



# DocumentOS Command Center

## User Guide

Prepared for the Compliance Officer

An internal operations tool by the Contractor Compliance Authority for managing license-application document collection.

This guide walks through each area of the system in the order you will use it.

# Dashboard

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Your home base. The Dashboard gives you an at-a-glance view of every active document collection effort and surfaces what needs your attention today.

- **Status tiles**

Counts for active, waiting, in-review, and at-risk requests update live so you always know where things stand.

- **Activity trend**

A rolling chart shows recent throughput, helping you spot busy periods and slowdowns at a glance.

- **Jump straight in**

Open any highlighted request directly from the Dashboard to begin working without hunting through lists.

# Document Collection Requests

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The core workflow. A request tracks every file a client still needs to provide, from creation all the way through completion.

- **Create a request**

Start a new request for a client, attach the documents you need, and set expectations for what is outstanding.

- **Track progress**

Each document moves through clear states as it is requested, received, and reviewed, so nothing slips through the cracks.

- **Stay on schedule**

Reminders and status indicators keep both your team and the client moving toward a complete file.

# Clients

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Everything about a client in one place. The Clients area brings together each client record and the documents tied to their engagement.

- **Unified profile**

View the client's details alongside their requests, applications, and collected documents without switching tools.

- **Connected to Zoho**

Client records are backed by Zoho CRM and WorkDrive, so the information you see reflects your system of record.

- **Face sheets**

Generate and reference a concise face sheet summarizing the key people and facts for an engagement.

# Applications

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Turn a license application into structured data fast. Upload an application and let the assistant scan and autofill its fields.

- **Scan and autofill**

Upload a PDF or image and the assistant extracts the fields, pre-filling them from the client's record where possible.

- **Review and edit**

Check the extracted values, correct anything that needs a human eye, and keep full control over the final content.

- **Generate the packet**

Produce a completed application — the filled original form when available, plus a clean summary sheet — ready to download.

# Document Library

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Know what is required before you ask for it. The Document Library is your reference for standard paperwork by application type.

- **Standard requirements**

Browse the documents typically required for each type of license application so requests are complete from the start.

- **Consistent expectations**

Using a shared library keeps every officer asking clients for the same, correct set of materials.

# Reports

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Understand how the team is performing. Reports turn day-to-day activity into completion rates and turnaround insight.

- **Completion rates**

See how many requests reach completion and where files tend to stall.

- **Turnaround time**

Track average time to collect a full set of documents so you can set realistic expectations with clients.

# Activity

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A complete, trustworthy history. The Activity log records who changed what, and when, across the system.

- **Full audit trail**

Every meaningful action is captured, giving you accountability and an easy way to retrace steps.

- **Answer questions fast**

When someone asks what happened to a request, the Activity log has the answer in seconds.