

# Videos

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Short overviews of the main features of DocBoss.

## DocBoss Overview Videos

The following list contains the videos created to support our helpdesk articles with detailed examples and instructions that will help our users complete their project set up and document control.

You can access to DocBoss channel on Vimeo by clicking [here](#). Or choose to see any of our specific videos from the below list:

1 - **Add Customer to DocBoss:** <https://vimeo.com/121257966>

*How to: set up a new customer, add customer code lists, and add customer return status lists*

2 - **Starting a New Project in DocBoss:** <https://vimeo.com/121261785>

*How to: create a new project and fill out the project **Main** settings*

3 - **Auto-Creation of Document: Registers:** <https://vimeo.com/121268436>

*How to: add doc codes to a project, set levels in the project code list, and add an equipment list*

4 - **Trimming Auto-Created Registers:** <https://vimeo.com/121301288>

*How to: set cards as unrequired in the **Card List** and automatically set cards as unrequired with a query*

5 - **Manual Cards:** <https://vimeo.com/410162006>

*How to: enable manual cards, add individual manual cards, and add manual cards in bulk via CSV*

6 - **DocBoss Workflow and Status (Routing and Transmittals):** <https://vimeo.com/124564740>

*How to: understand the routing and submittal features in DocBoss*

7 - **Working with Stages:** <https://vimeo.com/363395448>

*How to: create stages and assign them to doc codes*

8 - **Create Compilations in DocBoss:** <https://vimeo.com/152017558>

*How to: create compilations (databooks), structure compilations, customize compilations, create multiple compilations, and link compilations to doc codes for submittal to customers*

9 - **Upload Documents & Assign Workflow to DocBoss:** <https://vimeo.com/217522905>

*How to: bring files into DocBoss through **Incoming Documents**, assign files to cards, view card history, and use bulk processing (to automatically match files to cards)*

10 - **Assign Individual Pages:** <https://vimeo.com/380021039>

*How to: split pages of a single file into separate cards*

**11 - Stamps:** <https://vimeo.com/380305558>

*How to: upload a stamp template, choose the stamp template for a project, set default cover page/stamp options per doc code, and apply stamps*

**12 - Using Custom Levels to Create Procedure Registers:** <https://vimeo.com/104269961>

*How to: create custom levels available for all projects, import custom levels to a project, use major tags with custom levels, link equipment to custom levels' references (manually or with a query), and apply a custom level to a doc code*

**13 - Outstanding Actions:** <https://vimeo.com/375517481>

*How to: use routing to assign actions to DocBoss users, complete outstanding actions, and configure email reports for outstanding actions*

**14 - How to create a Quote in DocBoss:** <https://vimeo.com/535050151>

*How to: use the **Prices & Estimates** module to create a quote for documentation charges (to provide to customers)*

**15 - Managing Material Test Reports (MTRs):** <https://vimeo.com/392512133>

*How to: use the library feature to manage MTR documents*

**15.1 - MTR Management for Pipe Suppliers:** <https://vimeo.com/794679495>

**16 - Vendor/Supplier Portal:** <https://vimeo.com/501744793>

*How to: log into the supplier portal (for sub-suppliers) and upload documents to a project (as a sub-supplier)*

**17 - Templates:** <https://vimeo.com/503496755>

*How to: create templates, download sample templates, add variables, and add a list of document history entries to cover page templates*

**18 - Internal Approval:** <https://vimeo.com/520162787>

*How to: add an Internal Approval stage (where internal users complete a full approval/rejection cycle for sub-supplier documents)*

**19 - Packing & Unpacking:** <https://vimeo.com/555424022>

*How to: create packages and unpack returned package documents into individual cards*

**20 - Custom Card Fields:** <https://vimeo.com/555426158>

*How to: add custom card fields in admin, enable custom card fields on a project, and view custom card fields in the **Code List and Card List***

**21 - Custom Equipment Fields:** <https://vimeo.com/555427576>

*How to: add custom equipment fields in admin, enable/add new custom equipment fields in project, use a custom equipment field as a doc code level, create combination fields, and add additional unit types*

22 - **Major Tags:** <https://vimeo.com/566624712>

*How to: enable major tags, use custom equipment fields with major tags, and add major tag values to a project*

23 - **Markups:** <https://vimeo.com/569081460>

*How to: add, edit, and delete annotations using the document viewer*

## Quick Tips Videos

The following are quick tip videos to further support our helpdesk articles and videos. These quick tip videos have been created based on frequently asked questions.

### Compilation Settings

**Edit Document Numbers via CSV (also includes how to change manual number back to auto-generated number)**

**Edit Revision Numbers via CSV**

**Edit Sequence Numbers via CSV**

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