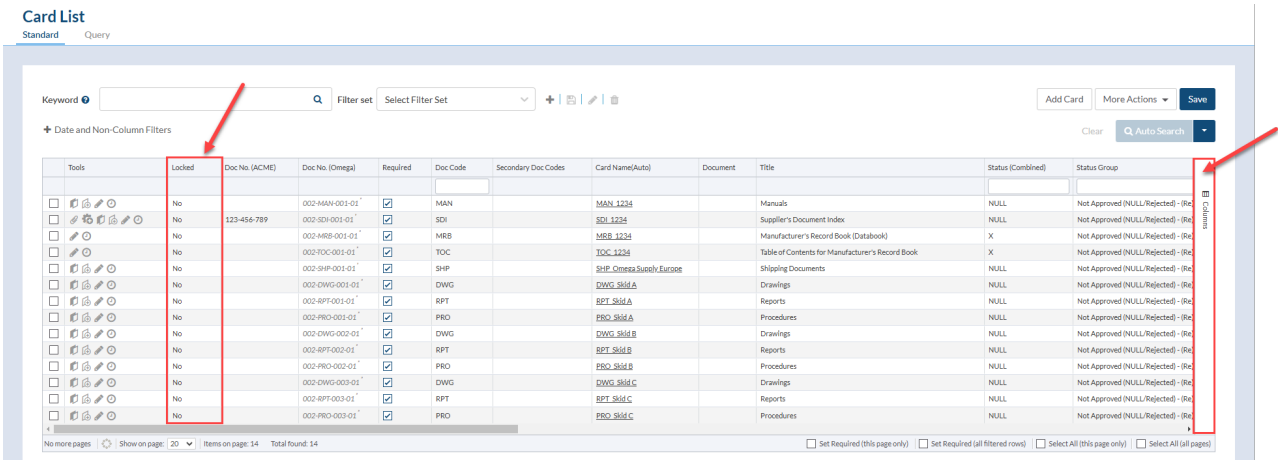
Locking Cards

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.



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.

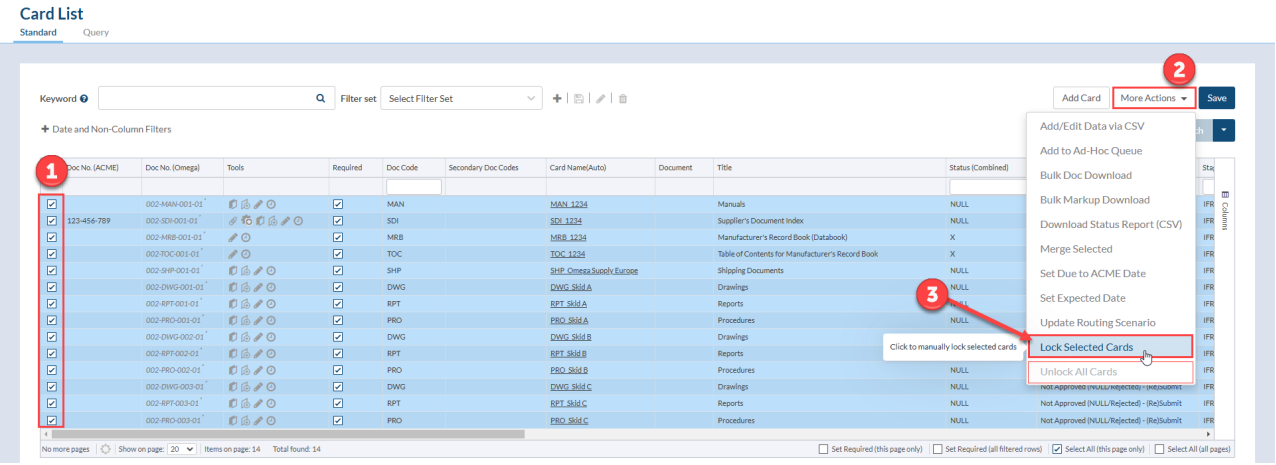
2. Transmitting an SDI report

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

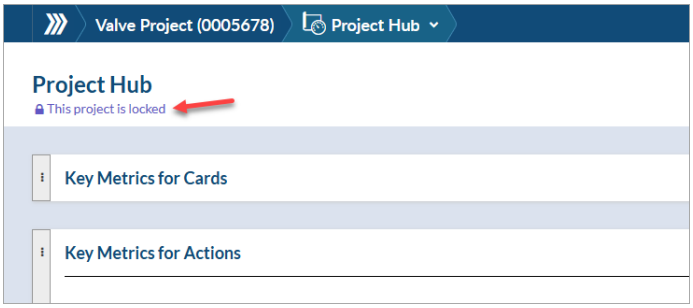


This same process would allow you to unlock cards (via the "Unlock All Cards" option).

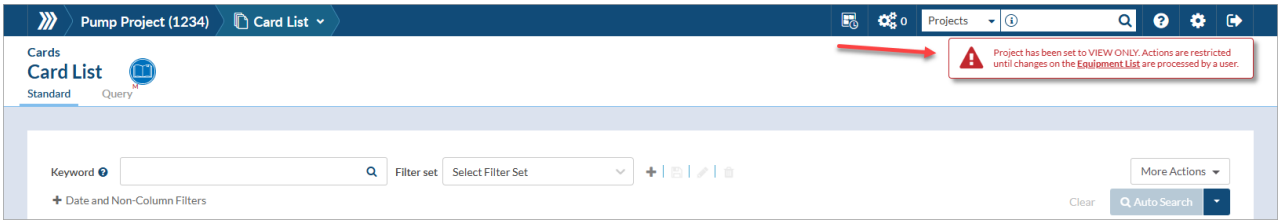
> **Note**: You can only unlock cards that have been manually locked, that have not been issued on a submittal, and/or have not been included as an entry on an SDI report that has been submitted through DocBoss. If there are no cards that are available to unlock, you will see the message "All Cards Locked"

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.



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