

Build Import File for Horizontal Layout

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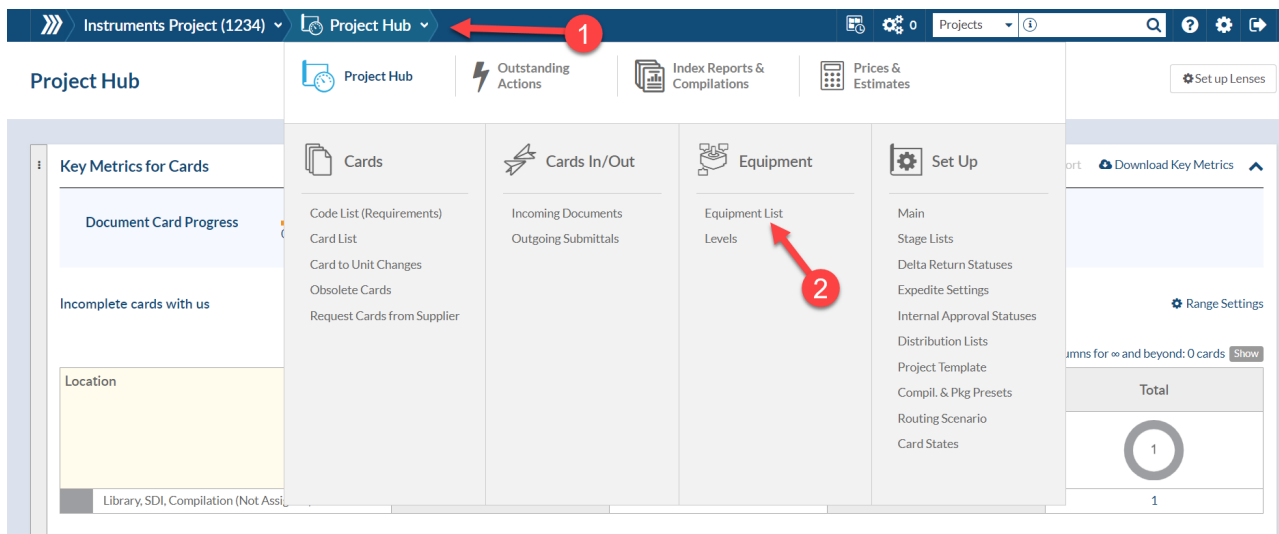
This article explains how to format an equipment list file for upload using the [horizontal layout](#) feature.

Topics

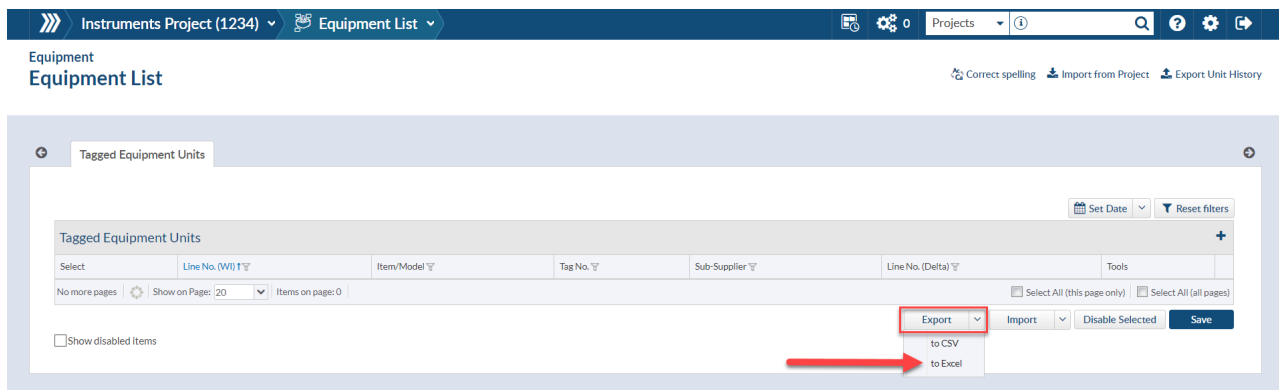
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Set up import file

From the **Project Menu**, navigate to the **Equipment List** screen.



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											
10											

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													

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

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

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:

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

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	N PO	R Mile	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																	

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																
12																

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-line lettering

In the **Project Template**, users select between two types of lettering for sub-units: reserved (gaps left for missing sub-units) and sequential (no gaps in lettering). This can be managed under **Admin > Customization > Project Templates** or directly within the project's template settings.

Admin / Customization
Project Templates Name * EN Affiliate * Wolfe Instruments

The screenshot shows the 'Project Settings' page. On the left is a sidebar with various settings categories. The main content area is divided into two columns. The left column contains settings for 'Default EQ Number', 'Default Level', 'Enforce Sub-Supplier Selection', 'Allow Sub-Supplier Access', 'Enable Internal Approval Statuses', 'Doc Control role is mandatory', 'Project Engineer role is mandatory', 'Drafting role is mandatory', 'Project Manager role is mandatory', and 'Remove sticky note drawing from PDFs'. The right column contains settings for 'Manual Cards Module', 'Major Tags Module', 'Display Sheet Adder for Manual Cards', 'Display only when Multiple Sheets', 'Sheet Adder Pattern', 'Enable Submittal CP Bookmark', 'Submittal CP Bookmark Pattern', 'Exceptional handling default (for file uploads)', and 'Horizontal layout sub-lettering default (for tagged equipment uploads)'. A red arrow points from the 'Project Engineer role is mandatory' dropdown to the 'Horizontal layout sub-lettering default' dropdown, which is highlighted with a red box. The selected option in the dropdown is 'Reserved (default - gaps left for missing units)'.

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:

Select	Line No. (WI) 1	Item/Model	Tag No.	Sub-Supplier	Shipment	Line No. (Delta)	Tools
<input type="checkbox"/>	1a	Valve456	VL-401	Valve Company	1		
<input type="checkbox"/>	1b	Actuator456	AC-401	ActuatorCo			
<input type="checkbox"/>	1c	Positioner456	VL-401	Positioner Company	2		
<input type="checkbox"/>	2	Valve456	VL-402	Valve Company			
<input type="checkbox"/>	3a	Valve456	VL-403	Valve Company			
<input type="checkbox"/>	3c	Positioner456	VL-403	Positioner Company			

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: **1a, 1b, 1c**.
- 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.