

Creating Cards with Custom Equipment Lists

09/16/2024 1:14 pm MDT

Setting up levels is one of the most important functions in DocBoss. Please [review this article](#) to learn more about how they can help you to build the Card List and link units to cards.

As you are aware, DocBoss has a set of DEFAULT levels. But - in many cases, those don't create the correct number of cards, or cards with the correct equipment lists.

Here are various methods to create cards with custom equipment lists:

Create your own level (and apply to the code)

1. Add custom column to equipment list.

You can have a new column in the equipment list and set different values for each group of items, which can be used as a NEW Level in the Code List to auto-generate the Cards linked to those specific units.

This is especially useful when you need to send the documents separated by some specific project equipment field (e.g MR number, Service, etc.) which are not set as default Levels.

You can use this function even if you don't have any specific column in your project.

An example: if you want to submit the Installation and Maintenance Manuals linked to specific groups of items, just set same value like "Electric Actuator Manuals" for one group of items and "Other Manuals" for the other items. Then set Level to that column in the Code List and DocBoss will auto-generate the cards, and link to correct units.

[Click here to check how to create new equipment columns.](#)

2. Use CUSTOM LEVEL option

Using Custom Level option, you can manually add a new Level (e.g. Installation and Maintenance Manuals) and then create the references (e.g. Electric Actuator Manual, Pneumatic Actuator Manual...etc.) and choose the applicable units for each reference from the Equipment List.

This is similar to adding a custom column in the Equipment List, but you don't need to add the column.

[Click here to read our Custom Level article.](#) And watch the video with more example [by clicking here.](#)

3. Choose tag level, and merge the cards

This should only be used as a **last resort / small project workaround!** It doesn't allow you to re-use the settings, AND if you add more equipment units to this project, they are not included automatically.

[Click here read our article about Merging Cards.](#)

Avoid level entirelyly - create cards manually

Note that creating/editing cards manually doesn't allow you to save and use the settings in future projects or even in this one if you add more units to the Equipment List.

1. Create "Manual Cards"

You can create cards manually (click plus in Card List) and assign all equipment units manually to each card.

[Click here to know more about Manual Cards.](#)

2. Edit auto-generated card to remove units.

You can also EDIT the tag units from an auto-generated card but note that the card will be converted into a "Manual" card.

The screenshot shows the 'Card List' interface with a table of cards. A red arrow points to the 'Edit' icon in the 'Tools' column of the table. The table has columns: Tools, Required, Card Name(Auto), Doc Code #, Title, Level, Stage, and Stage List. The 'Edit Card' pop-up is open, showing the 'Link Auto Card to:' section with an 'Edit' button. The 'Document Info' section shows 'Linked Equipment Sub-Suppliers' as 'Transmitter Co'.

Tools	Required	Card Name(Auto)	Doc Code #	Title	Level	Stage	Stage List
		B02_F1099	B02	Vendor Document Register	Order	IFA	IFA
		F13_Transmitter-TEMP1...	F13	Outline Dimensions	Item/Model...	IFA	IFA
		F13_Transmitter-TEMP1...	F13	Outline Dimensions	Item/Model...	IFA	IFA
		F13_Transmitter-ModelA	F13	Outline Dimensions	Item/Model...	IFA	IFA
		F13_Transmitter-ModelB	F13	Outline Dimensions	Item/Model...	IFA	IFA
		F13_Transmitter-ModelC	F13	Outline Dimensions	Item/Model...	IFA	IFA
		F13_Transmitter-TEMP1...	F13	Outline Dimensions	Item/Model...	IFA	IFA
		O02_PT-107	O02	Pressure Test Certificates	Tag (TE)	IFA	IFA
		O02_T-905	O02	Pressure Test Certificates	Tag (TE)	IFA	IFA
		O02_PT-108	O02	Pressure Test Certificates	Tag (TE)	IFA	IFA

To modify the tags, Navigate to the Card List > and under to the Tools column > click on the "Edit" icon.

Then on the Processing Pop-up select again "Edit" under "Link Auto-Card to:"

The screenshot shows the 'Edit Auto Card Linked to Equipment Units' pop-up with a table of auto-linked equipment units. A red arrow points to the 'Edit' button. The 'Edit Card' pop-up is also shown, with a red arrow pointing to the 'Edit' button in the 'Link Auto Card to:' section.

Wolfe PA Line Number	Item/Model	Tag Number	Sub-Supplier	Group
15	Transmitter-TEMP124	T-905	Transmitter Co	Temp

Again, click "Edit" on the new screen that shows up

Edit the Equipment Units linked to this Card
Equipment Units

Step 1: Add New Units to Card

Filter Units

Level: Select or type ahead... Reference: Select or type ahead... Search

Grid Rows Colors

Choose Additional Equipment Units

Wolfe PA Line Number 1	Item/Model	Tag Number	Sub-Supplier	Group
1	Transmitter-ModelA	PT-101	Transmitter Co	Gauge
2	Transmitter-ModelA	PT-102	Transmitter Co	Gauge
3	Transmitter-ModelA	PT-103	Transmitter Co	Gauge
4	Transmitter-ModelA	PT-104	Transmitter Co	Gauge
5	Transmitter-ModelB	PT-105	Transmitter Co	Gauge
6	Transmitter-ModelB	PT-106	Transmitter Co	Gauge
7	Transmitter-ModelB	PT-107	Transmitter Co	Differential
8	Transmitter-ModelB	PT-108	Transmitter Co	Differential
9	Transmitter-ModelC	PT-109	Transmitter Co	Differential
10	Transmitter-ModelC	PT-110	Transmitter Co	Differential

Select Page: 1 - 10 | 10 | Show on Page: 10 | Items on page: 10 | Total Found: 16 | Select All (this page only) | Select All (all pages)

Select Units

Step 2: Review Selected Units

Grid Rows Colors

Selected Equipment Units

Wolfe PA Line Number	Item/Model	Tag Number	Sub-Supplier	Tools	Group
15	Transmitter-TEMP124	T-905	Transmitter Co	Temp	

No more pages | Show on Page: 20 | Items on page: 1 | Select All (this page only) | Select All (all pages)

Remove Selected

Back Cancel **Submit Changes to Linked Units**

Edit Card

Link Auto Card to:

Auto-linked to: 1 equipment unit
Level: Item/Model (TE)
Reference: Transmitter-TEMP124

Document Info

Linked Equipment Sub-Suppliers
Transmitter Co

Document Sub-Supplier Override
- Select Sub-Supplier -

Document Title
Outline Dimensions

Tags

Tag(s) List
T-905

Status & Routing

Stage List * Select different stage list
IFA

Stage * Edit Stages
IFA

Doc Status *
NULL - NULL status
* Status can only be set when there is an active document.

Internal (User) Routing

Doc Control User

Cancel **Save**

1. And finally, if you need to add new tags, manually choose the additional units and click "Select Units".

2. Same if you need to remove some units, select them manually and then click "Remove Selected".

To save the changes, first click on "Submit Changes to Linked Units" and then on "Save" before leaving the Pop-up screen.