Update Document Numbers

09/16/2024 1:51 pm MDT

When uploading doc numbers using the edit data via CSV from the Card List – you must add the word (in all caps) OVERRIDE into the related column for "Doc Number Manually Changed".

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1	Primary Doc Code(ID)* Title	Title		Wolfe PA Doc #*		Wolfe PA Do	ual Changed		
2	*/B01(165578) General Arrangement Drawings		wings	5552244-B01-0001-001		1	OVERRIDE			
3	*/B02(150523)	Vendor Docur	ment Registe	er	55522	244-B02-0001-001		OVERRIDE		
4	4 */B03(152854) Fabrication / Production Sch		Schedule	5552244-B03-0001-001			OVERRIDE			
5	5 */B06(152855) Table Of Contents			5552244-B06-0001-001			OVERRIDE			
6	*/B14(152856)	Vendor Sub-O	rders		55522	44-B14-0001-001		OVERRIDE		

Why?

Let's assume you have auto-numbered all cards. When you initially download the Card List, all doc numbers will be in the CSV (as you would expect). If we don't add "OVERRIDE" in to the manually changed column, and you uploaded the CSV, every number would convert from "auto-generated", to "manual".

Switching from Manual Document Numbering back to Auto-Generated Numbering

If you have manually set a document number and want to revert to auto-generated number you should type [clear] in the document number column. Custom values (which were entered individually specified for documents) are not overwritten when re-sequencing values.

Sub-Supplier List	Card Name(Auto)	Tools	Required	Title	Doc Code 1	Stage	Doc No. (Acme)
Wolfe PA	A01 12345	0 🗊 🕼 🖋 🕑	V	Document Register	A01	IFA/IA	[clear] ^M
Wolfe PA	AA 12345	10 🕼 🖋 🧿	V	Document Schedule	AA	IFA	12345-AA-001-01
Supplier 1	AC Gate Valves	n 🕼 🖉 🕑	9	Isometrics	AC	IFA/IA	12345-AC-003-01
Supplier 1	AC Ball Valves	f 🕼 🖋 🕑		Isometrics	AC	IFA/IA	12345-AC-001-01
Supplier 1	AC Butterfly Valves	n 🕼 🖋 🕑	V	Isometrics	AC	IFA/IA	12345-AC-002-01
Supplier 1	<u>CD 1</u>	A ()	V	Material Test Certificates / Traceability Sheet	CD	IFI	12345-CD-001-01
Supplier 1	CD 2	A O		Material Test Certificates / Traceability Sheet	CD	IFI	12345-CD-002-01
Supplier 1	CD LT-108	10 🖉 🕗		Material Test Certificates / Traceability Sheet (Ea	CD	HC	

This can be done directly on the card list, as shown here:

Once you've typed clear and press save, the Doc No. will change back to the auto-generated numbering.

Sub-Supplier List	Card Name(Auto)	Tools	Required	Title	Doc Code 1	Stage	Doc No. (Acme)
Wolfe PA	A01 12345	Ø 🗊 🗟 🖋 🕑	V	Document Register	A01	IFA/IA	12345-A01-001-01
Wolfe PA	AA 12345	1 6 / 0	V	Document Schedule	AA	IFA	12345-AA-001-01
Supplier 1	AC Gate Valves	1 6 / 0	V	Isometrics	AC	IFA/IA	12345-AC-003-01
Supplier 1	AC Ball Valves	f 🕼 🖋 🕑	V	Isometrics	AC	IFA/IA	12345-AC-001-01
Supplier 1	AC Butterfly Valves	D 🕼 🖋 🕑	V	Isometrics	AC	IFA/IA	12345-AC-002-01
Supplier 1	<u>CD 1</u>	A 🕘	V	Material Test Certificates / Traceability Sheet	CD	IFI	12345-CD-001-01
Supplier 1	CD 2	Ø 0	V	Material Test Certificates / Traceability Sheet	CD	IFI	12345-CD-002-01

If you have multiple Manually entered numbers to change back to auto-generated numbers, you can make the same changes on the CSV and reupload.

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2 */A01(906 Document Register	[clear]	*/Yes	*/1	4529BIG-A */No	*/1 A		PDL	0 Y	*/No	
3 */AA(9062 Document Schedule	[clear]	*/Yes	*/1	4529BIG-A*/No	*/1 A		PDL	0 Y	*/No	
4 */AC(9063 Isometrics	12345-AC-001-01	*/No	*/1	4529BIG-A */No	*/1 A		PDL	0 Y	*/No	
5 */AC(9063 Isometrics	12345-AC-002-01	*/No	*/2	4529BIG-A */No	*/2 A		PDL	0 Y	*/No	
6 */AC(9063 Isometrics	12345-AC-003-01	*/No	*/3	4529BIG-A */No	*/3 A		PDL	0 Y	*/No	
7 */CD(9068 Material Test Certificates / Traceability Sheet	12345-CD-001-01	*/No	*/1	4529BIG-C*/No	*/1 A		PDL	0 Y	*/No	
8 */CD(9068 Material Test Certificates / Traceability Sheet	*/No	*/2	4529BIG-C */No	*/2 A		PDL	0 Y	*/No		

Updating Sequence Numbers

If you want to assign a specific number to a document, and ensure that number is not applied automatically to another document, you must use the "Sequence override" fields. You cannot use sequence numbers which are already assigned to transmitted documents (or included on a submitted document index). The sequence number cannot be used more than once per doc code.

If you are re-sequencing cards it's best to delete all information from the "Sequence" cells and enter the new values in the "Sequence Override" cells. Save and upload the CSV to see the changes on the card list. Deleting the existing values in the Sequence column allows you to re-use those sequence numbers in the Sequence Override column.

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1	Primary Doc Code(ID)*	Title	Doc No. (Acme) Doc No. M	anually Changed (Act S	equence (Acme) Sequ	ence Override (Acme) Doc
2	*/A01(9067)	Document Register	12345-A01-1-1 */No		/1	5 4529
3	*/AA(9062)	Document Schedule	12345-AA-1-1 */No	*	/1	4529
4	*/AC(9063)	Isometrics	12345-AC-1-1 */No	*	/1	4529
5	*/AC(9063)	Isometrics	12345-AC-2-1 */No	*	/2	4529
6	*/AC(9063)	Isometrics	12345-AC-3-1 */No	*	/3	4529
7	*/CD(9068)	Material Test Certificates / Traceability Sheet	12345-CD-1-1 */No	*	/1	4529
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