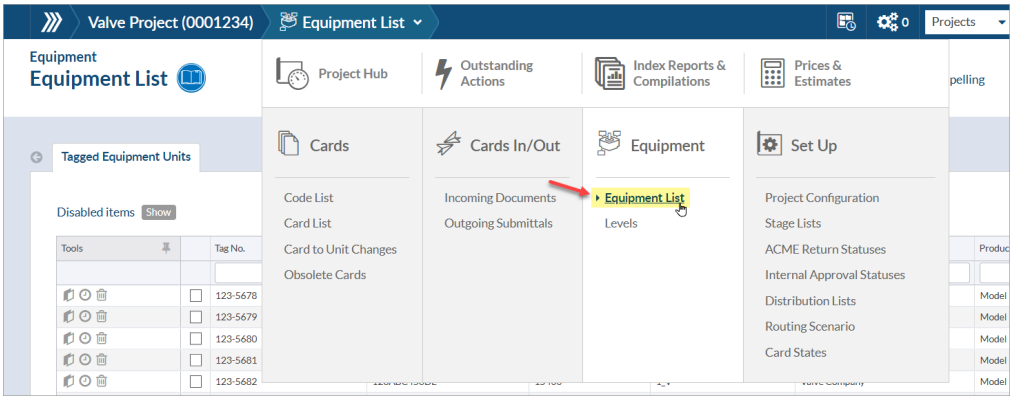
Add Equipment

10/21/2025 12:47 pm MDT

Navigate to the Equipment List

Equipment (with related tags) must be entered into DocBoss to enable card creation.

To begin entering equipment, navigate to Project Menu > Equipment > Equipment List.



Select Tagged Equipment tab

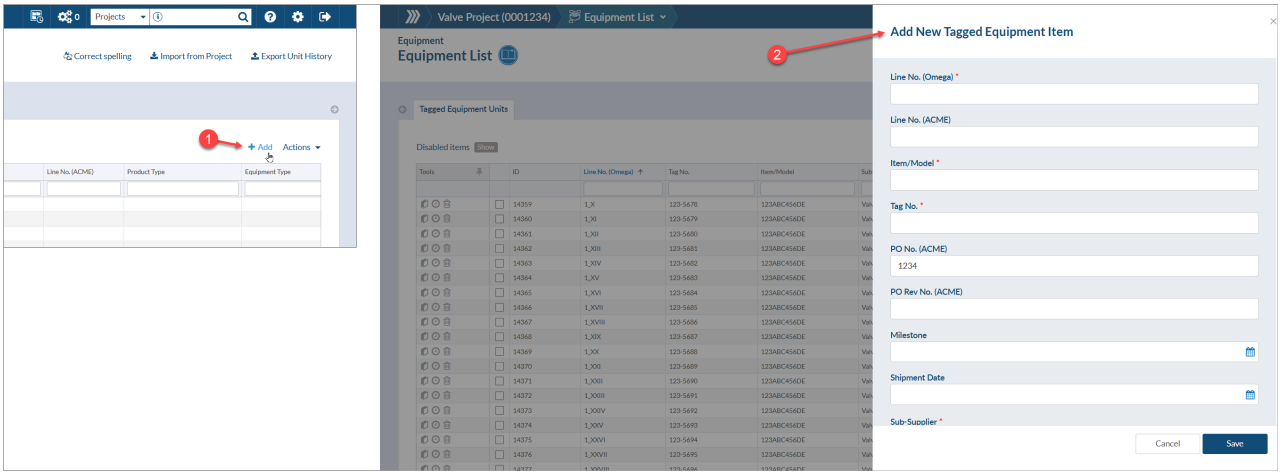
Most default layouts show only the **Tagged Equipment Units** grid. If you have enabled **Major Tags**, or **Steel Units**, please select the Tagged Equipment Units tab.

You will notice that the DocBoss equipment list does not have a quantity field. Every unit appearing in the equipment list is a quantity of ONE. This layout ensures that users can allocate unit specific data to each piece of equipment such as tag numbers, serial number etc.

When many pieces of equipment correlate with your line numbers, DocBoss uses numbering conventions enable users to keep the line numbering the same, but still to have each piece of equipment as a separate row in the equipment list.

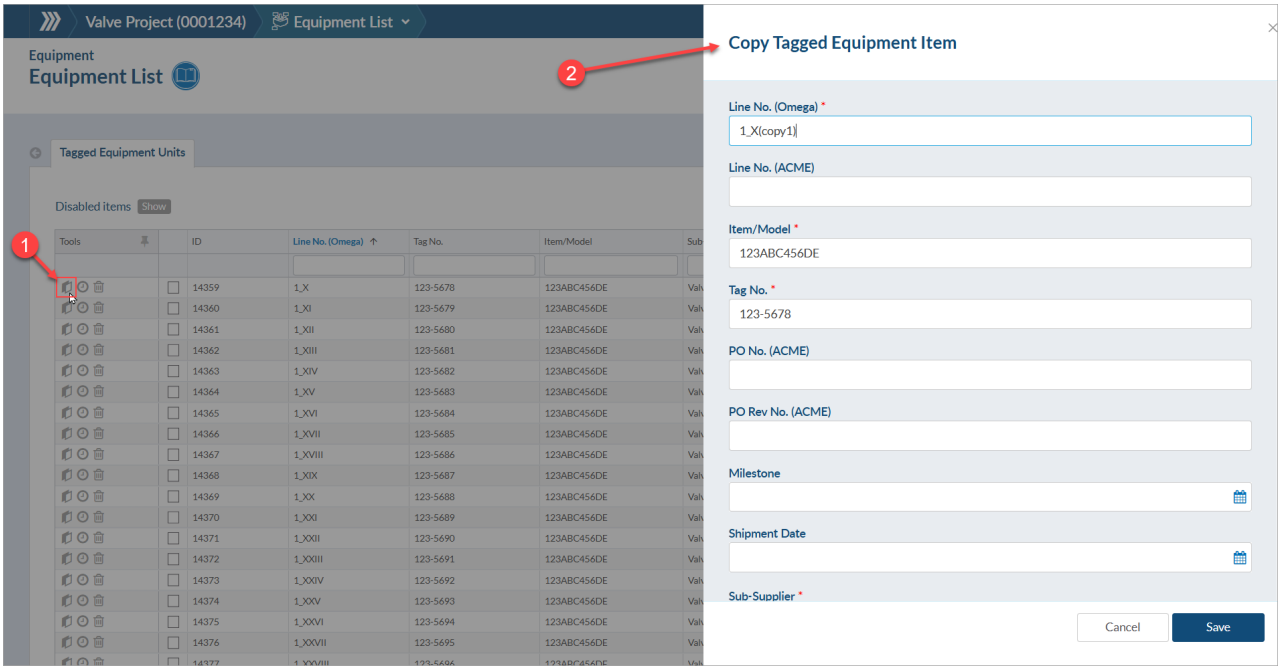
Manual Entry

To enter lines individually, click the "+ Add" button in the top right corner, and complete the required data.



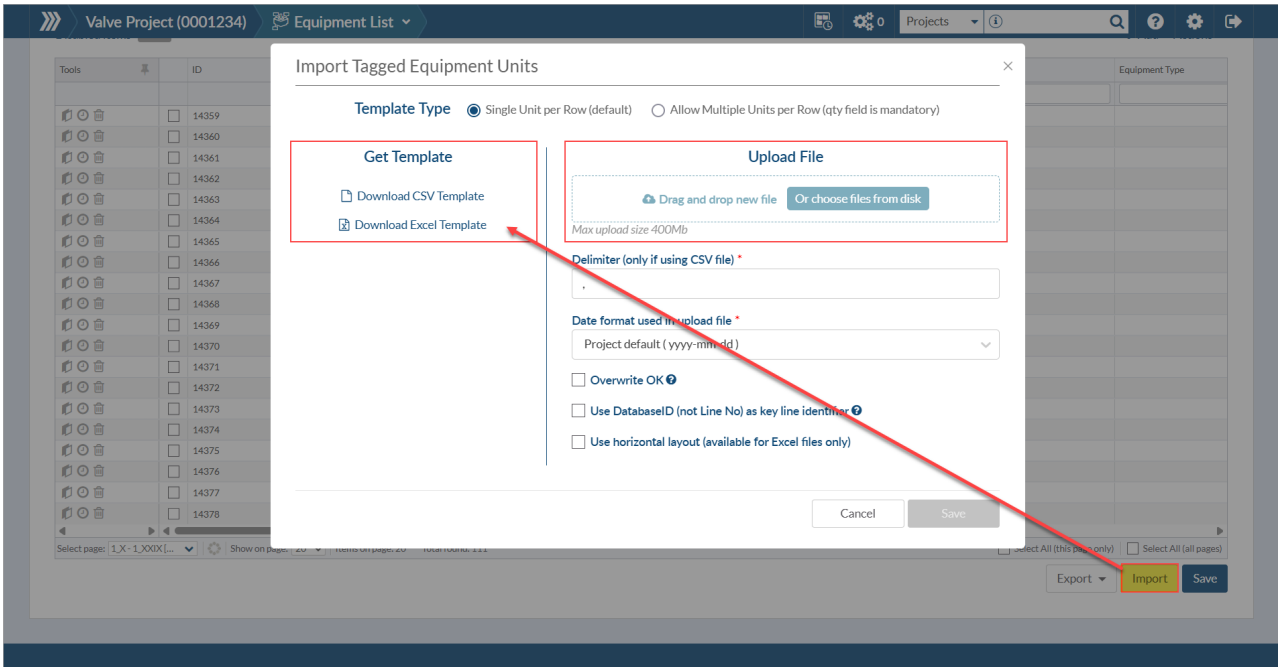
Copy Units

You can copy an existing entry by clicking the copy icon under the "Tools" column.



Import Equipment

To import equipment into DocBoss, click the "Import" button (bottom right below grid).



Because DocBoss supports different column requirements (based on the Project Fields Template), first download the template (either CSV or Excel).

Once ready to upload, the file can be uploaded by searching or dragging and dropping into the "Upload File" section. If updating existing lines, make sure to check the "Overwrite OK" box. To complete the upload, click "Save."

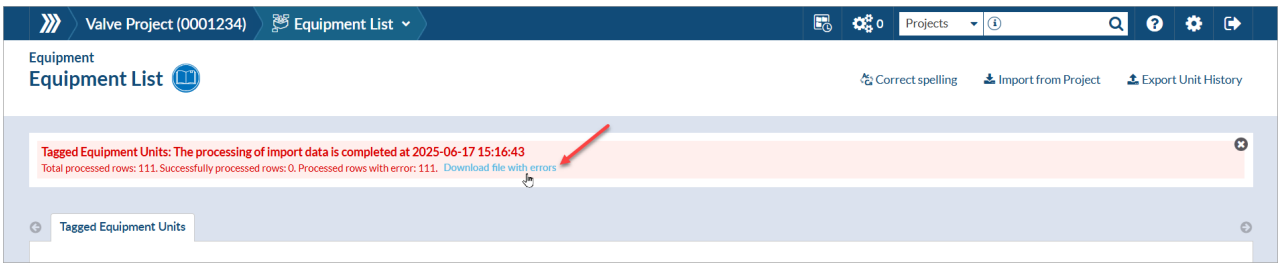
Delimiters: Different delimiters may be used when saving CSV files. In North America, the default is the comma; while in Europe, the default is the semi-colon. A default may be set in your user profile.

> **Note**: The default upload option is **Single Quantity,** where every piece of equipment is entered on a separate row. If there are multiple units per row, use the "**Allow Multiple**" option (for more information, see below).

Please refer to the instructions on how to format values containing commas or quotes, if applicable: Edit Data via CSV When Using Values Containing Commas or Quotes.

Review errors on CSV upload

Sometimes the upload file will not be properly formatted. You can download the error report from the pop-up message.



Only rows with errors will be included in the report. In the report, scroll to the last column, which provides some feedback about the problem. Correct the identified error and try the upload again.

To fix the error, the data can be modified directly in the error report and upload back to DocBoss. It is **not** necessary remove the error column.

Horizontal Upload

The horizontal layout allows users who receive their equipment lists in a horizontal format to do less pre-processing of information before uploading the units. This can save time for users working with units that have multiple components that need to be tracked. For more information, see here.

Multiple Quantity Upload

If your business system, or excel sheet has quantities which are greater than 1, you may choose to upload an equipment list which DOES have a quantity column.

When to use

This template simplifies upload when the source file (from order systems, or elsewhere in the organization) contains line items with multiple quantities (vs having every unit on the same line).

Note that DocBoss unpacks the multiple qty uploads to create a line item in the order detail grid for every unit (remove the qty column). i.e. if qty is 5, DocBoss will create 5 lines in our order detail grid.

Line numbering

DocBoss flattens your multi qty upload into individual units. To maintain the line numbering, we add roman numerals for each qty.

Upload template:

YOUR Line Number	Qty	Model Number
1	5	XXX-YYY-ZZZ
2	3	ABCDEF-GG

DocBoss result:

1.I	XXX-YYY-ZZZ
1.II	XXX-YYY-ZZZ
1.III	XXX-YYY-ZZZ
1.IV	XXX-YYY-ZZZ
1.V	XXX-YYY-ZZZ
2.I	ABCDEF-GG
2.II	ABCDEF-GG
2.III	ABCDEF-GG

Tags

You have 2 options for tags in the multi qty upload.

DEFAULT: Either you must have a list of tags EQUAL to the qty (separated by commas)

Qty	Tags
4	Tag1, Tag2, Tag3, Tag4

OPTION: Allow a SINGLE tag for the line.

Qty	Tags
4	Tag1

Note: To use this single tag option you must enable the checkbox in the admin settings for **Allow single tag for multi qty CSV upload.

Sub-lines

To assist with the upload of instrumentation assemblies you may add a subline to your upload. All lines with the same line number (and different sub-lines) will be considered as part of an assembly.

If there is only qty 1 in the first sub-line of the assembly the results will be as follows.

YOUR Line Number	Sub-line	Qty	Model Number	Tag
1	a	1	TRANS_123	PT-101
1	b	2*	SEAL_ABC	This can be empty

DocBoss result:

Line	Model	Tag
1.a.I	TRANS_123	PT-101
1.b.I	SEAL_ABC	PT-101
1.b.II	SEAL_ABC	PT-101

Multiple quantities per sub-line

Note that the quantity of the first sub-line (normally 'a') determines the NUMBER of IDENTICAL assemblies that are being uploaded for that line. DocBoss will divide qty of each line by the qty of the first sub-line. We then treat each of these as independent assemblies.

In this case we have 3 ASSEMBLIES (each with one transmitter, and one seal)

YOUR Line Number	Sub-line	Qty	Model Number	Tag
1	a	3	TRANS_123	PT-101, PT-102, PT-103
1	b	3*	SEAL_ABC	This can be empty

*This must be a multiple of the first line, so 3, 6, 9 etc.

DocBoss result:

Line	Model	Tag
1.I.a	TRANS_123	PT-101
1.I.b	SEAL_ABC	PT-101
1.II.a	TRANS_123	PT-102
1.II.b	SEAL_ABC	PT-102
1.III.a	TRANS_123	PT-103

1.III.b	SEAL_ABC	PT-103

The first sub-line will have the same number of tags as the qty. DocBoss will assume that there are 2 assemblies - a PT-101 assembly with a transmitter and 1 seal; and a PT-102 assembly also with one transmitter and 1 seals.