Project Setup: Quick List of Steps

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Every project setup in DocBoss, regardless of how simple or how complicated the requirements are, follows the same basic workflow:

A. Set up customer

B. Initiate project

C. Add equipment

D. Add doc code requirements

E. Add compilations (optional)

F. Add index reports (optional)

Pre Project Setup (Gear Menu)

A) Set Up Customer (Gear > Lists > Companies)

1. Click on **customer name** (or add new customer)
2. In **profile**: Check/add the logo, address, contacts
3. In **Code/Status/State**:
    a. **Doc Codes**:
        i. Check if exists, else
        ii. ADD NEW CODE LIST (Name it for first code e.g A01)
        iii. Then add or upload codes
    b. **Return Statuses**:
        i. Check if exists, else
        ii. ADD NEW STATUS LIST (Name it using all statuses e.g. A/B/C/D)
        iii. Then add statuses
        iv. Mark STAGE COMPLETE for all applicable

Project setup

B) Initiate Project (Logo > Add Project)

1. Complete **Profile**
    a. **Project Name**: This should be the CUSTOMER's name for this project.

2. Complete **Default Users/Lists**
    a. Set **Internal Users** to your own name
    b. Enter **Customer Contacts** (as applicable)
    c. Select **Doc Code List**
    d. Select **Return Status List**

3. Complete **Document Auto-Numbering**
    a. Customer Document Auto-Numbering format (Only if customer has provided specific format requirements)

4. **Save** (additional options will appear after)

5. Update **Output Settings**
    a. **Templates** (cover page, transmittal, etc.), if customer has specific requirements
    b. Update **Output Formats**
        i. Change Header/Footer format
        ii. Change Outgoing File Name format, if customer has specific requirements

6. **Save**

C) Add Equipment (Project Menu > Equipment > Equipment List)

1. **Add equipment**
    - EVERY unit should be on a separate line. Every line number must be unique.
    - On export of the CSV file, starred columns are required.
    - Columns depend on the Project Fields Template.

D) Doc Codes (Project Menu > Cards > Code List (Requirements))

1. **Click +** in grid and choose codes from list.

2. **Set Levels**
    a. ONE [document code name] per [Level]
    b. Set any Not Applicable (Level=N/A) or Included In codes.

c. Generic Codes

i. Procedures:

- Opt1: Set to Order and duplicate cards for each procedure (all tags apply to all procedures)

- Opt2: Create custom level (allows each procedure to have unique tag list).

ii. Tests: Duplicate Doc Code, then edit description

- i.e. “NDE tests” to “NDE tests (PMI); NDE tests (Mag particle)"

d. Manual cards (if levels not sufficient to build list of documents)

3. **Delivery Days + Reference Date** (10 AO, AS ARAD etc...).

4. **Type** (Generated, Compilation, Published, System Generated)

    a. Generated: Document specific to the project [assign via documents in/out]

    b. Compilation: Databook and Databook Table of Contents [assign via code list]

    c. Published: Library Docs [assign via card list (or bulk via code list)]

    d. System Generated: Index. [assign via code list]

5. **Query**

    a. If you have equipment-specific doc codes, then you should apply queries

    b. Select codes, click apply below grid, set Queries, and choose stored query

6. **Stage Lists**

    a. Choose the stage lists (issue purpose steps) required for this document code.

    b. Add additional stage lists (if required). Or add/import from instance.

Optional

The following should be added if required by the customer.

E) Compilations (Project Menu > Index Reports & Compilations)

1. Compilations List grid: **Click + to add compilation**, enter name, and save.

2. **Add doc codes, sections, and move codes into the sections**. Add binder cover page.

    a. Enable/disable section and code title pages. Change templates if required.

3. **Set TOC numbering**, bookmark depth.

4. **TOC/Bookmark Pattern** (and individual code patterns if required).
5. Disable **cover sheets**, add subsections.
6. Set **advanced document sorting options**.
7. **Link to doc code** (from Code list).

F) Index Reports (Project Menu > Index Reports & Compilations)

1. SDI Reports grid: **Click +** to add index report.
2. Enter **Name** (generally "Supplier Document Index").
3. Choose **template type** = Document Index.
4. **Choose XLS and PDF template** (normally they will use the same template).
5. **Save**, and re-generate.
6. **Link to doc code** (from Code list).