Doc Codes vs. Cards

07/21/2025 3:27 pm MDT

Doc codes are the standard <u>types</u> of documents that a customer uses across all projects. These are "categories" of documents that they require, and are <u>not</u> individual documents. In DocBoss, the **Code List** is the list of <u>document types/categories</u> that will be managed on the project.

Example: Common list of doc codes provided by a customer.

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

Using the list of codes above, consider an example: There is only **one doc code** for all test procedures (PRO - Test Procedures), but there are multiple different test procedures (e.g., Hydrostatic Test Procedure, PRI Procedure, etc.) to be provided to the customer.

In DocBoss, the **Card List** is the list of <u>documents</u> that will be managed on the project. In order to manage each test procedure independently, multiple **cards** can be created to represent each document. These cards will be "categorized" under the "PRO" code provided by the customer, aligning with their requirements.

Doc Code	Title	Customer Document Number
LST	Vendor Document List	P7564-PO018-400-30-LST-0001
LST	2YO Spare Parts	P7564-PO018-400-30-LST-0002
ITP	Inspection and Test Plans	P7564-PO018-400-30-ITP-0001
DWG	General Arrangement Drawings	P7564-PO018-400-30-DWG-0001
DWG	Overall Drawings with Principal Dimension and Weights	P7564-PO018-400-30-DWG-0002
CAL	Calculations	P7564-PO018-400-30-CAL-0001
PRO	Hydrostatic Test Procedure	P7564-PO018-400-30-PRO-0001
PRO	PMI Procedure	P7564-PO018-400-30-PRO-0002
PRO	Heat Treatment Procedure	P7564-PO018-400-30-PRO-0003
PRO	Painting Procedure	P7564-PO018-400-30-PRO-0004
IOM	Ball Valve Installation, Operation and Maintenance Manual	P7564-PO018-400-30-IOM-0001
IOM	Actuator Installation, Operation and Maintenance Manual	P7564-PO018-400-30-IOM-0002
RPT	Test Reports	P7564-PO018-400-30-RPT-0001
CER	Material Test Certificates	P7564-PO018-400-30-CER-0001
CER	Conformity Certificate	P7564-PO018-400-30-CER-0002
MDR	Manufacturing Data Record	P7564-PO018-400-30-MDR-0001

Each test procedure card can be updated to reflect the appropriate title and document numbers. DocBoss supports several document number columns, including the internal (supplier) number, customer number, end-user number and sub-supplier number.

If the customer does not provide a code list and only provides a list of documents, see this article to find the best options for setting up the card list.

For more information about setting up your card list from doc codes, see this article: Configure Doc Code List.