

Duplicating Codes: How and Why

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Sometimes, your customer gives you a rather GENERIC doc code. But - in your company, there are several separate documents which correspond to that code, and you want to manage them all separately (so you can keep track of the ones you are missing etc...).

A classic example: The customer has a single "Non Destructive Examination (NDE) Tests" code, but you have separate tests for MP, PMI, UT, etc.

So question is: How can I get those separate documents into DocBoss?

> You need separate cards.

*Remember that a card is the smallest component. It contains the metadata for the file. This includes the document numbers, status, the list of linked equipment, and doc codes.

How to Duplicate

From the CODE LIST:

The screenshot shows the DocBoss interface. At the top, there are navigation elements: a blue bar with a right-pointing arrow, a search icon, and the text 'CRPO (1234-5678)'. Below this is another blue bar with a document icon and the text 'Code List (Requirements)'. The main content area is titled 'Cards' and 'Code List (Requirements)'. Below the title is a 'Grid Rows Colors' icon. The main table is titled 'Document Requirements' and has the following columns: 'Doc Code', 'Doc Code Name', and 'Level'. The first row has the values 'NDE', 'Non Destructive Examination (NDE) Tests', and 'Order'. A red arrow points to the 'Tools' column of this row, which contains a 'Duplicate Doc Code' button. Below the table, there is a pagination bar with 'No more pages', a refresh icon, and 'Show on Page: 30'.

After adding the Doc Code for NDE reports, just DUPLICATE the code. This creates a second line in the Code List with the same Doc Code

Then - simply change the names for EACH Code, and set the level to create the cards for each test.

e.g. Magnetic Particle Tests, Positive Material Identity (PMI) Tests

CRPO (1234-5678) Code List (Requirements)

Grid Rows Colors Save

Document Requirements +

Select	Tools	Doc Code	Doc Code Name	Level	Type	Stage List	Cover Page / Stamps	ACME Cover Page
<input type="checkbox"/>		NDE	Magnetic Particle Test Procedure	Order	Generated (Wolfe PA)	IFI	Cover page only (no stamp)	Use Project Default
<input type="checkbox"/>		NDE	Positive Material Identification (PMI)	Order	Generated (Wolfe PA)	IFI	Cover page only (no stamp)	Use Project Default

No more pages Show on Page: 10 Select/Deselect All

Apply Download CSV Template Upload data via CSV Delete Selected Save

Duplicating Codes is especially useful because it allows you to have different levels/queries/stages etc for the separate codes.

*Note: You can create a copy/sheet of one CARD in the card list. This is really designed when you have a drawing, but have multiple pages related to one piece of equipment. It will increment a sheet number in DocBoss (and give it a separate doc number, but keep it connected to the same equipment/tags). [Click here to read the complete article.](#)

Or if you need to send different documents applicable to different tags you can Split a Card and assign specific units to each card. [Click here to read the complete article.](#)

Package the Codes

Assume you wish to upload a report for each tag, and your customer requires that you submit only ONE PACKAGE containing all reports for each type of document.

You can create a quick package for any code by clicking the package button under the tools column. For help creating packages, [check out this article.](#)