

# Build Import File for Horizontal Layout

10/01/2025 10:09 am MDT

This article explains how to format an equipment list file for upload using the [horizontal layout](#) feature.

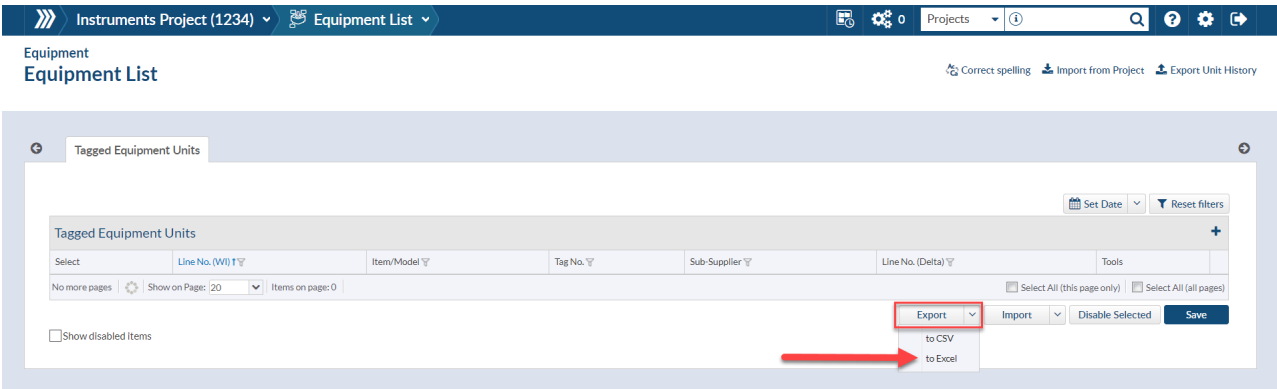
## Topics

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## Set up import file

Navigate to **Project Menu > Equipment > Equipment List**.

On the equipment list page, select **Export > to Excel** from the options below the grid.



Open the exported Excel file.

If the project already has an equipment list, remove all data from the spreadsheet except the first row (column headers).

Highlight the cell containing **Item/Model**. This is not required, but it will make it easier to distinguish the units and sub-units, as each will begin with **Item/Model**.

	A	B	C	D	E	F	G	H	I	J	K
1	Line No. (WI)*	Item/Model*	Tag No.*	Line No. (Delta)	PO No. (Delta)	PO Rev No. (Delta)	Milestone	Ship Date	Sub-Supplier*	Shipment	
2											
3											
4											
5											
6											
7											
8											
9											

Copy all header rows, starting with **Item/Model**, and paste them into the empty cells to the right of the existing headers.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Line No. (WI)*	Item/Model*	Tag No.*	Line No. (Delta)	PO No. (Delta)	PO Rev No. (Delta)	Milestone	Ship Date	Sub-Supplier*	Shipment			
2													
3													
4													

Diagram illustrating the data flow for the 'copy' and 'paste' actions:

- A red arrow labeled "copy" points from the range B1:M1 to the range K1:M1.
- A blue arrow labeled "paste" points from the range K1:M1 to the range B1:M1.

There should now be two sets of columns after the internal line number, both beginning with **Item/Model**.

[illegible]

The columns included in the first column set should be left as they are.

Additional column sets can include any other columns (except **Line No.** and major tag fields, which are always inherited from the main unit), but only require **Item/Model** and **Sub-Supplier**. For any fields which are the same for the main unit and sub-units, these columns can be deleted from the second column set. For example, in the project shown below, most of the columns have been removed:

[illegible]

Note that the columns included in the second column set appear in the same order as in the first. This is important for the upload to process correctly.

This process is then repeated, depending on the number of sub-units per unit. If the columns will be the same for all sub-units, simply copy and paste the second column set as many times as needed.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Line No. (WI)*	Item/Model*	Tag No.*	Line	PO	PO	F	Ship	Sub-Supplier*	Shipment	Item/Model*	Tag No.*	Sub-Supplier*	Shipment	Item/Model*	Tag No.*	Sub-Supplier*	Shipment
2																		
3																		
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		

Main unit

Sub-units

The next step is to add the equipment units and sub-units.

## Add equipment units

Each row has two types of information:

- Line Number (*Internal*)
- Column sets, beginning with **Item/Model**

The line number will apply to all column sets in each row. Later, when the file is processed, each column set will be

separated into its own row in DocBoss, with its own unique line number. For example, if a row's line number is **1**, then after upload, the system will use **1.a** as the line number for the first column set, and **1.b** as the line number for the second column set.

The column sets contain the information related to the specific units and sub-units.

The first column set:

- Is treated as the main unit
- Requires all column headers that the file was exported with

Any additional column sets:

- Are treated as sub-units
- Must begin with **Item/Model** and include **Sub-Supplier**
- Inherit the data from all columns in the first column set (main unit) that are not included as columns in the sub-unit

### Important!

Any information in columns not added to sub-units is copied from the main unit to the sub-units.

As an example, a user might have a project where each line number on the purchase order represents a valve and the actuator and positioner for that valve. Horizontal layout would be useful in this situation.

If the user were to fill out an equipment upload spreadsheet for DocBoss for this project, it might look something like this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	Line No. (WI)*	Item/Model*	Tag No.*	Line	PO	N	PO	R	Mile:Ship	Sub-Supplier*	Shipment	Item/Model*	Tag No.*	Sub-Supplier*	Shipment	Item/Model*	Sub-Supplier*	Shipment
2	1	Valve123	VL-101							ValveCo	1	Actuator123	AC-101	ActuatorCo	1	Positioner123	PosCo	2
3	2	Valve123	VL-102							ValveCo	1	Actuator123	AC-102	ActuatorCo	1	Positioner123	PosCo	
4	3	Valve123	VL-103							ValveCo	2	Actuator123	VL-103	ActuatorCo	1	Positioner123	PosCo	
5																		
6																		
7																		
8																		
9																		
10																		
11																		

Valve tag numbers

Actuator tag numbers

Positioners will inherit valve tag numbers

As an example of how data inheritance works in DocBoss with horizontal layout, note the **Tag No.** fields for each type of equipment in the image above:

- **Valves:** Here, the valves are the main units, so the **Tag No.** column must be included in the valve column set. A tag number has been entered for each valve.
- **Actuators:** Some of the actuators listed have different tag numbers than the valves they belong to, so the **Tag No.** column needs to be included for them. Where the tag number is the same for the actuator as for the valve (see line 3), the tag number must be filled in.
- **Positioners:** In this project, all the positioners have the same tag numbers as the valves. Because **Tag No.** is not a required column for additional column sets, the user can simply remove this column from the positioner column set. This tells DocBoss to inherit the valve tag numbers for the positioners.

If any cells are left blank in a column that is included in the upload file but is NOT a required field for equipment units (see column **Q** in the example above), DocBoss will process these as blank values.

If any cells are left blank in a column that is a required field for equipment units (marked with an asterisk), this will result in errors when the equipment list is imported to DocBoss. An error message will be shown to the user after import if this occurs.

## Define sub-unit lettering

On **Project Configuration Templates**, users select between two types of lettering for sub-units: dedicated by column (skip letter if column is empty), or sequential by row (no gaps in lettering). This can be managed in the "Advanced" tab in the "**Equipment List**" section. This selection can also be updated on individual projects from **Project Menu > Set Up > Project Configuration > Advanced**.

Admin / Customization  
Project Configuration Template: Default Project Fields Template

Main **Advanced** Fields & Equipment Types Compilation & Package Presets Expediting Info

Users Roles

Doc Codes & Cards Defaults Doc Code Queries Library Queries Packaged Cards Stage List Settings

Project Setup Feature Management

Equipment List

Enforce sub-supplier selection Yes

Horizontal unit upload: sub-unit lettering

- Dedicated by column (skip letter if column is empty)
- Dedicated by column (skip letter if column is empty)
- Sequential by row (no gaps in lettering)

Workflow Submittals

Other



Note: It is not recommended to change the sub-line lettering system in the middle of a project.

## Working with incomplete equipment lists



















If a user is working with an order that does not include a sub-unit of each type for each main unit, they can leave the cells where the units would have been added blank. If no information is entered for a sub-unit in any line, DocBoss will not try to add a sub-unit from those cells.

For example, in the image below, not all sub-units are included on the order. However, for each unit and sub-unit that is included, the file will upload correctly as long as the columns are set up properly and the required fields, highlighted here in yellow, are complete (or can be inherited) for each piece of equipment that is on the list.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q		
1	Line No. (WI)*	Item/Model*	Tag No.*	Line	PO	N	PO	R	Mile	Ship	Sub-Supplier*	Shipment	Item/Model*	Tag No.*	Sub-Supplier*	Shipment	Item/Model*	Sub-Supplier*	Shipment
2	1	Valve456	VL-401								ValveCo	1	Actuator456	AC-401	ActuatorCo		Positioner456	PosCo	2
3	2	Valve456	VL-402								ValveCo								
4	3	Valve456	VL-403								ValveCo						Positioner456	PosCo	
5																			

When splitting the line numbers, DocBoss will leave gaps in sub-line sequencing for missing units. This is done so that if these units are later added to the order, there is a line number available for them that is consistent with the rest of the numbering in the equipment list.

For example, the file above imports into DocBoss as follows:

Tagged Equipment Units							
The processing of Import data is completed							
Total processed rows: 6. Successfully processed rows: 6. Rows with error: 0.							
<div> <div>Set Date</div> <div>Reset filters</div> </div>							
Tagged Equipment Units							
Select	Line No. (W/I) T	Item/Model	Tag No.	Sub-Supplier	Shipment	Line No. (Delta)	Tools
<input type="checkbox"/>	1.a	Valve456	VL-401	Valve Company	1		  
<input type="checkbox"/>	1.b	Actuator456	AC-401	ActuatorCo			  
<input type="checkbox"/>	1.c	Positioner456	VL-401	Positioner Company	2		  
<input type="checkbox"/>	2	Valve456	VL-402	Valve Company			  
<input type="checkbox"/>	3.a	Valve456	VL-403	Valve Company			  
<input type="checkbox"/>	3.c	Positioner456	VL-403	Positioner Company			  
<div> <div>No more pages</div> <div>Show on Page: 20</div> <div>Items on page: 6</div> </div> <div> <div>Select All (this page only)</div> <div>Select All (all pages)</div> </div> <div> <div>Export</div> <div>Import</div> <div>Disable Selected</div> <div>Save</div> </div>							

Note the effects of the missing units on the imported data:

- For line 1, because the import file had data for units in all of the included column sets, the line numbering is consistent: **1.a, 1.b, 1.c**.
- For line 2, because no sub-units were included, the line number is **2**. If sub-units are added later, the user will need to manually update line **2** to **2.a** if required.
- For line 3, because the actuator, which is in the second column set, is not included, DocBoss skips over line **3.b** so that it is available in the future if this piece of equipment is added to the order.