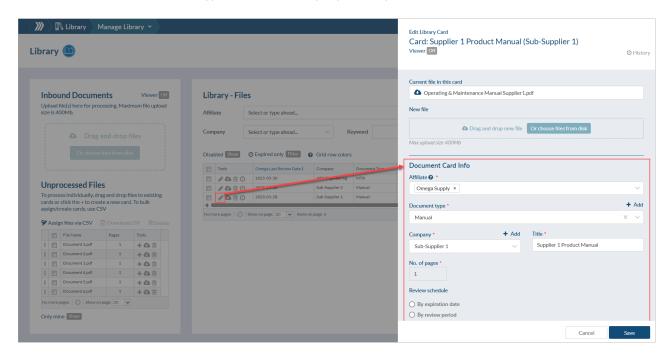
Edit Library Cards

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**.

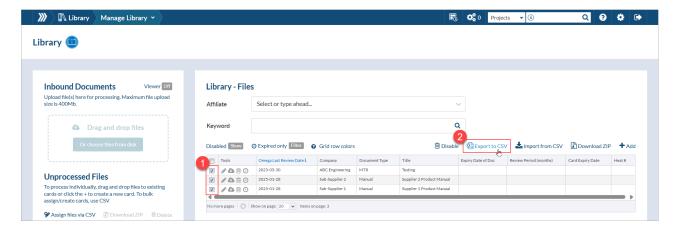
Individual Documents

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.



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.



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.

