

# Marking cards as required / not required

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When DocBoss auto-generates cards (based on your selected LEVEL), it creates ALL possible cards. In some cases, not all cards are applicable for the doc code in question.

Assume a customer has requested **pressure tests** from a seller of instrumentation, AND assume the order contains BOTH pressure AND temperature transmitters.

When you set the Doc Code for pressure tests to the **tag** level, a pressure test card is created for every tag in the order. BUT - temperature transmitters don't require pressure tests.

You now need to tell DocBoss which cards **SHOULD** be left on the order (required), and which should be hidden (marked as not required). You can do this **MANUALLY**, OR via a **QUERY**.

## Manually select which cards are required / not required

On the **standard tab**, you can check or uncheck the required column.

Remember that if the card is already locked, marking a card as unrequired will move the card to obsolete (its history must be maintained). If not locked, it will simply be removed from the display.

The screenshot shows the 'Card List' interface for 'Valve Project (0001234)'. The 'Standard' tab is selected. A table lists various cards with columns for Tools, Required, Document, Doc Code, Title, Status (Combined), Doc No. (Omega), Card Name(Auto), and Stage List. The 'Required' column has checkboxes, some of which are checked. A red box highlights the 'Required' column header and the first few rows of the table.

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.

The screenshot shows the bottom of the Card List table with bulk action buttons. A red arrow points to the 'Set Required (this page only)' button.

3(+)	0001234-K10-001-01	<a href="#">K10_1234</a>	IFA	
NULL	0001234-B01-001-01	<a href="#">B01_123-5678</a>	IFA	
<input type="checkbox"/> Set Required (this page only) <input type="checkbox"/> Set Required (all filtered rows) <input type="checkbox"/> Select all (this page only) <input type="checkbox"/> 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	07-04-
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-

## 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 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.

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.

### NOTE:

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 you want to manually edit the equipment assigned to a card, just edit the equipment. For more info, [see how to add/edit cards](#).

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