Why is my card or document missing?

10/22/2025 11:45 am MDT

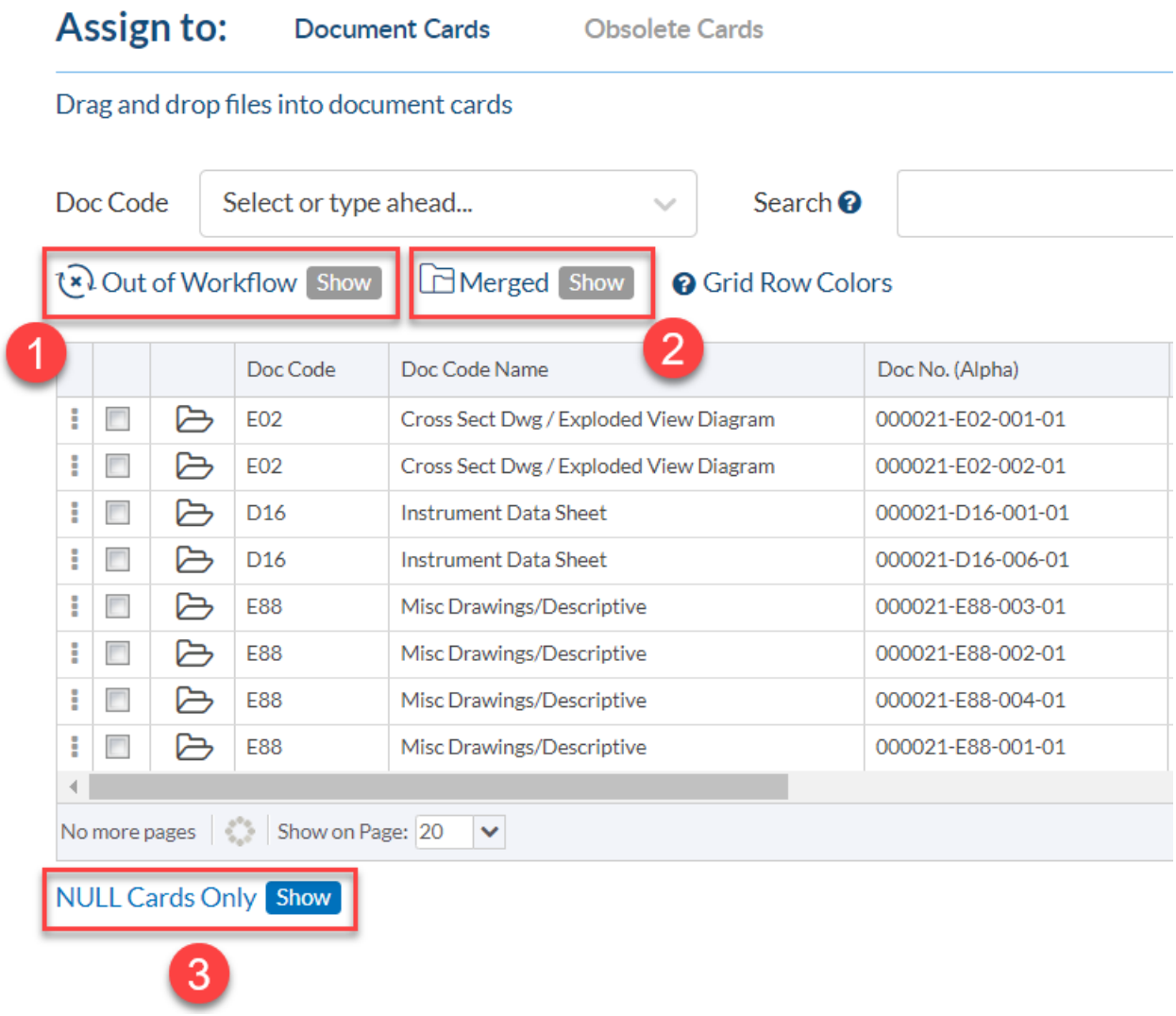
If unsure where a card is, try out the troubleshooting steps below.

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.



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.

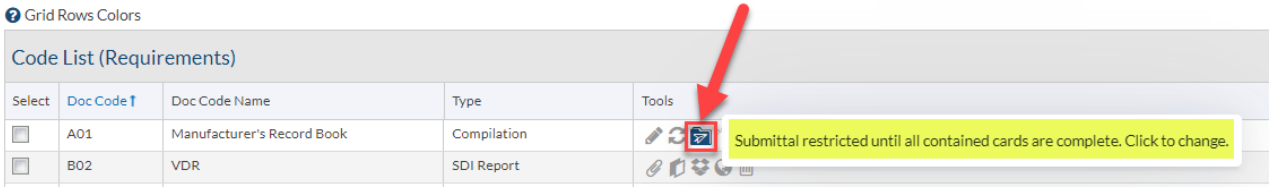
Cannot find card in Outgoing Submittals

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.

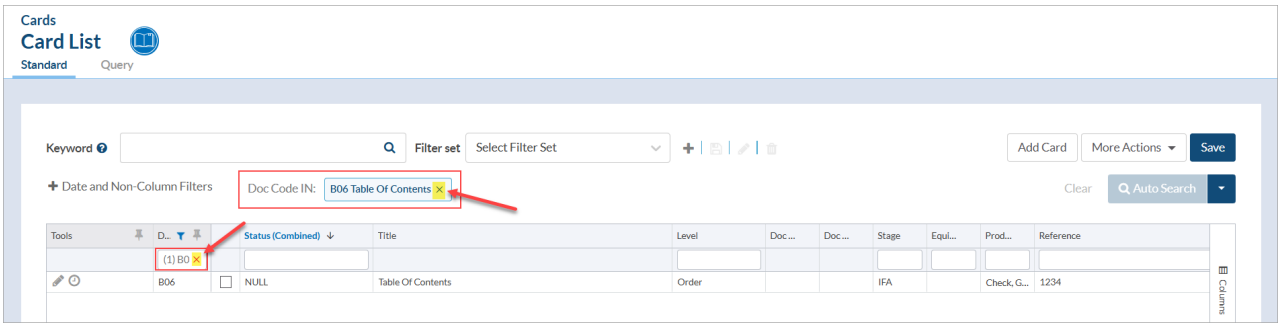
Cannot find card in Card List

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

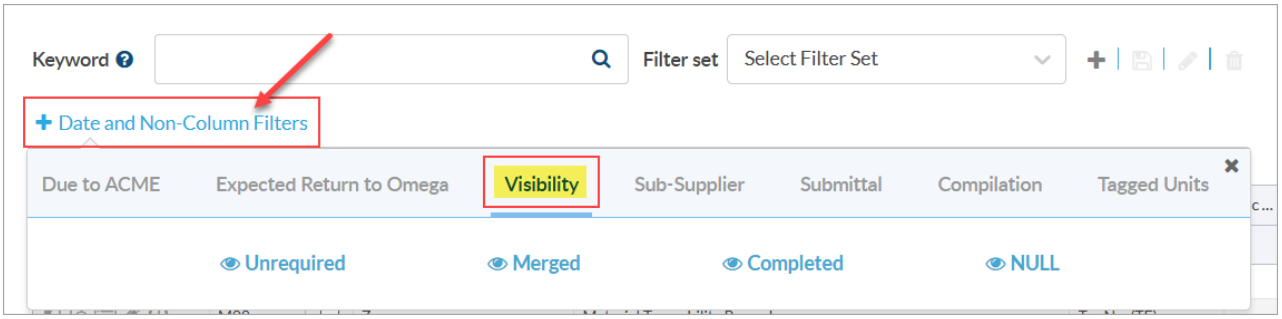
Check filters and view settings

If filters are applied, they will limit the cards shown on the card list. To clear a filter, click the "X" in the column, or from above the grid.

Filters may be applied automatically if a filter set is selected for the grid.



The visibility options available under "+ Date and Non-Column Filters" also affect which cards are displayed. To view the most available cards, configure the visibility to show all cards, including unrequired, merged, completed, and NULL cards:



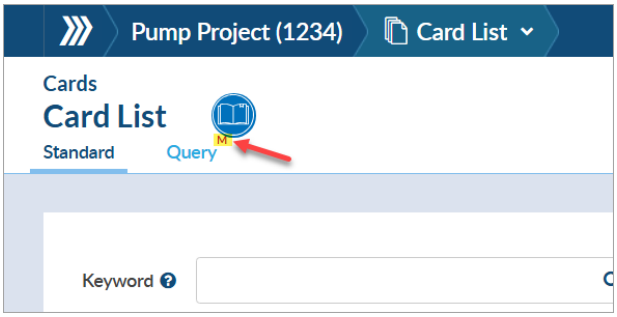
For more information about card filters, check out this article: Filtering the Card List

Check Query View

By default, all cards for all codes are marked as required based on a default query. This query can also be modified to mark cards as required/unrequired using a specific condition(s) (see article for more information: Marking cards as required / not required).

If a card(s) is **manually** marked as unrequired, the query (per doc code) is no longer "in sync" with the card list. As a result, if new cards with the same doc code are created, they will **not** be automatically marked as required.

If there is a small "M" appearing beside the "Query" tab of the card list, this indicates that the query and the card list are not in sync.



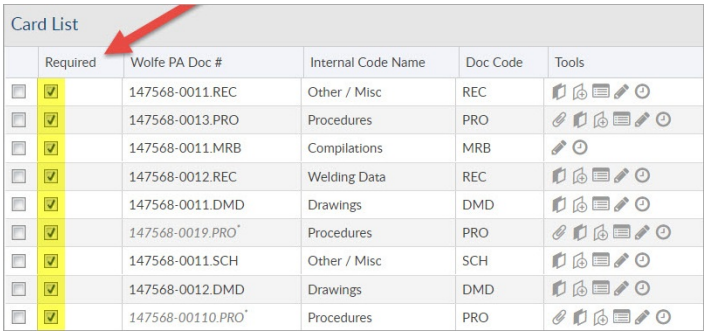
There are two solutions (depending on the desired outcome):

a. Re-run the query - This option will reset the cards to align with the query. If a card was manually marked as unrequired, re-running the query will reset the manual adjustment. To re-run the query, (1) open the "Query" tab,

(2) select the impacted doc code (identified with a small "M" to indicate that manual changes have been made), and (3) re-run the query.



b. Manually set cards as required - This option will allow continued manual changes, and any new cards will need to be manually marked as required. To manually mark cards as required, navigate to the card list and ensure unrequired cards are visible (see instructions above). Scroll or search card(s) in question, and manually enable the "Required" checkbox.



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.