Definitions of the Users and Lists Sections

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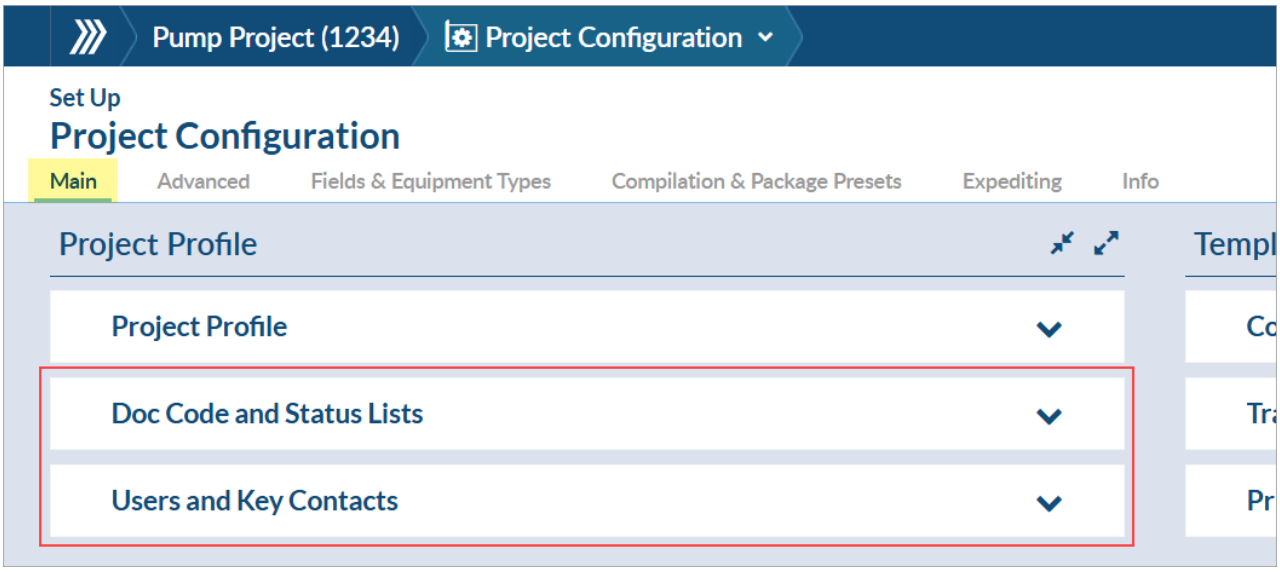
Users and lists can be managed from the "Project Profile" section of Project Main (**Project Menu > Set Up > Project Configuration**). The "Doc Code and Status" Lists" area is where lists can be managed, and the "Users and Key Contacts" area allows you to define key contacts for the specific project.



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 expediter.
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.