

Horizontal Layout (Equipment List) Troubleshooting

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The [horizontal upload](#) feature works a bit differently than the standard DocBoss equipment upload process. For troubleshooting tips, see the topics below.

No option to enable horizontal upload on CSV import

Horizontal layout is only available when importing equipment units from Excel files. If a user has already created an equipment list import file, they will simply need to open the file in Microsoft Excel, select **Save As**, and choose the **.xlsx** file extension to convert the file.

No option to enable horizontal upload for Major Tags or additional equipment types

Although it can be used on projects which include major tags or additional equipment types, horizontal layout is only available as a function for the Tagged Equipment Units list upload.

Line numbering skips values

This is configured intentionally. If there are missing sub-units for certain pieces of equipment, the sub-line numbering will skip over their values so that these values are available in the future if needed. See [here](#) for more information.

File uploaded with errors

Users may receive error messages when importing equipment units if they have not formatted their data in the way that DocBoss expects. When this happens, the user is prompted to download a file that includes a breakdown of the errors so that they can correct them.

Equipment
Equipment List

Correct spelling Import from Project Export Unit History

Tagged Equipment Units

The processing of import data is completed Close Notification

Total processed rows: 6. Successfully processed rows: 4. Rows with error: 2. [Download File with Errors.](#)

| Select | Line No. (WI) ↑ | Item/Model ↑ | Tag No. ↑ | Shipment ↑ | Sub-Supplier ↑ | Line No. (Delta) ↑ | Tools |
|--------------------------|-----------------|---------------|-----------|------------|--------------------|--------------------|-------|
| <input type="checkbox"/> | 1.a | Valve123 | VL-101 | | Valve Company | | |
| <input type="checkbox"/> | 1.b | Actuator123 | VL-101 | | ActuatorCo | | |
| <input type="checkbox"/> | 1.c | Positioner123 | VL-202 | | Positioner Company | | |
| <input type="checkbox"/> | 2.c | Positioner123 | VL-203 | | Positioner Company | | |

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

Show disabled items

Export Import Disable Selected Save

Here are common ways to resolve the errors listed on the **Download File with Errors** files.

- **Incorrect number of columns:** a column header may be missing, in the wrong location, or spelled incorrectly. If an asterisk (*) is included in a column header on file export, the asterisk must be included every time that

column header is included in the import file (the reverse also applies). Users should review their imported data to ensure that the information has pulled into the correct fields. If beginning a new project, it may be easier to disable all equipment units, correct the import file, and import all units again.

- **[Field name] is required:** information is missing from a required field. The user can simply complete the required information for each line in the file with errors, then import that file into DocBoss (without using horizontal layout).

Using custom equipment list fields

Custom equipment list fields can be added as usual. They will be included in the export file when [preparing the upload file for horizontal layout](#). The same rules apply for custom fields as for default fields when building the upload file.

If a custom equipment list field is added to a project *after* the equipment list has been uploaded, best practice is to export the file from DocBoss and populate the field in the default (vertical) layout, then upload without enabling horizontal layout.

Too many columns to work with in Excel file

For ease of working with the Excel file, columns can be hidden. Hidden columns are processed as regular columns when the equipment list is imported to DocBoss.
