

Create Manual Cards (bulk load)

09/16/2024 1:36 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 Edit Data via CSV file function. This button is located below your Card List grid.

Card List

Grid Rows Colors | How to use auto-generated values for ACME Doc # and Wolfe PA Doc #

Add to Ad-Hoc Queue | Set Date | Generate Request | Bulk Doc Download | Save

Required	Tools	Doc Code†	Card Name(Auto)	Title	Wolfe PA Doc #	Status (Combined)	ACME Status	Stage List	Sub-Supplier List
<input checked="" type="checkbox"/>		A01	A01_556	Document Register	123444-A01-0001-001	X+	X	IFI	Wolfe PA
<input checked="" type="checkbox"/>		B14	B14_556	Vendor Sub-Orders	123444-B14-0001-001	NULL	NULL	IFI	Wolfe PA
<input checked="" type="checkbox"/>		C02	C02_556	Sizing Calculations (Tag(TE))	123444-C02-0001-001	NULL	NULL	IFI	Wolfe PA


No more pages | Show on Page: 10 | Items on page: 7

Set Required (this page only) | Set Required (all filtered rows) | Select All (this page only) | Select All (all pages)

Show Completed Cards | Show NULL Cards | Hide Unrequired Cards | Hide Merged Cards

Download Status Report (CSV) | Merge Selected | **Add/Edit Data via CSV** | Save

Filter Set: Select Filter Set | Create Filter Set | Update Filter Set | Edit Filter Set | Delete Filter Set



Once clicked, a window will open with the option to download the CSV file (as it currently exists). This 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:

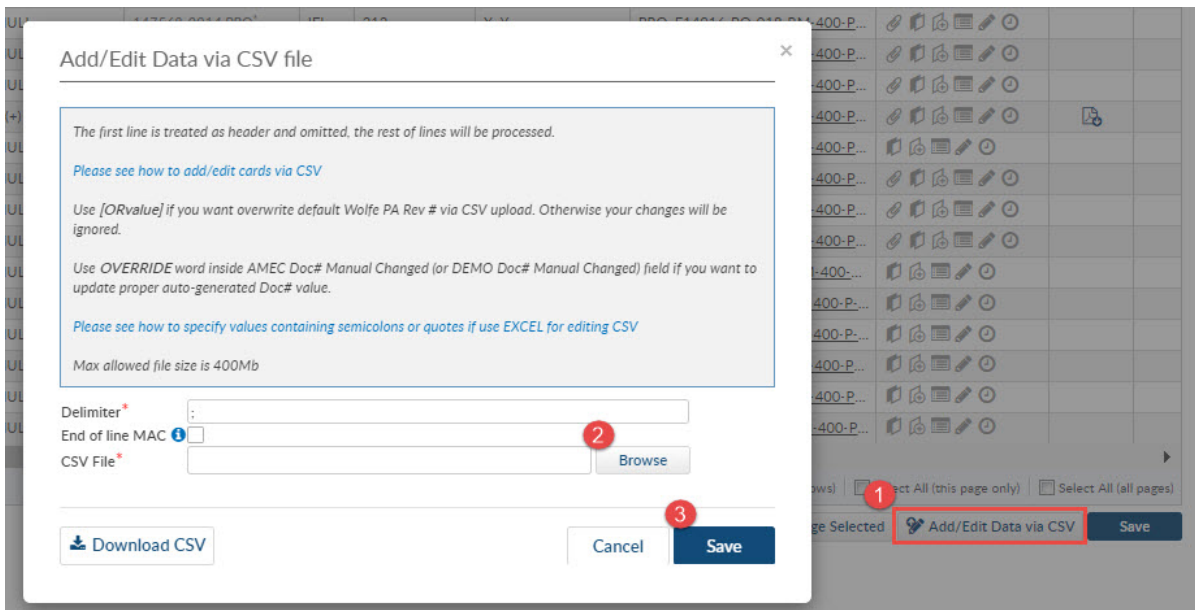
- **Primary Doc Code(ID)*** (This is the doc code the card is linked to.)

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

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

It is ideal to use this feature if you have a lot of cards you want to create. You can add as many lines as you want, 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. Below the grid click the Edit data via CSV button, browse for the new file and 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](#)