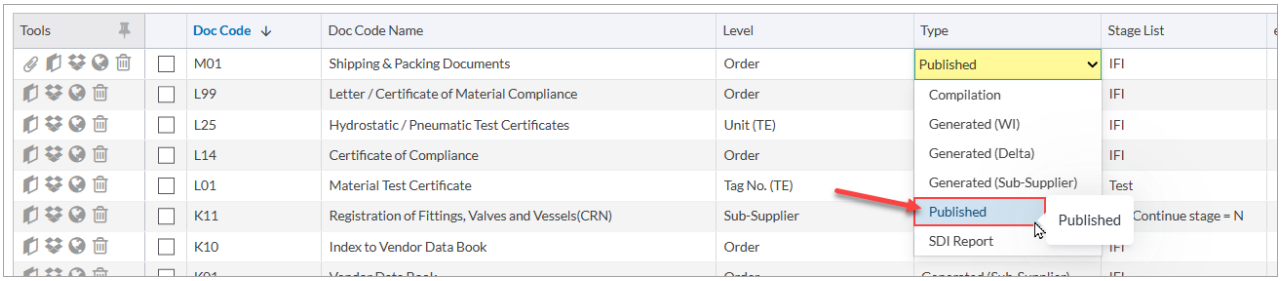
Connect Library Documents to Doc Codes or Cards

07/08/2025 2:56 pm MDT

Library documents can be used on multiple projects and are connected to a project through the doc code list.

Set TYPE on Doc Code

To attach library documents to a doc code, navigate to the code list and set the TYPE of the applicable doc code to "Published."

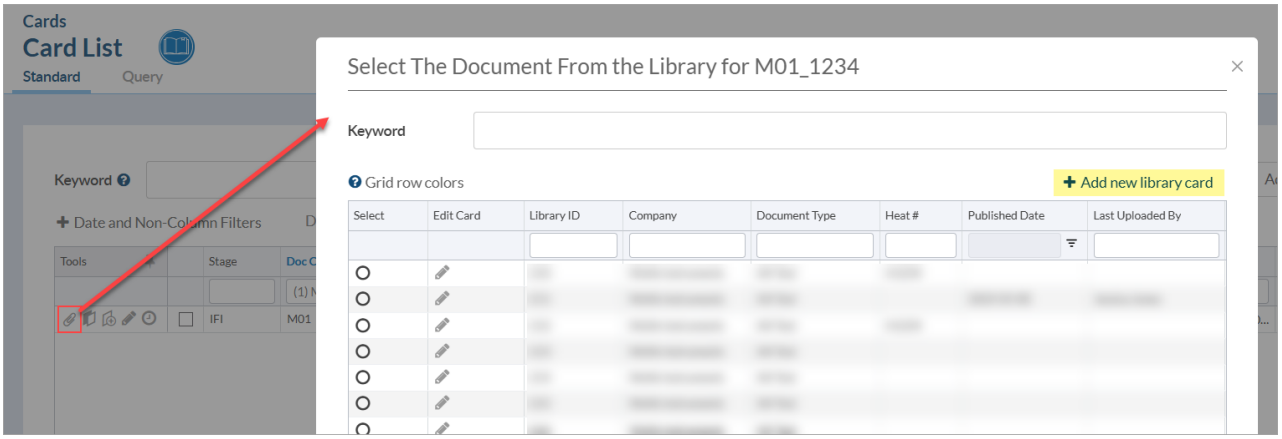


Attach a published document to a card

Attaching a published document to a card can either be done manually or automatically using a query.

Manually

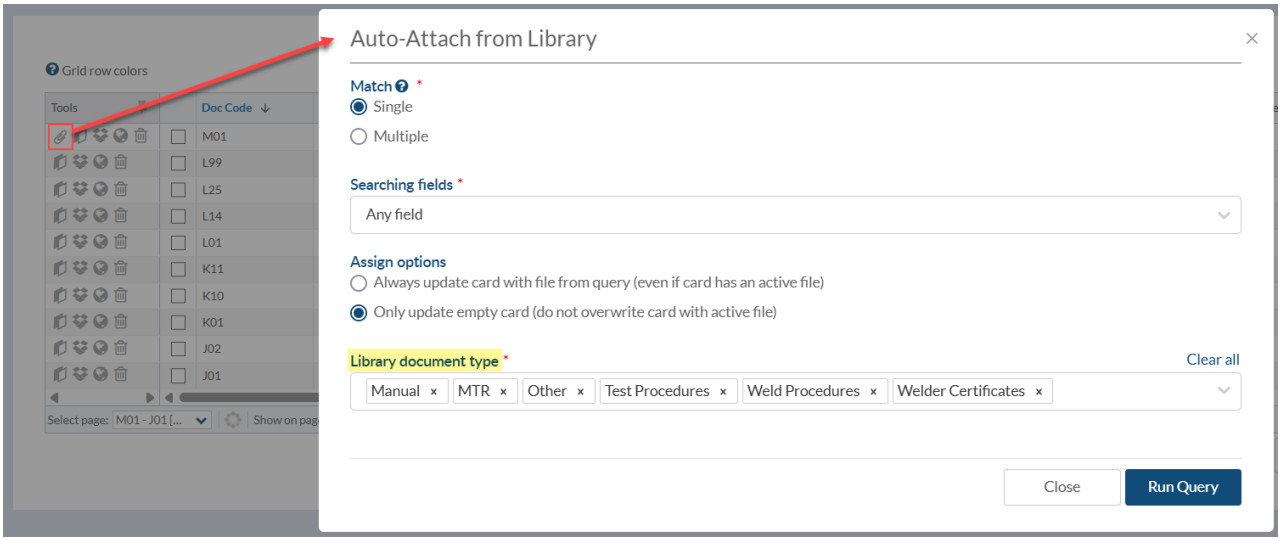
To manually assign published documents to a card, navigate to the card list. For the appropriate card, click the attach (paper clip) icon under "Tools." From the pop-up, search for the applicable library document, and add a new library card if needed.



Auto Assign

To automatically assign published documents to a card, navigate to the code list. For the appropriate code, click the attach (paper clip) icon under "Tools."

From the pop-up, you can choose the library document type(s) where the query will look for the document (e.g., Manual, MTR, Other, Test Procedures, etc.)



Before using the auto-assign feature, make sure the **level** for the doc code is set correctly.

The level should reflect the connection to the document (e.g., if multiple line items are organized into two distinct groups, set the level to that grouping). Once set appropriately, the auto assign feature looks for any library documents that have that reference in the key words.

Once a library document(s) has been attached to a card, the value in the "Est. Pgs" column will reflect the actual number of pages. The value will be grey to indicate it is an actual (not estimated) number.

