

Apply Stamps

01/21/2025 5:46 am MST

This article explains the steps to applying stamps. Please keep in mind, for the stamps to show on the documents (not just a preview), they must be sent via outgoing submittals. It is during this process DocBoss adds the stamp you apply to the document.

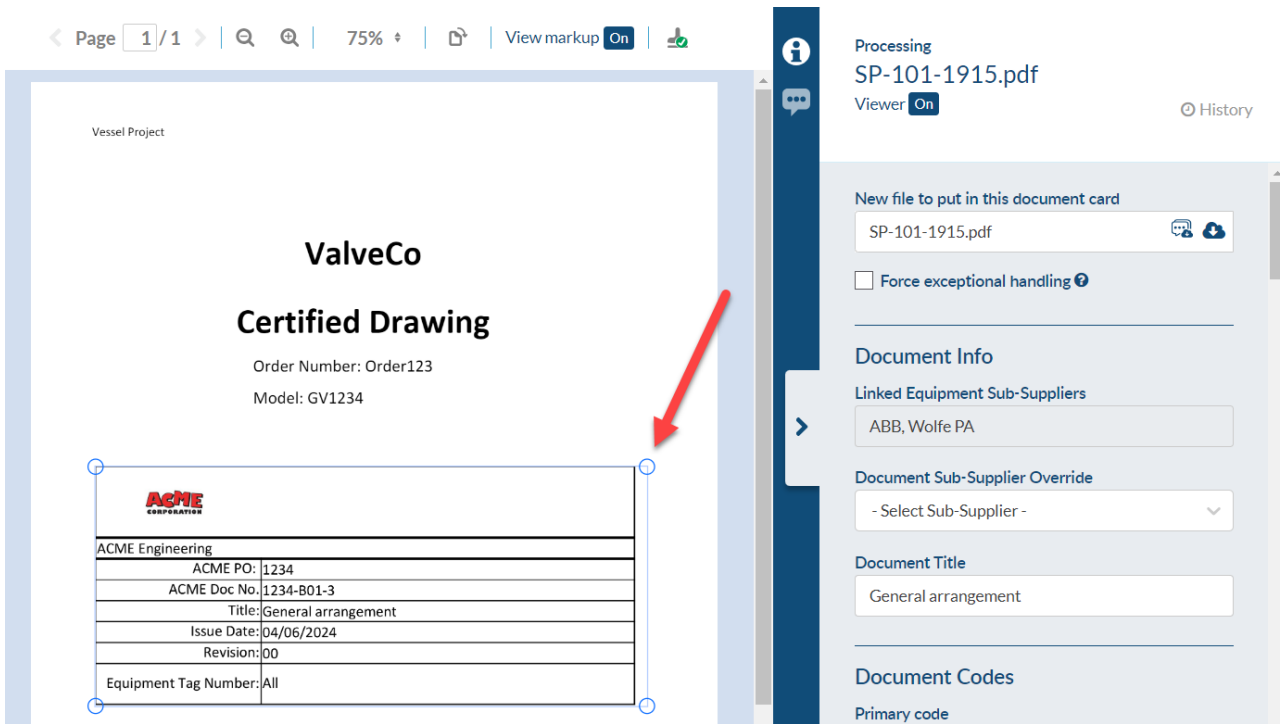
Stamps can be applied on the document Viewer once the file has been assigned to the Card. This process can be done from the assignment screen in Incoming Documents or from the Outstanding Actions screen.

The screenshot shows the 'Assign to' screen in DocBoss. On the left, there is a 'File Staging Area' with instructions to upload files. Below it is a table of 'Unassigned Files' with two entries: 'SP-101-1915.pdf' (1 page). A red arrow points from this row to the 'Document Cards' table on the right. The 'Document Cards' table has columns for Status, Doc No. (Wolfe PA), Stage, Tools, Doc Code, Title, and Reference. The selected row has Status 'NULL', Doc No. '4531TD-5-A00-0001', Stage 'IFI', Doc Code 'B01', Title 'General arrangement', and Reference 'Valves'.

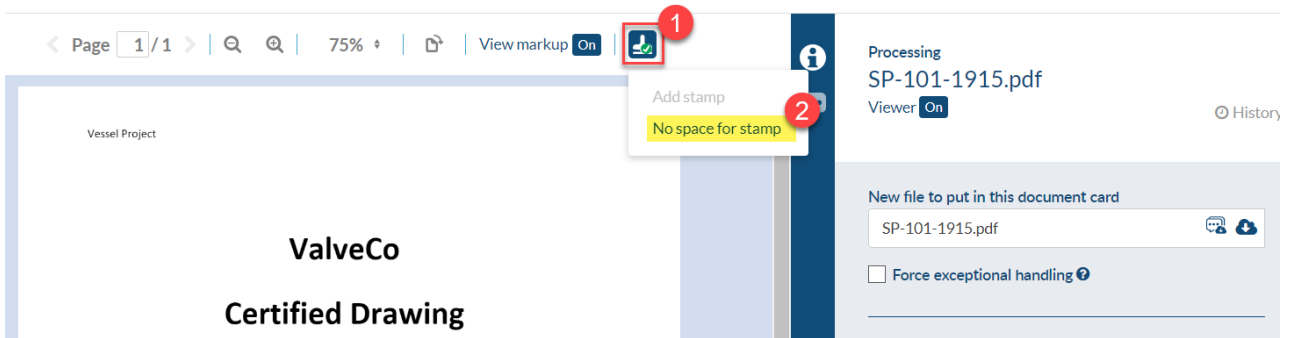
Add Stamp

The screenshot shows the document viewer for 'SP-101-1915.pdf'. The document content is 'ValveCo Certified Drawing' with order number 'Order123' and model 'GV1234'. On the right sidebar, the 'Viewer' toggle is set to 'On' (1). At the top of the viewer, there is a stamp icon (2) and an 'Add stamp' button (3). A tooltip above the button says 'Add stamp' and 'No space for stamp'.

1. Ensure the viewer is enabled and that "View Markup" is set to ON.
2. Click the stamp icon
3. Select Add Stamp



The stamp it is applied in its default size but it can be resized and placed in a different area on the document.




If the system is requesting a stamp, the user can select "No space for stamp" to satisfy the stamp request.

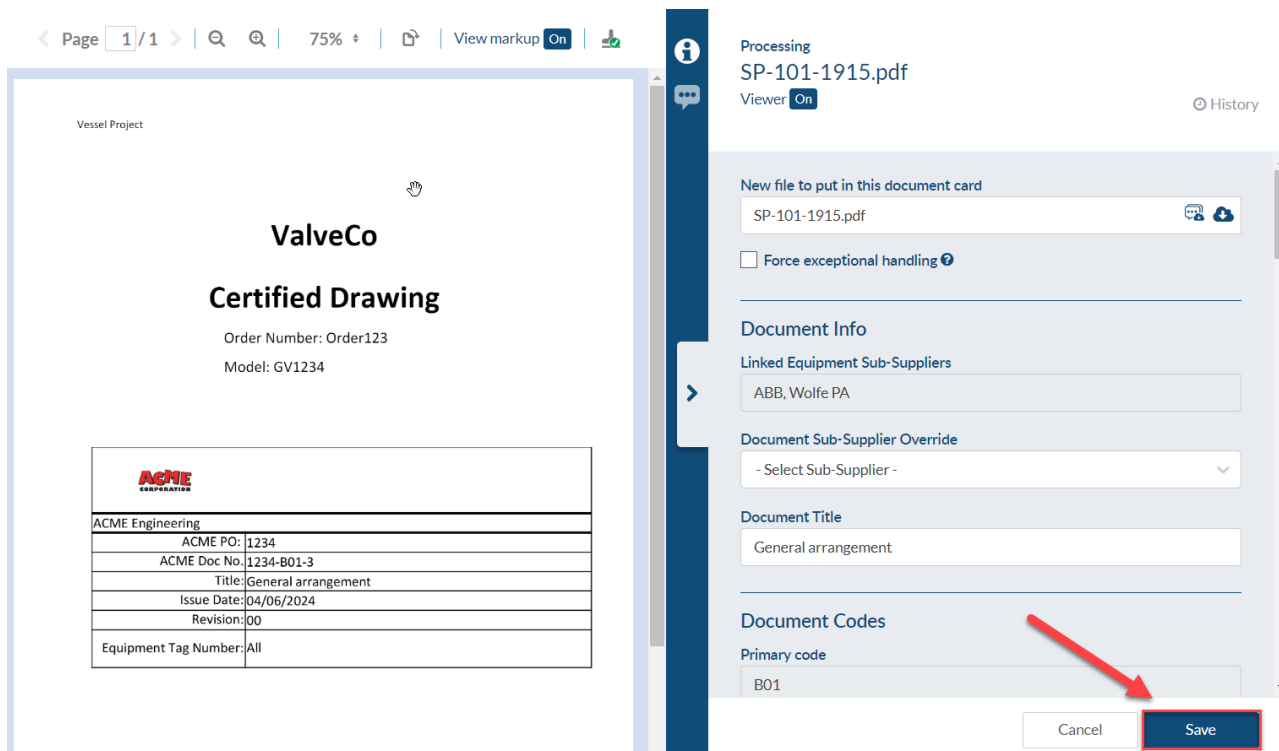
Certified Drawing

Order Number: Order123


Model: GV1234

	
ACME Engineering	
ACME PO:	1234
ACME Doc No.:	1234-B01-3
Title:	General arrangement
Issue Date:	04/06/2024
Revision:	00
Equipment Tag Number:	All

Also – if you wish to remove and re-apply the stamp, click once on the stamp with your mouse and then the delete button on your keyboard.



The screenshot shows the DocBoss interface. On the left, a PDF viewer displays a 'Vessel Project' page with the 'ValveCo Certified Drawing' stamp. The stamp contains the following information:

	
ACME Engineering	
ACME PO:	1234
ACME Doc No.:	1234-B01-3
Title:	General arrangement
Issue Date:	04/06/2024
Revision:	00
Equipment Tag Number:	All

On the right, the configuration panel for 'SP-101-1915.pdf' is shown. It includes a 'New file to put in this document card' section with a checkbox for 'Force exceptional handling'. Below that is the 'Document Info' section with fields for 'Linked Equipment Sub-Suppliers' (ABB, Wolfe PA), 'Document Sub-Supplier Override' (Set to '- Select Sub-Supplier -'), and 'Document Title' (General arrangement). The 'Document Codes' section has a 'Primary code' field set to 'B01'. A red arrow points to the 'Save' button at the bottom right of the configuration panel.

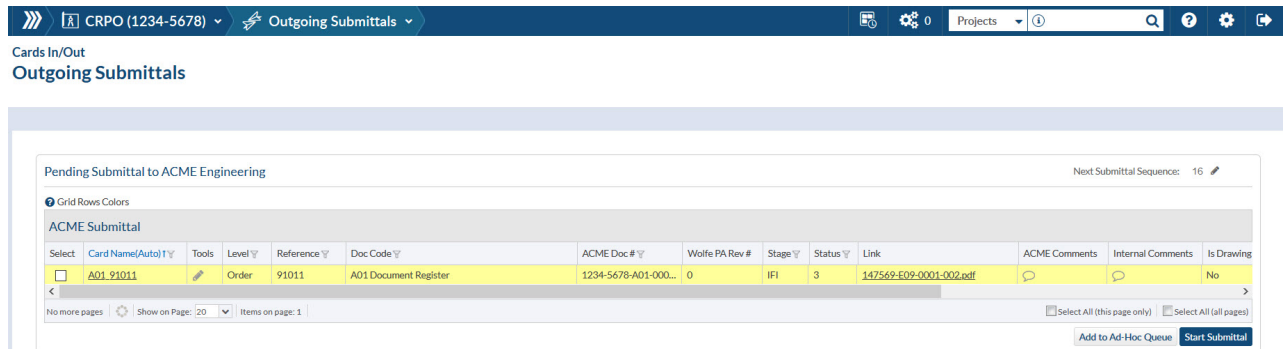
Once you have completed the stamp, click the checkbox to save

Note: Stamps are applied much like cover pages. Upon submittal, DocBoss will place the stamp on the document. Until the submittal

process, the stamps are only visible in the document preview.

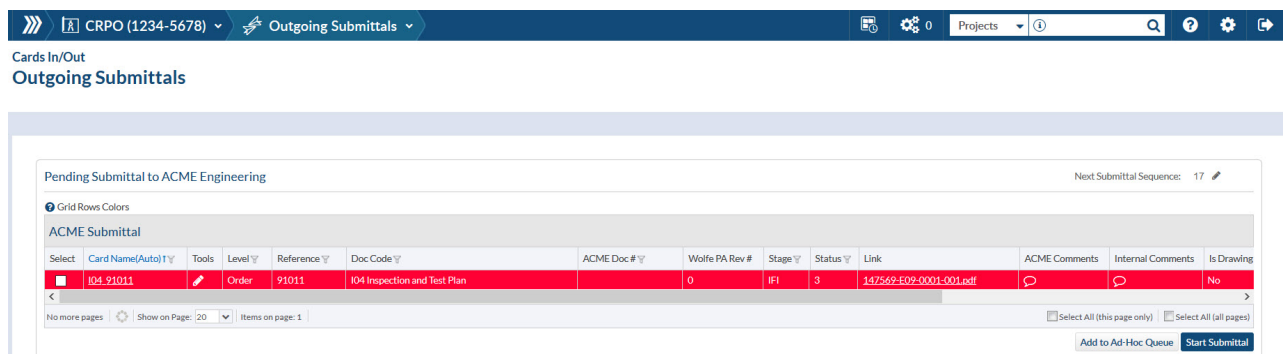
If option “Stamp, else cover page” or “Stamp and cover page” are selected on the Code, and Stamp is not applied during the submittal, DocBoss will warn you in the Outgoing Submittal grid that Stamp is missing.

In case of “Stamp, else cover page” the line in the Outgoing Submittal grid will be yellow:



The screenshot shows the 'Outgoing Submittals' interface for project 'CRPO (1234-5678)'. The main heading is 'Pending Submittal to ACME Engineering' with a 'Next Submittal Sequence: 16'. Below this is a table titled 'ACME Submittal' with columns: Select, Card Name(Auto) T, Tools, Level, Reference, Doc Code, ACME Doc #, Wolfe PA Rev #, Stage, Status, Link, ACME Comments, Internal Comments, and Is Drawing. The first row is highlighted in yellow and contains: A01 91011, Order, 91011, A01 Document Register, 1234-5678-A01-000..., 0, IFI, 3, 147569-E09-0001-002.pdf, and No. The interface includes navigation options like 'Show on Page: 20' and 'Items on page: 1', and buttons for 'Add to Ad-Hoc Queue' and 'Start Submittal'.

And in case of “Stamp and cover page” the line in the Outgoing Submittal grid will be red:



The screenshot shows the 'Outgoing Submittals' interface for project 'CRPO (1234-5678)'. The main heading is 'Pending Submittal to ACME Engineering' with a 'Next Submittal Sequence: 17'. Below this is a table titled 'ACME Submittal' with columns: Select, Card Name(Auto) T, Tools, Level, Reference, Doc Code, ACME Doc #, Wolfe PA Rev #, Stage, Status, Link, ACME Comments, Internal Comments, and Is Drawing. The first row is highlighted in red and contains: I04 91011, Order, 91011, I04 Inspection and Test Plan, 1234-5678-I04-000..., 0, IFI, 3, 147569-E09-0001-001.pdf, and No. The interface includes navigation options like 'Show on Page: 20' and 'Items on page: 1', and buttons for 'Add to Ad-Hoc Queue' and 'Start Submittal'.