Merge Cards

09/16/2024 1:35 pm MDT

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

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.

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.

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.

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.
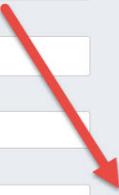
Then click save.

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.

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:

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.

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.

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.

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).