

# Configure Code List (Requirements)

09/16/2024 1:54 pm MDT

There are many configurations on the *Code List (Requirements)* grid that will affect the setup and management of cards on your project. Below is a general description of the columns available in this grid.

## Doc Code

This is the DocCode that will appear as reference on your card.

## Included In

If your customer has requested a document code but the contents are covered by another doc code being supplied, that code will be selected here.

For example, a Wiring Diagram might be included in the Installation manual. The Wiring Diagram's "Included In" would be set to Installation manual. The line for the Wiring Diagram will turn dark grey once the change is saved, indicating it is now an "Included In" code. Note - both the wiring diagram and Installation manual doc codes will appear on the cover page of the installation manual.

Select	Doc Code	Doc Code Name	Level	Included In	Cover Page / Stamps	Cover Page (Acme)	Stage List	Required	Type
<input type="checkbox"/>	A01	Document Register	Order	--	Cover page only (no stamp)	Use Project Default	IFA/IA	1/1	SDI Report
<input type="checkbox"/>	D01	Wiring Diagram	Item/Model (TE)	OM Installation Manual	Cover page only (no stamp)	Use Project Default	IFI	3/3	Generated
<input type="checkbox"/>	OM	Installation Manual	Item/Model (TE)	--	Cover page only (no stamp)	Use Project Default	IFI	3/3	Generated

No more pages | Show on Page: 20 | Select/Deselect All

Apply | Download CSV Template | Upload data via CSV | Delete Selected | Save

## Not Applicable

If the customer has requested a document code but it is Not Applicable for the project, you can set the **Level** to N/A. This allows you to still enter the code for tracking purposes but identifies that the cards for this code won't exist because the Doc Code is N/A.

## Type

This is to specify the source the document for the first upload to DocBoss. This is a drop-down selection of 5 options.

- **Compilation:** Used if your doc code refers to a compilation of multiple documents and you are going to use DocBoss to create that compilation. Manufacturer's Record Books, shipping dossiers, MTR packages, etc. ALSO used for tables of content specific to the compilations.
- **Generated («Company»):** Documents which are CREATED by «Company» OR by one of your CUSTOMERS. e.g. spare parts lists, packing slips, engineered Drawings)
- **Generated (Sub-Supplier):** Docs created/provided by your sub-supplier. e.g. hydro tests, calibration reports
- **Published:** These documents are stored in the DocBoss library. They are documents which can be used on many projects, and are often available on the internet, or controlled internally. e.g. Quality Manuals, Instruction Manuals, ISO Certifications, etc.
- **System generated:** Documents which are created from the DocBoss database (typically the document Index)

## Level

This is the instruction to DocBoss that indicates how the cards are made. To understand levels, you need only ask the following question of each doc code: *We need one [fill in document name] for every [...fill in this blank with a grouping from your order detail...]* The "fill in the blank" portion is your "LEVEL". Some typical examples, below:

- We need one **Drawing** for every unique.....**Item/Model**..... (from your order detail) So your level is **ITEM/MODEL**
- We need one **Pressure Test Certificates** for every unique ...**Tag**.... (from your order detail) So your level is **TAG**
- For doc codes where there is only one document to be submitted and is applicable to all tags of the order detail you set the level to **ORDER**
- For doc codes requested but not applicable to the product ordered you can set the level to **N/A**

## Delivery Days:

This field is to be used to enter a number representing working days. A value of 20 would represent 4 weeks. By combining the reference date below and the delivery days, you have a timeline for you to issue the documents to your customer.

## Reference Date:

This column is used to determine when you will be submitting your documents to the customer. The Delivery days column and the reference date column are combined to provide the timeline.

- AS: After shipment
- BS: Before shipment
- AO: After order
- ARAD: After receipt of approved Drawings
- AM: After milestone
- BM: Before milestone

## Cover Page /Stamps

Do you need to submit your documents with a Cover Pages or add a Stamp? There is a drop-down selection to allow you to manage this by each code. Note the Cover Page template or Stamp Template must already be added to the system and selected on your main set up to use this function.

- Cover page only (no stamp)
- Stamp, else cover page
- Stamp and cover page
- No stamp and no cover page

To read more about Cover Page/Stamp set up [check out this article](#).

## Stage List:

This is a drop-down selection and is the available document workflows that have been pre-created in your instance/project. (For Stage List set up click [here](#).)

---