

Edit Equipment

07/19/2024 1:18 pm EDT

As projects progress, often there are changes which happen to required equipment. DocBoss supports those and helps you manage the changes to your document cards.

Why does DocBoss monitor changes to equipment?

All Auto-Generated cards are directly linked to the equipment. When equipment changes, so too do the cards. These changes happen automatically, in the background.

Navigate to **Equipment List**

Project Hub > Equipment: Equipment List

How to change equipment data

Make Edits in Grid

In the grid, as you make edits, DocBoss will identify cells you have changed with a red flag in the cell. These are UNSAVED changes. If you leave the screen they will be lost.

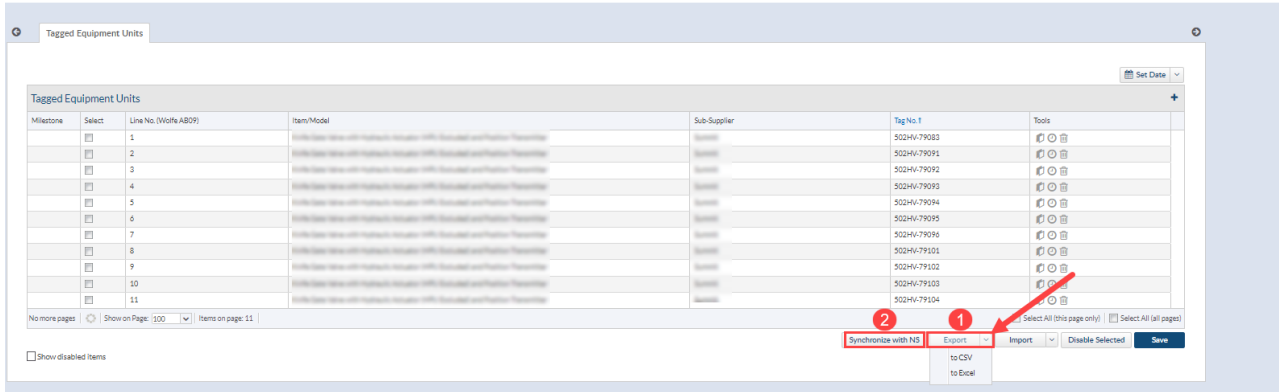
Tagged Equipment

Tagged Equipment Units				
Select	DEMO - RE Line Nu...	Item/Model ↑	Tag Number	
<input type="checkbox"/>	1	XXX	Tag-1	€
<input type="checkbox"/>	4	XXX	Tag	€
<input type="checkbox"/>	5	XXX	Tag5	€
<input type="checkbox"/>	6	XX	Tag6	€
<input type="checkbox"/>	9	XXXXY	Tag9	€
<input type="checkbox"/>	10	XXX	Tag10	€

Be sure to click SAVE at the bottom of the grid once you are finished.

Via CSV/Excel Upload (or Synchronization)

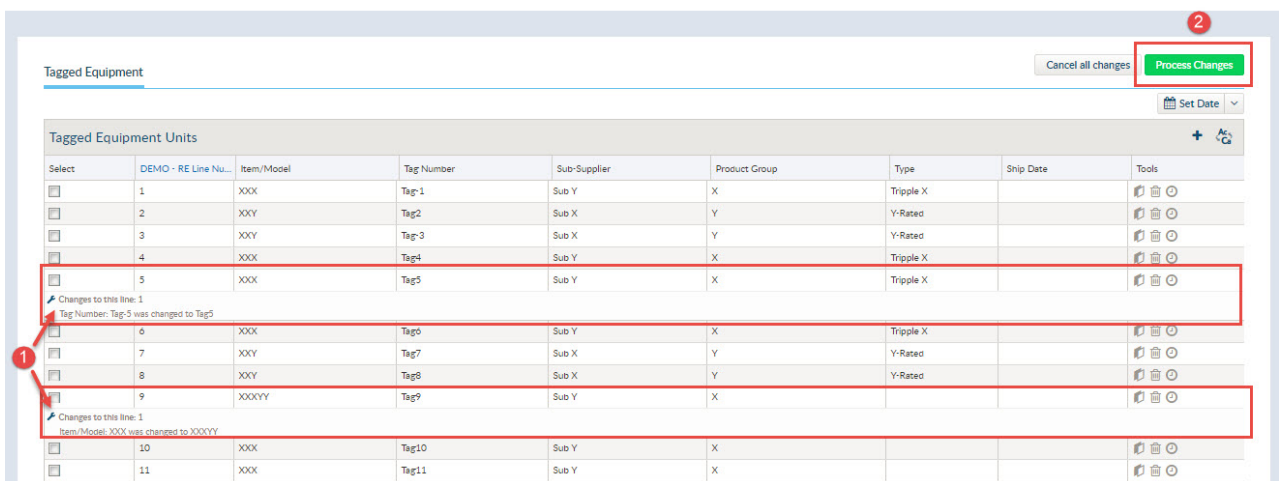
1. If you are managing the DocBoss data via CSV or Excel, you can export the existing data and edit, and upload.
2. If your organization has implemented a link with their order management system, you can click the synchronize button.



Process Changes

Once you have clicked save, DocBoss gives you a final chance to review changes prior to processing

- 1. Review Changes:** Every changed row will display a notifier indicating the number of values changed in the line. When a user clicks on the notification, the list of changes (on that row) will be displayed.
- 2. Start Processing:** Once all changes have been made, the user must click the **process changes** button. This will start the review of any card impact resulting from the equipment changes.



Suggestions

If there has been a change made, and there are other fields that contain the same original data, DocBoss will give you the option to change those as well.

In the example above we changed Item/Model "XXX" to "XXXYY", after we saved and processed the change we get the following suggestion.

Process Changes

Partial changes have been detected: 1/1
There are 64 units with the same value that were not changed, do you want to change them?
Change Item/Model from XXX to XXXYY

Yes, make the change **No, do what I said**

DEMO - RE Line Number	Co123 Line Number	Item/Model I	Tag Number	Co123 PO Number	Co123 PO Rev Number	Milestone	Ship Date	Sub-Supplier	Product Group	Type
64		XXX	Tag64					Sub-Y	X	
59		XXX	Tag59					Sub-Y	X	
28		XXX	Tag28					Sub-Y	X	
90		XXX	Tag90					Sub-Y	X	

Note the suggested lines are displayed in the grid. You have two options,

- Yes, make the change: This will change make the change for all line items suggested
- No, do what I said: This will only make the specific change you applied and the rest will be left as they are

Not Done Yet!

Now that these changes have been accepted and processed, you need to look at and provide instruction for the cards that have been affected due to these changes. See the articles linked below for more direction.

Changes to line numbers

Typically, DocBoss will use the line number as the key identifier for a line. If the line numbers will be changing and a user is making bulk changes via CSV, it is best to use the internal database ID as the key identifier.

To do so, select **Import** and select **Use Database ID (not Line No) as key line identifier**. Then select **Download CSV**. The export will include an additional column, **Unit ID**. This will be used to tell DocBoss which units are the same, even if their line numbers are changed.

Import Tagged Equipment Units from CSV



Single Quantity Multiple Quantity

The uploaded file must contain the following fields in the specified order:
ID, Line No. (WI)*, Item/Model*, Tag No.*, Line No. (Delta), PO No. (Delta), PO Rev No. (Delta), Milestone,
Ship Date, Sub-Supplier*, Shipment, Product Group

The first line is treated as a header and omitted. The rest of lines will be processed.

- Fields with an asterisk (*) are mandatory for units.
- The Sub-Supplier field accepts both the full name and short name of the sub-supplier company.
- Dates should be in the following format: m/d/yyyy

[Please see how to specify values containing commas or quotes if using Excel to edit a CSV file.](#)

The max allowed file size is 400Mb

Delimiter *
CSV File *
Date format for CSV uploads *
 Overwrite OK
 Use Database ID (not Line No) as key line identifier



Download CSV

Cancel

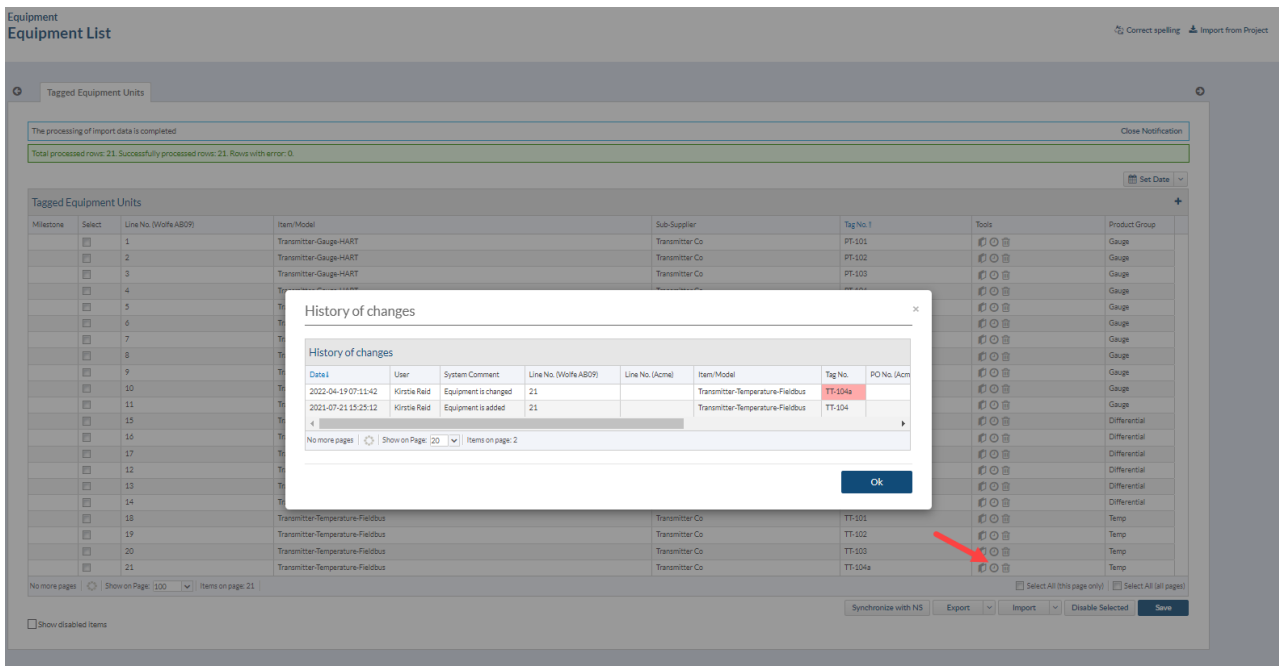
Save

When uploading the file for import, ensure that **Use Database ID** is still selected.

Equipment List history of changes

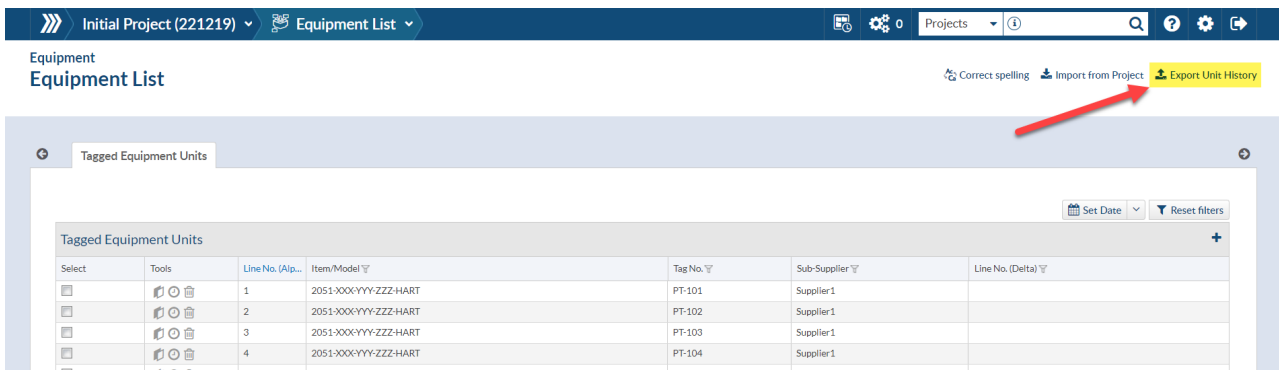
View individually

DocBoss stores a history of changes made to items in the equipment list. It records the change, the user, and timestamp to enable reconstruction of events. To view the history of each line in the equipment list, click on the History icon under tools.



Export in bulk

To download a CSV file containing the history of changes to the entire **Equipment List**, click the **Export Unit History** button from the top right of the **Equipment List** screen.



[Card to Unit Changes, click to learn more.](#)

[Void / Supersede, click to learn more.](#)

[Obsolete Cards and How to Manage Them, click to learn more.](#)