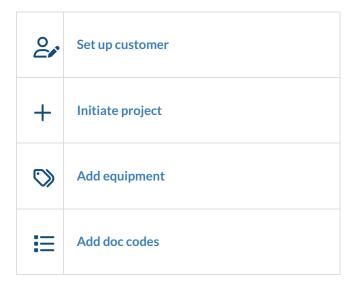
Project Setup: Quick List of Steps

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Every project setup in DocBoss follows the same four basic steps:



In addition, there are two optional steps that can be taken at the time of project creation:

- Add a compilation
- Add an index (SDI) report

Set up customer

Navigate to System Menu > Lists > Companies

- Click the pencil icon under tools to the company profile
 - If the company is not already in the system, click the "+" icon (top right of grid) to add.
- From company profile:
 - Add/update doc code list
 - Click the "+ Add List" button (top right of page) to add a new list
 - **Note**: Doc code lists are commonly named using the first and last doc code (e.g., A01 Z09)
 - Click the "+" button (top right of grid) to add doc codes to a new or pre-existing list
 - Adjust doc code details by clicking directly in the grid
 - Add/update return status list
 - Click the "+ Add List" button (top right of page) to add a new list
 - Note: Return status lists are commonly named using the statuses they contain (e.g., A/B/C/D)
 - Click the "+ Add Status" button (top right of grid) to add a status to a new or pre-existing list
 - Adjust status details by clicking directly in the grid



Initiate Project

Navigate to Logo Menu > Add new Project

- Select a project config. template to use
- Fill in/select all required values (indicated with an asterisk (*)). Key required fields are as follows:
 - Project Profile:
 - Affiliate name and address (*if applicable*), sales order number, order date, project name, customer name and address. PO number
 - Note: Project name should be entered as indicated by the customer
 - Lists, Users, and Custom Fields:
 - Doc code list, customer return status list, project users
- Once saved, additional options will appear and can be configured if desired. Additional options include:
 - Document auto-numbering (for customer and internal doc no.)
 - Templates (cover page, stamp, transmittal)
 - Output formats (e.g., outgoing file name, headers/footers, etc.)

Add Equipment

Navigate to Project Menu > Equipment > Equipment List

- Individual upload
 - Click the "+ Add" button (top right above the grid) to add a new equipment unit
 - Fill in/select all required values (indicated with an asterisk (*)). Key required fields are as follows:
 - Line no. ([supplier]), item/model, tag no., sub-supplier
- Bulk upload
 - o Click the "Import" button (bottom right below the grid) and download the template (.csv or .xlsx)
 - Fill in all required fields (indicated with an asterisk (*) and re-upload to the Import > Upload File drop zone

Add Doc Codes

Navigate to Project Menu > Cards > Code List

- Add doc codes
 - Click the "+ Add" button (top right above the grid) and select the applicable doc codes for the project
 - If a new doc code is required, click the "+ Add" button from the pop-up to add a new doc code

- Note: The new doc code will be added to the customer doc code list to be used on future projects
- · Configure the doc code list
 - Set the level for each doc code to auto-generate the appropriate number of cards
 - Custom levels can be created if/when needed, and manual cards can be used as an advanced option when additional flexibility is required
 - Note: Manual cards are typically used for suppliers of equipment that is engineered-to-order
 - Set not applicable codes to "N/A"
 - Codes that are included as part of another code can be identified from the "Included in" field
 - Set the type for each doc code
 - Generated (customer, internal, sub-supplier)
 - Documents specific to the project (assigned via incoming documents)
 - Compilation
 - Databooks and the databook table of contents (assigned via code list)
 - SDI Report:
 - Index report (assigned via code list)
 - Published:
 - Library documents (assigned via card list (or in bulk via code list))
 - Set the stage list (i.e., issue purpose steps) for each doc code
 - If a new stage list is required, add a new list (either at admin or directly on the project)
 - Set the initial submission dates for each doc code using the "Delivery days" and "Reference date" fields
 - Delivery days: Number of working days before/after the reference
 - Reference date: The specific date used (e.g., shipment date, order date, etc.)
 - o Optional Add a query to mark cards as required/unrequired
 - Select the codes from the grid that will use the query
 - Click "Actions" above the grid and select the "Set Query" option
 - Choose the appropriate query
 - If a new query is required, create a query from System Menu > Admin > Queries
 List or directly from the card list (see video for details: Trimming Auto-Created
 Registers)

Optional Steps

Navigate to Project Menu > Index Reports & Compilations

Add a compilation

• Create a compilation

- Click the "+" button (top right above the grid), enter a name, and choose a pre-configured compilation layout (optional)
- Configure the compilation settings
 - Select the templates to be used in the compilation
 - Create the compilation structure by adding the applicable doc codes/sections, and a compilation cover page if required
 - A table of contents will be included automatically
 - Enable/disable section and doc code title pages as needed
 - Adjust the table of contents/bookmark depth/numbering and organization, as well as other formatting options
 - Configure additional options as needed
- Link the compilation to the compilation doc code

Add an index (SDI) report

- Create an index (SDI) report
 - Click the "+" button (top right above the grid), enter a name, choose the template type (i.e., document index), and indicate which PDF and/or CSV/XLS template to use
 - Note: In most cases, the same template would be used for both PDF and CSV/XLS
 - Enable/disable additional options as needed
- Link the index (SDI) to the SDI doc code