

Marking cards as required / not required

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When DocBoss auto-generates cards (based on your selected level), cards will be created for ALL equipment references. By default, all cards will be set as required based on a default query (i.e., "All docs are required"). In some cases, not all cards are applicable for the doc code in question.



Example: The customer has requested **pressure tests** from a seller of instrumentation, and the order contains both pressure AND temperature transmitters.

When you set the level of the pressure tests doc code to **tag**, a pressure test card is created for every tag in the order. **BUT** - temperature transmitters do not require pressure tests.

When certain cards are not required, you need to tell DocBoss which cards **SHOULD** be left on the order (required), and which should be hidden (marked as not required).

This distinction can either be made (1) **manually** OR (2) automatically using a **query**.

Option 1: Manually select which cards are required / not required

From the **standard** tab of the card list, you can set cards as required/unrequired from the **"Required"** column in the grid.

Tools	Required	Document	Doc Code	Title	Status (Combined)	Doc No. (Omega)	Card Name(Auto)	Stage List
	<input checked="" type="checkbox"/>		K01	Vendor Data Book	X	0001234-K01-001-01	K01_1234	IFA
	<input checked="" type="checkbox"/>		A01	Supplier Document Register	X+	0001234-A01-001-01	A01_1234	IFA
	<input checked="" type="checkbox"/>		G02	Preservation Procedure and Handling & Shipping Procedures	NULL	0001234-G02-001-01	G02_1234	IFA
	<input checked="" type="checkbox"/>		J01	Operating & Maintenance Manual	NULL	0001234-J01-005-01	J01_567ABC891DE	IFA
	<input checked="" type="checkbox"/>		J01	Operating & Maintenance Manual	2(+)	0001234-J01-001-01	J01_123ABC456DE	IFA
	<input checked="" type="checkbox"/>		J01	Operating & Maintenance Manual	2(+)	0001234-J01-002-01	J01_234ABC567DE	IFA
	<input checked="" type="checkbox"/>		J01	Operating & Maintenance Manual	NULL	0001234-J01-003-01	J01_345ABC678DE	IFA
	<input checked="" type="checkbox"/>		J01	Operating & Maintenance Manual	NULL	0001234-J01-004-01	J01_456ABC789DE	IFA

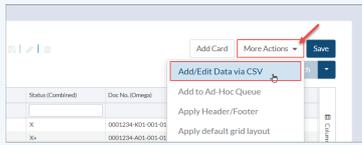
Rather than marking each card individually, the check boxes beneath the grid can also be used to set cards as required/unrequired quickly. If all applicable cards are set as required, clicking the box a second time will mark them as unrequired.

heets	4531-C04-001-01	Cover page only (no stamp)	C04_CV7777
	4531-C15-004-01	Cover page only (no stamp)	C15_GV1234

Set Required Y/N (this page only)
 Set Required Y/N (all filtered rows)
 Select all (this page only)
 Select all (all pages)



Manually setting cards as required/unrequired can also be achieved in bulk via .CSV upload. From the "Required" column, set cards as required with a "Y," and unrequired with an "N."



B	E	N	O	P	V	AE	AF	AG
1	Primary Doc Code(ID)* Title	StageList	Stage	Status	Doc No. (Omega)	Required	Locked	Due to A
2	*/K01(15345) Vendor Data Book	IFA	IFA	X	0001234-K01-001-01	Y	*/Yes	07-04-
3	*/A01(15339) Supplier Document Register	IFA	IFA	X+	0001234-A01-001-01	Y	*/Yes	
4	*/G02(15343) Preservation Procedure and Handling & Shipping Procedure	IFA	IFA	NULL	0001234-G02-001-01	Y	*/Yes	07-04-
5	*/J01(15344) Operating & Maintenance Manual	IFA	IFA	NULL	0001234-J01-005-01	Y	*/No	07-04-
6	*/J01(15344) Operating & Maintenance Manual	IFA	IFA	2	0001234-J01-001-01	Y	*/Yes	08-08-
7	*/J01(15344) Operating & Maintenance Manual	IFA	IFA	2	0001234-J01-002-01	Y	*/Yes	08-08-
8	*/J01(15344) Operating & Maintenance Manual	IFA	IFA	NULL	0001234-J01-003-01	Y	*/Yes	07-04-
9	*/J01(15344) Operating & Maintenance Manual	IFA	IFA	NULL	0001234-J01-004-01	Y	*/Yes	07-04-

***Important:**

- Manually setting cards as required/unrequired from the "Required" column disables the default query (i.e., "All docs are required"), as DocBoss can no longer determine which cards SHOULD be left on the order (required), and which should be hidden (marked as not required). Because the query is disabled, any new auto-generated cards will be left as **unrequired** and will need to be manually set as required (see article: [Why is my card or document missing?](#)).

Option 2: Use a Query to determine if card should be required / not required

The query tab enables users to define the criteria between required and not required cards automatically using a query.

The query approach builds a logic statement to define which of the level elements you actually need to submit. Various fields are available to choose from including model, manufacturer, and tag. Note that the field(s) used to determine required/unrequired cards do not need to be the same as the level set for the doc code.

The screenshot shows the 'Card List' interface for 'Compressor Project (19283)'. The 'Query' tab is active, displaying a query: 'Item/Model Starts with 'P-300' OR Sub-Supplier Equal to 'Sub-Supplier 3''. Below the query is a 'Query Builder' table with the following structure:

Not	Parenthesis (L)	Field	Action	Value	Parenthesis (R)	AND/OR	Tools
<input type="checkbox"/>		Item/Model	Starts with	P-300		OR	
<input type="checkbox"/>		Sub-Supplier	Equal to	Sub-Supplier 3		OR	

Below the query builder is a table of 'Units' with the following data:

Line No. (Omega)	Line No. (ACME)	Item/Model	Tag No.	Sub-Supplier	PO No. (ACME)	PO Rev No. (ACME)	Milestone	Shipment Date	Product Type	Shipment
1		P-300 Compact Pump	1234 - A	Sub-Supplier 1				2025-12-19		1
2		P-300 Compact Pump	5678 - A	Sub-Supplier 1				2025-12-19		1
3		P-450 Centrifugal Pump	1234 - B	Sub-Supplier 2				2025-12-22		2
4		P-450 Centrifugal Pump	5678 - B	Sub-Supplier 2				2025-12-22		2
5		P-750 Industrial Pump	1234 - C	Sub-Supplier 3				2025-12-22		3
6		P-750 Industrial Pump	5678 - C	Sub-Supplier 3				2025-12-22		3



For large projects and projects where change orders are frequent, the query approach will be very helpful because any new line items and their corresponding documents will be automatically set as required or not based on your previously created conditions. In a manual approach, you must remember to select these documents after updating the order information.

***Important:**

- The required/not required query does NOT edit the equipment assigned to each card. The SOLE FUNCTION of the QUERY tab (in the card list) is to set required/not required status.
- If a card includes ANY unit which satisfies the query, the card is marked as required.
- If changing the query will result in [merge sets](#) being sent to obsolete (which requires manual intervention to restore if done unintentionally), there is a warning to inform you of this and prevent accidental changes.
- If instead you are looking to manually edit the equipment assigned to a card, follow the instructions here: [Link to Equipment](#).

For more examples and details about marking cards and running queries have a look at our video: [Trimming Auto-Created Registers](#).
