

Edit Library Cards

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Library cards can be updated both individually and in bulk when changes are required. To begin making changes, navigate to **System Menu > Library > Manage Library**.

Individual Documents

To make a change to an individual library document, find the document in the grid and click the pencil icon under "Tools." From the edit form, values in the "Document Card Info" section, including (but not limited to) the associated affiliate(s), document type, associated company, and keywords, can be modified as needed.

The screenshot displays the 'Manage Library' interface. On the left, there are sections for 'Inbound Documents' and 'Unprocessed Files'. The main area shows a 'Library - Files' grid with columns for 'Tools', 'Omega Last Review Date', 'Company', and 'Document Type'. A red arrow points from the pencil icon in the 'Tools' column of the grid to the 'Document Card Info' section of the 'Edit Library Card' form on the right. The form includes fields for 'Affiliate' (Omega Supply), 'Document type' (Manual), 'Company' (Sub-Supplier 1), 'Title' (Supplier 1 Product Manual), and 'No. of pages' (1). There are also 'Cancel' and 'Save' buttons at the bottom right of the form.

To disable a library card, click the trash bin icon under "Tools". If a disabled library card should be permanently deleted, click the "X" icon under "Tools". Note that the library card must first be disabled before it can be deleted. A disabled library card can also be re-enabled if required.

This close-up shows the 'Tools' column of the library grid. Three icons are highlighted with red boxes and labels: a trash bin icon labeled 'Disable', an 'X' icon labeled 'Delete', and a refresh icon labeled 'Re-enable'.

Multi Documents

To make a change to multiple library documents simultaneously, select the applicable documents from the grid and click "Export to CSV" above the grid. To select files in bulk, use the "Select all" boxes in the bottom right.

Library - Files

Affiliate: Select or type ahead...

Keyword: [Search]

Disabled Show Expired only Filter Grid row colors Disable Export to CSV Import from CSV Download ZIP Add

Tools	Omega Last Review Date	Company	Document Type	Title	Expiry Date of Doc	Review Period (months)	Card Expiry Date	Heat #
[Icons]	2025-05-30	ABC Engineering	MTR	Testing				
[Icons]	2025-01-28	Sub-Supplier 2	Manual	Supplier 2 Product Manual				
[Icons]	2025-01-28	Sub-Supplier 1	Manual	Supplier 1 Product Manual				

No more pages | Show on page: 20 | Items on page: 3 | Total found: 3 | Select all (this page only) | Select all (all pages)

Once exported, values in the spreadsheet, including (but not limited to) the document type, associated company, and keywords, can be modified as needed. To disable an active library card, type "disabled" in the "Status" column. To permanently delete the library card, type "DELETE".

As a reminder, any columns with an asterisk are **mandatory**.



There are two columns that cannot be modified (indicated by the suffix "(Do not Touch)"): the Library ID number, and the File Name.

After the desired change(s) have been made, re-upload the CSV using the "Import from CSV" button above the grid.

Disable Export to CSV Import from CSV Download ZIP Add

Type	Title	Expiry Date of Doc	Review Period (months)	Card Expiry Date	Heat #
	Testing				
	Supplier 2 Product Manual				