

Why is my card or document missing?

09/16/2024 1:51 pm MDT

If unsure where a card is, try out the troubleshooting steps below.

Topics

- [Cannot find card in Incoming Documents](#)
- [Cannot find card in Outgoing Submittals](#)
- [Cannot find card in Card List](#)
- [Card has incorrect document](#)

Cannot find card in Incoming Documents

The **Assign To** area of **Incoming Documents** has several filtering options to make it easier for users to find the cards they need to assign documents to. However, if the view options are not set in the way a user is expecting, they may not be able to see a card they are looking for.

Drag and drop files into document cards

Doc Code Search

Out of Workflow
 Merged
 Grid Row Colors

1			Doc Code	Doc Code Name	Doc No. (Alpha)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E02	Cross Sect Dwg / Exploded View Diagram	000021-E02-001-01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E02	Cross Sect Dwg / Exploded View Diagram	000021-E02-002-01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	D16	Instrument Data Sheet	000021-D16-001-01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	D16	Instrument Data Sheet	000021-D16-006-01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E88	Misc Drawings/Descriptive	000021-E88-003-01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E88	Misc Drawings/Descriptive	000021-E88-002-01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E88	Misc Drawings/Descriptive	000021-E88-004-01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E88	Misc Drawings/Descriptive	000021-E88-001-01

2

No more pages Show on Page: 20

NULL Cards Only

3

1. If **Show Out of Workflow** is disabled (button is gray), any cards for which DocBoss is not expecting a document brought in from the source the files were uploaded to will be hidden.
2. If **Show Merged** is disabled, any cards that are part of a merged set will be hidden.
3. If **Show NULL Cards Only** is enabled (button is blue), any cards not at status NULL will be hidden.

Important!

Adjust the view options on the **Assign To** grid until the required card is visible.

If the required card is still not visible, see [Cannot find card in Card List](#) below.

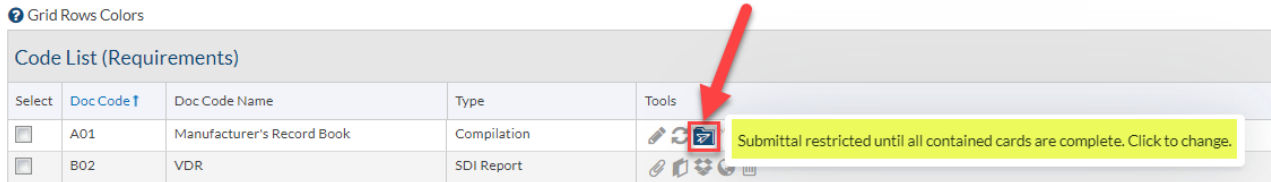
Cannot find card in Outgoing Submittals

If a card is not in the **Outgoing Submittals** area, check the card's **Status (Combined)** column on the **Card List** to see if it has any routings assigned or is already out with Customer/Internal/Sub-Supplier, and to confirm that the card's status is not **NULL** (requires document) or **Z** (often for cards with Stage **No Individual Submission**).

If the card is a compilation or is not in the correct queue, see the steps below.

Compilation card not available for submittal

If a user is trying to submit a compilation (or compilation table of contents) for which not all required cards are complete, they must deselect the option to restrict submittals for incomplete compilations (under **Tools** in the **Code List**).



The compilation may also need to be (re)generated, or may not be linked correctly to the doc code. For more information, see [Why isn't my compilation showing in the outgoing submittals area?](#)

Card not in correct queue

If card is in incorrect queue, and belongs in Customer, Internal, or Sub-Supplier queue, follow [these instructions](#) to update it. (Either select the Internal/Sub-Supplier queue, or uncheck option for those queues to default to stage target, which is usually the customer.)

If card needs to be in Ad-Hoc queue (tracked outside of its workflow), follow [these instructions](#) to add it.

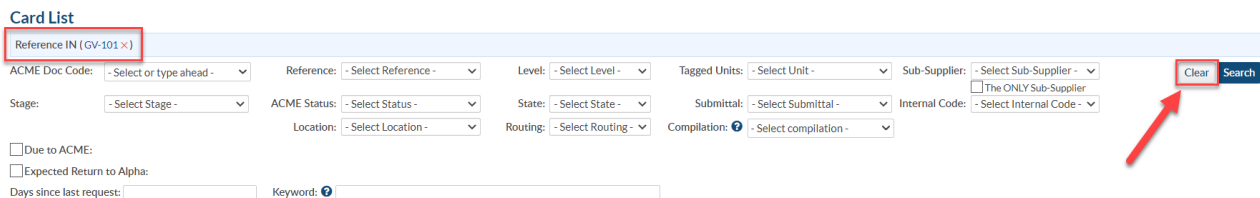
Cannot find card in Card List

If a card is not visible in the **Card List**, try the options below to find it.

Check filters and view settings

If filters are applied, they will limit the cards shown on the card list. To remove filters, select **Clear** from the top right of the **Card List** screen.

Filters may be applied automatically if a [filter set](#) is selected for the grid.



The view options on the bottom left of the grid affect which cards are displayed. To view the most available cards, configure the view options as shown below:

<input type="checkbox"/>	E09	Installation Drawings	000023-E09-001-01	NULL
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Select Page: 000023-B02-001-01 - 000023-E09-001-01 ... Show on Page: 10 Items on page: 10

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

Important!

Sometimes the view options hide cards which a user would not expect to be hidden. For example, a card may have been marked as unrequired in error, and so would only be visible if **Hide Unrequired Cards** was unchecked.

Check Card to Unit Changes

If changes have been made to the **Equipment List**, DocBoss will move certain affected cards to the **Card to Unit Changes** screen to await processing by users. To access this screen, select **Cards > Card to Unit Changes** from the project menu. To move cards out of this area, see [these instructions](#).

Check Obsolete Cards

To see if a user has accidentally set a card to Obsolete status, check the **Obsolete Cards** screen for the missing card (**Cards > Obsolete Cards** from the project menu). If a card has been set to Obsolete in error, follow [these instructions](#) to reattach the card (and if desired, its history) to an active card.

Card has incorrect document

If a card has a document that the user doesn't expect, they can try the following options:

- 1) Check **Obsolete Cards** (see above) to see if there is a duplicate card which contains the correct document.
- 2) Check the card's history (see [these instructions](#)) to view the history of files attached to the card. Depending on the situation, the user may choose to revert to an earlier file. Or, the history may show that the incorrect document was uploaded from the beginning, and the user will need to upload the correct document to the card.