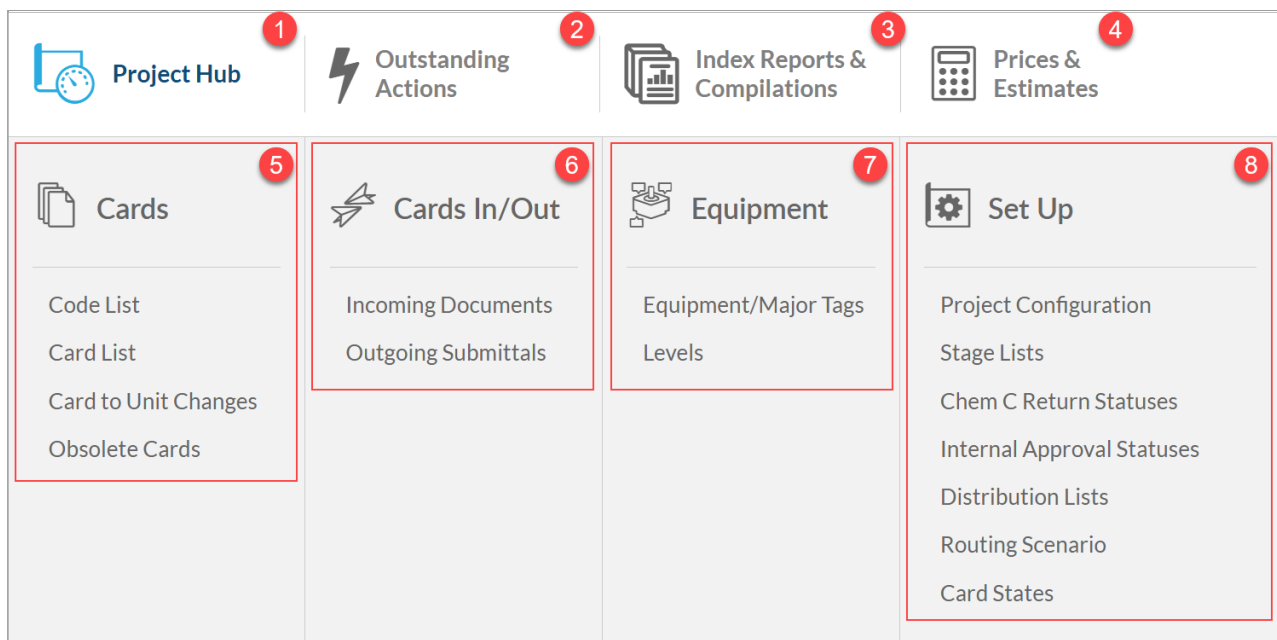
This will take you to the screen that is selected as the project's landing page (by default, the **Project Hub**). Whatever screen you are on, the navigation bar inside a project functions the same:



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

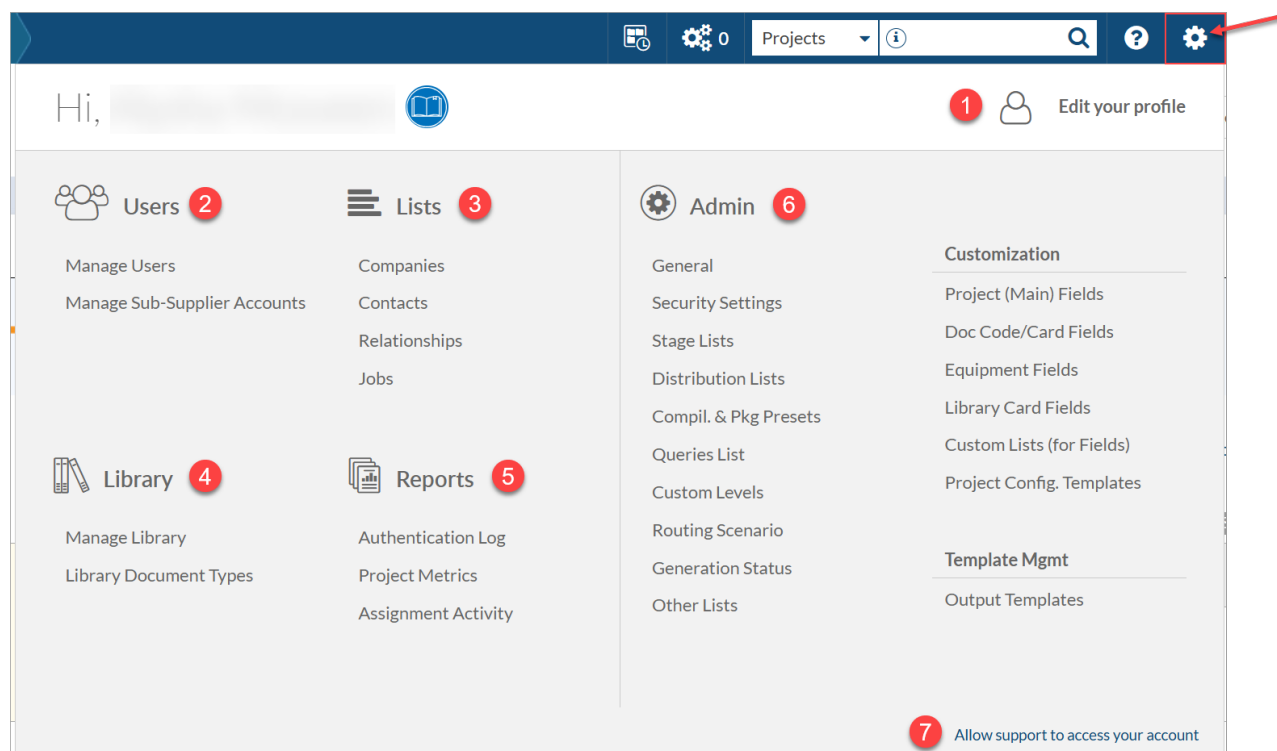
- Manage the list of equipment related to the project

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.



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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
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