# What reporting options does DocBoss have?

12/03/2025 3:49 pm MST

DocBoss provides a variety of different reporting options for different purposes. This article summarizes each of the available options (both at the project and system level), outlines the information included in the report, indicates the intended purpose, identifies where the report can be accessed/who can access it, and provides resources for additional information.

## Project reports

### Project hub

- **Summary:** A page with curated information about the project. Metrics outlined on the page provide the real-time status of cards and actions on the project, and are clickable to facilitate efficient work. The card metrics are exportable to CSV, and an SDI report can also be generated and exported from the page.
- **Intended purpose/use case:** Can be used as the landing page when opening a project, and/or used to view a quick summary of actionable items.
- **How to access:** *Project Menu > Project Hub*
- **Who can access:** All DocBoss users have access to view the project hub and download a CSV export.
- **More information:**
  - Project Hub

### Project status report

- **Summary:** A CSV export with the most relevant/pertinent information about cards (e.g., card title, doc no.'s, due/expected dates, card status, etc.). The cards included in the report will be those that are included after filtering the card list. Alternatively, the user can individually select the cards to be included in the report.
- **Intended purpose/use case:** Downloading a snapshot of a filtered list of cards OR the cards selected by the user. Note that this export is **not** intended for making bulk updates to the card list.
- **How to access:** *Project Menu > Card List > More Actions > Download Status Report (CSV)*
- **Who can access:** All DocBoss users have the ability to download a CSV status report.

### SDI report

- **Summary:** A full list of documentation included on a project, which may include not applicable/included in doc codes, cards in states other than "active" (e.g., cancelled, voided, etc.), and/or obsolete cards. Submittal history information may also be included. This report is often required to be submitted to the customer.
  - **Note:** SDI reports can also be run per job, where all projects assigned to that job will be included in the report.
- **Intended purpose/use case:** Providing a list of required documents to the customer. Can also be used to generate an internal overview of documentation on the project for tracking/reporting purposes.
- **How to access:**
  - Per project: *Project Menu > Index Reports & Compilations > SDI Reports*
  - Per job: *System Menu > Lists > Jobs*
- **Who can access:**
  - Per project: All DocBoss users have the ability to generate and download a project-based SDI report,

  but an SDI report must first be added to the project by a full or admin user. The configuration of the SDI report can only be modified by full and admin users.
  - Per job: All DocBoss users have the ability to generate and download a job-based SDI report, but an SDI report must first be added to the job by a full or admin user. The configuration of the SDI report can only be modified by full and admin users.
- **More information:**
  - Add an SDI Report to your project
  - Regenerate SDI Reports
  - Job based Supplier Document Indexes

## Expediting

- **Summary:** A report that is sent to a defined target (customer, sub-supplier, or internally (to DocBoss users OR non-DocBoss users within your company), outlining a list of documents that are late to be returned.
- **Intended purpose/use case:** Sending the list of documents to prompt their return. Can also be used to generate a list of overdue documents for any given target as a tracking/reporting measure.
- **How to access:**
  - To enable/configure on project: *Project Menu > Set Up > Project Configuration > Expediting > General*
  - To run the report: *Logo Menu > Expedite Projects*
- **Who can access:** All DocBoss users can view the configuration of expedite reports on the project. The configuration of the reports can only be modified by full and admin users, and the reports can only be generated/sent by full and admin users.
- **More information:**
  - Enable Expediting for a Project
  - Configure Expedite Reports
  - Run the Expedite Process and Send Emails

# System reports

At the system level, there are reports related to projects, as well as reports related to user activity.

## Project-related reports

### Project dashboard

- **Summary:** A page with curated information about each project in the system (presented as "tiles"). Metrics outlined in each tile provide the real-time status of cards on the project, and are clickable to facilitate efficient work. The way tiles are sorted, grouped, and filtered can be customized to each users' preference.
- **Intended purpose/use case:** Can be used as the landing page when opening opening DocBoss, and/or used to view a quick summary of all projects in the system.
- **How to access:** *Logo Menu > Project Dashboard*
- **Who can access:** All DocBoss users have access to view the project dashboard.
- **More information:**
  - Project Dashboard Overview and Tile Layout
  - Configure Lenses on the Dashboard
  - Multi-Project Tiles

### Multi-project card report

- **Summary:** A list of all cards across all projects in the system. Note that the grid will be empty until a keyword

or filter is applied.
- **Intended purpose/use case:** Downloading a filtered list of cards across multiple projects (e.g., all cards that are overdue to the customer across multiple projects).
- **How to access:** *Logo Menu > Multi-Project Card Report*
- **Who can access:** All DocBoss users have access to view the multi-project card report and generate/download a CSV export.
- **More information:**
    - Multi-Project Card Report

## Project metrics

- **Summary:** A list of a variety of different usage metrics for the specified filter(s) (e.g., project, customer, user, etc.) within a specified date range. The report can include multiple values across multiple different filters, allowing for extensive customizability. Different targets (e.g., customer, sub-supplier, etc.) can be excluded from the report, but all targets will be included by default.
    - **Examples of included metrics:** Submittals received, files assigned (from submittals), average days to first submittal, files submitted on time, count of overdue cards, average days overdue, on-time receipt percentage, files out with the customer (total/overdue/not due yet), etc.
- **Intended purpose/use case:** View the activity on multiple projects within the last X number of days as a measure of efficiency.
- **How to access:** *System Menu > Reports > Project Metrics > Usage Report by Project*
- **Who can access:** DocBoss users with a full or admin license have the ability to generate and download a project metrics report.
- **More information:**
    - Project Metrics
    - Project Metrics - Description of each metric

## Custom card history report

- **Summary:** A custom-built report that provides a list of card data across all projects in the system. Report can include submittal history information if requested. Note that the specific data varies depending on how the report has been configured by the support team.
- **Intended purpose/use case:** Review ALL card data across all projects in the system for tracking/reporting purposes.
- **How to access:** *System Menu > Reports > Project Metrics > Custom Card History Report*
- **Who can access:** Only admin users with security permissions have the ability to generate and download a custom card history report. Note that this report is only available upon request, as it is custom built by our support team.

# User-related reports

## Authentication log

- **Summary:** A list of who has accessed the DocBoss system, when access was provided, as well as if access was denied/changes were made (e.g., password update).
- **Intended purpose/use case:** Reviewing who has accessed DocBoss within a specified date range (to evaluate license allocation).
- **How to access:** *System Menu > Reports > Authentication Log*
- **Who can access:** Only admin users with security permissions have the ability to generate and download an authentication report.
- **More information:**

    - History of Access to DocBoss

## Assignment activity

- **Summary:** List of the number document assignments (i.e., documents assigned to cards)  that have occurred within a specified time period (organized per user, project, and target).
- **Intended purpose/use case:** View the activity of a specific user within the last X number of days as a measure of efficiency.
- **How to access:** *System Menu > Reports > Assignment Activity*
- **Who can access:** DocBoss users with a full or admin license have the ability to generate and download an assignment activity report.
- **More information:**
    - Assignment Activity

Additional automated reports that are specific to each user can be enabled on the user profile. See this article for more information: Automated email reports from user profile.