Initiate a Project

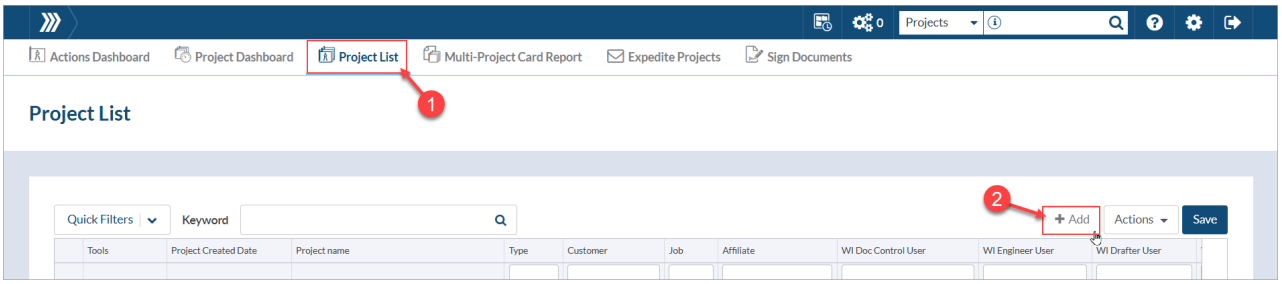
09/21/2026 1:38 pm MDT

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

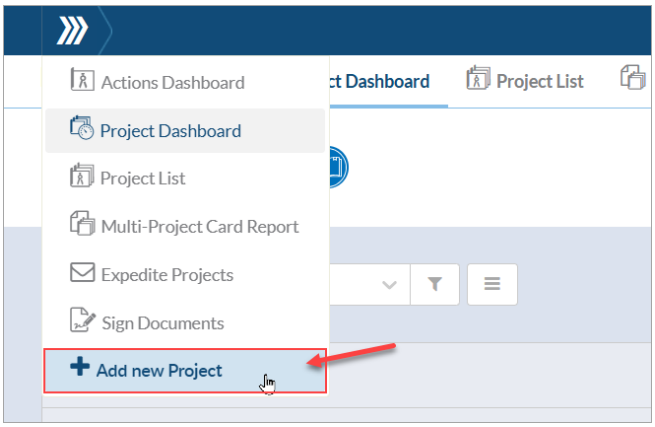
From Project List (option 1)

Click the "+ Add" button in the top right corner of the grid.



From Logo Menu (option 2)

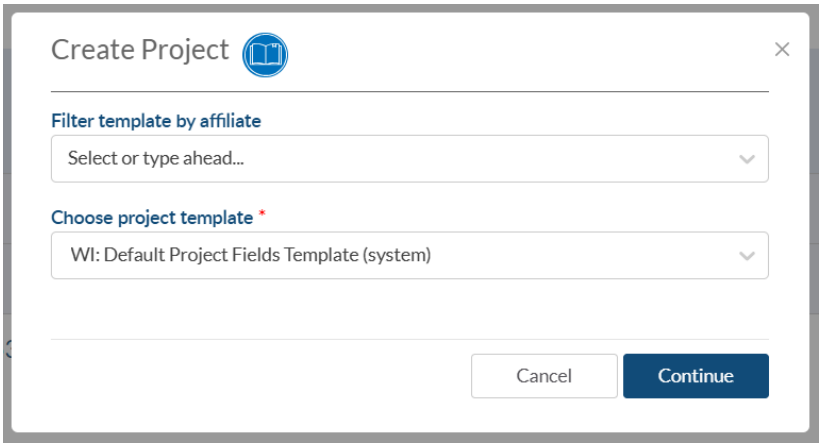
From the logo menu, click **Add new Project**.



2. Choose project configuration template

1. Select template - if there are many templates available, the list can be filtered by affiliate. If you're unsure about which template to use, it is always an option to use the default template and adjust settings on the project if/when required.

2. Click **Continue**.

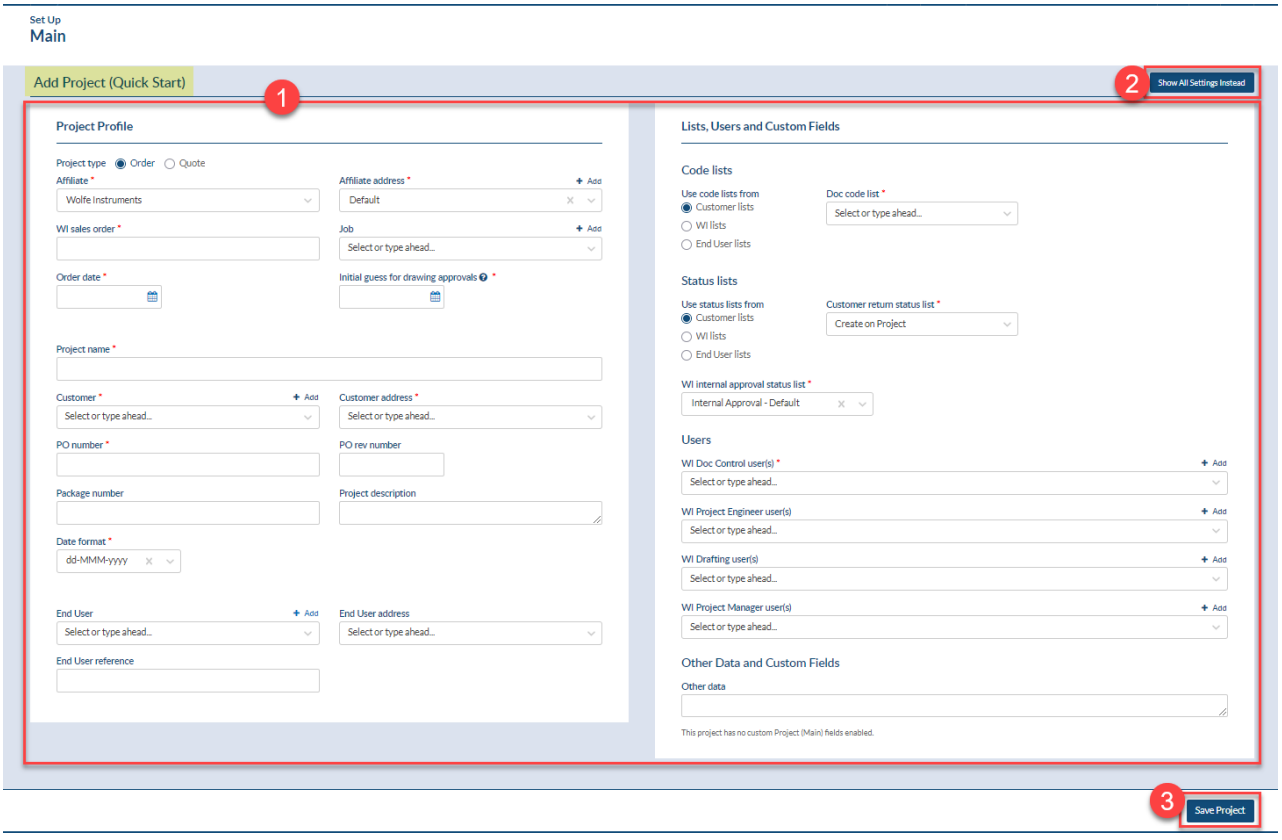


Note: Project Field templates are reusable templates that allow you to start a project in DocBoss knowing that you will be adding all specific data required for that project. If you don't have a template already saved, no problem, you can still add the custom columns at any time throughout a project.

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.