

Include Sub-Units as Additional Columns in Unit Upload (Horizontal Layout)

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Overview

DocBoss now allows a horizontal layout in the files used for equipment list uploads. This feature can save time for users working with units that have multiple components that need to be tracked.

Typically, to include sub-units in an equipment list upload, each unit and sub-unit would have to be on separate lines in the uploaded file. The list of units is arranged vertically:

	A	B	C	D	E	F	G	H	I
1	Line No. (Wolfe PA)*	Item/Model*	Tag No.*	Line	PO	PO Rev	Milestone	Ship Date	Sub-Supplier*
2	1.a	Valve123	VL-101						ValveCo
3	1.b	Actuator123	VL-101						ActuatorCo
4	1.c	Positioner123	VL-202						PosCo
5									

The horizontal layout allows users who receive their equipment lists in a horizontal format to do less pre-processing of information before uploading the units.

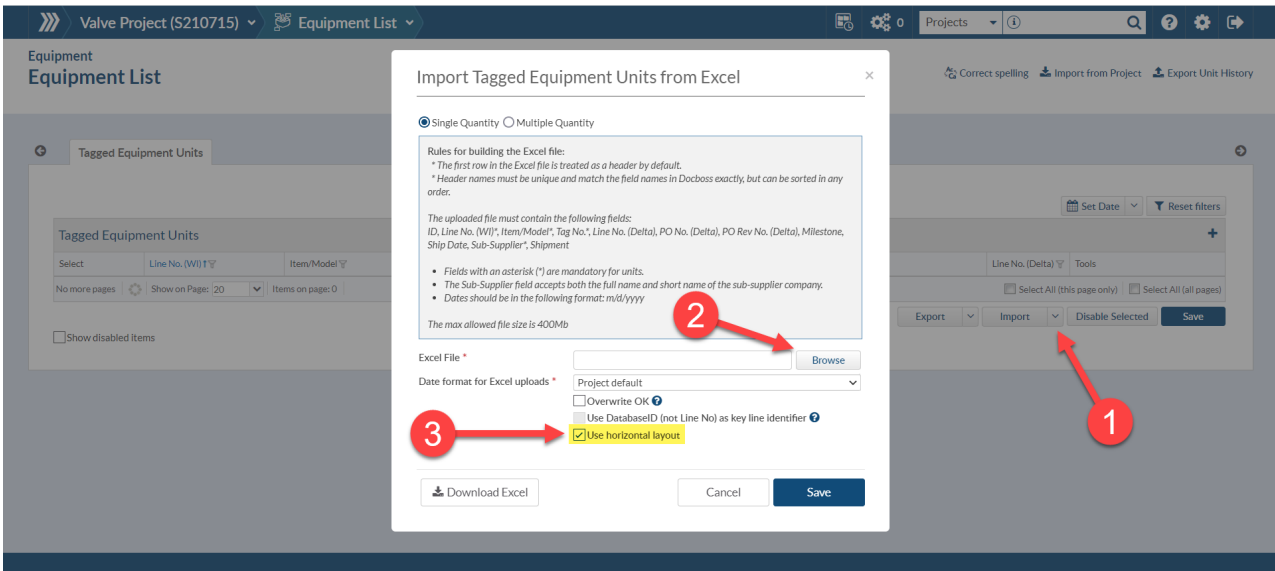
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Line No. (Wolfe PA)*	Item/Model*	Tag No.*	Line	PO	PO Rev	Milestone	Ship Date	Sub-Supplier*	Item/Model*	Sub-Supplier*	Item/Model*	Tag No.*	Sub-Supplier*
2	1	Valve123	VL-101						ValveCo	Actuator123	ActuatorCo	Positioner123	VL-202	PosCo
3														

After upload, DocBoss will convert the horizontal layout into the vertical layout used in the equipment list. The line number will be divided to separate each unit and sub-unit (1.a, 1.b, etc.). The result is the same as using the vertical layout to upload, but with DocBoss doing the extra work instead of users.

Adding new equipment

For a guide on how to prepare an equipment list upload file that is compatible with the horizontal layout feature, see the article [Build Import File for Horizontal Layout](#).

Once the equipment list file is prepared, upload it into DocBoss. From the **Equipment List** screen, (1) select **Import > from Excel**. (2) Select **Browse** and locate the file. (3) Ensure the checkbox **Use horizontal layout** is selected, then save.



Editing equipment

Once an equipment list is uploaded to DocBoss using the horizontal layout feature, it is converted into the default vertical layout used in the system. If changes need to be made to the equipment list after initial upload, it is recommended to use one of the following methods:

Use vertical layout only:

- Once the equipment list is uploaded and converted to the default vertical layout used in DocBoss, make future changes directly within DocBoss or using the default (vertical format) export of the equipment list in CSV/Excel.

Keep horizontal layout file as master equipment list:

- Do not export the equipment list from DocBoss to make edits. Keep the original horizontal layout file as the "master" list to which all edits are made. After making a change, upload that modified file to DocBoss.
- When importing the updated equipment list file, always enable all three of these options: 1) horizontal layout, 2) overwrite OK, and 3) Disable units when missing from upload file.
- Avoid changing the number or sequence of columns in the upload file, as this may cause errors.
- Do not make any changes to the equipment list directly within DocBoss.