Project Setup: Quick List of Steps

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

	**Set up customer**
	**Initiate project**
	**Add equipment**
	**Add doc codes**

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
  - 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.)
    - *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