

Set Different Revision Numbers Per Stage

09/16/2024 1:19 pm MDT

In the stage list, users can define the FIRST revision value of each stage by including first revision number and letter in “Custom Value” column.

Order #	Stage (Abbr)	Stage Name	Target	Reset Wolfe PA Rev #	Custom Value	Expect Document Return
1	IFR	Issued for Revision	Customer			<input checked="" type="checkbox"/>
2	IFA	Issued for Approval	Customer	<input type="text" value="Reset to Custom Value"/>	B1	<input checked="" type="checkbox"/>
3	IFI	Issued for Implementation	Customer			<input checked="" type="checkbox"/>

1. In the dropdown from column “Reset *Instance* Rev #” select “Reset to Custom Value”.
2. Type the first revision number and letter in “Custom Value” column.

Assume that the following descriptions and revision formats are requested by your customer (or engineering)

Revision Stage

A1 (A2, A3...) IFR - Issue for Revision (IFR)

B1 (B2, B3...) IFA - Issue for Approval (IFA)

O1 (O2,O3...) IFI - Issue for Implementation (IFI)

First, in the Main settings > Document Revision Settings > Edit Default Value to “A1” to start document submission (IFR) with this revision format.

Document Revision Settings

Wolfe PA Rev # Default Value: Save and Apply

Primary Doc Rev Name: Wolfe PA Rev # Warning:

Enable Secondary Doc Rev

Then, when building the Stage List you can add the revision format in “Custom Values” for the Issue for Approval and Issue for Implementation stages.

Set Up / Stage Lists
Stage List: IFR/IFA/IFI

Order#	Stage (Abbr)	Stage Name	Target	Reset Wolfe PA Rev #	Custom Value	Expect Document Return
1	IFR	Issued for Revision	Customer			<input checked="" type="checkbox"/>
2	IFA	Issued for Approval	Customer	Reset to Custom Value	B1	<input checked="" type="checkbox"/>
3	IFI	Issued for Implementation	Customer	Reset to Custom Value	01	<input checked="" type="checkbox"/>

Hide disabled stages

Once Stage "IFR" is completed (approved), Stage "IFA" would start with B1 document numbering. And once stage "IFA" is completed, Stage "IFI" would start with 01.

NOTE: Inside each stage (multiple revisions), it is important to know that updates to revisions must be done manually. DocBoss does not advance the rev number for your second "Issued for Revision" submission to "A2". You must update this yourself when you upload a new version of the file.

[Note also that the "submission number" DOES auto-increment]

The screenshot shows the DocBoss interface for document assignment. On the left, the 'File Staging Area' shows an unassigned file: 147569-G15-0001-001.pdf. The 'Assign to:' section displays a list of document cards with columns for Doc Code, Doc Code Name, and Wolfe PA Rev #. A red arrow points from the 'Wolfe PA Rev #' column to the 'Document Card Numbers' panel on the right. In this panel, the 'Wolfe PA Rev #' field is highlighted in yellow and contains the value 'A2'. Other fields include 'ACME Doc #', 'Wolfe PA Doc #', 'Sub-Supplier Doc #', and 'EU Doc #'. The 'Comments' section at the bottom is empty.