

Major Tags

09/16/2024 1:54 pm MDT

Why Major Tags

DocBoss maintains 2 levels of equipment - Major Tags, and Tagged Equipment.

The decision to use major tag can be determined by the tagging hierarchy you are managing. If you have 2 levels of tagging (or more), you should be using both Tagged equipment and Major Tags. If only one level of tags, just use Tagged Equipment (you may still choose to use Major Tags instead of tagged equipment if there is the potential for sub-tags).

Typical Examples include:

- Skids with instrumentation/valves
- Vessels with instrumentation/valves
- Plants with vessels

Enable Major Tags on the Project

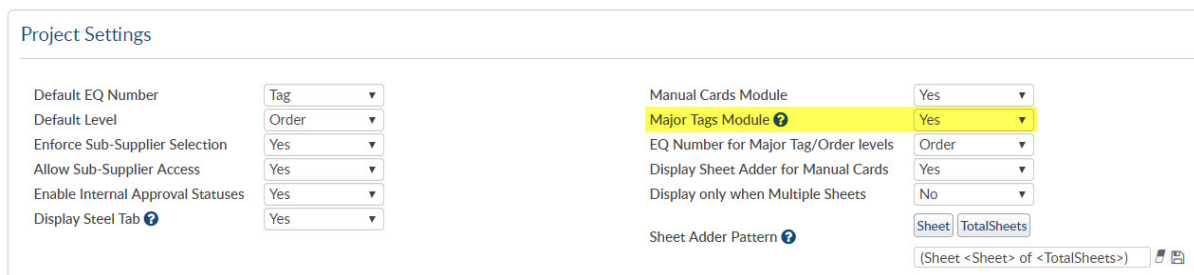
Turn on the module

The major tag module is enabled from the **Project Fields Template**.

Navigate to **Project Fields Template**

Project Menu > Setup: Project Fields Template.

Scroll to Project Settings, and set Major Tags module to YES



The screenshot shows the 'Project Settings' form. On the right side, the 'Major Tags Module' is highlighted in yellow and set to 'Yes'. Other settings include 'Manual Cards Module' (Yes), 'EQ Number for Major Tag/Order levels' (Order), 'Display Sheet Adder for Manual Cards' (Yes), 'Display only when Multiple Sheets' (No), and 'Sheet Adder Pattern' (Sheet, TotalSheets).

Setting	Value
Default EQ Number	Tag
Default Level	Order
Enforce Sub-Supplier Selection	Yes
Allow Sub-Supplier Access	Yes
Enable Internal Approval Statuses	Yes
Display Steel Tab	Yes
Manual Cards Module	Yes
Major Tags Module	Yes
EQ Number for Major Tag/Order levels	Order
Display Sheet Adder for Manual Cards	Yes
Display only when Multiple Sheets	No
Sheet Adder Pattern	Sheet, TotalSheets

*NOTE: If you do not see this option, the feature has not been enabled for your instance. Please contact our support team (support@docboss.com)

Add a Major Tag field

To use Major tags, you must create the field name for the tag. It might be "Skid Tag", or "Vessel Tag".

Navigate to **Project Fields Template**

Project Menu > Setup: Project Fields Template.

Scroll to the Major Tags Fields, click Add New

Major Tags Fields



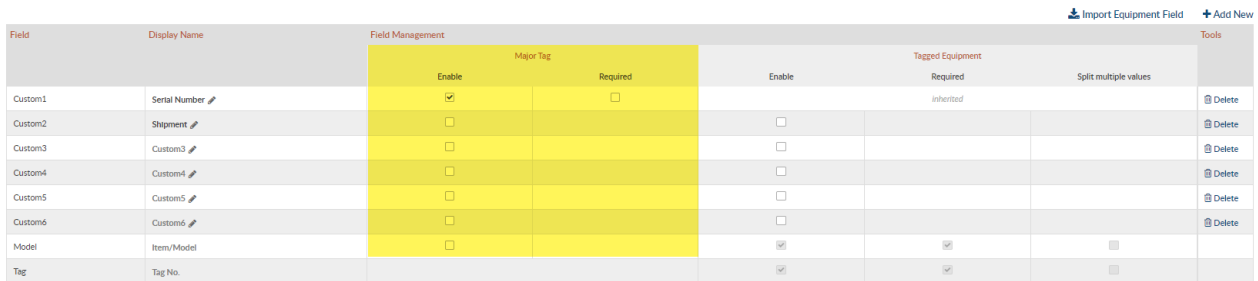
Name	Variable	
Vessel Tag	MajorTag1	

*NOTE It is possible to create more than one major tag, but you will be forced to select a value for all fields when adding cards. Start with a single field - as it is the typical requirement.

Enable Other Equipment Fields

Beyond just your major tag (and supplier/date), you may want to manage additional information. Typically the item/model field would be enabled. Maybe you have created a custom field like "Serial Number" which you want to display on cover sheets. It is important to enable that field for use on the major tags grid.

Equipment Fields



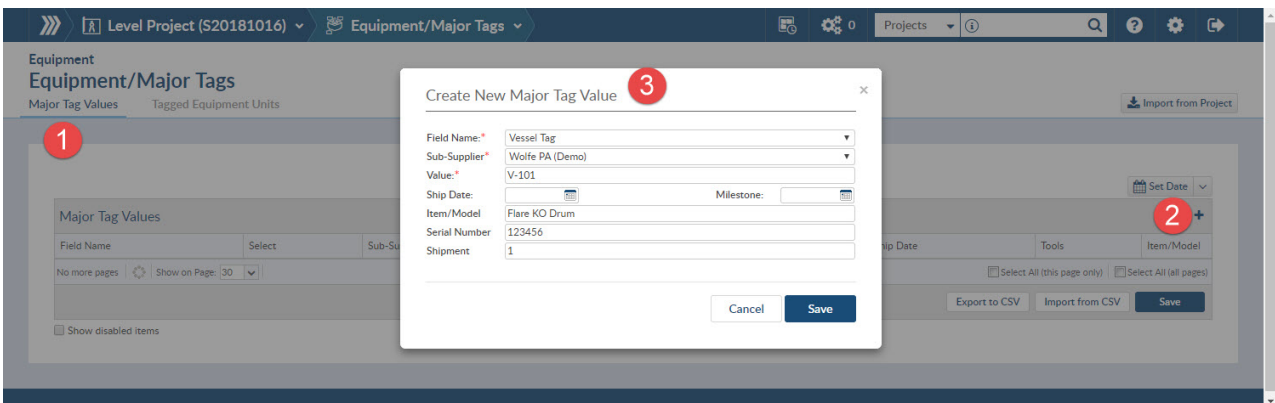
Field	Display Name	Field Management		Enable	Tagged Equipment		Tools
		Enable	Required		Required	Split multiple values	
Custom1	Serial Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>		inherited		
Custom2	Shipment	<input type="checkbox"/>		<input type="checkbox"/>			
Custom3	Custom3	<input type="checkbox"/>		<input type="checkbox"/>			
Custom4	Custom4	<input type="checkbox"/>		<input type="checkbox"/>			
Custom5	Custom5	<input type="checkbox"/>		<input type="checkbox"/>			
Custom6	Custom6	<input type="checkbox"/>		<input type="checkbox"/>			
Model	Item/Model	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Tag	Tag No.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Adding Major Tag Values

Above you have added/enabled your Major Tag Field, now you have to add the actual values.

Navigate to **Major Tag Values**

Project Menu > Equipment/Major Tags: Major Tag Values [TAB]



The screenshot shows the 'Equipment/Major Tags' interface. The 'Major Tag Values' tab is active, indicated by a red circle '1'. A dialog box titled 'Create New Major Tag Value' is open, with a red circle '3' next to its title. The dialog contains the following fields: Field Name (Vessel Tag), Sub-Supplier (Wolfe PA (Demo)), Value (V-101), Ship Date, Milestone, Item/Model (Flare KO Drum), Serial Number (123456), and Shipment (1). A red circle '2' is next to the 'Add' button in the background interface.

1. Major Tags Tab

2. Add equipment (or upload via CSV)

3. Enter major tag value (and any additional fields)
