Library Documents

09/16/2024 1:55 pm MDT

Library documents are typically published documents or documents that can be reused from project to project. DocBoss uses the library for uploading, storing and reviewing these documents.

Examples include – Instruction Manuals, Brochures, MTRs, Welder Cert's, Procedures

Upload to the Library

Individual Documents

To attach a single document, after uploading the document to the Inbound Documents section of your library you click on the + button under the actions column. You then proceed to enter the meta data discussed above and click save.
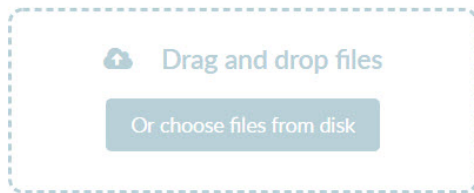

Multi Documents

To add multiple documents to the library, once you have uploaded your documents to the Inbound Documents section, you can then select applicable documents and press the Assign Files via CSV.

Once you have your export you fill out columns with applicable information. Please note that you do not change the ID column or the File Name column (Do not Touch). Again any columns with an asterisk symbol are mandatory.

You will then save your file as CSV, and go back to your grid and press Import from CSV, browse for your file and save. This will attach all applicable meta data to each file and then add the documents to your library.

Available Meta Data Fields

Below is a list of fields available when bringing documents into the library. All fields with an asterisk symbol * are mandatory fields.

*Sub-Supplier: The publisher of the document. Note that a Company must have "Sub-Supplier" checked in its profile to appear in this list.

*Sub-Supplier Doc Name: This is the title of the document as named by the publisher.

Sub-Supplier Doc Ref #: This is the reference number used by the publisher to control this document. Typically listed in the bottom right corner of the document.

[Instance] Doc Name: your company may have a different way to refer to this document (a common name). This is field is included in search, so be sure to add several search terms in this field.

Reviewing options: The reviewing options are designed to keep documents as current as possible. During the initial upload you assign the reviewing options and associated the documents to a specific customer. When the document has reached the review period or expiration date, an alert will appear in the library reminding you that

cards need review. The grid row will also change color to indicate they have expired.

- No Reviewing – the document will never need to be reviewed
- By Review Period -Months between reviews. (12=one year)
- By Expiration Date – A specific date for reviewing the document

*Folder: This is the grouping you want the document to be assigned to. (This plays an important role when using the auto assign feature.)

- Manual
- MTR
- Other
- Test Procedures
- Weld Procedures
- Welder Certificates

*Page Number: The number of pages in the document, this should auto-populate

Web Address: If this is a internet published document, you can enter the website where it can be found.

Keywords: Keywords can be entered to improve searching ability. Note that additional keywords will be added automatically as the document is used in production.

Adding/Editing Library Folders

To add a new folder, or edit an existing Library Folder, 1) navigate to the Admin/Settings Menu and click on 2) "Library Folders". Here you can add/edit the folders.
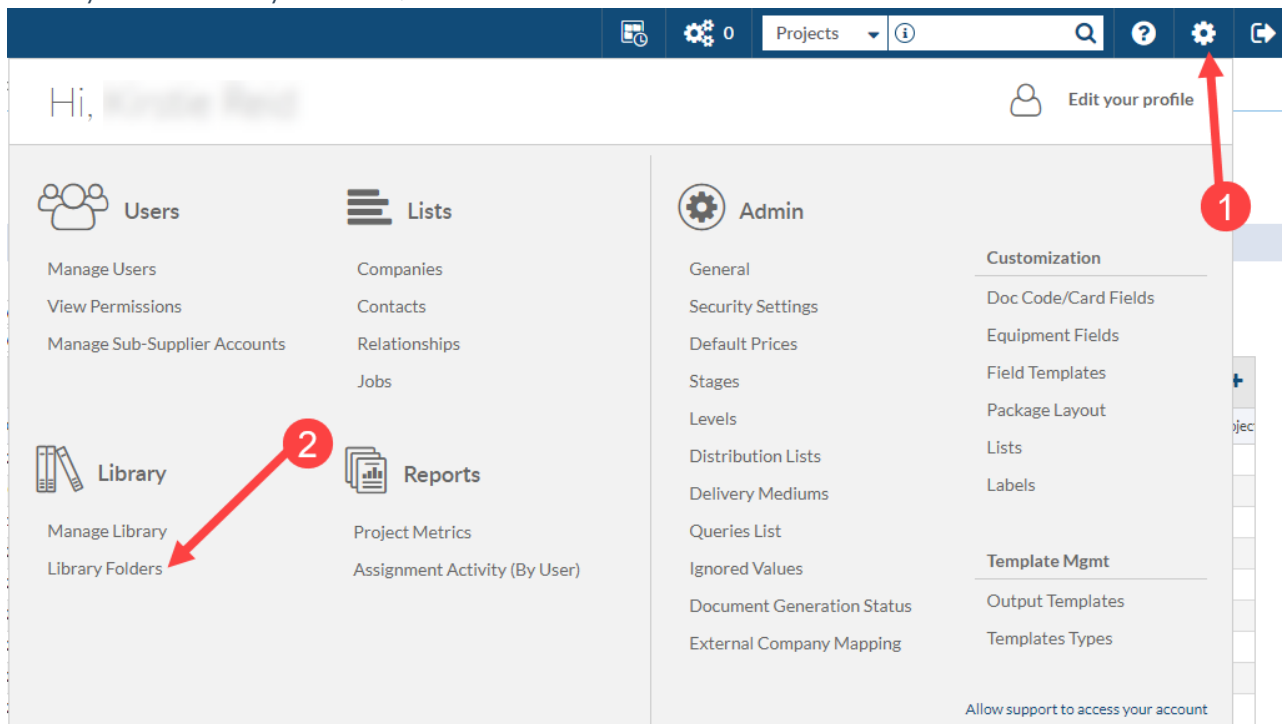
New folders can also be added in the assign screen when brining in a new library document.
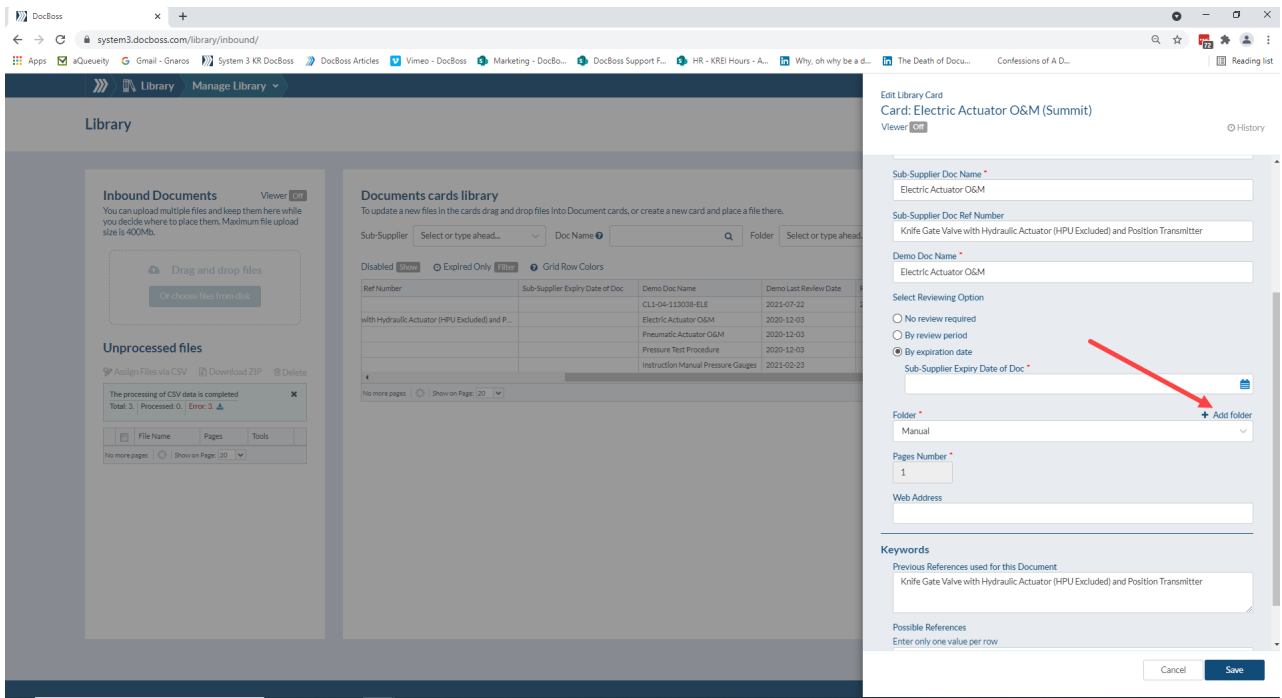
Adding/Editing Library Custom Fields

From the settings gear, select **Admin** > **Customization** > **Library Card Fields** to access the library card field list. Add and edit custom fields. These fields will automatically be available in the library and in the pattern search when attaching library docs to codes.

Admin / Customization
Library Card Fields

Library Card Field List

Key ↑	Name	Type	Source	Required	Tools
LibraryField1	Heat #	Text		☐	✏
LibraryField2	Published Date	Date		☑	✏
LibraryField3	Last Uploaded By	List	Users	☐	✏

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Save