

Reviewer User Guide

01/28/2026 12:11 pm MST

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:

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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)

4. Search bar

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

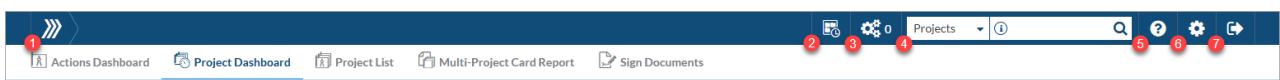
5. Support site

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

6. System menu

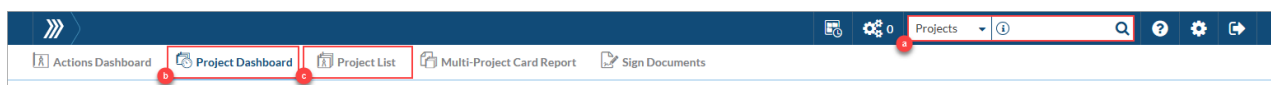
- a. Provides access to your profile, as well as the lists you have access to (i.e., companies, contacts, relationships, and jobs)

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

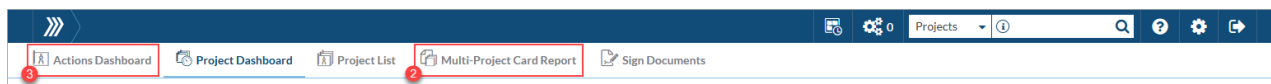


Search

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 all 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)



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)



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)
X	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
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- **Location (Status Suffixes)**

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

- **Routings (Role Suffixes)**

d	Doc Controller
p	Preparer
c	Checker
a	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)
<input type="checkbox"/>	B01	General Arrangement Drawings	2.dp(+)	B01_123-5680
<input type="checkbox"/>	B01	General		81
<input type="checkbox"/>	B01	General		02
<input type="checkbox"/>	B01	General		03

Review Progress

- Waiting for file
- Doc Controller
- Preparer
- Queue to stage target (customer)

- **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/3^d party (center), and from customer (right).

Valve Project (0001234) Incoming Documents

Cards In/Out Incoming Documents

Existing Submittals from Sub-Supplier

2 folders

	Name	Submittal Date	Progress	Sub-Si
✓	2025-07-10_124102	2025-07-10	6/6	Sub-Si
✓	2025-07-10_124531	2025-07-10	6/6	Sub-Si

Existing Submittals from Internal/Third-Party

1 folders

	Name	Submittal Date	Progress	From
ⓘ	2025-07-10_124510	2025-07-10	0/6	Omega

Existing Submittals from ACME

2 folders

	Name	Submittal Date	Progress	Tools
✓	T-002	2025-07-10	6/6	
✓	T-003	2025-07-10	6/6	

For outgoing, pending submittals are separated by queue – to customer (top), to internal/3^d party (middle), and to sub-supplier (bottom). Submittal history is also visible below the queues.

Valve Project (0001234) Outgoing Submittals

Pending Submittal to ACME Engineering

Next Submittal Sequence: 4

Grid Row Colors

ACME Submittal

Select	Card Name(Auto) ⓘ	Level ⓘ	Reference ⓘ	Doc Code ⓘ	Doc No. (ACME) ⓘ	Rev # (Omega) ⓘ	Stage ⓘ	Status ⓘ	Due to ACME ⓘ	Active File Link	Comments (ACME)	Comments File Link (ACME)	Comments (Intern
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Pending Submittal to Internal/Third-Party

Next Submittal Sequence: 1

Omega Submittal

Select	Card Name(Auto) ⓘ	Level ⓘ	Reference ⓘ	Doc Code ⓘ	Doc No. (ACME) ⓘ	Rev # (Omega) ⓘ	Stage ⓘ	Status ⓘ	Due to ACME ⓘ	Active File Link	Comments (Internal/Third-Party)	Comments File Link (Internal/Third-Par
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Pending Submittal to Sub-Supplier

Next Submittal Sequence: 1

Select Sub-Supplier to Begin Submittal: All Sub-Suppliers

Sub-Supplier Submittal

Select	Card Name(Auto) ⓘ	Level ⓘ	Reference ⓘ	Doc Code ⓘ	Doc No. (ACME) ⓘ	Rev # (Omega) ⓘ	Stage ⓘ	Status ⓘ	Due to ACME ⓘ	Active File Link	Comments (Sub-Supplier)	Comments File Link (Sub-Supplier)	Con
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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

The screenshot shows the 'Outstanding Actions' dashboard for 'Valve Project (0001234)'. On the left, a table lists actions. The first row is highlighted with a red circle '1'. On the right, the details for 'Card: B01_123-5730' are shown. A red circle '2' highlights the 'New File' section, which includes a 'File in Document Card' input field and a 'New File' button with a 'Drag and drop new file' area.

Card Name(Auto)	Doc No. (Omega)	Doc Code	Title	Status (Combined)
B01_123-5680	0001234-B01-003-01	B01	General Arrangement Drawings	2.dp(+)
B01_123-5703	0001234-B01-010-01	B01	General Arrangement Drawings	2.p(+)
B01_123-5729	0001234-B01-011-01	B01	General Arrangement Drawings	3.c(+)
B01_123-5730	0001234-B01-012-01	B01	General Arrangement Drawings	3.dc(+)

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](#)

The screenshot shows the document viewer interface. A red circle 'b' highlights the comment bubble icon in the top right toolbar. A red circle 'c' highlights the 'Save' button in the markup form. The document content shows 'ValveCo Certified Drawing' with a yellow box around 'Update model number'.

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

Outstanding Action
Card: B01_123-5730
Review Progress (click to see full workflow): Doc Controller
Viewer Off

Document Info
Linked Equipment Sub-Suppliers
Valve Company
Document Sub-Supplier Override
- Select Sub-Supplier -
Title
General Arrangement Drawings
Rev # (Omega)
0
Last sent as Rev 0

5. Add comment(s)

- 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

Comments
Comments for NEXT ACME submittal
Comments for NEXT Sub-Supplier submittal
Comments (Internal/Third-Party)

6. Save changes

- Your "turn" (i.e., no actions to be completed before you)
 - To complete your action → "Complete action"
 - If a notification should be sent to inform someone of the completed action, choose "Complete action & notify"
 - To save without completing action → "Save for later"
 - If a notification should be sent to inform someone of the progress, choose "Save for later & notify"
- Not your "turn" (i.e., actions to be completed before you)
 - To save your progress → "Save"
 - If a notification should be sent to inform someone of the progress, choose "Save & notify"
- 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).
