

How can I upload an older revision of a document?

09/11/2024 9:29 am MDT

Sometimes you may need to send a modified document while the current version is still being reviewed by the customer.

An Example:

- You send revision 0.
- Someone at the customer side steps outside of the normal doc control process (sometimes it is required from a timing perspective) and asks for a quick revision. The document is modified by your team, and you send revision 1.
- Normally, when doc control catches up, you will get rev 0 back, before rev 1.

Uploading a new file to an already issued card

If out with customer, the card will have a + status. (i.e. X+)

The screenshot displays a software interface for document management. On the left, the 'File Staging Area' shows an 'Unassigned Files' table with one file: '147569-G15-0001-001.pdf' (3 pages). A red arrow points from this file to the 'Assign to:' section in the center, where a 'Show' button is highlighted with a red circle and the number '1'. Below this, a table lists document cards, including one for 'K05 Operating and Maintenance Manual' with a 'Wolfe PA' status. On the right, a 'Processing' pop-up window is open for the file '147569-G15-0001-001.pdf'. It features a yellow warning box (labeled '2') with the text: 'Warning: NOTE: The card you have selected is OUT-OF-WORKFLOW. Its current stage and status is [X+]. - If you are uploading an old revision, this is expected (Note: Current Wolfe PA Rev # is 1) - proceed without worry. - If you are uploading a current document: some of the options and post processing (workflow) may be incorrect.' Below the warning, the 'New file to put in this document card' is '147569-G15-0001-001.pdf'. Under 'Document Card Numbers', the 'Wolfe PA Rev #' field is set to '1' (labeled '3') and is highlighted in yellow. Other fields include 'ACME Doc #', 'Wolfe PA Doc #' (5552244-K05-0001-001), and 'Sub-Supplier Doc #'. 'Cancel' and 'Save' buttons are at the bottom.

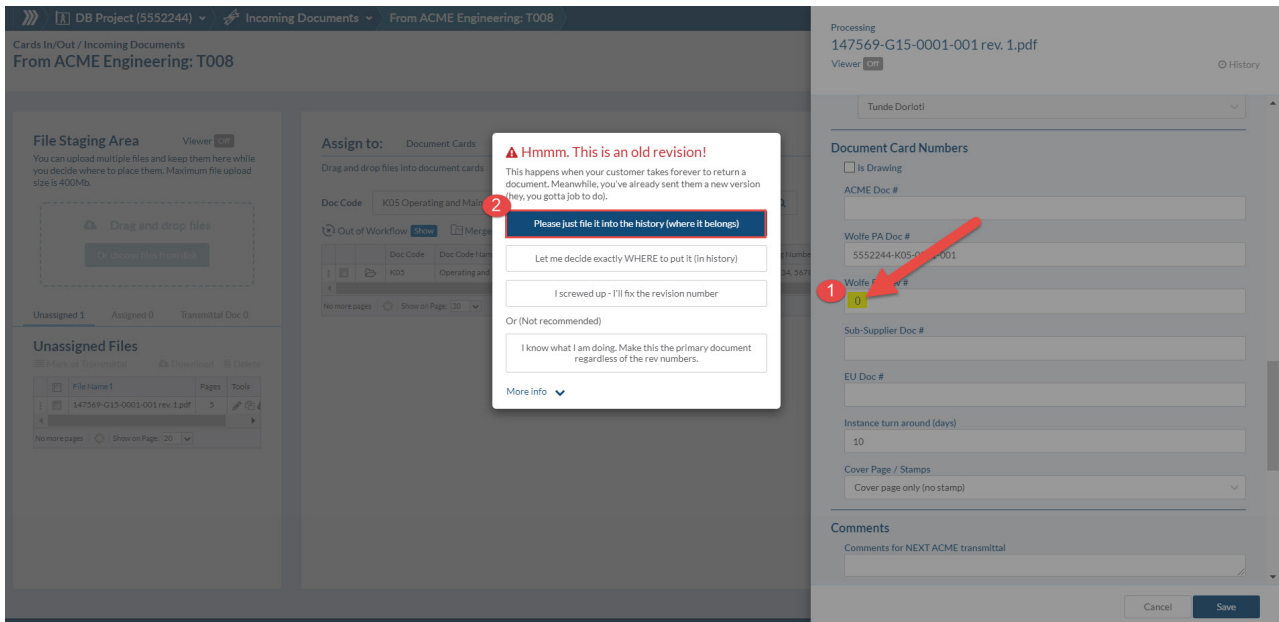
In order to upload a new revision of a document already out with the customer:

1. Mark "Show" button in Out of Workflow, and drag and drop the file into the Card
2. Note that a Warning message will show up in the Processing pop-up
3. Manually change the Revision number

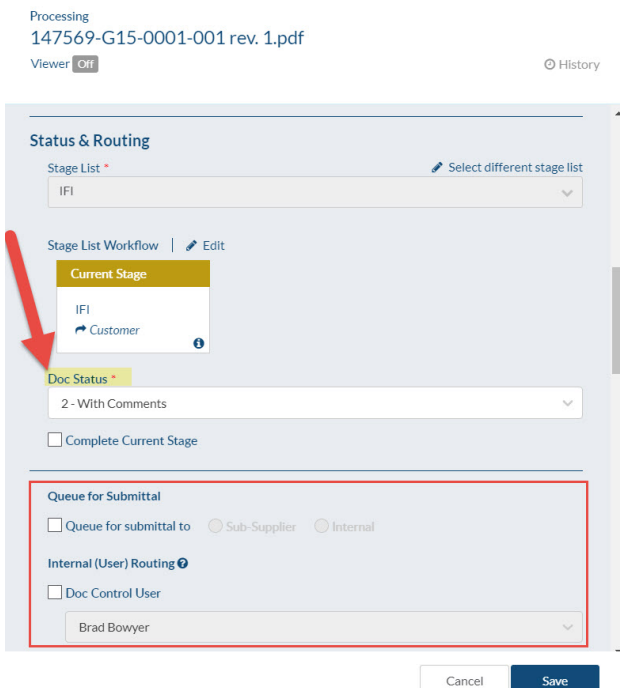
Once complete, the card will have a (+) status (i.e. ready to send). You can then issue the new submittal with the new rev.

Return older file from customer

When uploading an older revision from customer, modify the Revision number and confirm to system to place file in the history (where it belongs).



Before leaving the Processing pop-up, keep in mind to assign the status. Note that in this case setting Queue for Submittal is not required.



Now in Card History you will have X+, then 2+ (i.e. returned with comments), then X(+) (2 status will be before X(+)). System will take 2 status as returned status and keep last revision X+ as the active file.

File History

Entries displayed on cover pages [Show](#)

[Move active file to a different card](#) [Edit Card](#)

View1	Recorded1	User	Stage	Status	Wolfe PA Rev #	Original Doc Link	State	Submission #	ACME Comments	In Tx Number	Tools	Cover Page / Stamps
<input checked="" type="radio"/>	2019-11-19 14:29:34	tunde@docboss.com	IFI	X+	1	5552244-K05-0001-001_REV02_SUB002.pdf	A	2		2019-11-19_142237		Cover page only (no stamp)
<input type="radio"/>	2019-11-19 14:28:08	tunde@docboss.com	IFI	X(+)	1	147569-G15-0001-001.pdf	A	1		2019-11-19_142237		Cover page only (no stamp)
<input type="radio"/>	2019-11-19 14:22:12	tunde@docboss.com	IFI	2+	0	147569-G15-0001-001.rev_1.pdf	A	1		J008		Cover page only (no stamp)
<input type="radio"/>	2019-11-19 14:22:12	tunde@docboss.com	IFI	X+	0	5552244-K05-0001-001_REV01_SUB001.pdf	A	1		2019-11-19_142115		Cover page only (no stamp)
<input type="radio"/>	2019-11-19 14:21:41	tunde@docboss.com	IFI	X(+)	0	147569-G15-0001-001.pdf	A	0		2019-11-19_142115		Cover page only (no stamp)
<input type="radio"/>	2019-11-19 14:16:03	tunde@docboss.com	IFI	NULL	0		A	0				Cover page only (no stamp)

No more pages Show on Page: 20