

Internal Doc Code List

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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.

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

L00 - 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.

The screenshot shows the 'Doc Codes' interface in DocBoss. The breadcrumb trail is 'Lists / Companies / Wolfe PA / Code/Status/State'. The 'Doc Codes' section is active, and the 'Internal' tab is selected, indicated by a red arrow. Below the tab is a 'Name' field containing 'Internal'. A table titled 'Code List' displays the following data:

Doc Code	Doc Code Name	Level	Type	Stage List	Delivery Days	Reference Date	Query	Tools	Discipline	DOC or DWG	Customer Rev	Vendor's VP Number	YDR Code	VP Size	NMR
A00	Document Index	- No Level -	SDI Report	IFI	10	AO	All Required								
C00	Calculations	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
D00	Drawings	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
E00	Data Sheets	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
L00	Lists	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
M00	Manuals	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
P00	Procedures	- No Level -	Published	IFI	10	AO	All Required								
Q00	Quality Reports / Testing	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
R00	Compilations	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
S00	Schedules	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
W00	Welding Data	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
X00	Shipping Data	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								
Z00	Other / Misc	- No Level -	Generated (Sub-Supplier)	IFI	10	AO	All Required								

At the bottom of the interface, there are controls for 'No more pages', 'Show on Page: 20', 'Select All (this page only)', 'Select All (all pages)', 'Disable Selected', 'Save', 'Export in CSV', and 'Import from CSV'.

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

<input type="checkbox"/> Enable Grid Search for Large Project ?	Card Name Suffix: <input type="text"/>
<input checked="" type="checkbox"/> Delivery output ?	Acme Turn Around <input type="text" value="10"/> (working days)
<input type="checkbox"/> Doc No. Override (Sub-Supplier) ?	Instance Turn Around <input type="text" value="10"/> (working days)
<input checked="" type="checkbox"/> Enable Mapping to Internal Codes ?	Action Turn Around <input type="text" value="5"/> (working days)
<input checked="" type="checkbox"/> Force Mapping on Requirements Grid ?	Date format <input type="text" value="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.

Admin General

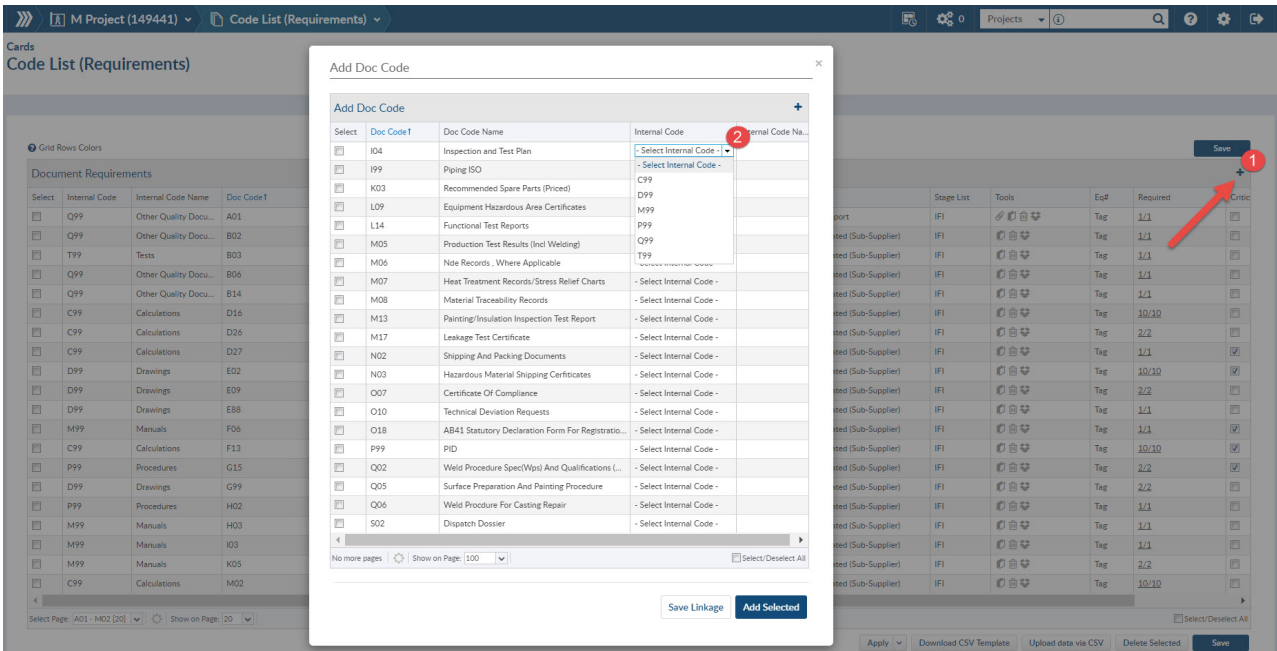
General

Project Default Options

Last Project Pattern	<ProjectName>{<SO_Quote>}
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>
Default Footer Format	Document: <SupplierDocNumber> Page: <PageNumber> of <TotalPages>
Default Submission Number Format	###
Primary Rev# Default Value	000
Default Primary Doc Rev Format	###
Default Secondary Doc Rev Format	###
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
Copy Units, Default Levels and Stage Lists	No
Default Delimiter for Bulk Assign	..''
Enable Internal Approval Statuses	Yes

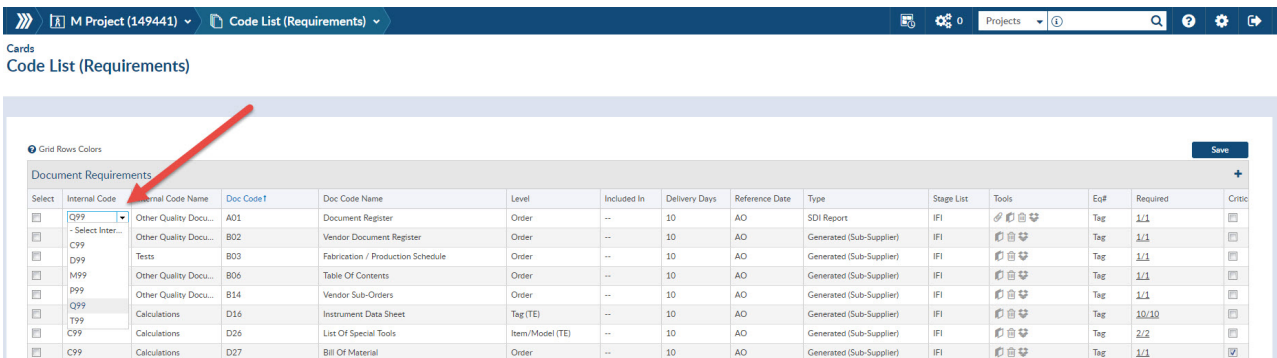
Add mapping while adding codes to a project

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).



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.



Enjoy Internal Codes!