# **Internal Doc Code List**

05/22/2025 9:28 am MDT

The Internal Doc Code field/column allows users to map customer codes to a common set of internal codes. This provides two benefits:

- 1. It provides a nice way to search for similar documents, across all projects. Searching for customer codes can be difficult, as they all have different codes for each project.
- 2. When mapping codes, DocBoss will copy all of the default settings from your internal codes (level, delivery, etc) into the customer codes. It can speed up the creation of default settings for new customer code lists. (To override this setting, check the box "Always load all field values from this list, NOT from mapped codes.")

### **Setup Internal List for Cross Reference**

If you don't have an internal set of codes, we suggest you create a few general codes to make use of this function.

A general example:

- C00 Calculations
- D00 Drawings
- E00 Data Sheets
- LOO Lists
- M00 Manuals
- P00 Procedures
- Q00 Quality Reports

Of course - the internal list for cross reference supports all of the defaults - so when you do the mapping, the defaults will also cross over.

An internal code list will show a crossover icon beside the name, making it distinguishable from other code lists.

## Lists / Companies / Wolfe Systems **Doc Codes**

G	Primary / Cross Reference List 🔀	ENG STD 1	Simple
G	Doc Code List		
	me: * Primary / Cross Reference List		
×	This list can be used for mapping customer/Proj	ect doc codes to Wolfe Syste	ems internal codes.

### Use internal codes on a project

In the settings area - you can Enable the Mapping to Internal Codes and also have the option to Force mapping (make it mandatory for all doc codes). Note: if you choose to Force Mapping, you must identify an internal code for

#### every code on your project.

Settings		
Enable Grid Search for Large Project 🕜	Card Name Suffix:	
Delivery output ??	Acme Turn Around	10 (working days)
🗌 Doc No. Override (Sub-Supplier) 🕜	Instance Turn Around	10 (working days)
Enable Mapping to Internal Codes ?	Action Turn Around	5 (working days)
Force Mapping on Requirements Grid	Date format	yyyy-mm-dd 🗸

\*Note that you can also set both of these options to defaults on project set up. This has to be done by an Admin User under the Admin tab.

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Project Default Options	
open of the second s	
Last Project Pattern 🖋	<projectname>(<so_quote>)</so_quote></projectname>
Default Stage List 🥜	IFI
Default Project Fields Template 🥒	Variable Area Flowmeters
Default Page Size for Output Documents 🥜	A4
Default Instance Turn Around (working days) 🥜	10
Default Customer Turn Around (working days) 🖋	10
Default Action Turn Around (working days) 🖋	5
Default Stage Delivery Days (working days) 🥜	10
Default Header Format 🥒	<projectname></projectname>
Default Footer Format 🥜	Document: <supplierdocnumber> Page: <pagenumber> of <totalpages></totalpages></pagenumber></supplierdocnumber>
Default Submission Number Format 🥜	222
Primary Rev# Default Value 🥜	000
Default Primary Doc Rev Format 🥜	222
Default Secondary Doc Rev Format 🥒	222
Primary Revision Number Warning 🥜	Warn if not changed
Primary Doc Rev Name 🖋	Wolfe PA Rev #
Secondary Doc Rev Name 🥒	Customer Rev #
Handling Duplicates from Card to Units Changes 🥜	Increase sheet
Status for Stage Auto Completion 🖋	Customer Final Status
Allow Single Tag for Multi Qty CSV Upload 🖋	No
Force Mapping for New Projects &	No
Force Mapping on Codes List (Requirements) 🖋	No

### Add mapping while adding codes to a project

The add codes pop up shows you the mapping and allows you to change it (and that setting will be saved to the master list).

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				Add D	oc Code			+						
				Select	Doc Code1	Doc Code Name	Internal Code	prenal Code Na						
Grid F	iows Colors				104	Inspection and Test Plan	- Select Internal Code -							Save
	nent Requirem				199	Piping ISO	- Select Internal Code -							
					К03	Recommended Spare Parts (Priced)	C99							
	Internal Code	Internal Code Name	Doc Code1		L09	Equipment Hazardous Area Certificates	M99			Stage List	Tools	Eq#	Required	
	Q99		A01		L14	Functional Test Reports	P99		port	IFI	◎◎自♥	Tag	1/1	
	Q99	Other Quality Docu			M05	Production Test Results (Incl Welding)	Q99		sted (Sub-Supplier)	IFI	Ø û ♀	Tag	1/1	
	T99	Tests	B03		M06	Nde Records , Where Applicable	T99		sted (Sub-Supplier)	IFI	◎◎♥	Tag	1/1	
	Q99	Other Quality Docu	B06		M07	Heat Treatment Records/Stress Relief Charts	- Select Internal Code -		ited (Sub-Supplier)	IFI	¢ è ♀	Tog	1/1	
	Q99	Other Quality Docu	B14		M08	Material Traceability Records	- Select Internal Code -		sted (Sub-Supplier)	IFI	◎●♥	Tag	1/1	
	C99	Calculations	D16		M13	Painting/Insulation Inspection Test Report	- Select Internal Code -		sted (Sub-Supplier)	IFI	◎◎♡	Tag	10/10	
	C99	Calculations	D26		M17	Leakage Test Certificate	- Select Internal Code -		ited (Sub-Supplier)	IFI	◎◎♀	Tag	2/2	
	C99	Calculations	D27		N02	Shipping And Packing Documents	- Select Internal Code -		ated (Sub-Supplier)	IFI	Ø û ♥	Tag	1/1	5
	D99	Drawings	E02		N03	Hazardous Material Shipping Cerfiticates	- Select Internal Code -		sted (Sub-Supplier)	IFI	000	Tag	10/10	5
	D99	Drawings	E09		007	Certificate Of Compliance	- Select Internal Code -		ited (Sub-Supplier)	IFI	◎◎♥	Tag	2/2	
	D99	Drawings	E88		010	Technical Deviation Requests	- Select Internal Code -		sted (Sub-Supplier)	IFI	◎自♥	Tag	1/1	
	M99	Manuals	F06		018	AB41 Statutory Declaration Form For Registratio	- Select Internal Code -		sted (Sub-Supplier)	IFI	Ø @ ♥	Tag	1/1	
	C99	Calculations	F13		P99	PID	- Select Internal Code -		sted (Sub-Supplier)	IFI	♥☆♥	Tag	10/10	
	P99	Procedures	G15		Q02	Weld Procedure Spec(Wps) And Qualifications (	- Select Internal Code -		ted (Sub-Supplier)	IFI	Ø û ♀	Tag	2/2	
	D99	Drawings	G99		Q05	Surface Preparation And Painting Procedure	- Select Internal Code -		sted (Sub-Supplier)	IFI	000	Tag	2/2	
	P99	Procedures	H02		Q06	Weld Procdure For Casting Repair	- Select Internal Code -		sted (Sub-Supplier)	IFI	000	Tag	1/1	
	M99	Manuals	H03	10	S02	Dispatch Dossier	- Select Internal Code -		ited (Sub-Supplier)	IFI	Øev	Tag	1/1	
	M99	Manuals	103						ated (Sub-Supplier)	IFI	089	Tag	1/1	
	M99	Manuals	K05	No more	pages   🔿   Sho	w on Page: 100 V		Select/Deselect All	sted (Sub-Supplier)	IFI	000	Tag	2/2	
	C99	Calculations	M02						ted (Sub-Supplier)	IFI	0 a Q	Tag	10/10	
								Add Selected						

### Add Mapping AFTER adding codes to a project

If you have already added the code to the project, you must manually set the cross-reference values on the requirements screen. You can add mapping via the internal codes column, or via CSV export/import.

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Grid R	ows Colors													Save
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1		Other Quality Docu	A01	Document Register	Order		10	AO	SDI Report	IFI	00 🗊 🖶	Tag	1/1	1
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	D99	Tests	B03	Fabrication / Production Schedule	Order		10	AO	Generated (Sub-Supplier)	IFI	Øê♥	Tag	1/1	
	M99	Other Quality Docu	B06	Table Of Contents	Order		10	AO	Generated (Sub-Supplier)	IFI	Ø食♥	Tag	1/1	
	P99	Other Quality Docu	B14	Vendor Sub-Orders	Order		10	AO	Generated (Sub-Supplier)	IFI	ØB¥	Tag	1/1	
	Q99 T99	Calculations	D16	Instrument Data Sheet	Tag (TE)	-	10	AO	Generated (Sub-Supplier)	IFI	089	Tag	10/10	
	C99	Calculations	D26	List Of Special Tools	Item/Model (TE)	-	10	AO	Generated (Sub-Supplier)	IFI	Ø8₽	Tag	2/2	
		Calculations	D27	Bill Of Material	Order		10	AO	Generated (Sub-Supplier)	IFI	ØB¥	Tag	1/1	V

**Enjoy Internal Codes!**