

# Edit Cards via CSV file

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DocBoss allows users to make changes to existing data in the Card List using a CSV (excel) file. When you download the file for the first time the data can be a bit overwhelming - Don't let that scare you!

The screenshot shows the DocBoss interface for the 'Card List'. At the top, there are navigation tabs for 'DB Project (5552244)' and 'Card List'. Below this, there are filter options for 'ACME Doc Code', 'Reference', 'Sub-Supplier', 'Stage', 'ACME Status', and 'Location'. A search bar and 'Clear' button are also present. Below the filters, there are checkboxes for 'Due to ACME' and 'Expected Return to Wolfe PA', along with a 'Days since last request' field and a 'Keyword' field. A toolbar contains buttons for 'Add to Ad-Hoc Queue', 'Set Date', 'Generate Request', 'Bulk Doc Download', and 'Save'. The main area displays a table titled 'Card List' with columns: Tools, Required, Card Name(Auto), Doc Code, Stage List, Status (Combined), Wolfe PA Doc #, and Due to ACME. The table contains several rows of data. Below the table, there are pagination controls and checkboxes for 'Show Completed Cards', 'Show NULL Cards', and 'Hide Unrequired Cards'. At the bottom right, the 'Add/Edit Data via CSV' button is highlighted with a red arrow.

Once 'Add/Edit Data via CSV' is clicked a window will open and you have the option to download the CSV file (as it currently exists) This will give you the correct column headers and will be populated with any existing data.

The screenshot shows the 'Add/Edit Data via CSV file' dialog box. It contains the following text: 'The first line is treated as header and omitted, the rest of lines will be processed.', 'Please see how to add/edit cards via CSV', 'Use [ORvalue] if you want overwrite default Wolfe PA Rev # via CSV upload. Otherwise your changes will be ignored.', 'Use OVERRIDE word inside ACME Doc# Manual Changed (or Wolfe PA Doc# Manual Changed) field if you want to update proper auto-generated Doc# value.', 'Please see how to specify values containing semicolons or quotes if use EXCEL for editing CSV', and 'Max allowed file size is 400Mb'. Below the text, there are input fields for 'Delimiter\*' (set to ';'), 'CSV File\*' (with a 'Browse' button), and 'End of line MAC' (with a help icon). At the bottom, there are three buttons: 'Download CSV' (highlighted with a red arrow), 'Cancel', and 'Save'.

There are about 30 columns on the CSV download (more if you have custom columns created) Below are the

descriptions of each column.

## To Note:

- Column headers with the asterisk are required.
- You must include the Primary Doc Code and Doc Code Name, all other columns will default, if desired.
- Existing data that starts with "\*" should not be modified
- To update the Tags for an existing manual card via CSV, you **must update the Line No. List** column and DocBoss will add the associated tags. You cannot edit existing tags in the Tag List column for manually created cards (as indicated by "\*" at the start of these cells). Any changes to tags should be done using the line no. list column.
- If you want DocBoss to autogenerate your document number, you must enter [generate], include the square brackets, in your document number column.
- Use [ORvalue] to overwrite default primary revision number via CSV upload.
- Use **OVERRIDE** word inside <Customer>Doc# Manual Changed (or <instance> Doc# Manual Changed) field if you want to update proper auto-generated Doc# value.

The screenshot shows the Microsoft Excel interface with the following table structure:

|   | A                 | B                     | C               | D             | E     |
|---|-------------------|-----------------------|-----------------|---------------|-------|
| 1 | Id (Do not Touch) | Primary Doc Code(ID)* | Secondary Codes | Doc Code List | Title |
| 2 |                   |                       |                 |               |       |
| 3 |                   |                       |                 |               |       |
| 4 |                   |                       |                 |               |       |
| 5 |                   |                       |                 |               |       |
| 6 |                   |                       |                 |               |       |
| 7 |                   |                       |                 |               |       |

- ID (Do not Touch) - This is the DocBoos internal ID. Do not modify on existing data. You do not need to enter anything for new cards (lines)
- Primary Doc Code(ID)- Do not modify on existing data. The number value in the bracket is the Internal ID of the DocCode. You do not need to enter this UNLESS you have duplicate Doc Codes in your Requirements. To obtain this value, you have to navigate to the Code List (Requirements) grid and Download the CSV Template.
- Secondary Doc Codes - Not required, only enter if applicable - Adding secondary codes can only be added to Manually created cards
- Doc Code List - Do not modify existing data or add any data (this will be auto-populated)
- Title - If you do not add anything this will be populated with the Doc Code Title.

|   | B                     | C               | J                 | L          | N                        | U                    |
|---|-----------------------|-----------------|-------------------|------------|--------------------------|----------------------|
| 1 | Primary Doc Code(ID)* | Secondary Codes | Equipment Number* | Major Tag* | StageList*               | Wolfe PA Doc #*      |
| 2 | */B01(165578)         |                 | */Major Tag       | */FS-101   | IFI                      | 5552244-B01-0001-001 |
| 3 | */B02(150523)         |                 | */Major Tag       | */FTU-201  | IFA/IFC/AB               | 5552244-B02-0001-001 |
| 4 | */B03(152854)         |                 | */Major Tag       | */SEP-301  | No Individual Submission | 5552244-B03-0001-001 |
| 5 | */B06(152855)         |                 | */Major Tag       | */SEP-301  | IFA                      | 5552244-B06-0001-001 |

If you already have cards set up on the project they will be populated in the csv file. Any columns that contain an asterisk in the header are mandatory columns.

- Primary Doc Code(ID)\* - The Doc Code the card is linked to
- Secondary Codes - if there are any additional codes it covers - Adding secondary codes can only be added to Manually created cards - the system will ignore any values entered here for auto-generated cards
- Equipment Number\* - what is to be displayed as the reference for the card (typically the name of the major tag field)
- Sub Supplier\* - The sub-supplier associated with the item
- Major Tag\* - The Major Tag value (if multiple separated by a comma)
- StageList\* - The Stage List to be applied to the card
- <INSTANCE> Doc #\* - The document number

Once all applicable data has been added save the csv file and then use the Import feature. Click the browse button, search for the new file and click save.