

# Move history and active file to a different Card

09/16/2024 1:47 pm MDT

There may be some situations when a Card needs to be dismissed but the history and file still needs to be used in a different card.

e.g. A Merged Set which contain cards related to Tag1, Tag2, Tag3 was sent and reviewed by the customer.

In a next revision the merged set needs to contain Tag1, Tag2, Tag3 and also to Tag4.

Easiest option would be to merge the merged set with the auto-created card for Tag4, but if this is not possible another option is to create a [Manual Card](#) which includes all 4 tags and move the history from the merged set to the new manual card.

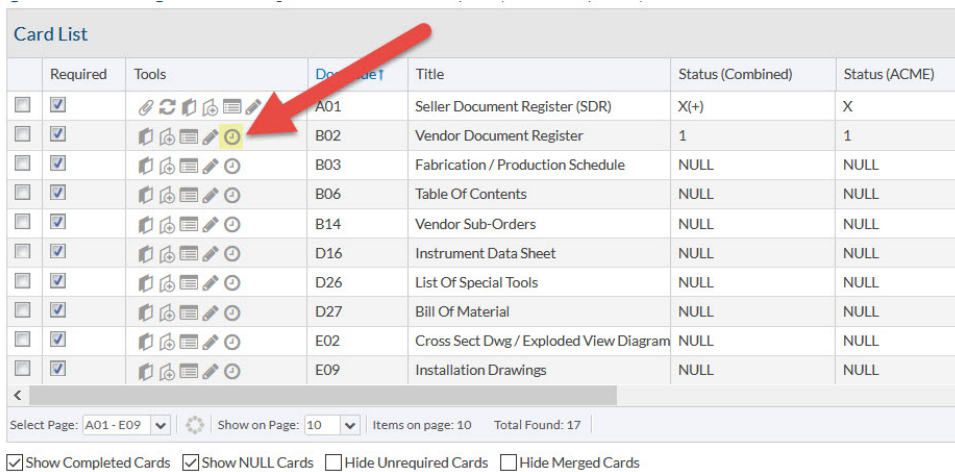
Then the cards from the merged set can just be marked as [Not Required](#).

**\*Note** that it is allowed to merge a merged set with an auto-created card but it's not possible to merge a merged set with a manual card. So if auto-created card for Tag4 can't be used a manual card won't work in this situation.

Let's start.

History and active file of a Card can be moved to a different Card in the [Document History](#).

Navigate to the Card List > and click on the History Icon under the Tools column.



The screenshot shows a 'Card List' table with columns: Required, Tools, Document, Title, Status (Combined), and Status (ACME). A red arrow points to the History icon (a circular arrow) in the Tools column of the row for card B02.

Required	Tools	Document	Title	Status (Combined)	Status (ACME)
<input checked="" type="checkbox"/>		A01	Seller Document Register (SDR)	X(+)	X
<input checked="" type="checkbox"/>		B02	Vendor Document Register	1	1
<input checked="" type="checkbox"/>		B03	Fabrication / Production Schedule	NULL	NULL
<input checked="" type="checkbox"/>		B06	Table Of Contents	NULL	NULL
<input checked="" type="checkbox"/>		B14	Vendor Sub-Orders	NULL	NULL
<input checked="" type="checkbox"/>		D16	Instrument Data Sheet	NULL	NULL
<input checked="" type="checkbox"/>		D26	List Of Special Tools	NULL	NULL
<input checked="" type="checkbox"/>		D27	Bill Of Material	NULL	NULL
<input checked="" type="checkbox"/>		E02	Cross Sect Dwg / Exploded View Diagram	NULL	NULL
<input checked="" type="checkbox"/>		E09	Installation Drawings	NULL	NULL

Select Page: A01 - E09 | Show on Page: 10 | Items on page: 10 | Total Found: 17

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

In the History tab click on **Move active file to a different card**.

File History

Entries displayed on cover pages **Show**

Rollback Last Assignment **Move active file to a different card** Edit Card

View1	Recorded1	User	System Comments	Tools	Active SEND record	Active RETURN record	Out Submittal Date	Status	Original Doc Lin
<input checked="" type="radio"/>	2020-10-27 15:13:45	tunde@docboss.com						1	003-B02-0001-4
<input type="radio"/>	2020-10-27 15:11:37	tunde@docboss.com	Document was submitted in T-001		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2020-10-27	X+	003-B02-0001-4
<input type="radio"/>	2020-10-27 15:11:00	tunde@docboss.com						X(+)	147562-G15-00
<input type="radio"/>	2020-09-28 16:49:52	tunde@docboss.com	Updated from card list						NULL
<input type="radio"/>	2020-09-25 14:51:28	tunde@docboss.com	Updated from card list						NULL
<input type="radio"/>	2020-09-25 14:48:27	tunde@docboss.com	Customer Doc # was re-generated by clicking reset button						NULL
<input type="radio"/>	2019-05-23 10:05:54	tunde@docboss.com	Card was set to required						NULL

No more pages Show on Page: 20

This will remove the active file and the history from this card and require that it be assigned to a new card. Note that current card will be set to NULL.

**Move active file to a different card** ✕

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This will remove the active file from this card and require that it be assigned to a new card.

**Note: Current card will be set to NULL.**

Cancel
Continue

In the Processing tab "Move history" checkbox will be automatically marked so if there are no other changes on the cards details this can be saved and process of moving the history will be completed.

Processing

003-B02-0001-001\_REVO\_SUB001.pdf

Viewer **Off**

History

**Move history**

New file to put in this document card

003-B02-0001-001\_REVO\_SUB001.pdf

**Document Info**

Linked Equipment Sub-Suppliers

Supplier1

Document Sub-Supplier Override

Supplier1

If the Card where the history will be moved is NULL then it will just contain the new history BUT if the Card where the new history and file will be moved does contain a history or a file old history will be available in Obsolete Cards.

Confirmation



You are going to SWAP document history on selected card. Are you sure you want to continue?

Please note! Old history from this card will be available from Obsolete Cards area in a case you need to revert it back

No

Yes