

# Edit Library Cards

07/08/2025 4:46 pm MDT

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.

**Edit Library Card**  
Card: Supplier 1 Product Manual (Sub-Supplier 1)  
Viewer: Off

**Current file in this card**  
Operating & Maintenance Manual Supplier 1.pdf

**New file**  
Drag and drop new file Or choose files from disk  
Max upload size 400Mb

**Document Card Info**  
Affiliate \*  
Omega Supply  
Document type \*  
Manual  
Company \*  
Sub-Supplier 1  
Title \*  
Supplier 1 Product Manual  
No. of pages \*  
1  
Review schedule  
☐ By expiration date  
☐ By review period

**Library - Files**  
Affiliate: Select or type ahead...  
Company: Select or type ahead...  
Keyword:  
Disabled Show Expired only Filter Grid row colors  
Tools Omega Last Review Date Company Document Type Title  
2025-05-30 ABC Engineering MTR Testing  
2025-01-28 Sub-Supplier 2 Manual Supplier 2 Product Manual  
2025-01-28 Sub-Supplier 1 Manual Supplier 1 Product Manual  
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## 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.

**Library - Files**  
Affiliate: Select or type ahead...  
Keyword:  
Disabled Show Expired only Filter Grid row colors  
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 #
<input checked="" type="checkbox"/>	2025-05-30	ABC Engineering	MTR	Testing				
<input checked="" type="checkbox"/>	2025-01-28	Sub-Supplier 2	Manual	Supplier 2 Product Manual				
<input checked="" type="checkbox"/>	2025-01-28	Sub-Supplier 1	Manual	Supplier 1 Product Manual				

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Once exported, values in the spreadsheet, including (but not limited to) the document type, associated company, and keywords, can be modified as needed. 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				

