Process Card to Unit Changes

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Overview

Sometimes, users may need to make changes to the **Equipment List** after documents have been submitted. Some situations where this could happen are:

- A project change order has been received
- A new piece of equipment has been added
- A tag has been removed

For a more detailed explanation, see Card to Unit Changes Causes.

> 🔔 When a change is made to the **Equipment List**, DocBoss automatically updates the equipment linked to existing, autogenerated cards. If the card is in progress, DocBoss will ask how to proceed. This process is managed through the **Card to Unit Changes** screen.

Identification

Cards with pending card to unit changes are not able to be submitted until the changes are processed:

On the Card List, cards with pending card to unit changes display the unit changes in light gray font:


Navigation

To find the **Card to Unit Changes** screen, navigate to the project and open the project menu from the dropdown as shown in the image below. Under the **Cards** heading, select **Card to Unit Changes**.
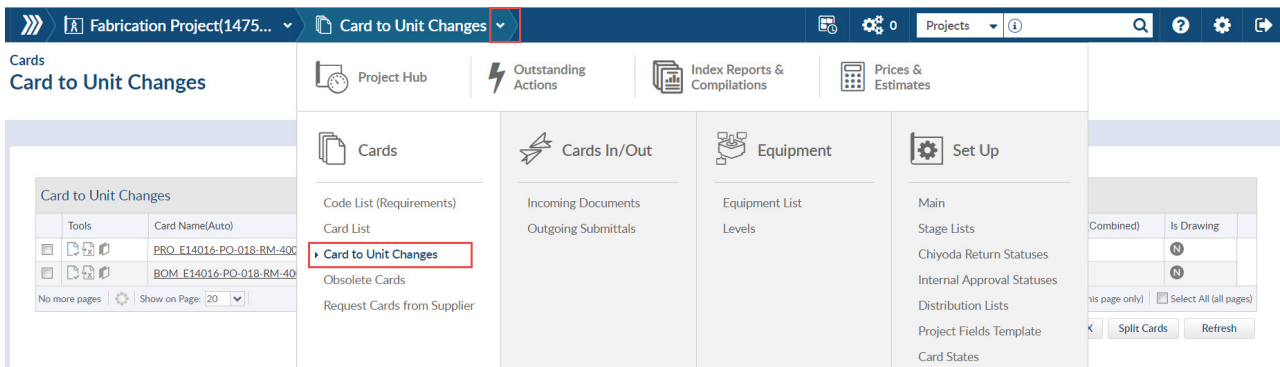
Options for moving cards out of Card to Unit Changes

On the **Card to Unit Changes** screen, there are three options which users may select from to move cards out of this stage. These options are listed to the bottom right of the grid (for bulk processing) and are also available under the **Tools** column (for individual processing).
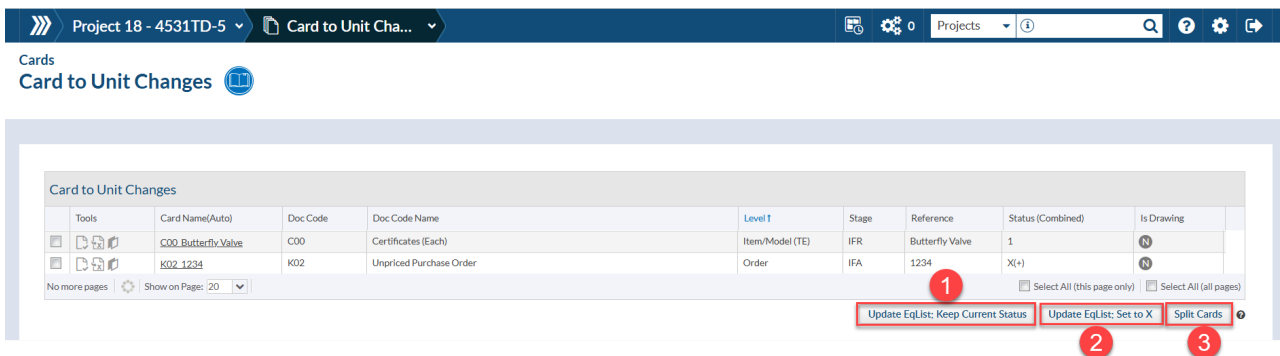
1. Update EqList; Keep Current Status – The system will simply replace the old TagSet with the new TagSet. No changes will be made to the status of the card, it will not be queued for resubmission, and the customer will not be notified of the change. Use this option to acknowledge the change in the **Equipment List** without taking any additional action regarding the change.

Please note: when generating compilations, DocBoss uses the most recent file on each card. If updates to equipment need to be reflected on a card's cover page, a new submittal must be made. (To update the cover page without resending the document to the customer, make a submittal and then auto-reclaim it.)

2. Update EqList; Set to X – This option resets the existing card to **X** status and queues the card for resubmission. Use this option if you want to re-issue the document with the current (new) TagSet.

3. Split Cards – This option leaves the original card as is and creates a duplicate card (sheet) with the new TagSet. The new card will include the document from the original card, but will have a new document number.

Please note: for **Order** level documents, changes to any tag will push documents into the revision area. Generally, it is best to use **Update EqList; Keep Current Status** in these cases.

To process cards in bulk, select the checkbox on the left side of the grid for each applicable card, then select one of the options below the grid to apply the action to the selected cards.

To process cards individually, select the appropriate icon under the **Tools** column in the row for that card. Hovering over an icon will display its name.

Please note: Not all actions are applicable to each card. Only the actions available for processing a given card will be shown in its **Tools** column.

Once a card has been processed, a history record entry will appear in the card history identifying that a change was made to the linked equipment units. See the Document History article for more information about card history.