




Tools Icons and Definitions (Card/Code List)








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Card List

Icon	Name	Definition
	Create Copy	Creates an exact duplicate of a card that is auto-linked to the same equipment/units (see article). *Note - The document number will be the same but with a new sequence number.
	Create Sheet	Creates a new card to accommodate for additional pages related to the same document (typically drawings - see article). *Note - The document number will have the same sequence number but a different sheet number.
	Split Card	Separates an auto-generated card into two (or more) separate cards when the equipment/tags should be managed individually (see article).
	Edit	Opens the card edit form where card details can be viewed and updated (e.g., document numbers, rev number, etc.).
	History	Provides a comprehensive overview of the work that has taken place on the card, including send/return records, completed actions, changes to card details/equipment units, etc. (see article).
	Delete Card	Deletes the card. If there is a file on the card or it is locked, it will be moved to obsolete (see article). *Note - Only available for manually-created card (i.e., manual cards, copied cards, and sheets). If auto-generated cards are not needed, set them as unrequired (see article).
	Attach SDI OR Library Document	Attach either an SDI report (see article) or a published library document (see article).
	Regenerate File	Regenerates SDI report to display up-to-date information (see article). *Note - A similar icon () will appear when the SDI report is in the process of regenerating.

Code List

Icon	Name	Definition
	Duplicate Doc Code	Creates an exact duplicate of the doc code (same doc code and configuration) with the suffix "_copyX" added to the doc code name (see article).
	Create Packages	Creates a package of cards at the level set on the doc code, and an additional doc code (order level) for the combination of those cards (see article).

Icon	Name	Definition
	Create Translation Cards	Creates cards in different languages when the different language version must be supplied/tracked (see article).
	Delete Code	Removes the doc code from the code list (when it is not required on the project). *Note - Deleting the doc code from the code list does not delete it from the company profile.
	Attach Compilation/SDI OR Run Query (Library Docs)	Attach either a compilation (see article) or an SDI report (see article). For "Published" doc codes, this icon will run a query to auto-assign library documents to their associated cards (see article).
	Re-generate File	Regenerates compilation (see article) or SDI (see article) to display up-to-date information. *Note - A similar icon () will appear when the compilation or SDI report is in the process of regenerating.
	Submittal Restricted/Allowed	Option to either restrict or allow submittal of incomplete compilations. Dark icon indicates that submittal is restricted (default), and light icon indicates that submittal is allowed anytime (see article).
	Unlink Compilation	Detaches compilation from doc code (see article).