Copy Card with History

09/11/2024 3:16 pm MDT

Usually when a copy or sheet is created from a card, the new card is expected to be a different, but related document. It is possible to create a full copy of a card (as a copy or as a sheet), including the active file and all of its history, following the steps below. Please note, this is <u>not</u> recommended in most situations, as it creates multiple workflows for a single document, which are not linked together. (An alternative to consider, depending on the desired outcome, is Temporary Cards. These allow for simultaneous submittals of a document to different targets.)

Steps:

1. Select either Create copy or Create sheet, depending on the desired outcome.

Tools	Required	Doc Code 🔻	Document	Title
		(1) E02 Gene ×		
10 🔂 🗐 🖉 🛈	~	E02	D	General Arrangement Drawing
1 6 🖬 🖉 🕗		E02		General Arrangement Drawing
10 🕼 🖿 🖉 🖸	~	E02	D	General Arrangement Drawing

2. Make note of the document number for the new card.

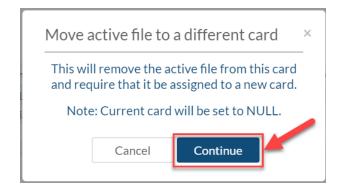
3. Click the **History** icon on the original card.

Tools	Required	Doc Code 🔻	Document	Title
		(1) E02 Gene ×		
10 🖬 🔊 🕐	 Image: A set of the set of the	E02	B	General Arrangement Drawing
1 6 🗖 🖉 🖸		E02		General Arrangement Drawing

4. On the File History screen, click Move active file to a different card.

											Cover Pa
File History								-	-		
Y Active send/retur	rn pairs	Show Y Entri	es displayed on cover pages	Show Grid Row Colors					Move act	tive file to a different card	Edit Card
Y Active send/retur Recorded	rn pairs View1		es displayed on cover pages	Show Grid Row Colors Original Doc Link	Final Doc Link	Stage	Comments (ACME)	File Com	Move act ments (ACME)	tive file to a different card Comments (Sub-Supplier)	Edit Card
~						Stage IFI	Comments (ACME)	File Com			

5. Click Continue.



6. Enter the document number from step #2 (for the new card) in the search bar, and hit **Enter**. Select the card from the list (it should be the only one - if not, review another value such as tag list or card name to find the match). Click **Continue**.

Assign fi	le to a differ	ent card								
Doc Code	Select or type a	head	~	Search 🚱	000050-E02-0004	-01	Q			
Doc No.	(Alpha)	Doc Code	Doc Code Name		Last Upload Date	Level		Status (Combined)	Stage	
000050	-E02-0004-01	E02	General Arrangement Drawing		Item/Model (TE)			NULL	IFI	
No more pages	Show on Page	20 🗸								
								Cancel	Continue	

7. On the Processing form, ensure **Move history** is selected, then save. The new card now has a copy of the file and history.

Processing DrawingABC.pdf Viewer Off	O History	
Move history New file to put in this document card		•
DrawingABC.pdf	🗟 🔂	4

8. Stay on the **File History** screen for the original card. Sort the file history with the **Recorded** column so that the most recent entry is at the top. In the row for the second most recent entry, select **Revert file and meta-data**. This returns the file and history to the original card, without affecting the new card.

File I	History				
(Y) Act	ive send/return pairs	Show) Entries displayed on cover	pages Show 9 Grid Row Colors	
View1	Recorded 1	Tools	Title	System Comments	Original Doc Link
0	2024-09-11 16:48:11		General Arrangement Drawing	Document status was set to NULL. Document was re-attached to another card(s).	
۲	2024-09-11 16:22:0 2	Ra 🖉 😡	General Arrangement Drawing		DrawingABC.pdf
0	2024-02-27 12:21:13	R 🖉	General Arrangement Drawing		DrawingABC.pdf
\cap	2024-02-27 12:18:50	Å	Conoral Arrangement Drawing	Card set to required	

9. Review the Active SEND Record and Active RETURN Record entries on both cards (original and new). This is an

additional column on the **File History screen** for each card. Enable any SEND or RETURN records that are still required, if they are not already enabled, by clicking on the Y/N icons to toggle the record's visibility on/off (for cover pages and index reports).