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+)

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).
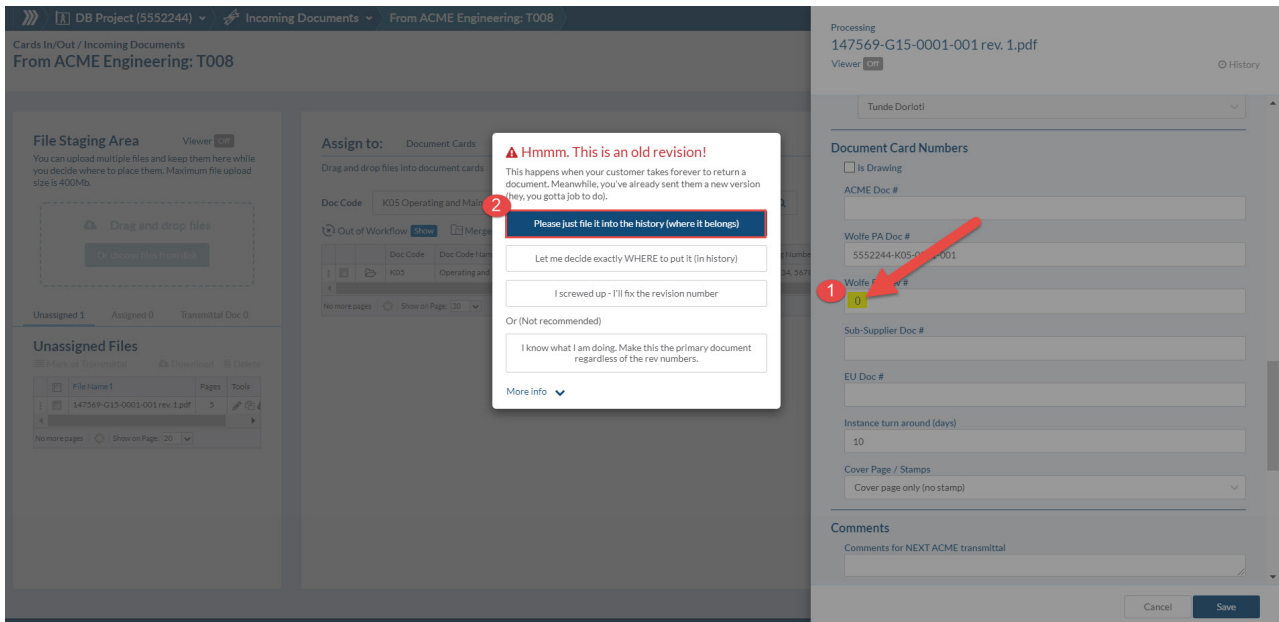
Before leaving the Processing pop-up, keep in mind to assign the status. Note that in this case setting Queue for Submittal is not required.
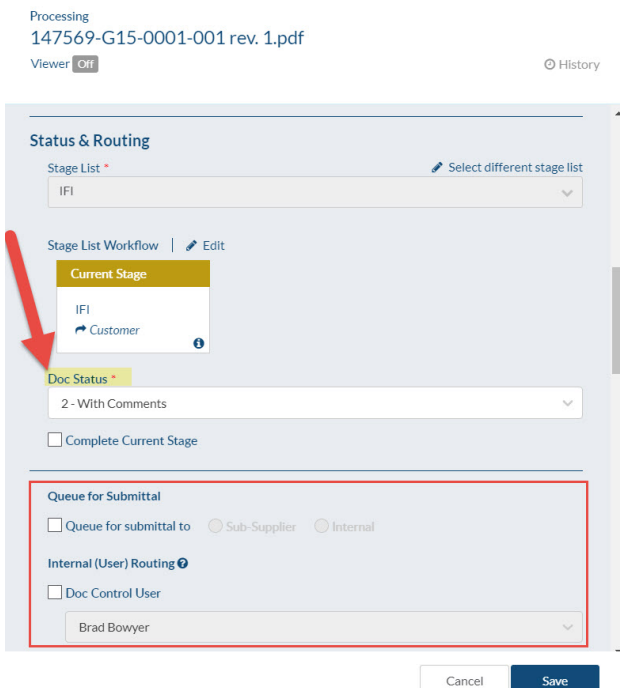
Now in Card History you will have X+, then 2+ (i.e. returned with comments), then X(+) (2 status will be before X(+)). System will take 2 status as returned status and keep last revision X+ as the active file.

5552244-K05-0001-001 (K05_E1099)

Viewer `On` `View file` `Compare`

Files   Requests to Supplier

⚙ Coverage Test

File History

ⓨ Entries displayed on cover pages `Show`

🔀 Move active file to a different card   ✏ Edit Card

View1	Recorded↓	User	Stage	Status	Wolfe PA Rev #	Original Doc Link	State	Submission #	ACME Comments	In Tx Number	Tools	Cover Page / Stamps
⦿	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)
○	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)
○	2019-11-19 14:22:12	tunde@docboss.com	IFI	2+	0	147569-G15-0001-001 rev. 1.pdf	A	1		T008	🗎🗎✏	Cover page only (no stamp)
○	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)
○	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)
○	2019-11-19 14:16:03	tunde@docboss.com	IFI	NULL	0		A	0			✏	Cover page only (no stamp)

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No more pages   ⟳   Show on Page: `20 ▾`