

# Initiate a Project

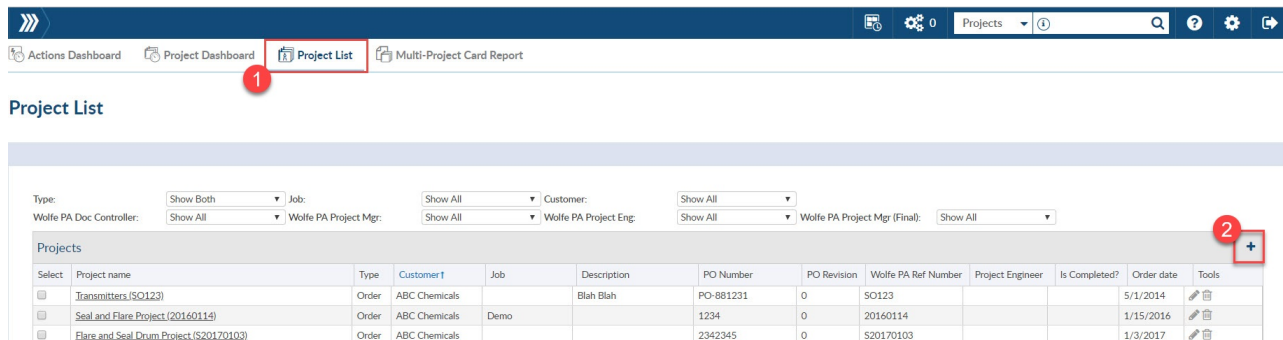
10/17/2024 3:00 pm MDT

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.

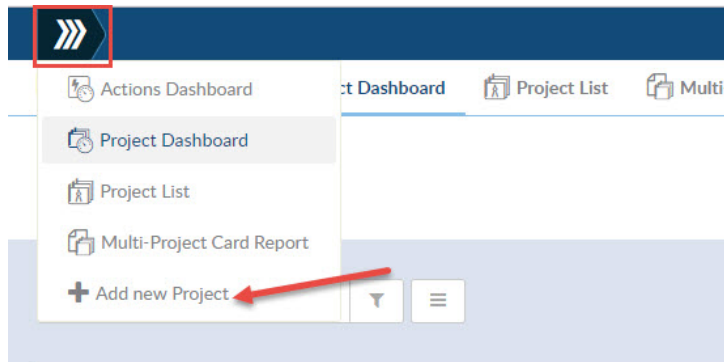


The screenshot shows the 'Project List' interface. At the top, there is a navigation bar with 'Project List' selected. Below the navigation bar, there are several filter dropdowns for 'Type', 'Wolfe PA Doc Controller', 'Job', 'Wolfe PA Project Mgr', 'Customer', 'Wolfe PA Project Eng', and 'Wolfe PA Project Mgr (Final)'. Below the filters is a table of projects. A red circle with the number '2' highlights a '+' icon in the top right corner of the table grid.

Select	Project name	Type	Customer I	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)

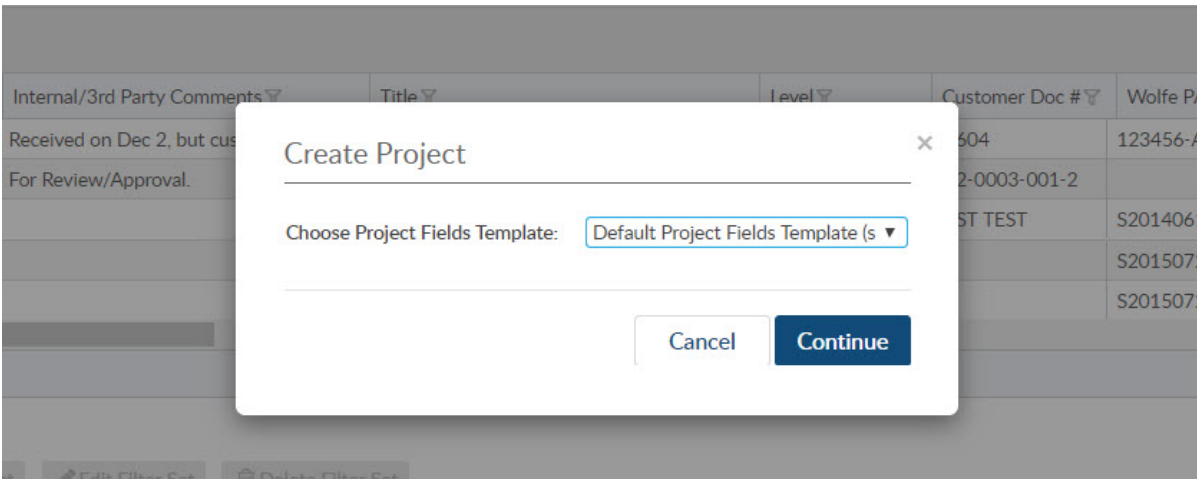
From the logo menu, click **Add new Project**.



The screenshot shows the logo menu. The 'Add new Project' option is highlighted with a red arrow. The menu items are: Actions Dashboard, Project Dashboard, Project List, Multi-Project Card Report, and Add new Project.

## 2. Choose project fields template

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

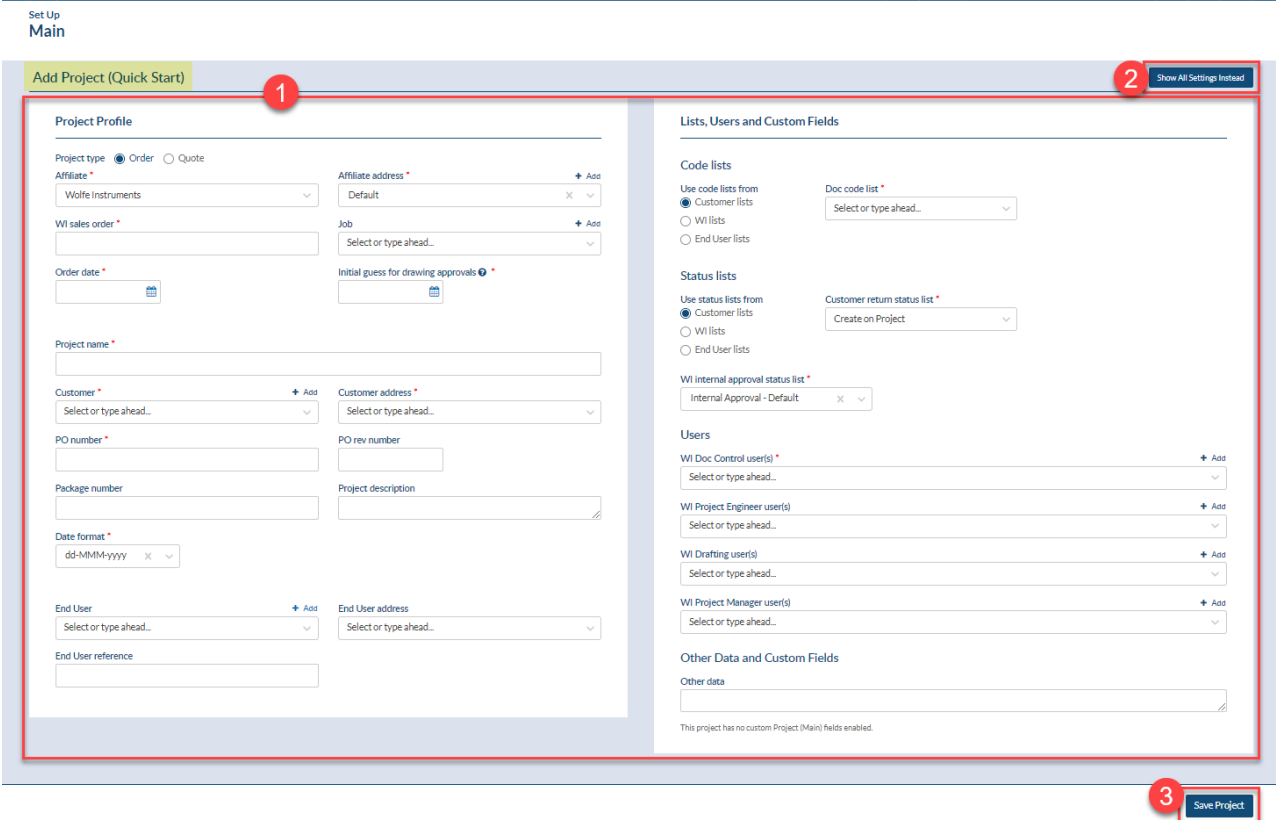


Project Field templates are reusable templates that allow you to start a project in DocBoss knowing that you will be adding all specific data required for that project. If you don't have a template already saved, no problem, you can still add the custom columns at any time throughout a project.

### 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 instead**. To read a description of all fields on this screen, see [Project Main Settings](#).
3. Click **Save Project**.



The project is now created. Next, add the [list of equipment and doc codes](#).

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