Edit the Routing of a Card

09/16/2024 1:35 pm MDT

During the course of managing cards you define routing and transmittal requirements. This is typically managed by DocBoss as you upload documents to the system because you have already assigned your specific workflow instruction.

However - Once you have processed a document, you may need to edit the workflow you have designed.

Maybe you have :

- queued a document for transmittal to your sub-supplier, but instead want it to go to the customer
- routed a document to the wrong technical resource
- etc..

>>> \] Fabrication Project(1475 🗸	🗋 Code List (Requirements	s) 🗸	E c	D Projects 👻 🔅	Q	?	¢	•
_{Cards} Code List (Requirements)			Project Hub Vutstanding Actions Index Reports & Prices & Estimates							
			Cards	Cards In/Out	Equipment	Set Up		_		
Grid Rows Colors			Code List (Requirems)	Incoming Documents	Equipment List	Main		2	ave	1
Document Requirements		Card List	Outgoing Submittals	Levels	Stage Lists			+		
Select	Internal Code	Internal Code	Card to Unit Changes			ACME Return Statuses	age List	Delive	ry Days	
	LOO	Lists	Obsolete Cards			Internal Approval Statuses	۸ (wIA)	10		
	D00	Drawings	Request Cards from Supplier			Distribution Lists		10		
	Z00	Other / Misc	nequest cards nonreappner			Project Fields Template		10		
	LOO	Lists				Card States	R	14		
	ROO	Compilations				Caru States	A.	147		
	P00	Procedures					A.	10		

Step 1 Navigate to the history of the card

Ca	rd List	-								+
	Tools	Required	Card Name(Auto)	Locked	Internal Code Name	Doc Code	Title 4	Wolfe PA Rev #	Status (Combined)	Tag Number List ♥
	00		WPS_E14016-PO-018-RM-400-P	Yes	Welding Data	WPS	Welding Procedure Specification (WPS) and Procedure	A1	X(+)	1456, 1576, 7121, 820
	0000		REC E14016-PO-018-RM-400-P	No	Welding Data	REC	Welder Qualification Certificate	A1	NULL	1456, 1576, 7121, 820
		Story 🖭	REG E14016-PO-018-RM-400-P	No	Lists	REG	Vendor Document Register	A1	NULL	1456, 1576, 7121, 820
	000		REG_E14016-PO-018-RM-400-P	No	Lists	REG	Vendor Document Register	A1	X(+).ta	
	0000	V	PRO E14016-PO-018-RM-400-P	No	Procedures	PRO	Ultrasonic Test Procedure	A1	NULL	1456, 1576, 7121, 820
	1 6 🗆 🖉 🖸		QMP E14016-PO-018-RM-400	No	Manuals	QMP	Quality Manual (with ISO accreditation certificate)	A1	NULL	1456, 1576, 7121, 820
	10 10 10 10		PRO E14016-PO-018-RM-400-P	Yes	Procedures	PRO	Packing, Shipping & Preservation Procedure	A1	X+	1456, 1576, 7121, 820
	10 10 10 10		REC E14016-PO-018-RM-400-P	No	Other / Misc	REC	NDE Operator Qualifications	A1	NULL	1456, 1576, 7121, 820
	# 0		MRB E14016-PO-018-RM-400-P	No	Compilations	MRB	Manufacturing Record Book	A1	NULL	1456, 1576, 7121, 820
	00000		PRO E14016-PO-018-RM-400-P	No	Procedures	PRO	Magnetic Particle Test Procedure	A1	NULL	1456, 1576, 7121, 820
										۱.
Selec	t Page: Welding Procedure	Specification (WP	S) and Procedure Qualification Record (PQR	0. 🗸 🔇	Show on Page: 10	 Items on page 	10 Total Found: 24 Set Required (this page only)	Set Required (all filter	ed rows) 🛛 🕅 Select All (tl	nis page only) 🛛 🕅 Select /
🗹 Sh	iow Completed Cards 🕑	Show NULL Car	rds 🗹 Hide Unrequired Cards 📝 Hide	Merged (Cards		🗟 Download Status Report (C	SV) 🗇 Merge Select	ed 😵 Add/Edit Data	via CSV Save

Step 2 Click on the Edit icon

File History

Y Ent	ries displayed on cover pages	how					Nove activ	e file to a different card	Edit Card	
View1	Recorded 4	User	Stage	Status	System Comments	Tools	State	Original Doc Link	Doc+	
۲	2019-04-05 11:31:14	tunde@docboss.com	IFA	X+	Document stage was changed from Document Requirements page.		A	147568-0017.PP / rA1.pdf	14756	
	2019-04-05 11:24:08	tunde@docboss.com	IFI	X+	Updated from Code List(Requirements)	Ra Ra 🖉	А	147568-00 // PRO rA1.pdf	14756	
	2019-04-05 10:59:24	tunde@docboss.com	IFI	X+	Updated from card list	Ro Ro 🖋	А	1475_s-0017.PRO_rA1.pdf	14756	
	2019-04-04 15:05:03	tunde@docboss.com	IFI	X+	Document was transmitted in T-007	12 12 1	A	47568-0017.PRO rA1.pdf	14756	
	2019-03-29 17:19:48	tunde@docboss.com	IFI	X(+)		Ro Ro 🖋	А	Setup Guide 2019-01-29.pd	If Setup.	
	2019-03-29 12:24:59	tunde@docboss.com	IFI	X(+)		Ra Ra 🖉	A	Setup Guide 2019-01-29.pd	If Setup (
	2019-03-22 12:30:57	tunde@docboss.com	IFI	NULL	Document stage was changed from Document Requirements page.	den a	А			
	2019-03-19 21:32:32	tunde@docboss.com	IFI	NULL		Carlo	А			
	2019-03-19 21:14:23	tunde@docboss.com	IFI	NULL	Updated from card list	dan .	А			
4									+	
No more	pages Show on Page: 20									

Step 3 Make required edits to the workflow process

Processing 147568-0017.PRO_rA1.pdf Viewer off

Internal (User) Routing 😧	
Admin User	
Brad Bowyer	~
Tech User	
Tunde Dorloti	~
Drafter User	
Brad Bowyer	~
Constructor User	
Tunde Dorloti	~
Between the first two roles, which user should receive t Tech Admin Due to Tech User Date	the card first?
2010.05.02	

If you have many updates to make, you can bulk update routing and meta data on the Card List screen (routing updates must be done via CSV).

Note: You do not have to select Queue for transmittal to "Internal" just because you are using the Internal (User) Routing function. If the document is continuing to queue into your "pending transmittal internally" even after all outstanding actions have been completed then you probably have it selected.

You also have the ability to manage which history records are included as output variables along with the ability to revert to previous records.

If using routing scenarios, these can be applied to individual cards. The scenario will override the routings that were previously on the card, but will not affect its queue location.

Reverting a Document

You have the ability to revert a document to a previous revision at anytime throughout the process.

Click on the icons under the Tools column on applicable history entries.

Option 1 - Revert Files and Meta Data

Option 2 - Revert Files

File History

Y Ent	ries displayed on cover pages S	ww						Move active file to	o a different card 🛛 🍞 Edit C	ard
View1	Recorded	User	Stage	Status	System Comments	Tools	State	Original Doc Link	Doc+CP Link	ACI
۲	2019-04-05 11:31:14	tunde@docboss.com	IFA	X+	Document stage was changed from Document Requirements page.		A	147568-0017.PRO rA1.pdf	147568-0017.PRO rA1.pdf	
۲	2019-04-05 11:24:08	tunde@docboss.com	IFI	X+	Updated from Code List(Requirements)	660	A	147568-0017.PRO rA1.pdf	147568-0017.PRO rA1.pdf	
۲	2019-04-05 10:59:24	tunde@docboss.com	IFI	X+	Updated from card list	Pa Pa /	A	147568-0017.PRO rA1.pdf	147568-0017.PRO rA1.pdf	
۲	2019-04-04 15:05:03	tunde@docboss.com	IFI	X+	Document was transmitted in T-007	R R /	A	147568-0017.PRO rA1.pdf	147568-0017.PRO rA1.pdf	
۲	2019-03-29 17:19:48	tunde@docboss.com	IFI	X(+)		R & #	A	Setup Guide 2019-01-29.pdf	Setup Guide 2019-01-29.pdf	
۲	2019-03-29 12:24:59	tunde@docboss.com	IFI	X(+)		2 2	A	Setup Guide 2019-01-29.pdf	Setup Guide 2019-01-29.pdf	
0	2019-03-22 12:30:57	tunde@docboss.com	IFI	NULL	Document stage was changed from Document Requirement	Ø	Revert file			
0	2019-03-19 21:32:32	tunde@docboss.com	IFI	NULL	Revert file and meta-data	dan .				
0	2019-03-19 21:14:23	tunde@docboss.com	IFI	NULL	Updated from card list	de la companya de la	A			
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