Locking Cards

06/17/2025 12:23 pm MDT

Locking cards ensures that changes are no longer made. Once a card is locked, DocBoss starts tracking the State and stops that card from being automatically re-numbered. To identify if a card is locked, navigate to the card list and review the "Locked" column. If you do not see the column, you can add it from the column selector to the right of the grid.

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Da	ate and Non-Column Fil	ters	/									Clear Q Auto Search 🝷
	Tools	Locked	Doc No. (ACME)	Doc No. (Omega)	Required	Doc Code	Secondary Doc Codes	Card Name(Auto)	Document	Title	Status (Combined)	Status Group
	10 6 1 0	No		002-MAN-001-01		MAN		MAN 1234		Manuals	NULL	Not Approved (NULL/Rejected) - (Re)
	00000	No	123-456-789	002-SDI-001-01		SDI		SDI 1234		Supplier's Document Index	NULL	Not Approved (NULL/Rejected) - (Re)
	10	No		002-MRB-001-01	2	MRB		MRB 1234		Manufacturer's Record Book (Databook)	x	Not Approved (NULL/Rejected) - (Re)
	10	No		002-TOC-001-01		TOC		TOC 1234		Table of Contents for Manufacturer's Record Book	x	Not Approved (NULL/Rejected) - (Re)
	1 6 1 0	No		002-SHP-001-01		SHP		SHP. Omega Supply Europe		Shipping Documents	NULL	Not Approved (NULL/Rejected) - (Rej
	1 6 1 0	No		002-DWG-001-01		DWG		DWG Skid A		Drawings	NULL	Not Approved (NULL/Rejected) - (Re)
	1 6 1 0	No		002-RPT-001-01	2	RPT		RPT_Skid A		Reports	NULL	Not Approved (NULL/Rejected) - (Re)
	1 6 1 0	No		002-PRO-001-01		PRO		PRO_Skid.A		Procedures	NULL	Not Approved (NULL/Rejected) - (Re)
	1 6 1 0	No		002-DWG-002-01	2	DWG		DWG Skid B		Drawings	NULL	Not Approved (NULL/Rejected) - (Re)
	1 6 1 0	No		002-RPT-002-01	2	RPT		RPT_Skid B		Reports	NULL	Not Approved (NULL/Rejected) - (Re)
	1 6 1 0	No		002-PRO-002-01	2	PRO		PRO_Skid B		Procedures	NULL	Not Approved (NULL/Rejected) - (Rej
	1 6 1 0	No		002-DWG-003-01	2	DWG		DWG_Skid_C		Drawings	NULL	Not Approved (NULL/Rejected) - (Re,
	1 6 1 0	No		002-RPT-003-01	2	RPT		RPT_Skid C		Reports	NULL	Not Approved (NULL/Rejected) - (Re)
	0610	No		002-PRO-003-01		PRO		PRO Skid C		Procedures	NULL	Not Approved (NULL/Rejected) - (Re)

How cards become locked

There are three ways that a card can become locked:

1. 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.

2. 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.

3. 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

yword 😧			Q Filter set	Select Filter	Set ~	+ 8 / 0				Add Card More Actions 👻	s
Date and Non-Colu	mn Filters									Add/Edit Data via CSV	:h
										Add to Ad-Hoc Queue	
Poc No. (ACME)	Doc No. (Omega)	Tools	Required	Doc Code	Secondary Doc Codes	Card Name(Auto)	Document	Title	Status (Combined)	Bulk Doc Download	Sta
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123-456-789	002-SDI-001-01	I to 🗊 🕼 I O		SDI		SDI 1234		Supplier's Document Index	NULL	Download Status Report (CSV)	IFF
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	002-TOC-001-01	# O	Image: A start and a start	TOC		TOC 1234		Table of Contents for Manufacturer's Record Book	х	Merge Selected	IF
	002-SHP-001-01	10 6 1 0		SHP		SHP Omega Supply Europe		Shipping Documents	NULL	Set Due to ACME Date	IF
	002-DWG-001-01	1 6 / 0		DWG		DWG_Skid A		Drawings	NULL		IF
	002-RPT-001-01	10 6 / 0	Z	RPT		RPT_Skid_A		Reports		Set Expected Date	IFF
	002-PRO-001-01	1 6 1 0		PRO		PRO_Skid A		Procedures	NULL	Update Routing Scenario	15
	002-DWG-002-01	1 6 1 0	2	DWG		DWG Skid B		Drawings			1 IFF
	002-RPT-002-01	1 6 1 0		RPT		RPT_Skid B		Reports	Click to manually lock selected cards	Lock Selected Cards	IF
	002-PRO-002-01	10 6 0		PRO		PRO_Skid B		Procedures	NULL	Unlock All Cards	IF
	002-DWG-003-01	0600		DWG		DWG Skid C		Drawings	NULL	Not Approved (NULL/Kejected) - (Ke/Submit	IF

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"

Locked project

A project will become locked if all (required) cards are locked. This is indicated with a message on the Project Hub.



A project can also become locked due to unprocessed changes on the equipment list. This is indicated with a pop-up message in the top right of the screen.

>>>	Pump Project (1234)	🖺 Card List 👻		民 🗱 0 Projects 🗸 🛈 📿 🖓 🎲 🕞
Cards Card Standar	List I Cuery			Project has been set to VIEW ONLY. Actions are restricted until changes on the <u>Equilament List</u> are processed by a user.
Ke	yword 😧	(Q Filter set Select Filter Set - + 🖹 🎤 📋	More Actions 💌
+	Date and Non-Column Filters			Clear Q Auto Search

To "unlock" the project, the changes will need to be processed on the "Card to Unit Changes" page. To access the page, click on the link in the pop-up message or navigate to **Project Menu > Cards > Card to Unit Changes**.

For more information, see the following articles:

- Card to Unit Changes Causes
- Process Card to Unit Changes
- Impact of Change Order