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."

Tools I	Doc Code ↓	Doc Code Name	Level	Туре	Stage List	
0000	M01	Shipping & Packing Documents	Order	Published 🗸	IFI	
10 😌 😧 🖻	L99	Letter / Certificate of Material Compliance	Order	Compilation	IFI	
10 😌 😧 🖻	L25	Hydrostatic / Pneumatic Test Certificates	Unit (TE)	Generated (WI)	IFI	
10 😌 😧 🖻	L14	Certificate of Compliance	Order	Generated (Delta)	IFI	
10 😌 😧 🛍	L01	Material Test Certificate	Tag No. (TE)	Generated (Sub-Supplier)	Test	
10 😌 😧 🖻	K11	Registration of Fittings, Valves and Vessels(CRN)	Sub-Supplier	Published Publish	hed Continue stage = N	
10 😌 😧 🖻	К10	Index to Vendor Data Book	Order	SDI Report	TEL	
	1/01	Vandan Data Daalu	Order	Conserved (Cult Conseller)	151	

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.

ds I rd List (199) dard Query	Select	Select The Document From the Library for M01_1234							
	Keyword								
Keyword 😧	🛿 Grid ro	ow colors						+ Add new library card	
+ Date and Non-Column Filters	Select	Edit Card	Library ID	Company	Document Type	Heat#	Published Date	Last Uploaded By	
								=	
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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.)

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		Doc Code 👽		
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ихо≞ 1≎о≘		1.25	Searching fields *	
		L14	Any field	,
1 ;; () 🗊		L01		
) ; (K11	Assign options	
j ∵ © û		K10	O Always update card with file from query (even if card has an active file)	
0₩0₪		К01	Only update empty card (do not overwrite card with active file)	
1 👽 😧 🛍		J02		Class
0₩0₪		J01	Library document type *	Clear
•		1	Manual × MTR × Other × Test Procedures × Weld Procedures × Welder Certificates ×	`
elect page: M01 - J	01[V Show on page		

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.

	Tools	Required	Document	Doc Code	Status (Combined)	Title	Est. pgs	Status Group
	0 🗊 🔂 🖉	~	B	P01	X(+)	Supplier 1 Product Manual	2	Not Approved (NULL/F
	0 🛍 🔂 🖉 🕗			P01	NULL	Shipping, Handling and Storage Procedure	2	Not Approved (NULL/F