

Void / Supersede

07/23/2024 3:08 pm EDT

Void

There are 2 types of VOID in DocBoss.

Not Required

Un-mark the checkbox under the "Required" column.

Grid Rows Colors How to use auto-generated values for Doc No. (ACME) and Doc No. (Wolfe PA)

	Required	Tools	Locked	Status (Combined)	Doc Code	Title
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Yes	X+	I04	Inspection and Test Plan
<input type="checkbox"/>	<input checked="" type="checkbox"/>		No	NULL	B01	General Arrangement Drawings

No more pages Show on Page: 10 Items on page: 2

You can mark a document as "Not required" at any time.

- If it was locked, its state will show V (Void)

Grid Rows Colors How to use auto-generated values for Doc No. (ACME) and Doc No. (Wolfe PA) Add to

Required	Tools	State	Locked	Status (Combined)	Doc Code	Title
<input type="checkbox"/>		V	Yes	X+	I04	Inspection and Test Plan

No more pages Show on Page: 10 Items on page: 1 Set Req

Show Completed Cards Show NULL Cards Hide Unrequired Cards Hide Merged Cards

- If not locked, the state will show Z (never required)

Grid Rows Colors How to use auto-generated values for Doc No. (ACME) and Doc No. (Wolfe PA) Add to

Required	Tools	State	Locked	Status (Combined)	Doc Code	Title
<input type="checkbox"/>		Z	No	NULL	B01	General Arrangement Drawings

No more pages Show on Page: 10 Items on page: 1 Set Req

Show Completed Cards Show NULL Cards Hide Unrequired Cards Hide Merged Cards

This is available for both manual and automatic cards.

Obsolete

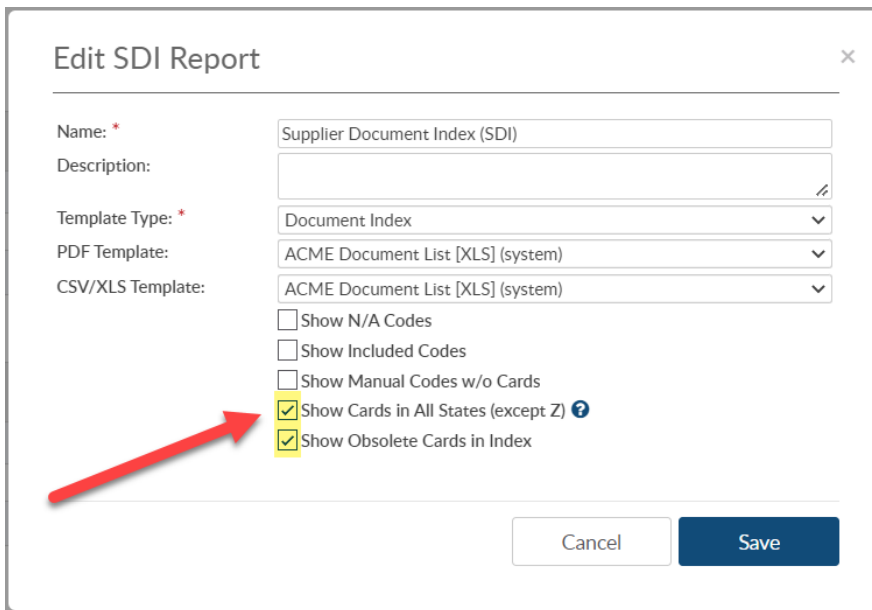
Documents can only be set as obsolete by internal system processes. This occurs when a locked document loses all

of its linked units.

These Cards are no longer part of the Card List and they are automatically moved to Obsolete Cards screen. For detailed information about how to manage Obsolete Cards, see our article [here](#).

This is available for auto-generated cards only.

Including Not Required Cards and Obsolete Cards in the Document Index template



Edit SDI Report

Name: * Supplier Document Index (SDI)

Description:

Template Type: * Document Index

PDF Template: ACME Document List [XLS] (system)

CSV/XLS Template: ACME Document List [XLS] (system)

Show N/A Codes

Show Included Codes

Show Manual Codes w/o Cards

Show Cards in All States (except Z) ?

Show Obsolete Cards in Index

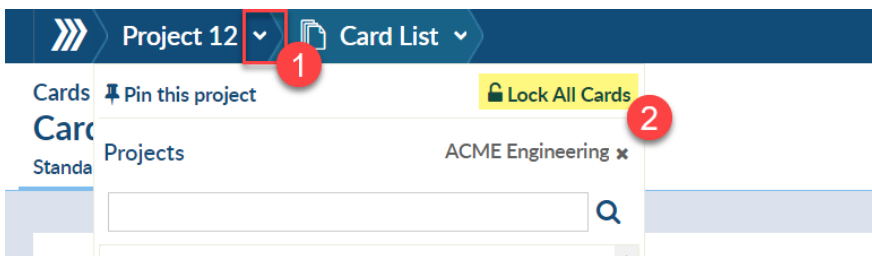
Cancel Save

Mark the checkboxes to "Show Cards in All States" and "Show Obsolete Cards in Index".

Note: Void cards will be included in the Document Index with the exception of Z State Cards (NULL Cards marked as Not Required).

If Z State Cards need to be included in the SDI, first Cards should be locked so the system can assign a different state then Z:

- Manually lock the card before unmarking the Required checkbox



- Un-mark the checkbox under the "Required" column

Grid Rows Colors How to use auto-generated values for Doc No. (ACME) and Doc No. (Wolfe PA) Add to

Card List							
Required	Tools	State	Locked	Status (Combined)	Doc Code	Title	
<input checked="" type="checkbox"/>		A	Yes	NULL	B01	General Arrangement Drawings	

No more pages Show on Page: 10 Items on page: 1 Set Req

- State will change to C - The document has never been submitted and is no longer required.

Grid Rows Colors How to use auto-generated values for Doc No. (ACME) and Doc No. (Wolfe PA) Add to

Card List							
Required	Tools	State	Locked	Status (Combined)	Doc Code	Title	
<input type="checkbox"/>		C	Yes	NULL	B01	General Arrangement Drawings	

No more pages Show on Page: 10 Items on page: 1 Set Req

Show Completed Cards Show NULL Cards Hide Unrequired Cards Hide Merged Cards

State abbreviations and descriptions, can included in any SDI template using the following variables:

- <DocumentsByIndex.State>
- <DocumentsByIndex.State_Description>

Also, the abbreviations (ie. C, V) can be changed for something relevant to you in Card States screen. Details are included [here](#).

Supersede

Supersede is not a term used explicitly in the DocBoss application, but can be accomplished nonetheless.

We use the following definition of “supersede”:

- The original card should be VOIDED and
- A NEW card should be created. This means
 - NO submission history
 - New document number
 - Empty metadata (customer/end-user numbers, status, stage etc).
- Allow the user to record the document number of the corresponding card.

This will ensure that both cards are listed in the document index.

To record the doc number of another card, you must add a custom column to your doc index. Name it “Supersede link” or “Supersede from/to”. When you need to record an entry as supersede, simply enter the data manually of the linked card.

Note: Copying (and or moving) submission history and meta-data from void cards to new cards is only possible from **VOID: Obsolete** cards. It is not available from **VOID: Not Required** cards.

“Supersede” as a simple Document Number Change

Some companies use the term supersede, but do not want to start a new card. In effect, they simply want to use a

new document number and retain all of the metadata and submission history.

This is very easy in DocBoss. You simply update the document number from the Card List. DocBoss will record that change in its history. A list of all current document numbers used to represent a specific card is available as a variable for output on index reports.

Please remember: The DocBoss index output displays individual cards. As we are dealing strictly with a single card, a second line will not appear on your index output.

Card to unit Changes

Units Modification (transitional state – not a permanent status)

These are documents for which the INITIAL REFERENCE remains, but there has been a change to the equipment that DocBoss wants to **automatically** link to this card.

e.g. If you have a MODEL level code and a model number of ABC. Maybe you have 5 pieces of equipment with Model ABC (T-101, T-102, T-103, T-104, T-105). The card is linked to these 5 pieces of equipment. If you ADD another piece of equipment with Model ABC (maybe T-106), DocBoss now sees that the document SHOULD link to SIX (6) pieces of equipment. As a result, the card will move to the Card to unit changes area, while DocBoss waits for your direction on how to manage this change.

This is available for auto-generated cards only.
