

# Merge Cards

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When users build card lists with levels, such as one card per tag for example, but later realize that one card covers multiple tags, there is no longer a need for the additional cards. Rather than leave the original cards as pending, DocBoss allows you to merge existing cards together.

## Select Cards to Merge - on the Card List

The screenshot shows the 'Card List' interface in DocBoss. At the top, there are several filter dropdowns: ACME Doc Code, Reference, Level, Tagged Units, Sub Supplier, Stage, ACME Status, State, Transmittal, Internal Code, Location, Routing, and Approval Status. Below these are checkboxes for 'Due to ACME' and 'Expected Return to Wolfe PA', along with a 'Days since last request' field and a 'Keyword' search box. A toolbar contains buttons for 'Add to Ad-Hoc Queue', 'Set Date', 'Generate Request', 'Bulk Doc Download', and 'Save'. The main area is a table with columns: Required, Wolfe PA Doc #, Internal Code Name, Doc Code, Status (Combined), Title, Tools, Level, Stage, Wolfe PA Rev #, and Card Name. The table lists 10 cards, each with a checked checkbox in the 'Required' column. At the bottom right of the table area, a yellow button labeled 'Merge Selected' is highlighted with a red circle. Below the table are pagination controls (Select Page: A1 - A1, Show on Page: 10, Items on page: 10, Total Found: 23) and a row of checkboxes for 'Show Completed Cards', 'Show NULL Cards', 'Hide Unrequired Cards', and 'Hide Merged Cards'. A 'Download Status Report (CSV)' button is also present.

1. Use the checkboxes to mark all cards required to be merged
2. Click the button "Merge Selected" bottom right below the grid.

## Select Cards to Merge - Incoming Doc Assignment

You have the ability to create merged cards while assigning docs from a submittal. There are two ways to select which cards you want to merge.

The screenshot shows the 'Incoming Doc Assignment' interface. On the left, there is a 'tagging Area' with a 'Viewer' toggle and instructions to 'upload multiple files and keep them here while de where to place them. Maximum file upload 30Mb.' Below this is a 'Drag and drop files' area with a 'Or choose files from disk' button. A 'signed Files' section shows a table with columns 'File Name', 'Pages', and 'Tools'. The main area is titled 'Assign to: Document Cards' and 'Obsolete Cards'. It includes a 'Doc Code' dropdown and a search box. Below that are buttons for 'Out of Workflow', 'Merged', and 'Grid Row Colors'. A table lists document cards with columns: ACME Doc #, Code, Code Name, Wolfe PA Doc #, and Status (Combined). The table lists 7 cards, with the first one checked. At the top right of the table area, a 'Merge' button is highlighted with a red circle.

1. In the card list, you can use the checkboxes to mark all the cards to be merged
2. Click the button "Merge" at the upper right corner of the list.

The second way is even easier! You only need to drag one card on top of the other.

The screenshot shows a software interface for document management. On the left, there is a 'tagging Area' with instructions to 'upload multiple files and keep them here while you decide where to place them. Maximum file upload 10Mb.' Below this is a 'Drag and drop files' area with a button 'Or choose files from disk'. A preview of a document titled 'Vehico Certified Drawing' is shown. On the right, there is a table titled 'Assign to: Document Cards' and 'Obsolete Cards'. The table has columns for 'ACME Doc #', 'Code', 'Code Name', 'Wolfe PA Doc #', and 'Status (Combine)'. The table contains several rows of document information.

ACME Doc #	Code	Code Name	Wolfe PA Doc #	Status (Combine)
P7564-PO018-400-30-BOM-0010	BOM	Bill of Material	147568-0011.BOM	X.[P](+)ta
P7564-PO018-400-30-DWG-0001	DMD	Dimensional Drawing	147568-0011.DMD	NULL
P7564-PO018-400-30-DWG-0002	DMD	Dimensional Drawing	147568-0012.DMD	NULL
P7564-PO018-400-30-DWG-0003	DMD	Dimensional Drawing	147568-0013.DMD	NULL
P7564-PO018-400-30-ITP-0001	ITP	Inspection and Test Plan	147568-0011.ITP	X+
P7564-PO018-400-30-PRO-0008	PRO	Packing, Shipping & Preservation Procedure	147568-0017.PRO	2+
P7564-PO018-400-30-REG-0001	REG	Vendor Document Register	147568-0011.REG	X+
P7564-PO018-400-30-SCH-0002	SCH	Engineering, Fabrication / Production Schedule (Bar Chart A3/A...	147568-0011.SCH	X+

## Enter/Edit the merged card's meta data

A slide in panel will then allow you to add specific details about the results you want to display on your new (merged) card. The merged cards will be tucked inside a single card.

### Merge Document Cards

The screenshot shows a 'Merge Document Cards' dialog box. It is divided into several sections:

- You will merge 2 document cards** (1): This section lists two document cards to be merged.
 

Document Card	E14016-PO-018-RM-400-P-0013
Wolfe PA Doc #	147568-0011.PRO
ACME Doc #	P7564-PO018-400-30-PRO-0015
Doc Code	PRO Dye Penetrant Examination Procedure
Wolfe PA Rev #	A1

Document Card	E14016-PO-018-RM-400-P-0013
Wolfe PA Doc #	147568-0012.PRO
ACME Doc #	P7564-PO018-400-30-PRO-0016
Doc Code	PRO Heat Treatment Procedure
Wolfe PA Rev #	A1
- Merge into one of the document cards \*** (2): This section contains two radio buttons:
  - Yes, maintain the history and numbering of this card
  - No, add a new document card
 Below the radio buttons is a dropdown menu labeled 'Select document card: \*' with the selected value 'PRO\_E14016-PO-018-RM-400-P-0013'. A note below the dropdown reads 'Note: No files exist on either card'.
- Primary Code \*** (3): This section contains a dropdown menu with the selected value 'PRO - Dye Penetrant Examination Procedure'.
- Document Info**: This section contains a dropdown menu labeled 'Document Sub-Supplier Override' with the selected value 'Supplier1'.

At the bottom of the dialog box are two buttons: 'Cancel' and 'Save'.

There is key information displayed

1. The Cards that will be merged
2. You can merge cards INTO an existing card (with an option to keep that card intact), or you can merge cards

into an entirely NEW card (which will remove all cards that have been included in the merge from the active card list)

3. The Primary Doc Code to be assigned to the card.

Remember to scroll down, to review/add the rest of the card metadata.

**Merge Document Cards** ✕

**Document Card Numbers**

Is Drawing

ACME Doc #  
P7564-PO018-400-30-PRO-0014

Wolfe PA Doc #  
147568-0014.PRO

Wolfe PA Rev #  
A1

Sub-Supplier Doc #

ADNOC Doc #

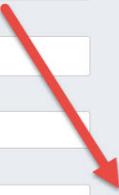
Cover Page / Stamps  
Cover page only (no stamp) ▾

**Custom Field(s)**

Discipline  
MEC

Doc. Type  
DWG

Cancel Save



Then click save.

## How will my merged cards appear in the card list?

The new card will be displayed in the grid, you will notice a different check mark appears in the required column (merged cards are always required) and you can show or hide merged cards using the “Hide Merged” toggle.

Card List						
	Required	Wolfe PA Doc #	Internal Code Name	Doc Code	Status (Combined)	Title
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0011.BOM <sup>1</sup>	Lists	BOM	X.{P}(+).ta	Bill of Material
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0017.PRO	Procedures	PRO	2+	Packing, Shipping & Preservation Procedure
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0011.SCH <sup>M</sup>	Other / Misc	SCH	X+	Engineering, Fabrication / Production Schedule (Bar C
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0011.QMP	Manuals	QMP	2*	Quality Manual (with ISO accreditation certificate)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0012.REC	Welding Data	REC	1	Welder Qualification Certificate
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0011.REG <sup>1</sup>	Lists	REG	X(+).ta	Vendor Document Register
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0011.SCH	Other / Misc	SCH	X+	Engineering, Fabrication / Production Schedule (Bar C
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0011.WPS	Welding Data	WPS	X	Welding Procedure Specification (WPS) and Procedur
<input type="checkbox"/>	<input checked="" type="checkbox"/>	147568-0011.ITP	Lists	ITP	X+	Inspection and Test Plan

No more pages | Show on Page: 30 | Items on page: 9

Show Completed Cards  Show NULL Cards  Hide Unrequired Cards  Hide Merged Cards

Filter Set: - Select Filter Set - [+ Create Filter Set](#) [Update Filter Set](#) [Edit Filter Set](#) [Delete Filter Set](#)

In the grid above, I have my merged cards displayed. The merged cards are the lines in grey (they are not active registers) The "new" merged card has the merged check mark under the required column.

## To edit a Merged Card

Click the Edit icon under the tools column and your Card slide will appear. At the top, it will list all cards that are included in the merge. You can:

**Edit Card**

2 document cards

Document Card E14016-PO-018-RM-400-P-0013  
 Wolfe PA Doc # 147568-0011.PRO  
 ACME Doc # P7564-PO018-400-30-PRO-0015  
 Doc Code PRO Dye Penetrant Examination Procedure  
 Wolfe PA Rev # A1

Document Card E14016-PO-018-RM-400-P-0013  
 Wolfe PA Doc # 147568-0012.PRO  
 ACME Doc # P7564-PO018-400-30-PRO-0016  
 Doc Code PRO Heat Treatment Procedure  
 Wolfe PA Rev # A1

**General**

Primary Code \*  
 PRO - Dye Penetrant Examination Procedure

**Document Info**

Linked Equipment Sub-Suppliers  
 Supplier1

Document Sub-Supplier Override  
 Supplier1

Document Title  
 Dye Penetrant Examination Procedure

Cancel Save

1. **Remove Individually:** This allows you to remove cards as required. If the merged card has an attached file and you simply need to delete one of the references you will have the option to attach a copy of the file to the now removed card as well. (So the merged card and the now deleted card will have the same file attached)

2. **Unmerge:** This will destroy the merged cards. If the merged card has an attached file you will have the option to select the card where you want the file to remain.

# Sometimes I can't merge my cards together - Why?

There are two types of merge in DocBoss

- Reference merge - Doc Code is same, Reference is different
- Doc Code Merge - Reference is same, Doc Code is different

**Reference merge (Creates TagSet):** If the doc code is the SAME, you can merge references together. This means that D16 Tag1 and D16 Tag2 can be merged together **because the doc code (D16) is the same.**

- Example, assume your customer has requested data sheets to be provided for each unit they are buying. Say they are buying 10 transmitters of which 5 are identical to one another and the remaining 5 are all different. Since datasheets are most often issued at the tag level, the document cards will be created based on the 10 different tag values. However, since some of the transmitters requested are the same and they have the same configuration, you only get 1 datasheet and it includes a tag list for the applicable transmitters. (The remaining datasheets can still be issued individually since they were all different configurations.)

**Doc Code Merge:** This case is the opposite, the reference MUST be the same, but the DocCodes can be different. This means that B01 Tag1 and B04 Tag1 can be merged together **because the reference (Tag 1) is the same.**

- Example, we are looking at a single tag, but we have a document which doubles as the (B01) Material Test, and the (B04) certificate of compliance. When you merge these, you will be asked to pick a "primary" SDRL code. This primary code will be used in document naming, and for the listing in the document card. All cover sheets can include BOTH codes (if you use the correct variable)

## Merging manual cards

Manual cards cannot be merged, but there is a workaround to accomplish a similar outcome.

Cards are merged in order to use a single document for more than one piece of equipment.

With manual cards, this outcome is possible by updating the linked equipment on the card to be kept and removing the card(s) which are no longer needed.

For example, the cards below cannot be merged using the **Merge Selected** function, because these are manual cards.

Grid Rows Colors How to use auto-generated values for Doc No. (ChemicalCo) and Doc No. (Alpha)

Card List						
	Level ↑	Tools	Doc Code	Doc Code Name	Doc No. (Alpha)	Line No. List (Alpha) ▾
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-010-01 *	12
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-011-01 *	13
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-013-01 *	15

In this example, the purpose of combining these cards would be to send one B01 document that applies to line numbers 12, 13, and 15.

Card List						
	Level ↑	Tools	Doc Code	Doc Code Name	Doc No. (Alpha)	Line No. List (Alpha) ▾
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-010-01 *	12
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-011-01 *	13
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-013-01 *	15

To combine these cards, first determine which one card to keep active (based on the desired document history record to be retained). Select the edit icon for this card and follow the instructions [here](#) to link the additional units of equipment. (This will be the equipment that is currently linked to the cards to be removed.)

After this is completed, the selected units will all be linked to one card (1). The other cards can then be marked as **Not Required** (2). Remember to **Save** to apply the change.

Card List							
	Level ↑	Tools	Doc Code	Doc Code Name	Doc No. (Alpha)	Line No. List (Alpha) ▾	Required
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-010-01 *	12, 13, 15	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-011-01 *	13	<input type="checkbox"/>
<input type="checkbox"/>	Manual		B01	General Arrangement Drawings	10236-B01-013-01 *	15	<input type="checkbox"/>

If a customer requires that the cards marked as **Not Required** show up in the SDI report, follow the instructions [here](#) for "Including Not Required Cards and Obsolete Cards in the Document Index template" (the Not Required Cards are the relevant cards for this).