

How to set a Level

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Auto-Generated cards are created by selecting a Level for each Doc Code on the Code List (Requirements) grid. It allows users to leverage project data to automate the master document list (or index). When the Equipment List (supply component) of a project includes many items, with several documents for each item, the auto-generation tool delivers a lot of value.

What is a LEVEL?

The Level is an attribute that DocBoss uses to group data from the Equipment List of a project.

Imagine a collection of fruit. There are many ways you might choose to group them.

- Color
- Taste (sweet/sour/salty/bitter)
- Country of origin
- Firmness (soft/medium/hard).
- Shape
- Type

If these were in DocBoss, each of these attributes would be an option for the Level selection.

Typical equipment Levels in DocBoss include

- Order
- Tag
- Model
- Shipment
- Sub-Supplier
- Assembly

How many cards will be created?

How many groups would be created if you grouped by that Level?

If we had 10 bananas and 15 oranges, and we grouped them by color – HOW MANY GROUPS WOULD WE HAVE?

Answer = 2 (Group 1 = Yellow & Group 2 = Orange).


Therefore two cards get created

Similarly:

If you have 3 pieces of equipment, and there are two unique model numbers, when you choose Model as your Level, then you would have Two cards created.

Example

Assume the following Equipment List:

Tagged Equipment Units				
DEMO Line Nu...	Item/Model	Tag Number	Sub-Supplier	Tools
1	ItemA	Tag 1	Sub-Supplier	  
2	ItemB	Tag 2	Sub-Supplier	  
3	ItemA	Tag 3	Sub-Supplier	  

If we group by “Item/Model”, we will have two groups and create two cards

- Group “ItemA” (contains item 1 and 3)
- Group “ItemB” (contains item 2)

If we group by “Tag”, we will generate three groups and create three cards

- Tag 1 (contains item 1)
- Tag 2 (contains item 2)
- Tag3 (contains item 3)

If we group by “Sub-Supplier”, we will generate two groups and create two cards

- Sub X (contains item 1 and 3)
- Sub Y (contains item 2)

So – can we assign the same level to more than one doc code?

Same example from above, and the Doc Code is **D01-Drawings**. If we set the Level to **TAG**: DocBoss will use every unique “tag number” to build the references.

Cards

Code List (Requirements)

Document Requirements						
Select	Doc Code	Doc Name	Level	Eq#	Type	Stage List
<input type="checkbox"/>	BOM	Bill of Material	Order	Tag	Generated (Sub-Supplier)	IFR/IFA/IFI
<input type="checkbox"/>	DMD	Dimensional Drawing	Tag (TE)	Tag	Generated (Sub-Supplier)	IFR/IFA/IFC
<input type="checkbox"/>	ITP	Inspection and Test Plan	Order	Tag	Generated (Sub-Supplier)	IFR/IFA/IFI

The auto-created document numbers combine the doc code, and the group value (we call this the REFERENCE).

D01_Tag 1

D01_Tag 2

D01_Tag 3

Here is the result in the index list – looking at the same columns.

Cards
Card List

Standard Query

Project Hub Outstanding Actions Index Reports & Compilations Pri Est

Cards Cards In/Out Equipment

Code List (Requirements)
Card List
Card to Unit Changes
Obsolete Cards
Request Cards from Supplier

Incoming Documents
Outgoing Submittals

Equipment List
Levels

AMEC Doc Code: - Select Code -
Stage: - Select Stage -
 Due to AMEC:
 Expected Return to DEMO:
Days since last request:

Grid Rows Colors How to use auto-generated v

Card List

	Required	Doc Code	Title	AMEC Doc #1	Tag Number List	Level	Status (Combined)	DEMO E
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DMD	D01-Tag 1	D01 Drawing	Tag 1	Tag (TE)	NULL	147568-0
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DMD	D01-Tag 2	D01 Drawing	Tag 2	Tag (TE)	NULL	147568-0
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DMD	D01-Tag 3	D01 Drawing	Tag 3	Tag (TE)	NULL	147568-0

Give me an EASY WAY!

Pose this question for each Doc Code:

I need ONE [insert DocCode-Name] for each [insert Level]

e.g

I need ONE D01-Drawing for each Tag, it dictates that for every unique tag number in your Equipment List, you should expect one D01-Drawing.

Some other examples:

- We need one [Data Sheet] for every [Tag]
- We need one [Catalogue] for every [Model]
- We need one [Material Traceability Report] for each [Heat #]
- We need one [MTR package] for each [Drawing]

Note: When changing a level to "Manual", DocBoss removes any query that may have existed on the previously selected level for that code. To re-enable a query, the level should be reverted back to the auto-generated level previously selected.

For more details about how levels work have a look at our video: [Auto-Creation of Document Registers.](#)