

Set Cover Page and Stamp Preferences per Doc Code/Card

09/16/2024 2:22 pm MDT

Doc Code Cover Page/Stamps Options and Templates

Users can define the metadata method for each doc code:

Cards

Code List (Requirements)

Doc Code	Doc Code Name	Level	Required	Type	Cover Page / Stamps	Cover Page (ACME)	Stamp Template	Stage List	Defl
B02	Vendor Document Register	Order	1/1	SDI Report	Cover page only (no stamp)	ACME Alternate CP [XLS] (Alina Sonke)	Use Project Defaults	IFA	10
D03	General Arrangement Drawings	Item/Model (TE)	5/5	Generated (Sub-Supplier)	Stamp, else cover page	Use Project Default	Drawing Stamp [XLS] (Alina Sonke)	IFA	10
D16	Instrument Data Sheet	Item/Model (TE)	5/5	Generated (Sub-Supplier)	Cover page only (no stamp)	Use Project Default	Use Project Defaults	IFA	10
L14	Functional Test Reports	Tag No. (TE)	2/2	Generated (Sub-Supplier)	Cover page only (no stamp)	Use Project Default	Use Project Defaults	IFA	10
O10	Technical Deviation Requests	Tag No. (TE)	2/2	Generated (Sub-Supplier)	Cover page only (no stamp)	Use Project Default	Use Project Defaults	IFA	10
S06	Manufacturing Data Book	Order	1/1	Compilation	No stamp and no cover page	Use Project Default	Use Project Defaults	IFA	10

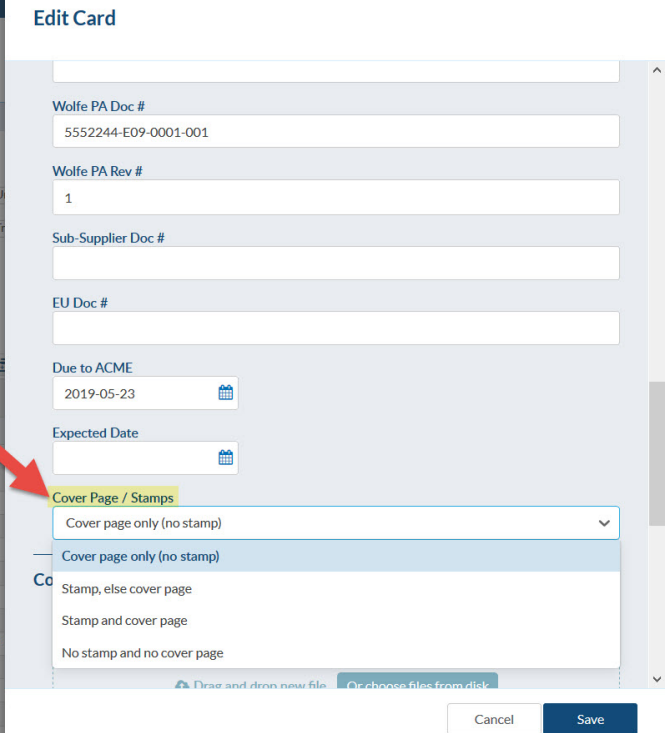
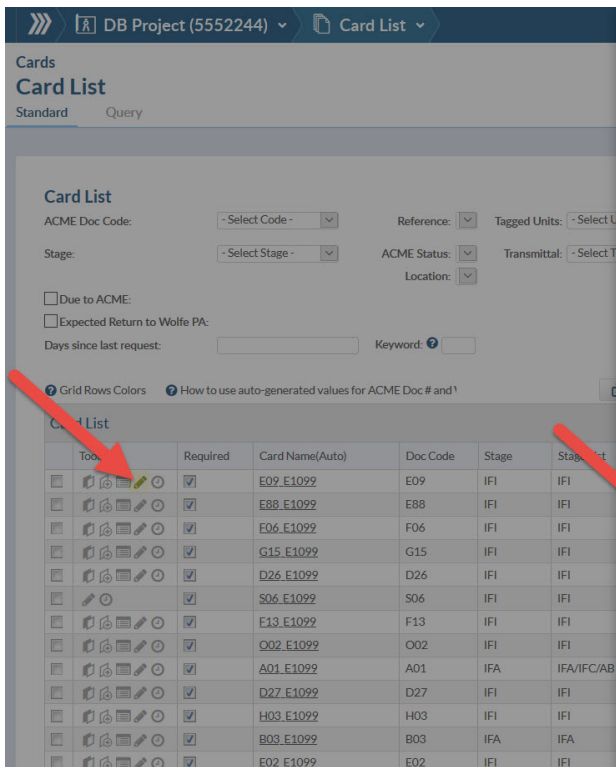
Cover Page/Stamps Option:

- **Cover page only (no stamp)**
- **Stamp, else cover page:** System will prompt the user to place a stamp. If the user decides it is not possible (i.e. there is no space), the user can indicate that the stamp cannot be placed. On submittal, DocBoss will add a cover page to the outgoing document.
- **Stamp and cover page:** DocBoss will prompt for a stamp. Even if the stamp is placed, DocBoss will still add a cover page.
- **No stamp and no cover page**

Users can also select which Cover Page and Stamp templates they want to use for each code from this screen. Stamp templates can also be set per card, through the **Stamp Template** column on the **Card List**.

Card Cover Page/Stamps Options

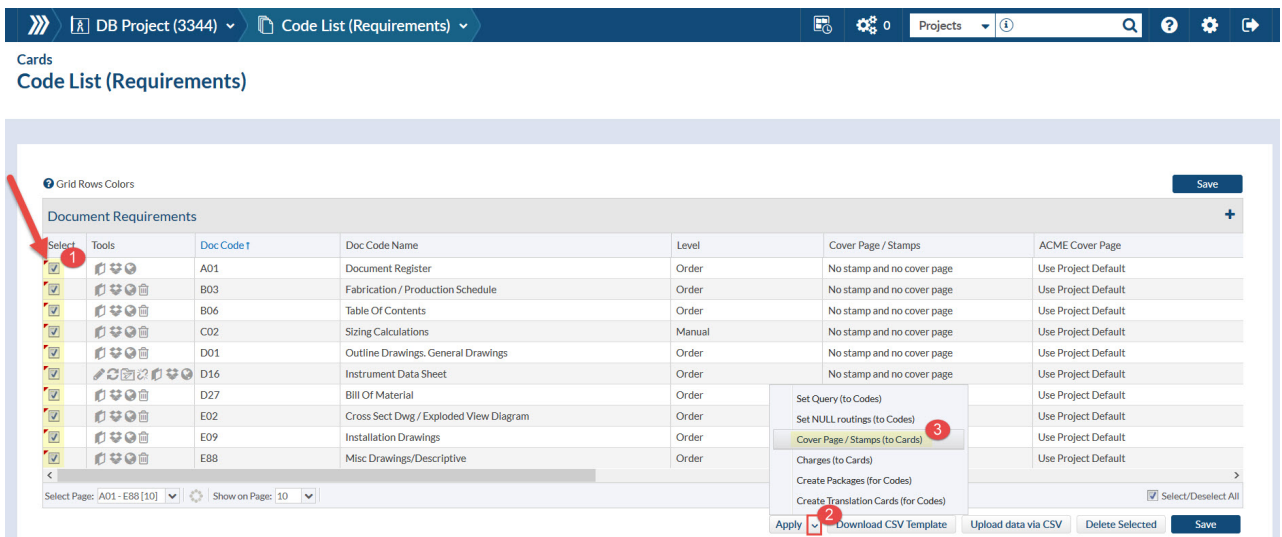
It's possible to edit any existing cover page/stamp setting on a given Card, **BUT** every time a new file is assigned, the card will be reset to the default (from the code)



To apply the changes consistently, these shall be made in the Code setting.

What if I change settings when project is in progress?

If you wish to change the Cover Page/Stamp setting on a project in progress (i.e. when Cards were already assigned) updates shall be made on the Codes and then "Applied to the Cards".



1. Select the Codes where settings were changed
2. Click on Apply drop down
3. Cover Page / Stamp (to Cards)

***Note: How changes are applied on Cover Page/Stamp settings:**

1. On each assignment we pull the value assigned to the code.
 2. If updates are made at that time we keep the setting.
 3. If the settings are changed on the CODE after assigning, the card is not updated.
 4. If the updates are made on the card after assigned, the setting IS updated.
 5. If changes are made on the doc code, and set "Apply Cover Page/Stamp (to Cards)", the cards are updated.
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