

Major Tags

10/01/2025 9:53 am 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:

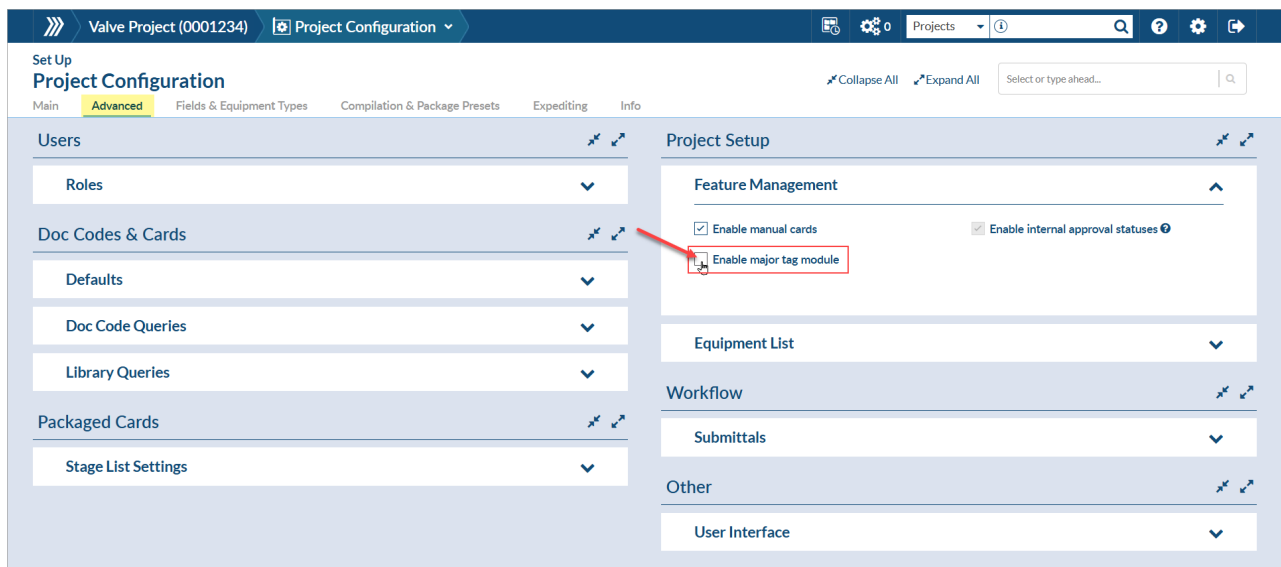
- Skids with instrumentation/valves
- Vessels with instrumentation/valves
- Plants with vessels

Enable Major Tags on the Project

Turn on the module

To enable the major tag module, navigate to **Project Menu > Setup > Project Configuration**.

In the "Advanced" tab, expand the "Feature Management" drop-down and check the box to "Enable major tag module."

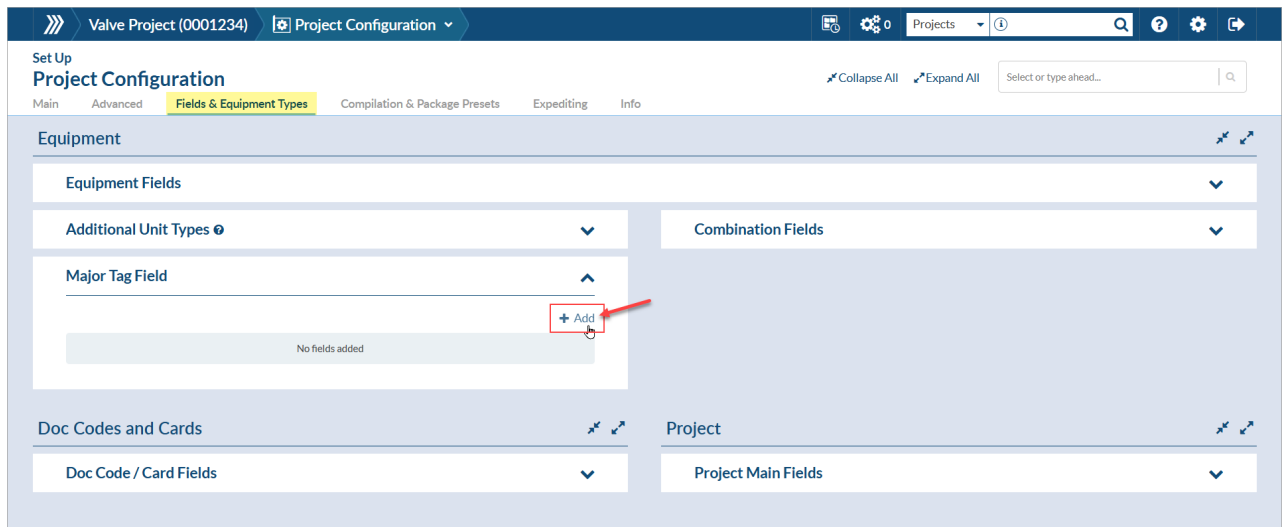


*NOTE: If you do not see this option, the feature has not been enabled for your instance. Please contact our support team (support@docboss.com)

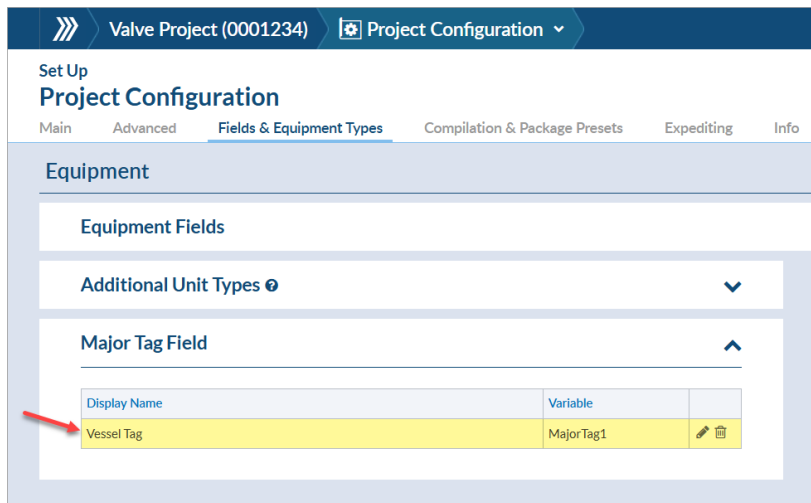
Add a Major Tag field

Once enabled on the project, you must create the field name for the tag. It might be "Skid Tag" , or "Vessel Tag".

Navigate to the "Fields & Equipment Types" tab of the Project Configuration page and expand the "Major Tag Field" drop-down. To add the field value, click the "+ Add" button.

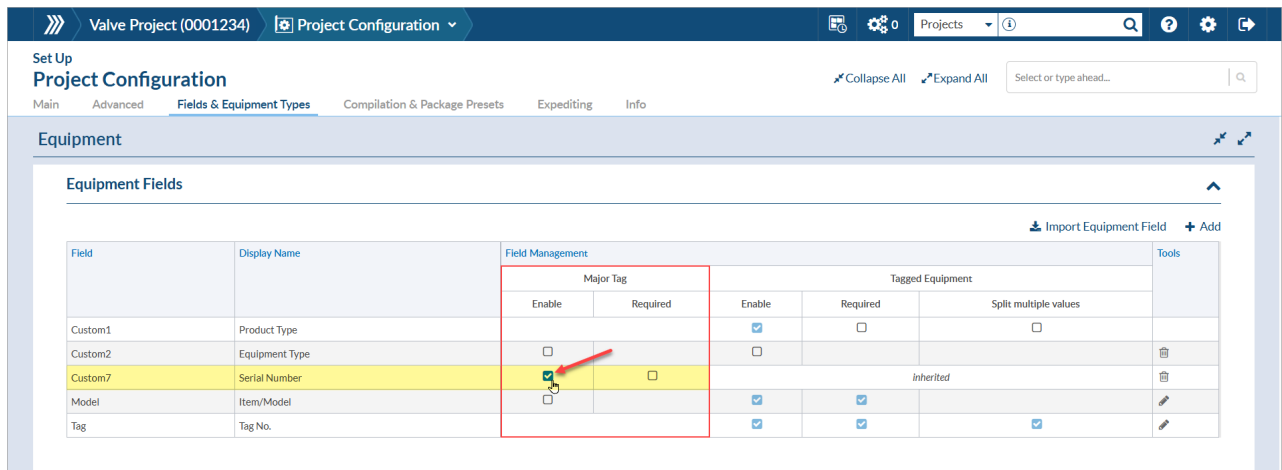


Enter in a field name. Once saved, the field will be visible in the grid.



Enable Other Equipment Fields

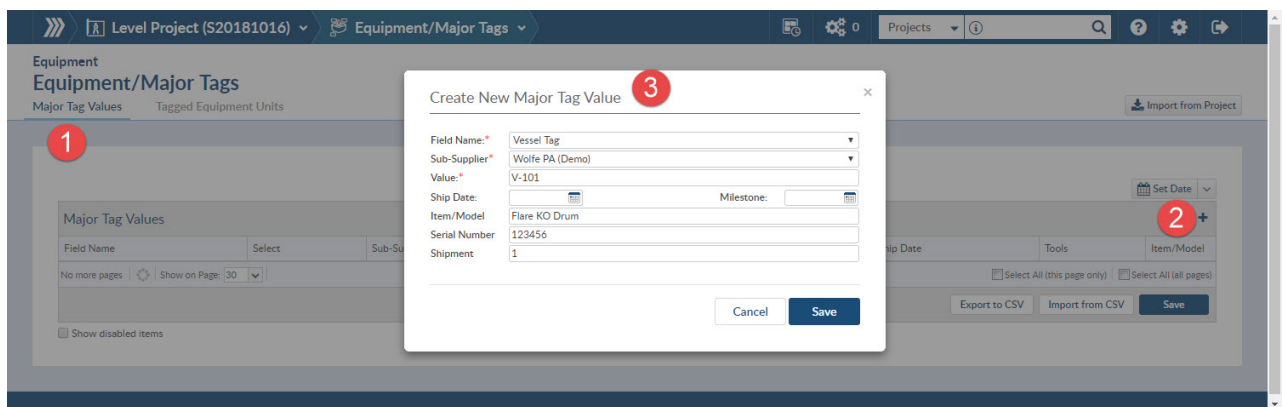
Beyond just your major tag (and supplier/date), you may want to manage additional information. Typically the item/model field would be enabled. Maybe you have created a custom field like "Serial Number" which you want to display on cover sheets. It is important to enable that field for use on the major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



Adding Major Tag Values

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

Navigate to **Project Menu > Equipment > Equipment/Major Tags (Major Tag Values tab)**.



1. Major Tags Tab
2. Add equipment (or upload via CSV)
3. Enter major tag value (and any additional fields)