

Document History

09/16/2024 1:47 pm MDT

The history of all cards is actively captured in DocBoss. You have the ability to view all previous versions of the document.

Clicking the History icon (from the Tools column) will open the History in a new window.

Required	Tools	Doc Code	Title	Status (Combined)	Card Name(Auto)
<input checked="" type="checkbox"/>		PRO	Packing, Shipping & Preservation Procedure	2+	PRO_E14016-PO-018-RM-400-P-00...
<input checked="" type="checkbox"/>		QMP	Quality Manual (with ISO accreditation certifica	2*	QMP_E14016-PO-018-RM-400-P-0...
<input checked="" type="checkbox"/>		PRO	Ultrasonic Test Procedure	NULL.a	PRO_E14016-PO-018-RM-400-P-00...
<input checked="" type="checkbox"/>		REG	Vendor Document Register	X+	REG_E14016-PO-018-RM-400-P-00...
<input checked="" type="checkbox"/>		REC	Welder Qualification Certificate	1	REC_E14016-PO-018-RM-400-P-00...
<input checked="" type="checkbox"/>		WPS	Welding Procedure Specification (WPS) and Pro	X+	WPS_E14016-PO-018-RM-400-P-0...

Select Page: Packing, Shipping & Preservation Procedure - Welding Procedure Specification (WPS) and Pro... Show on Page: 10 Items on page: 6 Total Found: 26

The new window will open and all the history linked to the card will be available from this screen. You can view the Files, Request to Suppliers and Viewer:

Fabrication Project (147568) / Card History
147568-0017.PRO (PRO_E14016-PO-018-RM-400-P-0013)

Files Requests to Supplier Viewer View file Compare files

1 2 3

File History

Entries displayed on cover pages Show Move active file to a different card Edit Card

View1	Recorded I	User	System Comments	Tools	Active SEND record	Active RETURN record	Status	Wolfe PA Rev #	Stage
<input checked="" type="radio"/>	2019-05-24 18:14:14	tunde@docboss.com	Custom Field Responsible PERSON was enabled		<input checked="" type="checkbox"/>	<input type="checkbox"/>	2+	A1	IFA
<input type="radio"/>	2019-04-26 16:25:52	tunde@docboss.com			<input checked="" type="checkbox"/>	<input type="checkbox"/>	2+	A1	IFA

No more pages Show on Page: 20

1. **Files** (File History Grid) will display any recorded history entries on the card.
2. **Requests to Suppliers**, this tab will display any times that the Request to Sub-Supplier was generated. (Click here for more detail)
3. **Viewer** You have the ability to turn on the Viewer, to view the document at any given entry as well as do any comparing. (click here for more detail)

Users can filter the grid on this screen to show only Active SEND record and Active RETURN record entries.

File History

Active send/return pairs Show Entries displayed on cover pages Show Grid Row Colors

Recorded I	Status	Active RETURN record	Active SEND record	Stage	State	Original Doc Link
2022-04-11 16:30:38	2(+).c	<input checked="" type="checkbox"/>	<input type="checkbox"/>	IFI	A	234234-D16-001-01 Rev0 Sub001.pdf
2022-01-24 15:36:27	X+	<input type="checkbox"/>	<input checked="" type="checkbox"/>	IFI	A	234234-D16-001-01 Rev0 Sub001.pdf

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Files/File History

All of the history entries linked to this card will be displayed in the grid. There is a lot of information displayed in this grid, please remember if you don't see a column it may be hidden. (Click the down arrow on any column header and then mouse over columns).

Here are a few key columns when you are looking at the history.

Fabrication Project (147568) / Card History
 147568-0017.PRO (PRO_E14016-PO-018-RM-400-P-0013)

Viewer On View file Compare files

Files Requests to Supplier

File History

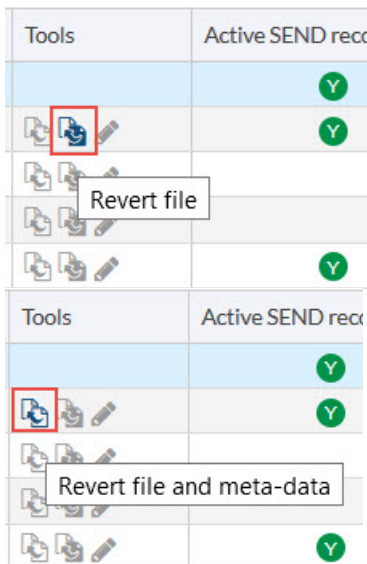
Entries displayed on cover pages Show

Tools Active SEND record Active RETURN record Status Wolfe PA Rev # Stage

View1	Recorded	User	System Comments	Tools	Active SEND record	Active RETURN record	Status	Wolfe PA Rev #	Stage
<input checked="" type="radio"/>	2019-05-24 18:14:14	tunde@docboss.com	Custom Field Responsible PERSON was enabled		Y		2+	A1	IFA
<input type="radio"/>	2019-04-26 16:25:52	tunde@docboss.com			Y		2+	A1	IFA
<input type="radio"/>	2019-04-26 16:22:01	tunde@docboss.com					2(+)	A1	IFA
<input type="radio"/>	2019-04-26 16:21:22	tunde@docboss.com					2(+)	A1	IFA
<input type="radio"/>	2019-04-05 11:31:14	tunde@docboss.com	Document stage was changed from Document Requirements page.		Y	Y	X+	A1	IFA
<input type="radio"/>	2019-04-05 11:24:08	tunde@docboss.com	Updated from Code List(Requirements)		N		X+	A1	IFI
<input type="radio"/>	2019-04-05 10:59:24	tunde@docboss.com	Updated from card list		N		X+	A1	IFI
<input type="radio"/>	2019-04-04 15:05:03	tunde@docboss.com	Document was transmitted in T-007		Y		X+	A1	IFI
<input type="radio"/>	2019-03-29 17:19:48	tunde@docboss.com					X(+)	A1	IFI
<input type="radio"/>	2019-03-29 12:24:59	tunde@docboss.com					X(+)	A1	IFI
<input type="radio"/>	2019-03-22 12:30:57	tunde@docboss.com	Document stage was changed from Document Requirements page.				NULL	A1	IFI
<input type="radio"/>	2019-03-19 21:32:32	tunde@docboss.com					NULL	A1	IFI
<input type="radio"/>	2019-03-19 21:14:23	tunde@docboss.com	Updated from card list				NULL	A1	IFI

No more pages Show on Page: 20

1. Each line will include a **Recorded Date**, **User** and **System Comments** which will easily allow you to view the workflow the card has been through.
2. **Tools** column allows you to revert file (and metadata if required) to a previous entry.



For more information regarding reverting files, see our article [here](#).

3. There is also the ability to change the **Stage List** and to select a different **Stage** for a particular entry from the History:

And the metadata: Title, Revision number, Submittal number, Comments, Document number.

Document Card Numbers

Is Drawing

Doc No. (Customer)

Doc No. (Wolfe PA)

158009-104-0001-001

Wolfe PA Rev #

1

Doc No. (Sub-Supplier)

Doc No. (End User)

Submittal Count (Customer)

2

Due to Customer

4. **Show in History Output (SEND/RETURN)** this toggle allows you to specify which entries are to be displayed on any of your outputs (Index or CoverPages). ([click here for more details](#))

In addition to viewing the history entries above the grid, you have a couple of actions available.

1

Move active file to a different card

2

Edit Card

Original Doc Link	Doc+CP Link	AC
P7564-PO018-400-30-BOM-0010 ...	P7564-PO018-400-30-BO...	
P7564-PO018-400-30-BOM-0010 ...	P7564-PO018-400-30-BO...	
147568-0017.PRO_rA1.pdf	147568-0017.PRO_rA1.pdf	
147568-0017.PRO_rA1.pdf	147568-0017.PRO_rA1.pdf	
147568-0017.PRO_rA1.pdf	147568-0017.PRO_rA1.pdf	
147568-0017.PRO_rA1.pdf	147568-0017.PRO_rA1.pdf	
147568-0017.PRO_rA1.pdf	147568-0017.PRO_rA1.pdf	
Setup Guide 2019-01-29.pdf	Setup Guide 2019-01-29.pdf	
Setup Guide 2019-01-29.pdf	Setup Guide 2019-01-29.pdf	

1. **Move the active file to a different card** This will remove the active file and the history from this card and

require that it be assigned to a new card. Note: Current card will be set to NULL.

2. **Edit Card** This is the ability to Edit the card in its current status.

For information on how to export the history of a card to an excel file click [here](#).

For information on how to edit the history of a card, click [here](#).
