Reviewer User Guide

07/15/2025 2:40 pm MDT

This article provides an overview of the areas of DocBoss that are especially useful for reviewer users - knowing these key features will set you up for success!

Click to navigate to a section:

- Login
- General Navigation
- Search
- Card List
- Incoming/Outgoing Documents
- Outstanding Actions
- Other Reports

Login

- 1. Login: email address
- 2. Password: provided by your administrator

General Navigation

1. Logo Menu

- a. Quick access to dashboards, project list, multi-project card report, and signing page
- b. *Same options available below in secondary bar*

2. Recent projects

a. Quick access to the projects you've visited recently

3. Active processes

- a. Provides a list of any in-progress actions (e.g., submittals being sent, compilations being generated, etc.)b. Actions typically initiated by doc controller(s)
- b. Actions typically initiated by doe conti

4. Search bar

a. Allows searches for projects, contacts, companies, documents, and libraries

5. Support site

a. Re-directs you to the DocBoss support site, where you can find information about any/all DocBoss features

6. System menu

a. Provides access to your profile, as well as the lists you have access to (i.e., companies, contacts, relationships, and jobs)

7. Exit (i.e., log out)



Search

1. Find projects

a. Search box in top right

i. Projects > Search by Project name, PO number, Job number, Sales order number (i.e., Ref number), etc.

- b. Look for projects in:
 - i. Project dashboard
 - 1. Filter results (e.g., "Select Project filter" = shows <u>all</u> projects you have access to
 - ii. Project list
 - 1. Search by keyword
 - 2. Sort/filter in the grid (e.g., filter by your name in role user columns)
 - 3. Use quick filters (e.g., Only my projects)

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Actions Dashboard	🖏 Project Dashboard	🕅 Project List	🕞 Multi-Project Card Report	Sign Documents							

- 2. Find documents in multi-project card report
 - a. Search by keyword
 - b. Sort/filter in the grid (e.g., filter by your name in role user columns)
 - c. Add non-column filters (e.g., all due cards)
 - d. Article: Multi-Project Card Report
- 3. Find all (cross-project) actions from actions dashboard
 - a. Sort/filter in the grid
 - b. Use quick show/hide filters (e.g., Show my actions only)

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Card List

(Project Menu > Cards > Card List)

Reviewer users can view all cards on the project, including the card history. The active file can also be downloaded by clicking the icon in the "Document" column.

Document Status/Status Combined Explanation

Default DocBoss Statuses

NULL	Needs active file (i.e., document has never been uploaded)
Х	Customer status not yet assigned (i.e., document added to the system)
Z	System completed (i.e., document workflow is fully complete)

• Return Statuses (Example - will vary by company

1	Approved
2	Approved with Comments
3	Rejected

4 For Information

• Location (Status Suffixes)

+	Submitted to Customer
-	Submitted to Sub-Supplier
*	Submitted Internally/to 3 rd Party
()	Pending submittal, expecting document return (contains above code)
< >	Pending submittal, not expecting document return (contains above code)

• Routings (Role Suffixes)

d	Doc Controller
р	Preparer
С	Checker
а	Approver

• Internal Approval Status (if applicable)

{A}	Approved
{P}	Pending
{R}	Rejected



Example: 2.dp(+)

The document was received from the customer in status 2 (i.e., Approved w comments/Resubmit). It will be queued for submittal back to the customer (with return expected), but it must first be reviewed by the doc controller, followed by the preparer before it appears in the submittal queue.

	Doc Code	Title ↓		Status (Combined)	Card Name	(Auto)
	B01	General Ar	rangement Drawings	2.dp(±)	<u>B01 123-5</u>	680
	B01	General			0	81
	B01	General	Review Progress		v	02
	B01	General	Waiting for file			03
			Doc ControllerPreparer			
-		_	Queue	to stage target (customer)		Itered rows)

• Article: Status (Combined) Column Explanation

Stage Lists

• System-generated stage lists:

IFI	Issued for Information
IFR	Issued for Review
NIS	No Individual Submission

- If a stage list has multiple stages (e.g., IFR-IFC-IAB), the document will move through each stage before it is considered complete
- Article: Introduction to Stage & Stage Lists

Incoming/Outgoing Documents

(Project Menu > Cards In/Out)

Reviewer users can view all incoming and outgoing documents.

For incoming, the submittals are separated by file source – from sub-supplier (left), from internal/3rd party (center), and from customer (right).

Cards In/Out				Documents	× /					₽0	🔅 0 Pro	ojects	• (i)	Q	8 🔅	•
I	t															
ncoming	g Document	s 🛄														
Existing	g Submittals fi	rom Sub-Su	upplier		Exi	sting	Submittals f	rom Interna	I/Third-Pa	arty	Existi	ng Su	bmittals from A	CME		
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For outgoing, pending submittals are separated by queue – to customer (top), to internal/ $\mathcal{3}^d$ party (middle), and to sub-supplier (bottom). Submittal history is also visible below the queues.

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aternal/Third-Par
Sequence: 1
Sequence: 1

Outstanding Actions

(Project Menu > Outstanding Actions)

Document controllers will be assigning documents for your review.

Finding actions

- All assigned actions: Actions Dashboard
- Project Specific: Project Menu > Outstanding Actions
- Article: Outstanding Actions

Completing actions

- 1. Open action by clicking on card name
- 2. Upload a new file (if required)
 - a. Drag the file directly onto the card in the grid
 - b. Open the card form and drag (or search for) the file using the "New File" drop-box

tstanding A	ctions	Outstandir	ng Actions 👻			Outstanding Action Card: B01_123-5730 Review Progress (click to see full workflow): Doc Controller Viewer Off	O Histo
Users : Select or ty	rpe ahead		Filter set Select Filter Set		× + =	File in Document Card 0001234-B01-012-01_Rev0_Sub001.pdf	8
						Z New File	
Show action/card due Card Name(Auto) ↑	e date problems only Sho Doc No. (Omega) 7	W DesCode	Title	*	Status (Combined)	New File Drag and drop new file Or choose files from disk	
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3. Add markup

- a. Turn the viewer on
- b. Switch to the markups screen (comment bubble icon)

c. Select the markup type you'd prefer and fill in the required information, clicking "Save" once complete

d. Article: Markups on documents

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Order Number: Order123 Model: GV1234 Update model number				Feedback:	
			Ľ		Save

- 4. Update revision number
 - a. Scroll to the "Document Info" section and update the "Rev #" value

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5. Add comment(s)

a. Scroll to the bottom of the card form and add the comment to the appropriate field (i.e., comments to the customer, the sub-supplier, or just internally)

				Outstanding Action Card: B01_123-5730 Review Progress (click to see full workflow): Doc Controller Viewer Off	O History
				Comments	
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ment Drawings			2.p(+)	Drag and drop new file Or choose files from disk	
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				Drag and drop new file Or choose files from disk	
	•	-		Comments (Internal/Third-Party)	
					1.
				Drag and drop new file Or choose files from disk	

6. Save changes

- a. Your "turn" (i.e., no actions to be completed before you)
 - i. To complete your action → "Complete action"
 - 1. If a notification should be sent to inform someone of the completed action, choose "Complete action & notify"
 - ii. To save without completing action \rightarrow "Save for later"
 - 1. If a notification should be sent to inform someone of the progress, choose "Save for later & notify"

b. Not your "turn" (i.e., actions to be completed before you

i. To save your progress → "Save"

1. If a notification should be sent to inform someone of the progress, choose "Save & notify"

c. Article: Complete an outstanding action

Outstanding Action Notifications

If you wish to be notified immediately when an action is assigned to you, you can enable the action-related options on your profile (System Menu > Edit your profile > Email Notifications > Alert). Available options are:

- "Alert me about pending sign actions assigned to me"
- "Receive an email for each action assigned to me"
- "Receive an email for each internal approval action assigned to me"

Outstanding Action Report

If you wish to be periodically (daily or weekly) notified of your outstanding actions, you can enable the "Receive a list of my open actions" option on your profile (**System Menu > Edit your profile > Email Notifications > Lists**).

• Article: Automated email reports from user profile

Other Reports

Status/Stage Change Summary Report

If you wish to be periodically (daily or weekly) notified of any status/stage changes, you can enable the "Send me a report showing all changes to status/stage" option on your profile (**System Menu > Edit your profile > Email Notifications > Reports**).

- This report can be customized to show all projects, or just a select number of projects
- Useful for project managers/supervisors
- Article: Automated email reports from user profile

Document Index (SDI) Report

To view the document index (SDI), open the appropriate project, and navigate to **Project Menu > Index Reports & Compilations**. If it has already been generated, you can download it by clicking the .xlsx icon under the "Download" column. If it needs to be (re)generated, click the generate icon under the preferred export option (.xlsx or PDF).