

Initiate a Project

09/16/2024 1:01 pm MDT

A project is the container object in DocBoss. It defines the information required to manage your documentation. It typically reflects the purchase order detail from your customer.

1. Create new project

From Project List (option 1)

Click the Add icon in the top right-hand corner of the grid.

The screenshot shows the 'Project List' interface. At the top, there is a navigation bar with tabs for 'Actions Dashboard', 'Project Dashboard', 'Project List', and 'Multi-Project Card Report'. The 'Project List' tab is active and highlighted with a red circle and the number '1'. Below the navigation bar, there are several filter dropdowns for 'Type', 'Wolfe PA Doc Controller', 'Job', 'Wolfe PA Project Mgr', 'Customer', 'Wolfe PA Project Eng', and 'Wolfe PA Project Mgr (Final)'. Below the filters is a table with the following columns: 'Select', 'Project name', 'Type', 'Customer', 'Job', 'Description', 'PO Number', 'PO Revision', 'Wolfe PA Ref Number', 'Project Engineer', 'Is Completed?', 'Order date', and 'Tools'. The table contains three rows of project data. In the top right corner of the table, there is a red circle with the number '2' and a small square button with a plus sign, which is the 'Add' icon.

Select	Project name	Type	Customer	Job	Description	PO Number	PO Revision	Wolfe PA Ref Number	Project Engineer	Is Completed?	Order date	Tools
<input type="checkbox"/>	Transmitters (SO123)	Order	ABC Chemicals		Blah Blah	PO-881231	0	SO123			5/1/2014	
<input type="checkbox"/>	Seal and Flare Project (20160114)	Order	ABC Chemicals	Demo		1234	0	20160114			1/15/2016	
<input type="checkbox"/>	Flare and Seal Drum Project (S20120103)	Order	ABC Chemicals			2342345	0	S20170103			1/3/2017	

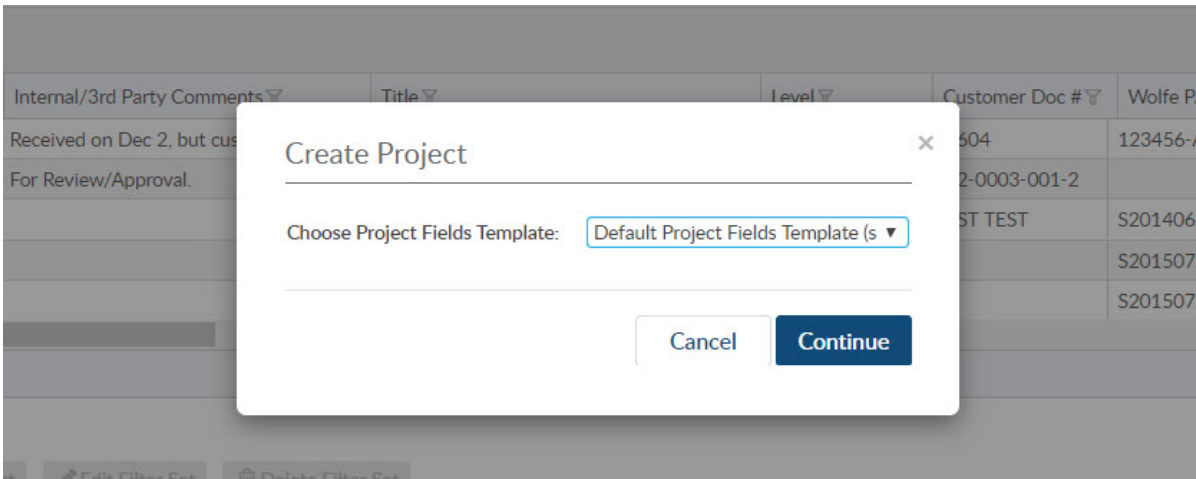
From Logo Menu (option 2)

From the logo menu, click **Add new Project**.

The screenshot shows the logo menu, which is a dark blue bar with a white double arrow icon on the left. Below the bar, there is a list of menu items: 'Actions Dashboard', 'Project Dashboard', 'Project List', and 'Multi-Project Card Report'. At the bottom of the menu, there is a red arrow pointing to the '+ Add new Project' option.

2. Choose project fields template

1. Select template (if unsure, use default).
2. Click **Continue**.



Project Field templates are reusable templates that allow you to start a project in DocBoss knowing that you will be adding all specific data required for that project. If you don't have a template already saved, no problem, you can still add the custom columns at any time throughout a project.

3. Complete project quick start

Complete the project Quick Start form.

1. Fill out the required fields
2. To add additional information (optional), select **Show all settings**.
3. Click **Save**.

Navigation: >>> | Projects | Search | ? | Settings | Refresh

Set Up | Main

1

2

Show all settings | Quick start

Profile

Project Type
 Order Quote

Affiliate *
Alpha Supply

Affiliate Address * + Add
Default X

Customer * + Add
Select or type ahead...

Customer Address *
Select or type ahead...

Project Name *

Alpha Sales Order *

PO Number *

Order Date *
2024-09-16

Initial Guess for Drawing Approvals *
2024-10-14

Default Users/Lists

Alpha Doc Control User * + Add
Select or type ahead...

Use Code Lists from
 Customer Lists
 Alpha Lists
 End User List

Doc Code List *
Select or type ahead...

Use Status Lists from
 Customer Lists
 Alpha Lists
 End User List

Customer Return Status List *
Create on Project

Internal Approval Status List *
Internal Approval - Default X

3

Save Project

The project is now created. Next, add the list of equipment and doc codes.