

Create Manual Cards (Individual)

07/23/2025 1:20 pm MDT

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

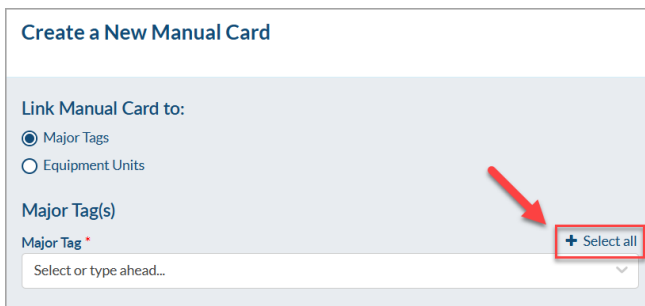
First - ensure the manual card module has been [enabled on your project](#).

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 be prompted to select which major tags to link. If all major tags should be linked, simply click "Select all":



The screenshot shows a form titled "Create a New Manual Card". Under the heading "Link Manual Card to:", there are two radio button options: "Major Tags" (which is selected) and "Equipment Units". Below this, there is a section for "Major Tag(s)" which includes a dropdown menu labeled "Major Tag *". The dropdown menu is open, showing a search bar with the placeholder text "Select or type ahead..." and a list of items. A red arrow points to a button labeled "+ Select all" located at the top right of the dropdown menu.

For Equipment Units, the process is as described below:

1. Choose Equipment Units
2. Navigate to expanded "Equipment Units" form

New Manual Card Linked To Equipment Units

Equipment Units

Step 1: Add New Units to Card

2

Step 2: Review Selected Units

No equipment units

Cancel

Submit Changes to Linked Units

Create a New Manual Card

Link New Manual Card to:

Major Tags

Equipment Units

1

This card has no equipment units

Use the panel on your left to filter and add units to your card.

Edit

General

Primary Code *

Secondary Code(s)

Document Info

Document Sub-Supplier Override

Wolfe PA (Demo)

Document Title *

Document Card Numbers

☐ Is Drawing

INPEX Doc #

Wolfe PA Doc # *

☐ Use Auto Generated Value

Cancel

Save

2. Start step 1.
 - i. Expand Step 1 drop-down.
 - ii. Filter the list of items if you wish. This can help jumpstart the equipment you want to select.
 - iii. 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".
 - iv. Select those units.

1

2

3

4

Step 1: Add New Units to Card

Filter Units

Level

Item/Model

Reference

Gauge-ABCDEFG

Search

Grid Rows Colors

Choose Additional Equipment Units

Wolfe PA Line Number	Item/Model	Tag Number 1	Sub-Supplier	Vessel Tag	
<input checked="" type="checkbox"/> 1	Gauge-ABCDEFG	LG-101	Jamesbury	V-101	
<input checked="" type="checkbox"/> 101	Gauge-ABCDEFG	LG-102	Jamesbury	V-102	
<input checked="" type="checkbox"/> 201	Gauge-ABCDEFG	LG-103	Jamesbury	V-103	
<input checked="" type="checkbox"/> 300	Gauge-ABCDEFG	LG-104	Jamesbury	V-103	

No more pages ☐ Show on Page: 20 Items on page: 4 ☒ Select All (this page only) ☒ Select All (all pages)

Select Units

Step 2: Review Selected Units

No equipment units

Create a New Manual Card

Link Manual Card to:

☐ Major Tags

☒ Equipment Units

This card has no equipment units

Use the panel on your left to filter and add units to your card.

General

Primary Code *

Secondary Code(s)

Document Info

Document Sub-Supplier Override

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Wolfe PA Doc # *

☐ Use Auto Generated Value

Cancel

Submit Changes to Linked Units

Cancel

Save

3. Start step 2
 - i. Once selected, the items turn grey. If you are editing an existing card, the units already assigned will already be grey.
 - ii. Expand Step 2 drop-down.
 - iii. Review the equipment selected for this card. If you want, you can remove units (under "Tools").

i. Once selected, the items turn grey. If you are editing an existing card, the units already assigned will already be grey.

- ii. Expand Step 2 drop-down.

iii. Review the equipment selected for this card. If you want, you can remove units (under "Tools").

iv. Once finished, save the changes to units linked to this card.

New Manual Card Linked To Equipment Units

Equipment Units

Reference: Gauge-ABCDEF x

Search

Grid Rows Colors

Choose Additional Equipment Units

Wolfe PA Line Number	Item/Model	Tag Number	Sub-Supplier	Vessel Tag
1	Gauge-ABCDEF	LG-101	Jamesbury	V-101
101	Gauge-ABCDEF	LG-102	Jamesbury	V-102
201	Gauge-ABCDEF	LG-103	Jamesbury	V-103
300	Gauge-ABCDEF	LG-104	Jamesbury	V-103

No more pages | Show on Page: 20 | Items on page: 4 | Select All (this page only) | Select All (all pages)

Select Units

Step 2: Review Selected Units

4 equipment units

Grid Rows Colors

Selected Equipment Units

Wolfe PA Line Number	Item/Model	Tag Number	Sub-Supplier	Tools	Vessel Tag
1	Gauge-ABCDEF	LG-101	Jamesbury		V-101
101	Gauge-ABCDEF	LG-102	Jamesbury		V-102
201	Gauge-ABCDEF	LG-103	Jamesbury		V-103
300	Gauge-ABCDEF	LG-104	Jamesbury		V-103

No more pages | Show on Page: 20 | Items on page: 4 | Select All (this page only) | Select All (all pages)

Remove Selected

Cancel | Submit Changes to Linked Units

Create a New Manual Card

Link Manual Card to:

☐ Major Tags

☒ Equipment Units

This card has no equipment units. Use the panel on your left to filter and add units to your card. Edit

General

Primary Code *

Secondary Code(s)

Document Info

Document Sub-Supplier Override: Wolfe PA (Demo)

Document Title *

Document Card Numbers

☐ Is Drawing

INPEX Doc #

Wolfe PA Doc # * ☐ Use Auto Generated Value

Cancel | Save

4. Return to main manual card form (right side)

i. Once saved, you now see that 4 units are assigned to this card. If you ever want to edit/review the units, click "Edit"

ii. Choose the primary code (only one allowed)

iii. Choose the secondary codes (multiple allowed)

iv. Set the document number. If you want DocBoss to assign the number for you, check the Use Auto-generated value.

v. Save the 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 -

Location: - Select Location -

Routing: - Select Routing -

Transmittal: - Select -

☐ Due to INPEX

☐ Expected Return to Wolfe PA

Days since last request: Keyword: 0

Grid Rows Colors

How to use auto-generated values for INPEX Doc # and Wolfe PA Doc #

Card List

Required	Card Name(Auto)	Title	Doc Code	Reference	Status (Combined)	INPEX Status	Location	Routing
<input type="checkbox"/>	Q06_PVWHT		Q06	PVWHT	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	Q01	1234	NULL	NULL		
<input checked="" type="checkbox"/>	D01_4568	MTR - Individual	Q01	4568	NULL	NULL		
<input checked="" type="checkbox"/>	D01_677788	MTR - Individual	Q01	677788	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	PSID	D01	V-101	3+	3	+	
<input checked="" type="checkbox"/>	D01_V-101_012	PSID	D01	V-101_012	NULL	NULL		
<input checked="" type="checkbox"/>	D01_V-102	PSID	D01	V-102	NULL	NULL		
<input checked="" type="checkbox"/>	D01_V-103	PSID	D01	V-103	NULL	NULL		
<input checked="" type="checkbox"/>	D01_V-104	PSID	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 *

D02 - General Arrangement 2

Please select Primary Code

Secondary Code(s)

D03 - Structural Detail Drawings * D06 - Saddle Drawings * 3

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

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.
