

Add Doc Codes to a Project

09/16/2024 1:18 pm MDT

Overview

In DocBoss, the **Code List (Requirements)** screen shows the list of document types that will be managed on the project. This list is often provided by the customer. If the customer does not have their own doc codes, users can add codes from their internal company list.

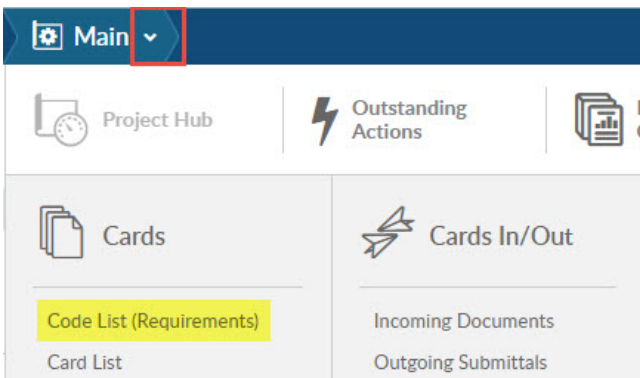
Customer code lists, saved under their company profiles, should ideally contain all codes provided by the customer. However, not all codes may be applicable to a specific project.

The **Code List (Requirements)** screen includes only codes which have been added the project. It has a few purposes:

- To show which types of documents are included in the project
- To create auto-generated cards
- To set defaults for different types of documents
- To create packages and attach compilations to codes

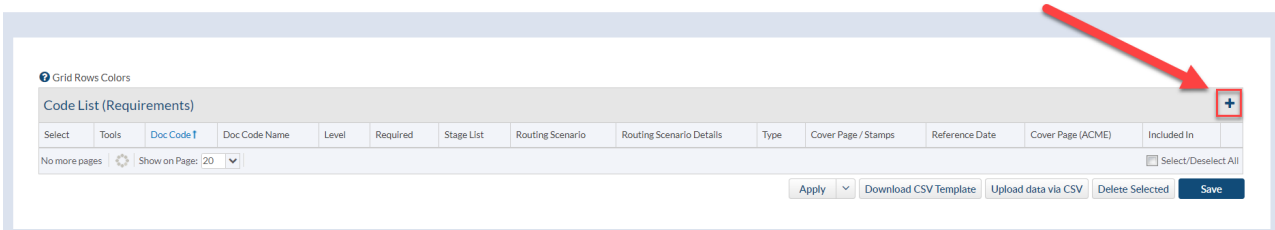
Add codes to a project

From the **Project Menu**, select **Code List (Requirements)**.



Select the + located at the top right of the grid. This will open the **Add Doc Code** popup.

Cards
Code List (Requirements)



Note: The doc codes available on this list are populated from the code list that was chosen for the project under **Main** (configured during initial setup).

Default Users/Lists

Alpha Doc Control User *	Alina Kleinsasser	+	
Alpha Project Engineer User	- Select User -	+	
Alpha Drafting User	- Select User -	+	
Alpha Project Manager User *	Alina Kleinsasser	+	
ACME/End User Engineer	- Select Contact -	+	
ACME/End User Expediter	- Select Contact -	+	
ACME/End User Doc Controller	- Select Contact -	+	
Use Code Lists from	<input checked="" type="radio"/> ACME Lists <input type="radio"/> Alpha Internal Lists <input type="radio"/> End User Lists		
Doc Code List *	B02-S06 (Primary)		+
Use Status Lists from	<input checked="" type="radio"/> ACME Lists <input type="radio"/> Alpha Internal Lists <input type="radio"/> End User Lists		
ACME Return Status List *	1-4		
Status for Stage Auto Completion	System Final Status(Z)		
Internal Approval Status List *	Internal Approval - Default		

From the **Add Doc Code** popup, users can select the applicable codes to add to the project.

Add Doc Code ✕

Add Doc Code 3 +

Select	Doc Code ↑	Doc Code Name
<input checked="" type="checkbox"/> 1	B02	Vendor Document Register
<input type="checkbox"/>	B03	Fabrication / Production Schedule
<input type="checkbox"/>	B06	Table Of Contents
<input type="checkbox"/>	B14	Vendor Sub-Orders
<input checked="" type="checkbox"/>	D16	Instrument Data Sheet
<input type="checkbox"/>	D26	List Of Special Tools
<input type="checkbox"/>	D27	Bill Of Material
<input type="checkbox"/>	E02	Cross Sect Dwg / Exploded View Diagram
<input checked="" type="checkbox"/>	E09	Installation Drawings
<input type="checkbox"/>	E88	Misc Drawings/Descriptive

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 Select Page: B02 - E88 [10] ⚙ Show on Page: 10 ⌵ Select/Deselect All

4 Add Selected

(1) Select the checkbox next to each applicable code.

(2) To view more codes, use the **Select Page** and **Show on Page** options at the bottom left of the grid.

(3) If a required code is not listed, (3) select the **+** in the Add Doc Code window to add the applicable codes. (Note: doing this will add the new code to the master list so it will be available for use on other projects using the same list.)

(4) Once all applicable codes are selected, click **Add Selected** to add them to the **Code List (Requirements)** grid.
