

Connect Library Documents to Doc Codes or Cards

08/02/2024 3:27 pm MDT

Library documents can only be connected to a project card from the Document Ref Assign screen. In order to connect library documents, the doc code type (in the Project Document List) must be published.

Set TYPE on Doc Code

To attach library documents to a doc code, you must set its TYPE to Published.

The screenshot shows the 'Code List (Requirements)' interface. At the top, there is a navigation bar with 'NGCP Pipeline Project (3...)' and 'Code List (Requirements)'. Below the navigation bar, the title 'Code List (Requirements)' is displayed. The main content area contains a table titled 'Document Requirements' with the following columns: Select, Doc Code, Doc Code Name, Type, Level, Stage List, Included In, Delivery Days, Reference Date, Tools, and Eq#. The table lists various document requirements, including 'Manufacturing Data Book', 'Instrument Test and Calibration Certificate', 'Pressure Test Certificates', 'Hardness Test Report', 'Material Test Certificate', 'Operating and Maintenance Manual', 'General Arrangement', 'Instrument Calculation', 'Outline Dimensions', and 'Instrument Termination and Hook Up Details'. The 'Type' column for the 'Instrument Termination and Hook Up Details' row (Doc Code F06) is highlighted, and a dropdown menu is open, showing 'Published' as the selected option. A red arrow points to the 'Published' option in the dropdown menu. The interface also includes a 'Save' button at the top right, a 'Select/Deselect All' checkbox at the bottom right, and buttons for 'Apply', 'Download CSV Template', 'Upload data via CSV', and 'Delete Selected'.

Select	Doc Code	Doc Code Name	Type	Level	Stage List	Included In	Delivery Days	Reference Date	Tools	Eq#
<input type="checkbox"/>	S06	Manufacturing Data Book	Compilation	Tag (TE)	IF1	--	10	AO		Tag
<input type="checkbox"/>	O03	Instrument Test and Calibration Certificate	Generated (Sub-Supplier)	Tag (TE)	IF1	--	10	AO		Tag
<input type="checkbox"/>	O02	Pressure Test Certificates	Generated (Sub-Supplier)	Tag (TE)	IF1	--	10	AO		Tag
<input type="checkbox"/>	M18	Hardness Test Report	Generated (Sub-Supplier)	Order	IF1	--	10	AO		Tag
<input type="checkbox"/>	M02	Material Test Certificate	Generated (Sub-Supplier)	Tag (TE)	IF1	--	10	AO		Tag
<input type="checkbox"/>	K05	Operating and Maintenance Manual	Published	Group	IF1	--	10	AO		Tag
<input type="checkbox"/>	G99	General Arrangement	Compilation	Item/Model (TE)	IF1	--	10	AO		Tag
<input type="checkbox"/>	G15	Instrument Calculation	Generated (Wolfe PA)	Tag (TE)	IF1	--	10	AO		Tag
<input type="checkbox"/>	F13	Outline Dimensions	Generated (Delta)	Order	IF1	--	10	AO		Tag
<input type="checkbox"/>	F06	Instrument Termination and Hook Up Details	Published	Order	IF1	--	10	AO		Tag

Attach a published document to a card

Manually

To manually assign published documents to a card, navigate to Documents>Document Index, and click the **attach** (paper clip) icon next to the appropriate card. You will then be able to find and search for the applicable library document.

NGCP Pipeline Project (3... | Card List

Cards
Standard Query

Card List

Delta Doc Code: - Select Code - Reference: - Select Reference - Level: - Select Level - Tagged Units: - Select Unit - Sub-Supplier: - Select Sub-Supplier - Clear Search

Stage: - Select Stage - Delta Status: - Select Status - State: - Select State - Transmittal: - Select Transmittal - Internal Code: - Select Internal Code -

Due to Delta:
 Expected Return to Wolfe PA:
 Days since last request: Keyword:

Grid Rows Colors | How to use auto-generated values for Delta Doc # and Wolfe PA Doc # | Add to Ad-Hoc Queue | Set Date | Generate Request | Bulk Doc Download | Save

Required	Tools	Card Name(Auto)	Reference	Sheet	Doc Code	Title	Level	Status (Combined)	Doc Code Name	Stage	Wolfe PA Doc # 1	Delta D
<input checked="" type="checkbox"/>		B02_PO-03-KSA0...	PO-03-KSA04-1	1	B02	Vendor Document Register	Order	NULL	Vendor Docu...	IFI	30000221-B02-0001-001'	
<input checked="" type="checkbox"/>		B14_PO-03-KSA0...	PO-03-KSA04-1	1	B14	Vendor Sub-Orders	Order	NULL	Vendor Sub-O...	IFI	30000221-B14-0001-001'	
<input checked="" type="checkbox"/>		G99_PO-03-KSA0...	PO-03-KSA04-1	1	G99	General Arrangement	Order	NULL	General Arran...	IFI	30000221-G99-0001-001'	
<input checked="" type="checkbox"/>		K05_Differential	Differential	1	K05	Operating and Maintenance Manual	Group	X(+)	Operating and ...	IFI	30000221-K05-0001-001'	
<input checked="" type="checkbox"/>		K05_Gauge	Gauge	1	K05	Operating and Maintenance Manual	Group	X(+)	Operating and ...	IFI	30000221-K05-0002-001'	
<input checked="" type="checkbox"/>		M02_PO-03-KSA...	PO-03-KSA04-1	1	M02	Material Test Certificate	Order	NULL	Material Test C...	IFI	30000221-M02-0001-001'	
<input checked="" type="checkbox"/>		M18_PO-03-KSA...	PO-03-KSA04-1	1	M18	Hardness Test Report	Order	NULL	Hardness Test ...	IFI	30000221-M18-0001-001'	
<input checked="" type="checkbox"/>		O02_PO-03-KSA0...	PO-03-KSA04-1	1	O02	Pressure Test Certificates	Order	NULL	Pressure Test ...	IFI	30000221-O02-0001-001'	

Auto Assign

To utilize the (new) auto assign feature, navigate to Documents>Requirements and click the attach (paper clip) icon next to the applicable doc code.

NGCP Pipeline Project (3... | Code List (Requirements)

Cards
Code List (Requirements)

Grid Rows Colors | Save

Document Requirements

Select	Doc Code 1	Doc Code Name	Type	Tools	Level	Stage List	Included In	Delivery Days	Reference Date	Eq#
<input type="checkbox"/>	S06	Manufacturing Data Book	Compilation		Tag (TE)	IFI	..	10	AO	Tag
<input type="checkbox"/>	O03	Instrument Test and Calibration Certificate	Generated (Sub-Supplier)		Tag (TE)	IFI	..	10	AO	Tag
<input type="checkbox"/>	O02	Pressure Test Certificates	Generated (Sub-Supplier)		Tag (TE)	IFI	..	10	AO	Tag
<input type="checkbox"/>	M18	Hardness Test Report	Generated (Sub-Supplier)		Order	IFI	..	10	AO	Tag
<input type="checkbox"/>	M02	Material Test Certificate	Generated (Sub-Supplier)		Tag (TE)	IFI	..	10	AO	Tag
<input checked="" type="checkbox"/>	K05	Operating and Maintenance Manual	Published		Group	IFI	..	10	AO	Tag
<input type="checkbox"/>	G99	General Arrangement	Generated (Sub-Supplier)		Tag (TE)	IFI	..	10	AO	Tag
<input type="checkbox"/>	G15	Instrument Calculation	Generated (Sub-Supplier)		Order	IFI	..	10	AO	Tag
<input type="checkbox"/>	F13	Outline Dimensions	Generated (Sub-Supplier)		Order	IFI	..	10	AO	Tag
<input type="checkbox"/>	F06	Instrument Termination and Hook Up Details	Generated (Sub-Supplier)		Order	IFI	..	10	AO	Tag

Select Page: S06 - F06 [10] | Show on Page: 10 | Select/Deselect All

Apply | Download CSV Template | Upload data via CSV | Delete Selected | Save

You will then be asked to select the Library Folder where the document is stored in the Library (Manual, MTR, Other, Test Procedures, Weld Procedures, Welder Certificates)

Code List (Requirements)

Auto-Attach from Library ✕

Match* ? Single Multiple

Choose Searching Fields*

Choose Library Folder*

How to Use Auto Assign

Doc Code "Type" will always be Published, this is the connection to the library. You will set your level as you typically would, DocBoss will then create the applicable cards. The level should reflect the connection to the document - for example, you want to use the library documents to submit F01 - manuals on your project. You have multiple line items but there are only two different types, 1.) Group=XXX and 2.) Group=YYY. If you set your Level to Item/Model it will auto generate two card's (F01_XXX and F01_YYY) then when you attach using the auto assign feature Doc Boss will look for any library documents that have that reference in the key words.

Note - Once Library documents have been attached to a card of doc code - DocBoss will automatically update the "Est. Pgs" column to the actual number of pages. The pages will be grey to indicate it is an actual, not estimated, number.

Card List							
Card Name(Auto)	Tools	Required	Title	Doc Code 1	Est. pgs	Status (Combined)	
<input type="checkbox"/> K05_Presssure Transmitter		<input checked="" type="checkbox"/>	Instruction Manual Pressure Gauges	K05	4	X(+)	
<input type="checkbox"/> K05_LevelProbe-07inch		<input checked="" type="checkbox"/>	Operation and Maintenance Manuals	K05	50	NULL	
<input type="checkbox"/> K05_LevelProbe-08inch		<input checked="" type="checkbox"/>	Operation and Maintenance Manuals	K05	50	NULL	