

Create Manual Cards (individual)

09/16/2024 1:36 pm MDT

Users may now add manual cards to their projects, even when just using the tagged equipment units.

First - ensure the manual card module has been [enabled on your project](#).

Add Cards

To add an individual card, click the + in the top right of the card list screen. You can also find this add icon in the assign screen.

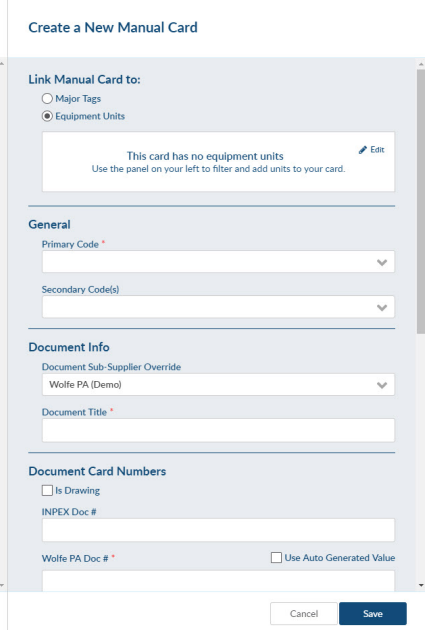
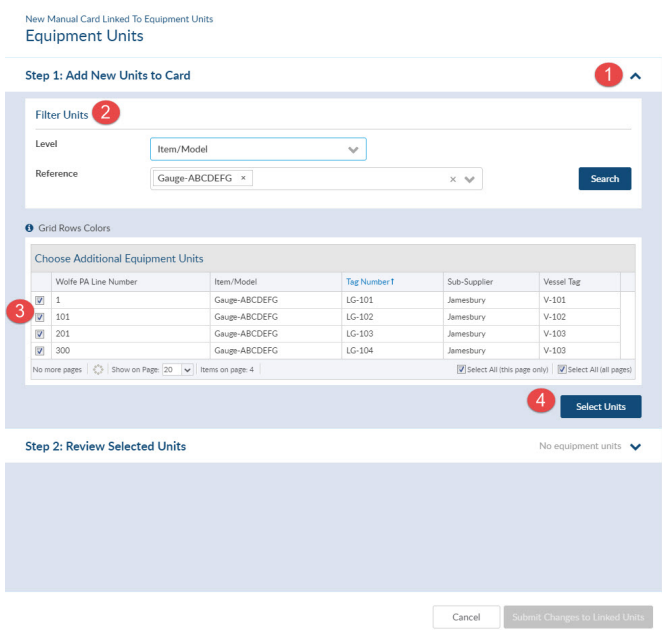
Link to Equipment

If the major tags module is enabled, you will be given an option about which type of card you want to create. For major tags, you will just select which major tags to link.

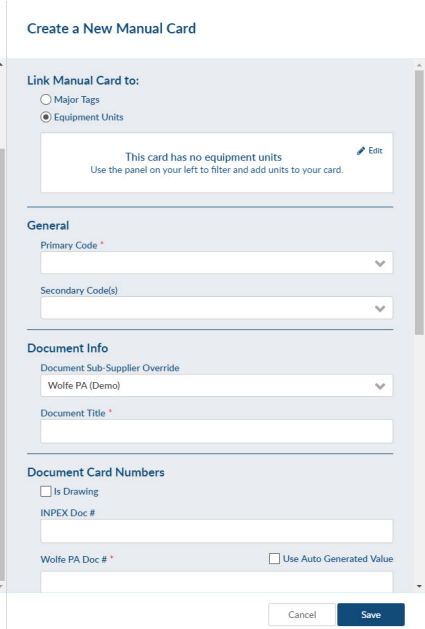
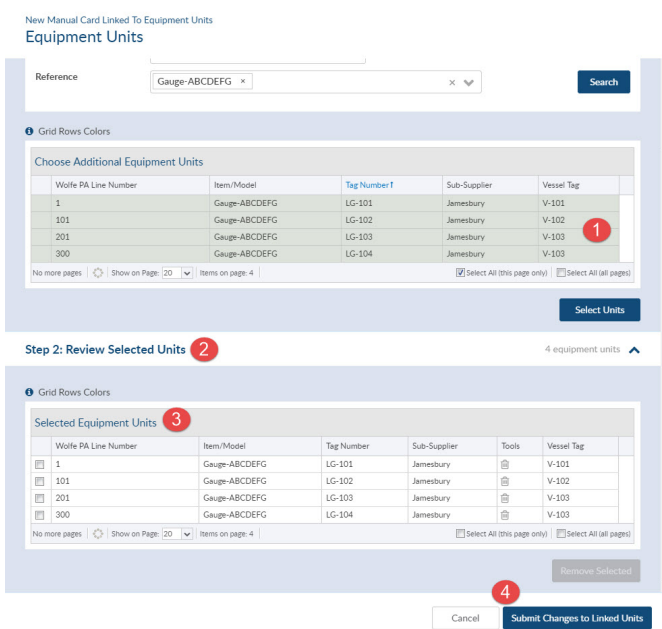
For Equipment Units, the process is as described below:

The screenshot displays the 'Create a New Manual Card' interface. On the left, a panel titled 'New Manual Card Linked To Equipment Units' shows 'Equipment Units' with two steps: 'Step 1: Add New Units to Card' (marked with a red '2') and 'Step 2: Review Selected Units' (marked with a red '1'). The main area shows a message: 'This card has no equipment units. Use the panel on your left to filter and add units to your card.' Below this, the 'Link Manual Card to:' section has radio buttons for 'Major Tags' and 'Equipment Units' (selected). The 'General' section includes 'Primary Code' and 'Secondary Code(s)' dropdowns. The 'Document Info' section includes 'Document Sub-Supplier Override' (set to 'Wolfe PA (Demo)') and 'Document Title'. The 'Document Card Numbers' section includes 'Is Drawing' (checkbox), 'INPEX Doc #' (text input), and 'Wolfe PA Doc #' (text input) with a 'Use Auto Generated Value' checkbox. At the bottom, there are 'Cancel' and 'Save' buttons.

1. Choose Equipment Units
2. Start step 1.



1. Expand Step 1. This is done by default.
2. Filter the list of items if you wish. This can help jumpstart the equipment you want to select.
3. Check the box to the left of each desired unit. If you have filtered the grid in step 2, you might just check "Select all"
4. Select those units.



1. Once selected, the items turn grey. If you are editing an existing card, the units already assigned will already be grey.
2. Start step 2
3. Review the equipment selected for this card. If you want, you can remove units.
4. Once finished, save the changes to units linked to this card.

Card List

INPEX Doc Code: - Select Code - Reference: - Select Reference - Level: - Select Level - Tagged Units: - Select

Stage: - Select Stage - INPEX Status: - Select Status - State: - Select State - Transmittal: - Select

Location: - Select Location - Routing: - Select Routing -

Due to INPEX:
 Expected Return to Wolfe PA:
 Days since last request: _____ Keyword: _____

Card List

Required	Card Name(Auto)	Title	Doc Code	Reference	Status (Combined)	INPEX Status	Location	Routing
<input type="checkbox"/>	Q06_PWHT		Q06	PWHT	NULL	NULL		
<input type="checkbox"/>	C01_V-104		C01	V-104	NULL	NULL		
<input type="checkbox"/>	Q02_HydroTest		Q02	HydroTest	NULL	NULL		
<input type="checkbox"/>	Q02_Mag Particle		Q02	Mag Particle	NULL	NULL		
<input type="checkbox"/>	Q02_Radiographic		Q02	Radiographic	NULL	NULL		
<input type="checkbox"/>	Q02_Visual Test		Q02	Visual Test	NULL	NULL		
<input checked="" type="checkbox"/>	D01_1234	MTR - Individual	O01	1234	NULL	NULL		
<input checked="" type="checkbox"/>	D01_4568	MTR - Individual	O01	4568	NULL	NULL		
<input checked="" type="checkbox"/>	D01_G77788	MTR - Individual	Q01	G77788	NULL	NULL		
<input checked="" type="checkbox"/>	D01_H77778	MTR - Individual	Q01	H77778	NULL	NULL		
<input type="checkbox"/>	C01_V-101	Calculations	C01	V-101	NULL	NULL		
<input type="checkbox"/>	C01_V-102	Calculations	C01	V-102	NULL	NULL		
<input type="checkbox"/>	C01_V-103	Calculations	C01	V-103	NULL	NULL		
<input checked="" type="checkbox"/>	D02_ENG-00011212	General Arrangement - ISO	D02	ENG-00011212	NULL	NULL		
<input checked="" type="checkbox"/>	D01_V-101	P&ID	D01	V-101	3+	3		+
<input checked="" type="checkbox"/>	D01_V-101_e#2	P&ID	D01	V-101_e#2	NULL	NULL		
<input checked="" type="checkbox"/>	D01_V-102	P&ID	D01	V-102	NULL	NULL		
<input checked="" type="checkbox"/>	D01_V-103	P&ID	D01	V-103	NULL	NULL		
<input checked="" type="checkbox"/>	D01_V-104	P&ID	D01	V-104	NULL	NULL		

Create a New Manual Card

Link Manual Card to:
 Major Tags
 Equipment Units

4 equipment units **1** [Edit](#)

General

Primary Code * **2**
 D02 - General Arrangement
 Please select Primary Code

Secondary Code(s) **3**
 D03 - Structural Detail Drawings × D06 - Saddle Drawings ×

Document Info

Document Sub-Supplier Override
 Wolfe PA (Demo)

Document Title *
 General Arrangement

Document Card Numbers

Is Drawing

INPEX Doc #

Wolfe PA Doc # * **4** Use Auto Generated Value

[Cancel](#) [Save](#) **5**

1. Once saved, you now see that 4 units are assigned to this card. If you ever want to edit/review the units, click the edit icon
2. Choose the primary code (only one allowed)
3. Choose the secondary codes (multiple allowed)
4. Set the document number. If you want DocBoss to assign the number for you, check the Use Auto-generated value.
5. Save the card

Now you have a new card added to the card list.

Note: To edit the "Reference" of a Manual Card, you must update the document number. For Manual Cards, the Reference = Document Number.