

# Locking Cards

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## What does locking cards do?

Once a card is locked, DocBoss starts tracking the State and stops that card from being automatically re-numbered.

## Is a card locked?

There is a column on the Card List that displays if a card is Locked. If you do not see the column, you can add it from the column selector to the right of the grid.

The screenshot shows the 'Card List' interface with a table of document cards. A red box highlights the 'Locked' column, which contains 'No' for all entries. Another red box highlights the 'Columns' selector on the right side of the table, which is used to manage the visible columns. The table has the following columns: Tools, Locked, Doc No. (ACME), Doc No. (Omega), Required, Doc Code, Secondary Doc Codes, Card Name(Auto), Document, Title, Status (Combined), and Status Group. The 'Locked' column is currently empty, indicating that no cards are currently locked.

## How do cards get locked?

### Transmitting a card

If you submit a card it automatically becomes locked. DocBoss starts tracking the state of this card and if Bulk Re-Numbering is reset on the project this card will not be included. The numbering will remain as assigned.

### Transmitting an SDI report

Submitting the SDI report through DocBoss will lock all cards on a project. This assumes, that the customer is expecting all cards as listed and therefore DocBoss starts to track the state of each card. If for example, there is something you have listed then it becomes N/A, (even though you have never submitted it) having the card locked will allow you to still display that entry in the SDI report.

### Manually locking cards

If you have a new project and you want to lock the cards without submitting an SDI report, you can do so by navigating to your Card List, selecting the cards you would like to lock, and locking them manually:

Card List (\*select cards\*) > More Actions > Lock Selected Cards

## Card List

Standard Query

The screenshot displays the 'Card List' interface. At the top, there is a search bar with the text 'Keyword' and a 'Filter set' dropdown. Below this is a table with columns: 'Doc No. (ACME)', 'Doc No. (Omega)', 'Tools', 'Required', 'Doc Code', 'Secondary Doc Codes', 'Card Name(Auto)', 'Document', 'Title', and 'Status (Combined)'. The first column contains checkboxes, with the first one highlighted by a red circle '1'. The table lists 14 items. A 'More Actions' dropdown menu is open on the right, with a red circle '2' above it. The menu includes options like 'Add/Edit Data via CSV', 'Add to Ad-Hoc Queue', 'Bulk Doc Download', 'Bulk Markup Download', 'Download Status Report (CSV)', 'Merge Selected', 'Set Due to ACME Date', 'Set Expected Date', 'Update Routing Scenario', 'Lock Selected Cards', and 'Unlock All Cards'. A red circle '3' is placed over the 'Lock Selected Cards' option, with a tooltip that says 'Click to manually lock selected cards'. At the bottom of the interface, there are pagination controls: 'No more pages', 'Show on page: 20', 'Items on page: 14', 'Total found: 14', and several checkboxes for filtering requirements.

Doc No. (ACME)	Doc No. (Omega)	Tools	Required	Doc Code	Secondary Doc Codes	Card Name(Auto)	Document	Title	Status (Combined)
<input checked="" type="checkbox"/>	002-MAN-001-01		<input checked="" type="checkbox"/>	MAN		MAN_1234		Manuals	NULL
<input checked="" type="checkbox"/>	123-456-789		<input checked="" type="checkbox"/>	SDI		SDI_1234		Supplier's Document Index	NULL
<input checked="" type="checkbox"/>	002-MRB-001-01		<input checked="" type="checkbox"/>	MRB		MRB_1234		Manufacturer's Record Book (Databook)	X
<input checked="" type="checkbox"/>	002-TOC-001-01		<input checked="" type="checkbox"/>	TOC		TOC_1234		Table of Contents for Manufacturer's Record Book	X
<input checked="" type="checkbox"/>	002-SHP-001-01		<input checked="" type="checkbox"/>	SHP		SHP_Omega Supply Europe		Shipping Documents	NULL
<input checked="" type="checkbox"/>	002-DWG-001-01		<input checked="" type="checkbox"/>	DWG		DWG_S164A		Drawings	NULL
<input checked="" type="checkbox"/>	002-RPT-001-01		<input checked="" type="checkbox"/>	RPT		RPT_S164A		Reports	NULL
<input checked="" type="checkbox"/>	002-PRO-001-01		<input checked="" type="checkbox"/>	PRO		PRO_S164A		Procedures	NULL
<input checked="" type="checkbox"/>	002-DWG-002-01		<input checked="" type="checkbox"/>	DWG		DWG_S164B		Drawings	NULL
<input checked="" type="checkbox"/>	002-RPT-002-01		<input checked="" type="checkbox"/>	RPT		RPT_S164B		Reports	NULL
<input checked="" type="checkbox"/>	002-PRO-002-01		<input checked="" type="checkbox"/>	PRO		PRO_S164B		Procedures	NULL
<input checked="" type="checkbox"/>	002-DWG-003-01		<input checked="" type="checkbox"/>	DWG		DWG_S164C		Drawings	NULL
<input checked="" type="checkbox"/>	002-RPT-003-01		<input checked="" type="checkbox"/>	RPT		RPT_S164C		Reports	NULL
<input checked="" type="checkbox"/>	002-PRO-003-01		<input checked="" type="checkbox"/>	PRO		PRO_S164C		Procedures	NULL

This same process would allow you to unlock cards (via the "Unlock All Cards" option).

**Note:** You can only unlock cards that have been manually locked, that have not been issued on a submittal, and/or have not been included as an entry on an SDI report that has been submitted through DocBoss.

If there are no cards that are available to unlock, you will see the message "All Cards Locked"