

# Definitions of the Users and Lists Sections

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Users and lists can be managed from the "Project Profile" section of Project Main (**Project Menu > Set Up > Project Configuration**). The "Doc Code and Status" Lists" area is where lists can be managed, and the "Users and Key Contacts" area allows you to define key contacts for the specific project.

The screenshot shows the 'Project Configuration' interface for 'Pump Project (1234)'. The 'Set Up' section is active, with 'Project Configuration' as the main title. Below the title are tabs: 'Main' (selected), 'Advanced', 'Fields & Equipment Types', 'Compilation & Package Presets', 'Expediting', and 'Info'. The 'Project Profile' section is expanded, showing three options: 'Project Profile', 'Doc Code and Status Lists', and 'Users and Key Contacts'. The last two options are highlighted with a red box. To the right of these options are expand/collapse icons. Below the main content area, there is a light blue information box with an 'i' icon and text: 'Any fields marked with a red asterisk (\*) are mandatory. The settings for which users are mandatory can be changed on the project fields template.'

## Users and Key Contacts

### Users

Internal users generally play a role in the routing/reviewing/uploading of documents. The role names can be changed by your company admin. The default role names depend on your instance, but typically listed as below:

- Doc Controller
- Project Engineer / Preparer
- Drafter / Checker
- Manager / Approver

Multiple users can be added to each role. Note that only the first user (alphabetical) will display on output templates listing roles.

### Customer/End User contacts

These are system contacts, both for internal reference, and for quick additional to distribution lists.

**Customer Engineer:** The customer's project engineer.

**Customer Expediter:** The customer's project expeditor.

**Customer Doc Controller:** The customer's document controller for this project.

## Doc Code and Status Lists

### Doc Code Lists

**Use Lists:** This allows you to indicate if you want to use the customers' doc code list (you should have already set up), an internal doc code list, or the end users' doc code list.

**Doc Code List:** The drop down will allow you to select the applicable Doc Code list for this project (based on your selection above if it is customer provided, end user provided, or internal) - these lists should be pre-created

### Return Status Lists

**Use Status Lists from:** This allows you to indicate if you want to use the customers' status list, an internal status list, or the end users' status list.

**Customer Return Status List:** The drop down will allow you to select the applicable return status list for this project (based on your selection above)

**Status for Stage Auto Completion:** If you have a stage that does not require an action for it to become complete you have the option to have them set to "Z" status or to set to the Customer final status.

**Internal Approval Status List:** This allows you to choose which Internal Approval Status List you want to use on the project, if you have more than one.

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