

Create Manual Cards (Bulk Load)

03/13/2025 4:12 pm MDT

Ensure Manual Cards are enabled on your project, see our article to learn how to enable this function: [Enable Manual Cards](#)

To bulk load manual cards, use the "Add/Edit Data via CSV" function. This option is available under the "More Actions" drop-down.

Card List

Standard Query

Keyword Filter set Select Filter Set + | | | |

+ Date and Non-Column Filters

Doc No. (ACME)	Doc No. (Omega)	Tools	Required	Doc Code	Secondary Doc Codes	Card Name(Auto)	Document	Title	Status (Combined)
<input type="checkbox"/> 1234-SDI-0124	001-SDI-001-01		<input checked="" type="checkbox"/>	SDI		SDI_1234		Supplier's Document Index	2+
<input type="checkbox"/> 1234-PRO-0063	001-PRO-001-01		<input checked="" type="checkbox"/>	PRO		PRO_1234		Procedures	X+
<input type="checkbox"/> 1234-MRB-0062	001-MRB-001-01		<input checked="" type="checkbox"/>	MRB		MRB_1234		Manufacturer's Record Book (Databook)	X
<input type="checkbox"/> 1234-TOC-0126	001-TOC-001-01		<input checked="" type="checkbox"/>	TOC		TOC_1234		Table of Contents for Manufacturer's Record Book	X

Add Card More Actions Save

Add/Edit Data via CSV

Add to Ad-Hoc Queue

Bulk Doc Download

Bulk Markup Download

Download Status Report (CSV)

Merge Selected

Once clicked, a window will open with the option to download a CSV template, which provides the correct column headers and will be populated with any existing data.

There are 30+ columns on the CSV (excel sheet) download (more if you have custom columns created). If you already have cards set up on the project they will be populated in the csv file (just leave them as they are displayed). The only columns you need to enter **contain an asterisk** in the header - they are mandatory columns.

You will need to enter:

- **Primary Doc Code(ID)*** (This is the doc code the card is linked to.)

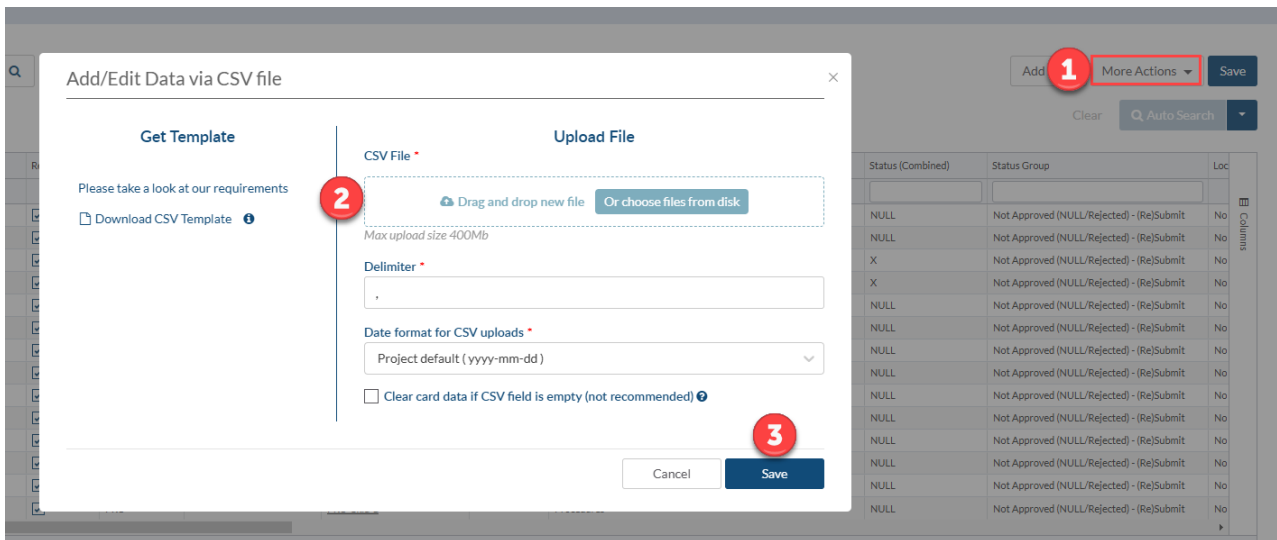
As well as one of the following (with multiple values* separated by commas):

- **Major Tag(*)**
- **Tag List(*)**
- **Line No. (Supplier) List(*)**

*If all tags are associated with a particular card, you may simply type "ALL" instead of listing every tag.

The bulk creation of manual cards is ideal to use when you have a lot of cards you want to create. You can add as many lines as you want, and they will all upload at the same time.

Once all applicable data has been added save the .csv file and then use the Import feature. From the "More Actions" drop-down, click "Add/Edit Data via CSV" and browse for the new file. Once loaded, click save.



Note: Once the manual card has been created, you cannot edit the tag numbers via CSV using the "Tag List" column. Any changes to the tags will need to be done in the "Line No. List" column and DocBoss will update the tags associated with those line numbers. For more information on editing cards via CSV click [here](#).

Overwriting existing fields

Use [ORvalue] if you want overwrite default Rev # (KT) via CSV upload. Otherwise your changes will be ignored.

Use **OVERRIDE** word inside Doc No. Manually Changed (ACME) (or Doc No. Manually Changed (Alpha)) field if you want to update proper auto-generated Doc No. value.

Values containing commas or quotes

Review [Edit Data via CSV When Using Values Containing Commas or Quotes](#) for formatting requirements.

Additional information

For an in depth review of how to edit your data using the csv upload click [here](#).

If the some of the Manual Cards are documents (i.e drawings) that have multiple pages related to one piece of equipment, these can be easily uploaded using "Make Sheet of previous row" in the CSV: [How to upload multiple sheets for manual cards](#)

For more information about incoming files have a look at our video: [Manual Cards](#)