Add Company Doc Code Lists

08/13/2024 3:55 pm MDT

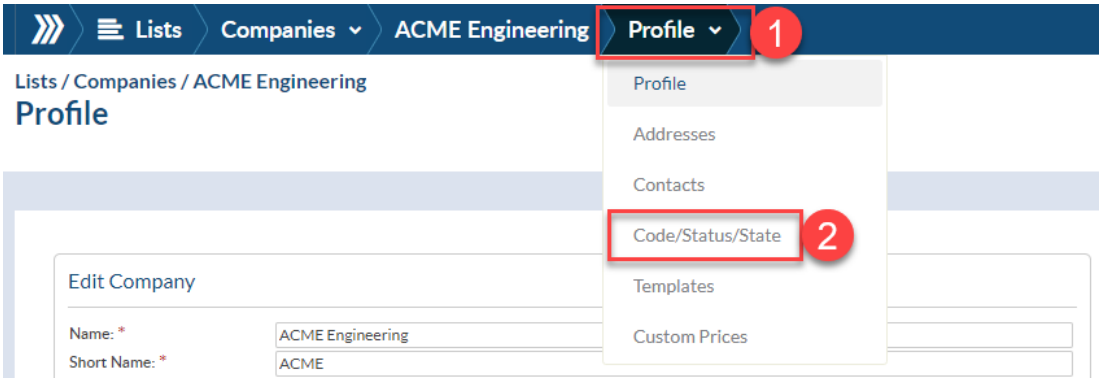
A Doc Code in DocBoss is a specific customer code or project code used to create project document groups. The following are examples of common Doc Codes:

Document Code	Document Code Description
LST	Lists
ITP	Inspection and Test Plans
DWG	General Arrangement Drawings
CAL	Calculations
PRO	Test Procedures
IOM	Installation, Operation and Maintenance Manual
RPT	Test Reports
CER	Certificates
MDR	Manufacturing Data Record

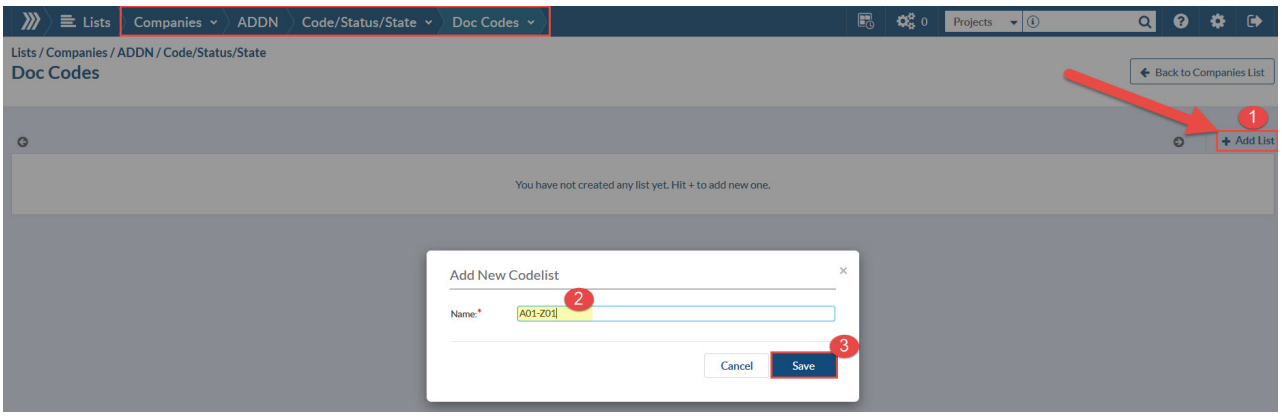
Adding Doc Codes to your customers allows you to re-use them in any of their Projects and the easiest way to automatically build the Card List (ie. Vendor Document List) is by configuring each Code settings.

Once a Customer profile is set up, Doc Code lists can be added.

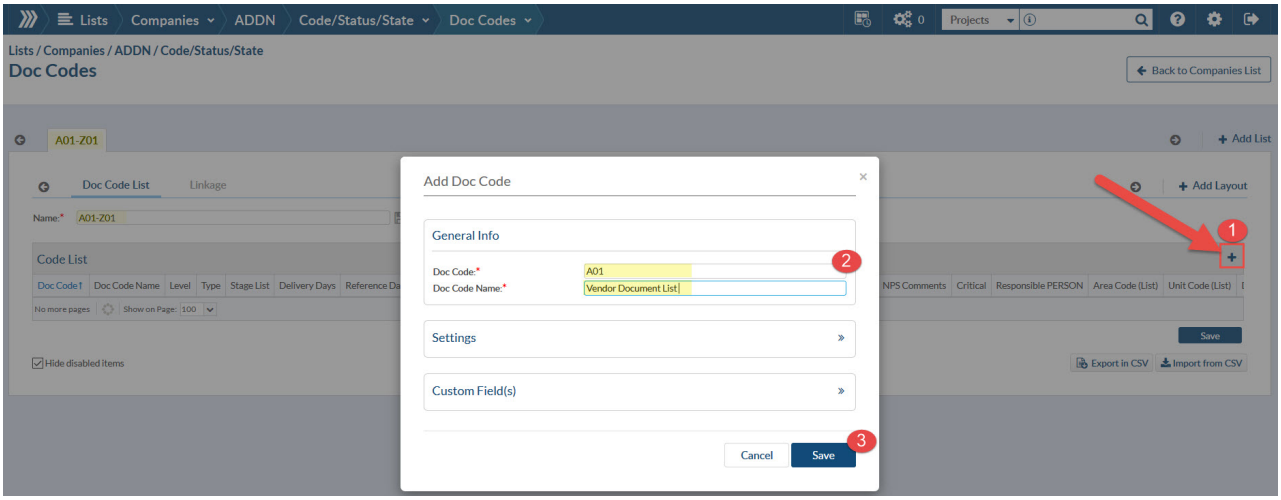
To get to a customer's code list entries, hover over the **Profile** option in the navigation bar and select **Code/Status/State**.



From the **Doc Codes** screen, select **Add List**:

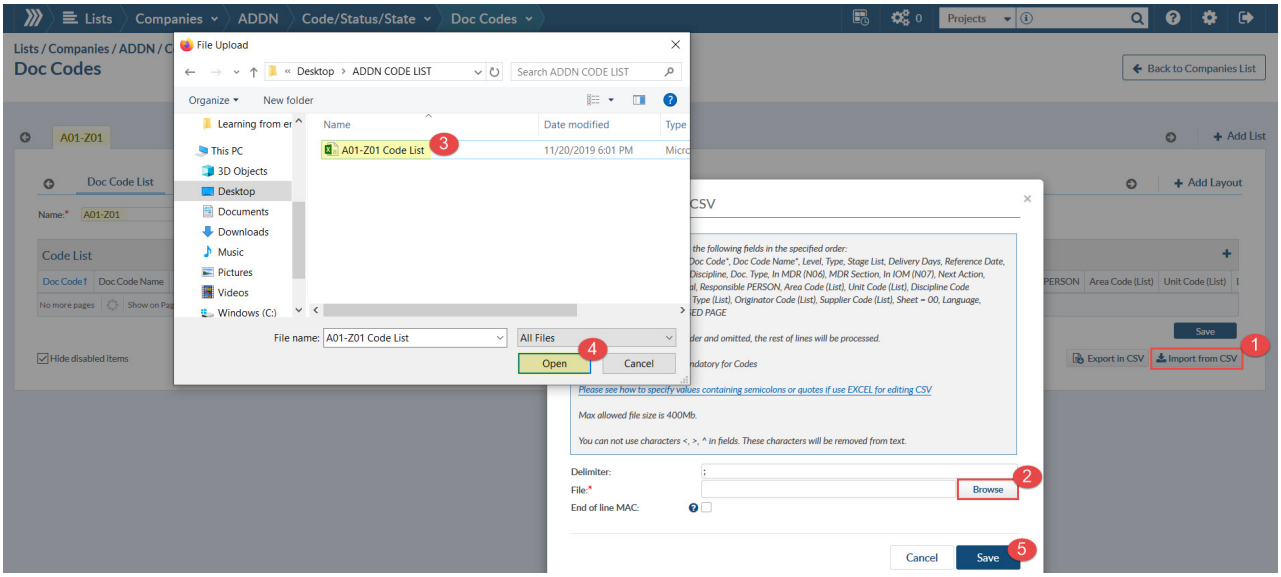


To add a Code List, click the blue **+** sign and give the list a name.



Once the list has been created. The codes and the descriptions can be entered either one at a time:

1. Click the + sign and a new window will open
2. Add Doc Code and Doc Code Name
3. Click Save



Or they can be uploaded from an Excel file. First Export in CSV, fill in the required information, then click the Import from CSV and choose the CSV file with the Codes and import it to the customer Code List.

Next steps:

Add Doc Codes to a Project

Configure Code List (Requirements)

Know more about Doc Codes:

Mapping customer codes to internal codes

Differences between Codes and Cards