

Custom Levels

09/16/2024 1:12 pm MDT

Custom Levels

We use custom levels to subdivide and classify your units when there are alternate requirements past the default levels we automatically provide.

Assume the requirement for packing slips. If you have many items, they may ship in different packages. What level would you associate with the Packing Slip Doc Code? Order? No – because there is only one order. Model? Unless you are shipping packages which contain only the exact same model number – it is unlikely.

In this case, you need to create a manual grouping of items, which can be grouped into one reference each.

First we name the level, then add references. We then identify what lines to include the reference. If we have three shipments, we'd create 3 references. When creating the cover page, all appropriate tag information would be pulled through based on the tag numbers for the items you have selected.

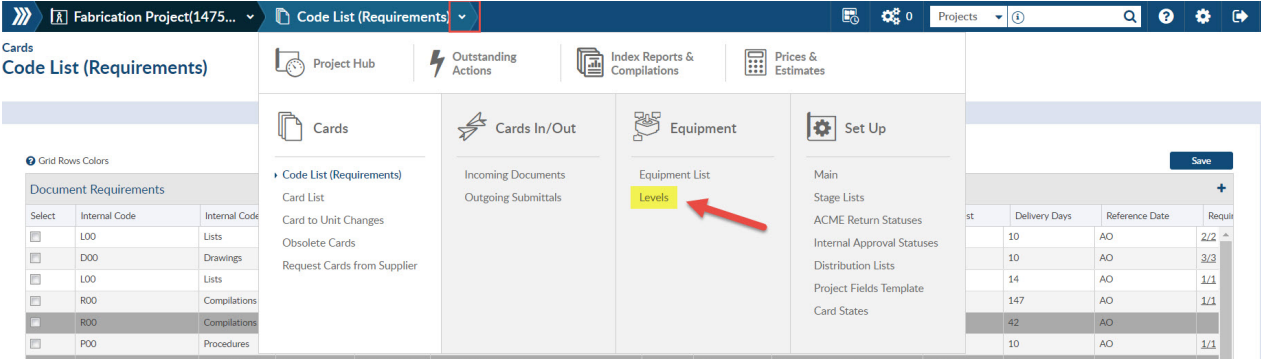
You can create custom levels with the query builder, OR by choosing the line items.

You can add and edit references anytime (there may be an impact on documents – covered in the revisions section of the manual). The card would reflect that we are only supplying 2 manuals, and we ensure that all relevant tag numbers are correctly associated.

Example

Assume there are 3 different models. XXX, XXY and ZZZ. Those products beginning with X are covered by one manual and those products beginning with Z are covered by another manual. If we were to issue the IOM by “model” the card would show that we would be providing 3 manuals, and the reference will be the specific model numbers. If we chose only to submit the manual once for the “x” models, we have a new problem of leaving out the tags associated to one of those models. We need to ensure “all” of the valid tag numbers are included on the cover pages, without submitting the same document twice.

Step 1. Navigate – Project Grid > Levels



The screenshot shows the software interface for 'Code List (Requirements)'. The top navigation bar includes 'Fabrication Project(1475...', 'Code List (Requirements)', and 'Projects'. The main area is divided into several sections: 'Cards', 'Cards In/Out', 'Equipment', and 'Set Up'. Under 'Equipment', there is a sub-section 'Equipment List' with a 'Levels' option highlighted in yellow and pointed to by a red arrow. The 'Set Up' section contains a table with columns for 'st', 'Delivery Days', 'Reference Date', and 'Require'.

st	Delivery Days	Reference Date	Require
10	AO		2/2
10	AO		3/3
14	AO		1/1
147	AO		1/1
42	AO		
10	AO		1/1

Step 2. Add New Level

-Click add in top right of grid and name.

Add New Level

Create new
 Import from instance

Level Name: *

Is Procedure List?

Step 3. Add First Reference

-In your situation, an example you could use is "Manual 1"

Add New Reference

Name: *

Step 4. Define which cards are to be included in the Reference you added. Click on the reference in the grid (will highlight in yellow)

a. you can manually select the units from the unit's grid

-select all applicable and then click save (the units you select will then highlight in green once saved)

References

Units Tab based on : TAGGED equipment

Name	Tagged Equipment Units Count	Steel Units Count	Tools
Manual 1	3	0	

Units

Found References

select	Wolfe PA Line Number	ACME Line Number	Item/Model	Tag Number	Sub-Supplier	Ship Date	ACME PO Number	ACME PO Rev Number	Milestone	Product Group	Type	Batch	sub	Assigned: Current Reference Only	Assigned: Other
<input checked="" type="checkbox"/>	1	A001	XXX	1456	Supplier1	2019-05-11									
<input checked="" type="checkbox"/>	2	A002	XXZ	7121	Supplier1	2019-05-11									
<input checked="" type="checkbox"/>	3	A003	XXZ	8208	Supplier1	2019-05-11									
<input type="checkbox"/>	4	A004	ZZZ	1576	Supplier1	2019-05-11									

Select All (this page only)
 Select All (all pages)

OR

b. you can use a query builder – click the add-in top right of query builder and add accordingly

-a query you could use for this situation is

Field = Item/Model, Starts With = X,

Once you click save you will notice the applicable units will be marked selected and highlighted in green)

References

Name	Tagged Equipment Units Count	Steel Units Count	Tools
Installation, Operation and Maintenance Manual	3	0	

No more pages | Show on Page: 20

Units

Select ALL

Query Builder

Not	Parenthesis	Field	Action	Value	Parenthesis	AND/OR	Tools
<input type="checkbox"/>		Item/Model (TE)	Starts with	X		AND	

Found References

DocLevel1	Name
Item/Model (TE)	XXX
Item/Model (TE)	XXZ

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Units

Select	Wolfe PA Line Number	ACME Line Number	Item/Model	Tag Number	Sub-Supplier	Ship Date	ACME PO Number	ACME PO Rev Number	Milestone	Product Group	Type	Batch	sub	Assigned: Current Reference Only	Assigned: Other Reference
<input checked="" type="checkbox"/>	1	A001	XXX	1456	Supplier1	2019-05-11									
<input checked="" type="checkbox"/>	2	A002	XXZ	7121	Supplier1	2019-05-11									
<input checked="" type="checkbox"/>	3	A003	XXZ	8208	Supplier1	2019-05-11									
<input type="checkbox"/>	4	A004	ZZZ	1576	Supplier1	2019-05-11									

No more pages | Show on Page: 10

Select All (this page only) | Select All (all pages)

Save

Step 5. Continue to add Second Reference

Add New Reference

Name: *

Cancel **Save**

Step 6. Define which cards are to be included in the new Reference you added. Click on the reference in the grid (will highlight in yellow)

a. you can manually select the units from the unit's grid

-select all applicable and then click save (the units you select will then highlight in green once saved)

References

Name	Tagged Equipment Units Count	Steel Units Count	Tools
Manual 1	3	0	
Manual 2	1	0	

No more pages | Show on Page: 20

Units

Select ALL

Query Builder

Not	Parenthesis	Field	Action	Value	Parenthesis	AND/OR	Tools
<input type="checkbox"/>							

Found References

DocLevel1	Name

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Units

Select	Wolfe PA Line Number	ACME Line Number	Item/Model	Tag Number	Sub-Supplier	Ship Date	ACME PO Number	ACME PO Rev Number	Milestone	Product Group	Type	Batch	sub	Assigned: Current Reference Only	Assigned: Other Reference
<input type="checkbox"/>	1	A001	XXX	1456	Supplier1	2019-05-11									
<input type="checkbox"/>	2	A002	XXZ	7121	Supplier1	2019-05-11									
<input type="checkbox"/>	3	A003	XXZ	8208	Supplier1	2019-05-11									
<input checked="" type="checkbox"/>	4	A004	ZZZ	1576	Supplier1	2019-05-11									

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Select All (this page only) | Select All (all pages)

Save

OR

b. you can use a query builder – click the add-in top right of query builder and add accordingly

-a query you could use for this situation would be opposite of above – just mark off NOT

NOT Field = Item/Model, Starts with = X

References

Name	Tagged Equipment Units Count	Steel Units Count	Tools
Manual 1	3	0	
Manual 2	1	0	

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Units

Select ALL

Query Builder

Not	Parenthesis	Field	Action	Value	Parenthesis	AND/OR	Tools
<input type="checkbox"/>		Item/Model (TE)	Starts with	X		AND	

Found References

DocLevel1 | Name

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Units

Select	Wolfe PA Line Number	ACME Line Number	Item/Model	Tag Number	Sub-Supplier	Ship Date	ACME PO Number	ACME PO Rev Number	Milestone	Product Group	Type	Batch	sub	Assigned: Current Reference Only	Assigned: Other
<input type="checkbox"/>	1	A001	XXX	1456	Supplier1	2019-05-11									
<input type="checkbox"/>	2	A002	XXZ	7121	Supplier1	2019-05-11									
<input type="checkbox"/>	3	A003	XXZ	8208	Supplier1	2019-05-11									
<input checked="" type="checkbox"/>	4	A004	ZZZ	1576	Supplier1	2019-05-11									

No more pages | Show on Page: 10 | Select All (this page only) | Select All (all pages)

Once you click save you will notice the applicable units will be marked selected and highlighted in green)

You can add and edit references anytime (there may be an impact on documents – covered in the revisions section of the manual). The card would reflect that we are only supplying 2 manuals, and we ensure that all relevant tag numbers are correctly associated.

You can now use Manuals as a LEVEL selection and DocBoss will auto-generate the two applicable cards and assign the tag lists accordingly.

Fabrication Project(1475... | Code List (Requirements)

Cards

Code List (Requirements)

Grid Rows Colors | Save

Document Requirements

Select	Internal Code	Internal Code ...	Doc Code#	Included In	Doc Name	Level	Eg#	Type	Stage List	Delivery Days	Reference Date	Required	Tools	Discipline
<input type="checkbox"/>	L00	Lists	BOM	--	Bill of Material	Order	Tag	Generated (Sub-Supplier)	IFA (w/IA)	10	AO	2/2		QCL
<input type="checkbox"/>	D00	Drawings	DMD	--	Dimensional Drawing	Item/Mode	Batch	Generated (ACME)	IFI	10	AO	3/3		QCL
<input type="checkbox"/>	Z00	Other / Misc	IOM	--	Installation, Operation and Maintenance Manual	Install	Tag	Generated (Sub-Supplier)	IFI	10	AO	1/1		
<input type="checkbox"/>	L00	Lists	ITP	--	Inspection and Test Plan	N/A		Generated (Sub-Supplier)	IFR	14	AO	1/1		PCL
<input type="checkbox"/>	R00	Compilations	MRB	--	Manufacturing Record Book	General		Compilation	IFA	147	AO	1/1		QCL
<input type="checkbox"/>	P00	Procedures	PRO	--	Dye Penetrant Examination Procedure	Batch		Published	IFA	10	AO	1/1		QCL
<input type="checkbox"/>	P00	Procedures	PRO	--	Heat Treatment Procedure	Installation, Operation ...		Published	IFA (w/IA)	10	AO	1/1		QCL
<input type="checkbox"/>	P00	Procedures	PRO	--	HIC Testing procedure	Manual		Published	IFI	10	AO	1/1		MEC
<input type="checkbox"/>	P00	Procedures	PRO	--	Impact Test procedure	Order		Published	IFI	10	AO	1/1		MEC
<input type="checkbox"/>	P00	Procedures	PRO	--	Magnetic Particle Test Procedure	Product Group		Published	IFI	10	AO	1/1		MEC
<input type="checkbox"/>	P00	Procedures	PRO	--	Packing, Shipping & Preservation Procedure	Pump, Tag		Published	IFA	10	AO	1/1		LOG
<input type="checkbox"/>	P00	Procedures	PRO	--	Ultrasonic Test Procedure	Sub-Supplier		Published	IFA	10	AO	1/1		MEC
<input type="checkbox"/>	M00	Manuals	QMP	--	Quality Manual (with ISO accreditation certificate)	Type		Published	IFA	10	AO	1/1		MEC
<input type="checkbox"/>	Z00	Other / Misc	REC	--	NDE Operator Qualifications	sub		Published	IFA	10	AO	1/1		MEC
<input type="checkbox"/>				--		Tagged Equipment		Published	IFI	10	BS	1/1		MEC
<input type="checkbox"/>				--		Units		Generated (Sub-Supplier)	IFR	10	AO	1/1		MEC
<input type="checkbox"/>				--		AssemblyLine (TE)		Generated (Sub-Supplier)	IFA	10	AO	1/1		MEC

Fabrication Project(1475... | Card List

Cards

Card List

Standard | Query

Card List

ACME Doc: Code IN (IOM Installation, Operation and Maintenance Manual X)

ACME Doc Code: - Select Code - | Reference: - Select Reference - | Level: - Select Level - | Tagged Units: - Select Unit - | Sub-Supplier: - Select Sub-Supplier - | Clear | Search

Stage: - Select Stage - | ACME Status: - Select Status - | State: - Select State - | Transmittal: - Select Transmittal - | Internal Code: - Select Internal Code -

Due to ACME: | Expected Return to Wolfe PA: | Days since last request: | Keyword:

Grid Rows Colors | How to use auto-generated values for ACME Doc # and Wolfe PA Doc # | Add to Ad-Hoc Queue | Set Date | Generate Request | Bulk Doc Download | Save

Card List

Required	Tools	Wolfe PA Doc #	Doc Code	Title	Item/Model List	Reference	Level	Status (Combined)	Wolfe PA Rev #	Stage	Card Name(Auto)	Due to ACME
<input checked="" type="checkbox"/>		147588-001.IOM	IOM	Installation, Operation and Maintenance Manual	XXX, XXZ	Manual 1	Installation, Operation and Maintenance M...	NULL	A1	IFI	IOM_Manual_1	2018-12-06
<input checked="" type="checkbox"/>		147588-002.IOM	IOM	Installation, Operation and Maintenance Manual	ZZZ	Manual 2	Installation, Operation and Maintenance M...	NULL	A1	IFI	IOM_Manual_2	2018-12-06

No more pages | Show on Page: 20 | Items on page: 2 | Set Required (this page only) | Set Required (all filtered rows) | Select All (this page only) | Select All (all pages)

Show Completed Cards | Show NULL Cards | Hide Unrequired Cards | Hide Merged Cards | Download Status Report (CSV) | Merge Selected | Add/Edit Data via CSV | Save

Filter Set: - Select Filter Set - | Create Filter Set | Update Filter Set | Edit Filter Set | Delete Filter Set

For more details about Custom Levels have a look at our video: [Using Custom Levels to Create Procedure Registers](#).
