

Marking cards as required / not required

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When DocBoss auto-generates cards (based on your selected LEVEL), it creates ALL possible cards. In some cases, not all cards are applicable for the doc code in question.

Assume a customer has requested **pressure tests** from a seller of instrumentation, AND assume the order contains BOTH pressure AND temperature transmitters.

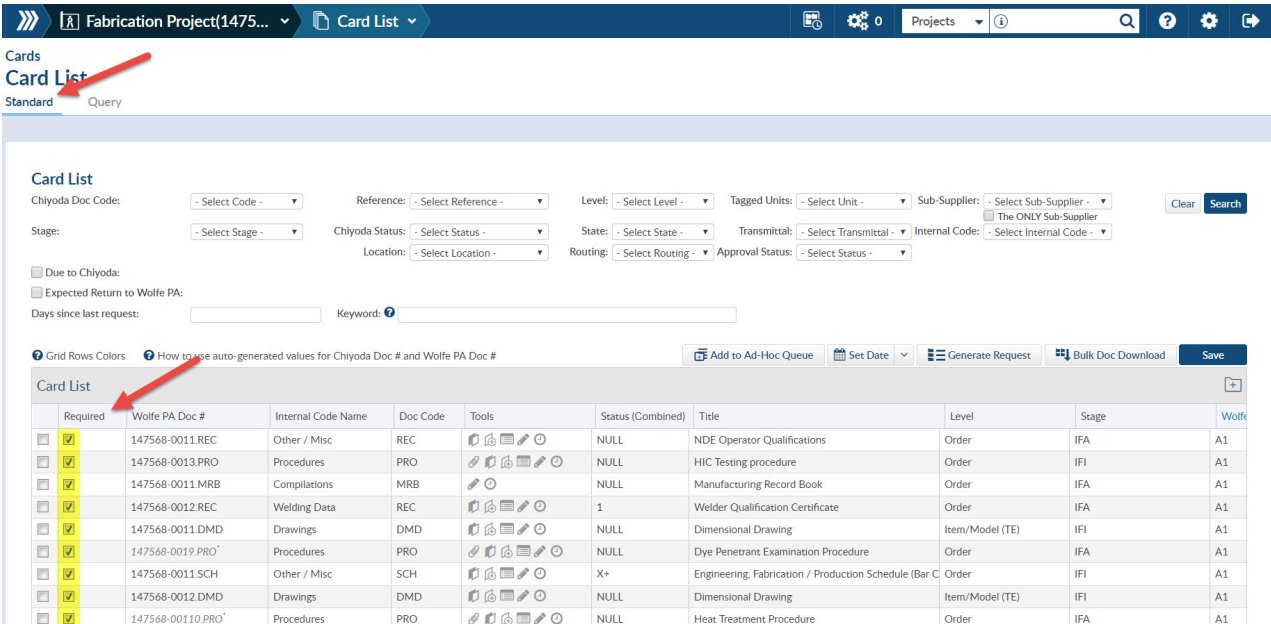
When you set the Doc Code for pressure tests to the **tag** level, a pressure test card is created for every tag in the order. BUT - temperature transmitters don't require pressure tests.

You now need to tell DocBoss which cards SHOULD be left on the order (required), and which should be hidden (marked as not required). You can do this MANUALLY, OR via a QUERY.

Manually select which cards are required / not required

On the **standard tab**, you can check or uncheck the required column.

Remember that if the card is already locked, marking a card as unrequired will move the card to obsolete (its history must be maintained). If not locked, it will simply be removed from the display.



The screenshot shows the 'Card List' interface in a web application. At the top, there's a navigation bar with 'Fabrication Project(1475...' and 'Card List' tabs. Below the navigation, there are several filter dropdowns for 'Chiyoda Doc Code', 'Reference', 'Level', 'Tagged Units', 'Sub-Supplier', 'Stage', 'Chiyoda Status', 'State', 'Transmittal', 'Internal Code', 'Location', 'Routing', and 'Approval Status'. There are also checkboxes for 'Due to Chiyoda' and 'Expected Return to Wolfe PA', and a 'Days since last request' field. A 'Keyword' search field is also present. Below the filters, there are buttons for 'Add to Ad-Hoc Queue', 'Set Date', 'Generate Request', 'Bulk Doc Download', and 'Save'. The main area is a table titled 'Card List' with columns: 'Required', 'Wolfe PA Doc #', 'Internal Code Name', 'Doc Code', 'Tools', 'Status (Combined)', 'Title', 'Level', 'Stage', and 'Wolfe'. The 'Required' column has checkboxes, and the 'Wolfe PA Doc #' column has a red arrow pointing to it. The table contains 10 rows of card data.

Required	Wolfe PA Doc #	Internal Code Name	Doc Code	Tools	Status (Combined)	Title	Level	Stage	Wolfe
<input checked="" type="checkbox"/>	147568-0011.REC	Other / Misc	REC		NULL	NDE Operator Qualifications	Order	IFA	A1
<input checked="" type="checkbox"/>	147568-0013.PRO	Procedures	PRO		NULL	HIC Testing procedure	Order	IFI	A1
<input checked="" type="checkbox"/>	147568-0011.MRB	Compilations	MRB		NULL	Manufacturing Record Book	Order	IFA	A1
<input checked="" type="checkbox"/>	147568-0012.REC	Welding Data	REC		1	Welder Qualification Certificate	Order	IFA	A1
<input checked="" type="checkbox"/>	147568-0011.DMD	Drawings	DMD		NULL	Dimensional Drawing	Item/Model (TE)	IFI	A1
<input checked="" type="checkbox"/>	147568-0019.PRO	Procedures	PRO		NULL	Dye Penetrant Examination Procedure	Order	IFA	A1
<input checked="" type="checkbox"/>	147568-0011.SCH	Other / Misc	SCH		X+	Engineering Fabrication / Production Schedule (Bar C	Order	IFI	A1
<input checked="" type="checkbox"/>	147568-0012.DMD	Drawings	DMD		NULL	Dimensional Drawing	Item/Model (TE)	IFI	A1
<input checked="" type="checkbox"/>	147568-00110.PRO	Procedures	PRO		NULL	Heat Treatment Procedure	Order	IFA	A1

Use a Query to determine if card should be required / not required

The query tab enables users to define the criteria between required and not required cards using a query.

The query approach builds a logic statement to define which of the level elements you actually need to submit. Various fields are available to choose from including model, manufacturer, and tag.

For large projects and projects where change orders are frequent, the query approach will be very helpful because any new line items and their corresponding documents will be automatically set as required or not based on your previously created conditions. In a manual approach, you must remember to select these documents after updating the order information.

NOTE:

The required/not required query does NOT edit the equipment assigned to each card. The SOLE FUNCTION of the QUERY tab (in the card list) is to set required/not required status.

If a card includes ANY unit which satisfies the query, the card is marked as required.

If you want to manually edit the equipment assigned to a card, just edit the equipment. For more info, [see how to add/edit cards](#).

For more examples and details about marking cards and running queries have a look at our video: [Trimming Auto-Created Registers](#).
