

Edit the Routing of a Card

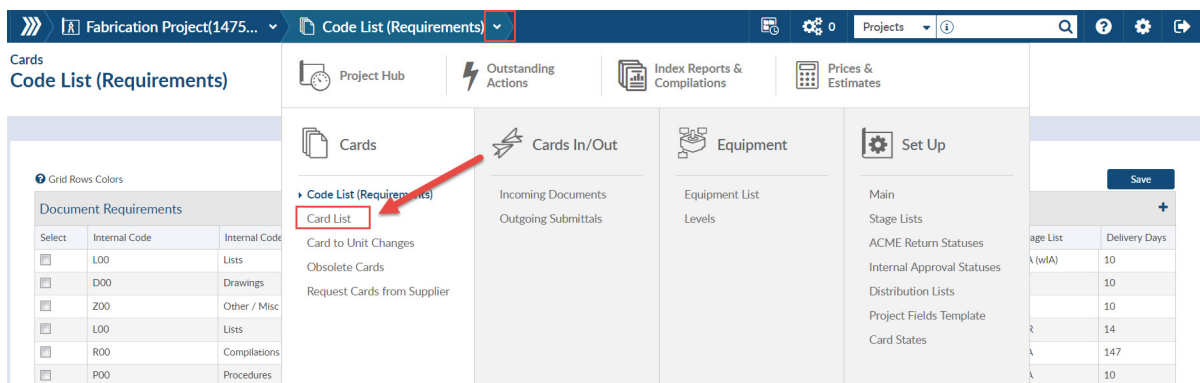
09/16/2024 1:35 pm MDT

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.

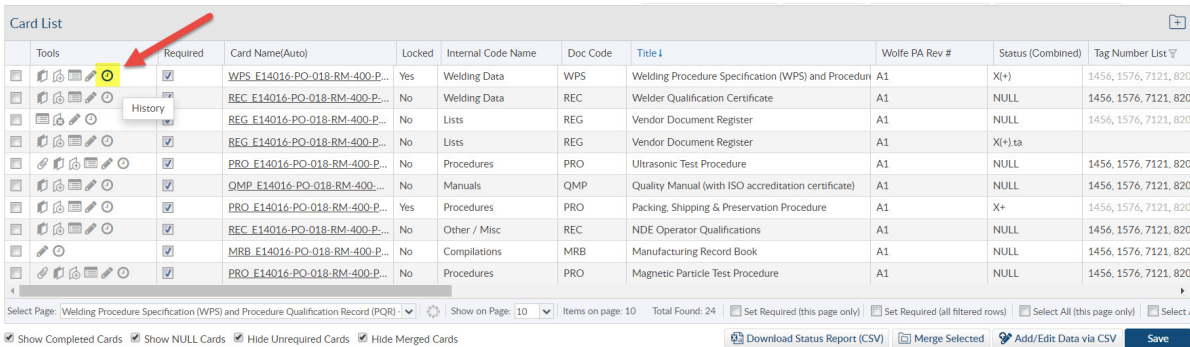
However – Once you have processed a document, you may need to edit the workflow you have designed.

Maybe you have :

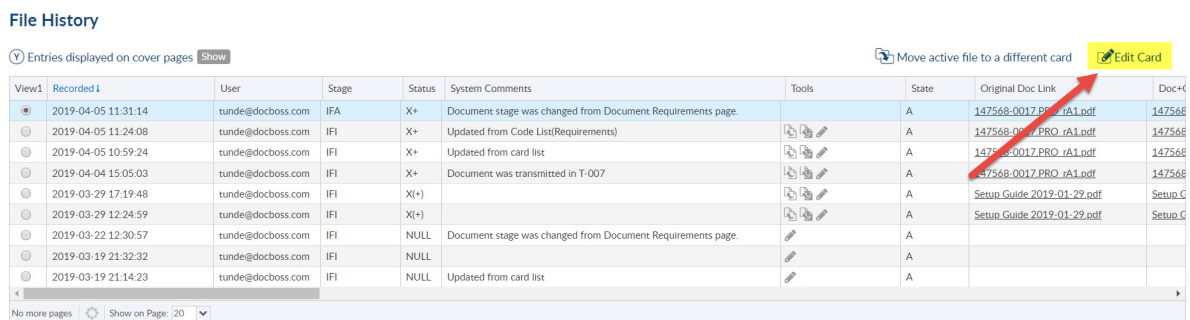
- queued a document for transmittal to your sub-supplier, but instead want it to go to the customer
- routed a document to the wrong technical resource
- etc..



Step 1 Navigate to the history of the card



Step 2 Click on the Edit icon



Step 3 Make required edits to the workflow process

Processing
147568-0017.PRO_rA1.pdf
Viewer Off

Queue for Submittal

Queue for submittal to Sub-Supplier Internal

Send the original document + cover page

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 the card first?
 Tech Admin

Due to Tech User Date
2019-05-02

Cancel Save

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

Entries displayed on cover pages [Show](#)

[Move active file to a different card](#)

[Edit Card](#)

View1	Recorded t	User	Stage	Status	System Comments	Tools	State	Original Doc Link	Doc+CP Link	ACI
	2019-04-05 11:31:14	tunde@docboss.com	IFA	X+	Document stage was changed from Document Requirements page.		A	147568-0017.PRO_rA1.edf	147568-0017.PRO_rA1.edf	
	2019-04-05 11:24:08	tunde@docboss.com	IFI	X-	Updated from Code List(Requirements)		A	147568-0017.PRO_rA1.edf	147568-0017.PRO_rA1.edf	
	2019-04-05 10:59:24	tunde@docboss.com	IFI	X+	Updated from card list		A	147568-0017.PRO_rA1.edf	147568-0017.PRO_rA1.edf	
	2019-04-04 15:05:03	tunde@docboss.com	IFI	X-	Document was transmitted in T-007		A	147568-0017.PRO_rA1.edf	147568-0017.PRO_rA1.edf	
	2019-03-29 17:19:48	tunde@docboss.com	IFI	X(+)			A	Setup Guide 2019-01-29.pdf	Setup Guide 2019-01-29.pdf	
	2019-03-29 12:24:59	tunde@docboss.com	IFI	X(+)			A	Setup Guide 2019-01-29.pdf	Setup Guide 2019-01-29.pdf	
	2019-03-22 12:30:57	tunde@docboss.com	IFI	NULL	Document stage was changed from Document Requirements					
	2019-03-19 21:32:32	tunde@docboss.com	IFI	NULL						
	2019-03-19 21:14:23	tunde@docboss.com	IFI	NULL	Updated from card list		A			

Revert file and meta-data

Revert file

No more pages | Show on Page: 20