

Key DocBoss Terminology

12/08/2025 1:36 pm MST

DocBoss Term	Also Known As	Description
Affiliate*	Internal company, doc control office	Internal company in DocBoss. Multiple affiliates can be used to separate divisions of a company.
Sales order number*	Project order number	Supplier's internal reference number for the project (must be unique).
Job*	-	Reference for a group of related projects (used for filtering and/or to run an SDI report including all related projects).
Project name*	-	Customer's name for the project (i.e., what should be displayed on cover pages).
PO number	-	Customer's purchase order number.
Package number	-	Customer's reference number for the project.
End user reference	-	End user's reference number for the project (if applicable).
Sub-supplier	Vendor	Additional suppliers of equipment (if applicable) contracted by your company.
Users	DocBoss users	Four "roles" on the project to assign files to other DocBoss users for review (i.e., routing). By default, these are roles are (1) doc controller, (2) preparer, (3) checker, and (4) approver. <i>*If your company uses different terms, this can be updated from Admin > General > Role names & abbreviations.</i>
Card list	Document list	List of documents on a project. Each card contains all of the metadata and revisions for a document.
Card	Document	The container that holds all metadata and file history (revisions) for a document.
Code list	Doc code list	List of doc codes required by the customer on the project. The document requirements list (SDRL/VDRL) provided by the customer is often used to build the code list.
Stage	Issue purpose, internal workflow stage	Full workflow cycle a document goes through in a single issue purpose (IFA, IFI, etc.).
Stage list	Issue purposes, internal workflow stages	Collection of one or more stages that represents the full lifecycle of a document (IFA-IFC-IAB, IFR-IFF, etc.).
Cover page	Cover sheet, title page	Typically refers to document cover page , but compilation cover pages are also available.
Transmittal	Transmittal letter, transmittal page	The file included as part of the submittal which lists all of the documents included in that submittal. Can be configured using the default DocBoss template, or a custom template .
Submittal	Transmittal <i>(*Note: NOT the term DocBoss uses for the full submittal package, but often used interchangeably within the industry)</i>	The full collection of documents being submitted together. The transmittal file is included as part of the submittal.
SDI	SDDL, SDRL, VDRL, SDL	The supplier document index report which generates a full list of documents included on the project and/or in the job . Can be configured using the default DocBoss template, or a custom template.

DocBoss Term	Also Known As	Description
Compilation	Final data book, manufacturer records book, job book	General term for a collection of cards that are submitted to the customer in a single file, usually as a PDF with a table of contents. Commonly refers to the final book submitted to the customer, but also refers to packages .
Package	-	Collection of related cards that are submitted to the customer as a single file (when it's component cards are NOT to be submitted to the customer individually). Used to manage documents like drawings and MTRs individually but submit as a package.
Expediting	Expedite request	Option to send reports of coming due/overdue document to customers, sub-suppliers, internally, or to other DocBoss users.

**If your company uses a different term, this can be updated from Admin > General > Labels.*