

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 not 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		
<input type="checkbox"/>		<input checked="" type="checkbox"/>	E02		General Arrangement Drawing
<input type="checkbox"/>		<input checked="" type="checkbox"/>	E02		General Arrangement Drawing
<input type="checkbox"/>		<input checked="" type="checkbox"/>	E02		General Arrangement Drawing

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

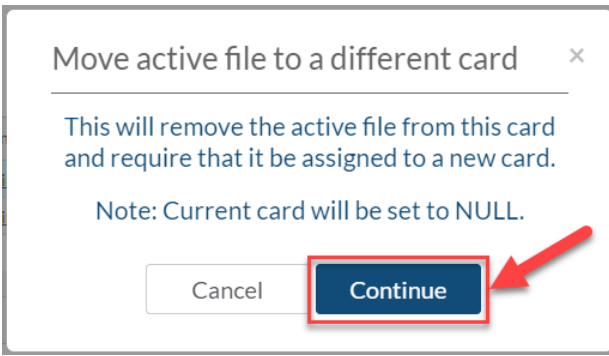
3. Click the **History** icon on the original card.

	Tools	Required	Doc Code	Document	Title
			(1) E02 Gene		
<input type="checkbox"/>		<input checked="" type="checkbox"/>	E02		General Arrangement Drawing
<input type="checkbox"/>		<input checked="" type="checkbox"/>	E02		General Arrangement Drawing

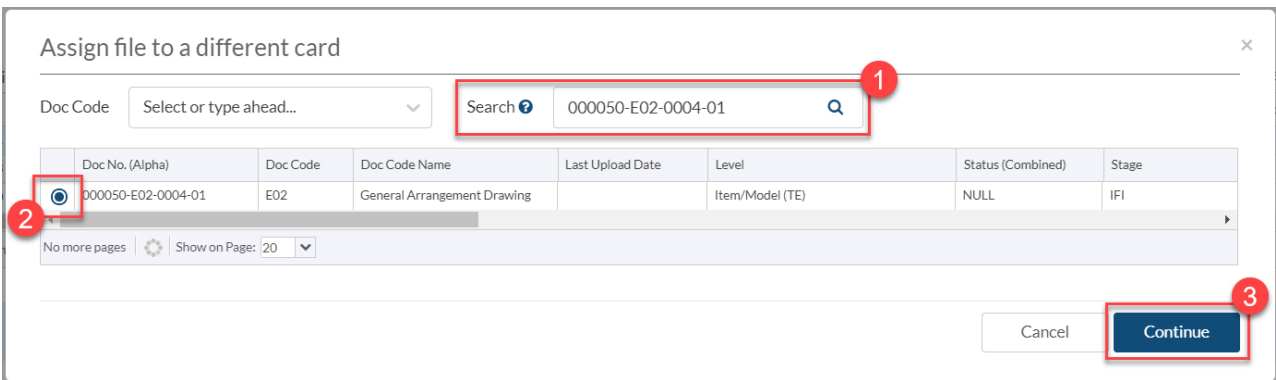
4. On the **File History** screen, click **Move active file to a different card**.

File History										
Recorded	View1	Tools	Title	Original Doc Link	Final Doc Link	Stage	Comments (ACME)	File Comments (ACME)	Comments (Sub-Supplier)	File Commen
2024-09-11 16:22:01			General Arrangement Drawing	DrawingsABC.pdf	DrawingsABC.pdf	IF1				
2024-02-27 12:21:13			General Arrangement Drawing	DrawingsABC.pdf	DrawingsABC.pdf	IF1				

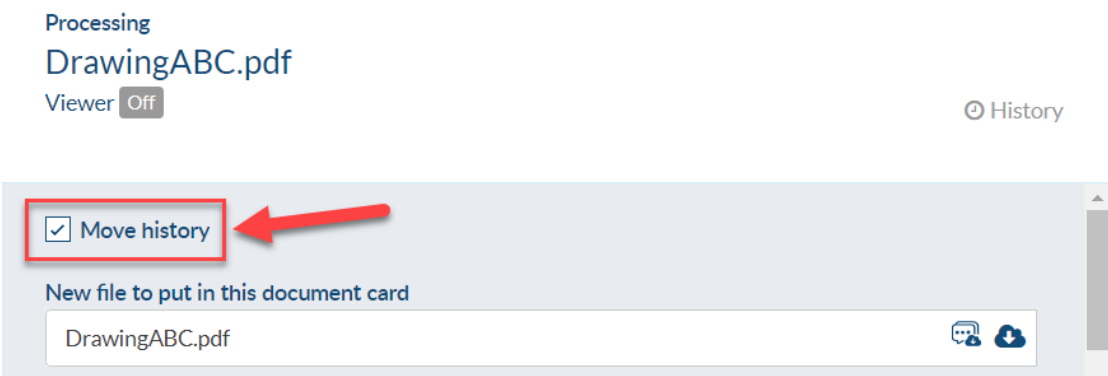
5. Click **Continue**.



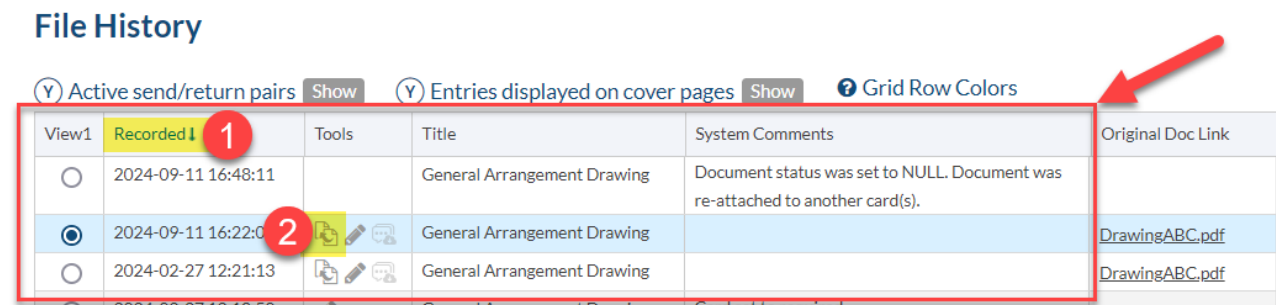
6. Enter the document number from step #2 (for the new card) in the search bar, and hit **Enter**. Select the card from the list (it should be the only one - if not, review another value such as tag list or card name to find the match). Click **Continue**.



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



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.



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).
