

Stages & Stage Lists

09/16/2024 1:49 pm MDT

Documents submitted to EPCs often must go through multiple issue purposes. While some documents may only be submitted as For Information or For Approval, engineered drawings can go through multi-step submittal processes. A common workflow for drawings is Issued for Approval > Issued for Construction > Issued As Built.

In DocBoss issue purposes can be managed through our Stages feature.

What is a Stage? The workflow of a document until it reaches a complete status within a particular issue purpose.

- A document may need multiple revisions/submissions, but once it has received the [complete](#) (ie. approved) status from the customer, the stage is considered complete.

An example of a Stage is IFA - Issued for Approval. Each stage contains a Stage Abbreviation (IFA) and a Stage Name (Issued for Approval).

The screenshot shows the 'Stage Lists' configuration page for 'Big Project - 4530'. The 'Stage List: IFA' is selected. The 'Stages' table contains one entry:

Order ↑	Stage Abbr	Stage Name	Target	Require New Document	Expect Document Return	Complete on upload	If AwCR, complete stage	Stage Name (Resubmittal)	Reset
1	IFA	Issued for approval	Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Buttons: '+ Add Stage', 'Save', 'Back to List', 'Show on Page: 20'.

What is a Stage List? A Stage List is a sequence of Stages which creates a specific workflow.

A Stage List is a combination of one or more stages to create a complete document life cycle. It allows a single document to be tracked through a series of processes.

A typical example requires a supplier to issue a document for customer approval (IFA), then issue for construction (IFC) and finally issue as built documents (IAB).

The screenshot shows the 'Stage Lists' configuration page for 'Big Project - 4530'. The 'Stage List: IFA/IFC/AB' is selected. The 'Stages' table contains three entries:

Order ↑	Stage Abbr	Stage Name	Target	Require New Document	Expect Document Return	Complete on upload	If AwCR, complete stage	Stage Name (Resubmittal)	Reset
1	IFA	Issued for Approval	Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	IFC	Issued for Construction	Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Reset t
3	IAB	Issued As Built	Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Reset t

Buttons: '+ Add Stage', 'Save', 'Back to List', 'Show on Page: 20'.

When submitting documents to customers for approval, it is expected that they will apply some form of status to the document which must be tracked in DocBoss.

If the document is returned with comments or rejected, the document can continue to move back and forth to the customer in the same stage* until complete status has been obtained.

Once the document has been marked with status complete for the Issued for Approval stage, the document is auto-transitioned to the next stage IFC - Issued for Construction process to start.

*There is also the option to set "If AwCR, complete stage?" and move to the next stage even if the document has not been returned with a complete status.

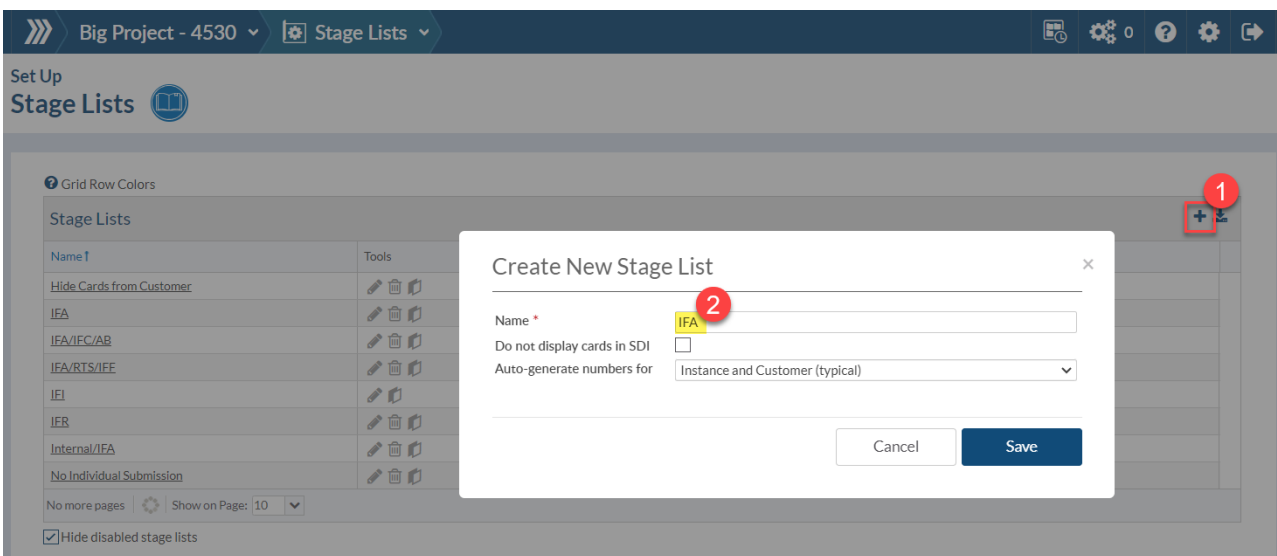
If a Stage List only contains one Stage, once this is received with the complete status from the customer the workflow is finished.

Setting Up Stage Lists Project Specific

Stage Lists can be created on the Project. This allows the flexibility to work with unique requirements that may not be applicable to any other projects.

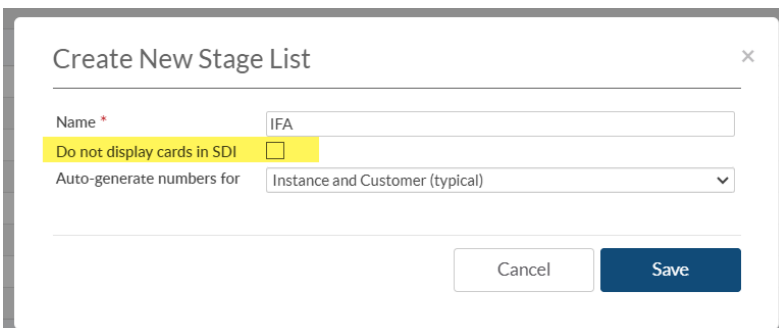
Navigate to Project Menu > Set Up > Stage Lists

Click the + button on the top right and give a name to the list.



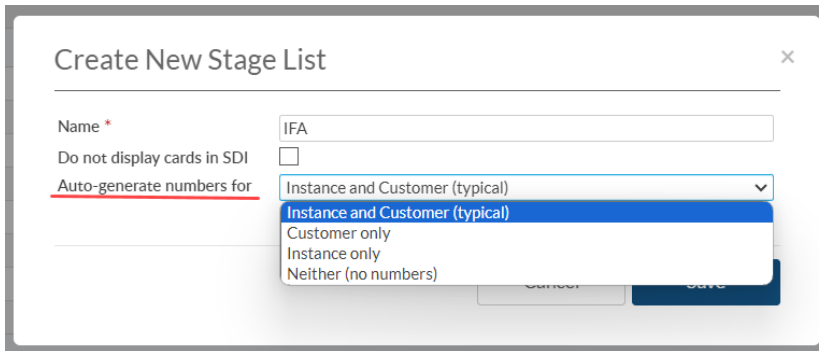
Try to make it descriptive, but not terribly long. Click save.

Do not display cards in SDI



When the list is created, Do not display cards in SDI can be marked if these cards don't need to be listed in the SDI Report.

Auto-generate numbers

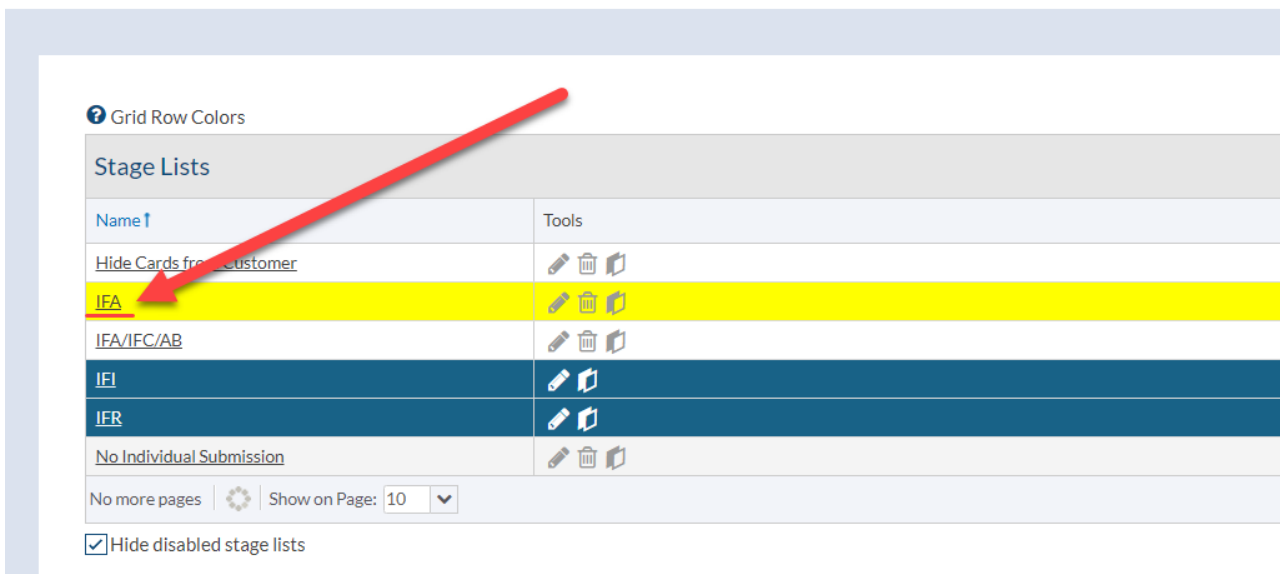


















By default, the cards using the new Stage List will have the customer and instance auto-numbers added but there is also the option to add the document numbers only to customer or instance or to neither of them.

*Note YELLOW indicates a Stage List has been started but the individual stages (workflows) have not been added, BLUE are Stage Lists already assigned to the Doc Code/Cards, WHITE are complete lists.

Big Project - 4530 Stage Lists

Set Up Stage Lists



Name ↑	Tools
Hide Cards from Customer	  
IFA	  
IFA/IFC/AB	  
IFI	 
IFR	 
No Individual Submission	  

No more pages | Show on Page: 10 | Hide disabled stage lists

Click the stage list name hyperlink to populate the items.

Setting Up Stages

Click the plus symbol on the right to create the first stage. Following the example above this stage would be called IFA (Issued for Approval).

Set Up / Stage Lists
Stage List: IFA

Back to List


Stages

Order ↑	Stage Abbr	Stage Name	Complete on upload	If AwCR, complete stage	Stage Name (Resubmittal)	Reset
No more pages						

Show on Page: 20

Hide disabled stages

Save



Next configure the options:

Add New Stage

Stage abbreviation *
IFA

Stage *
Issued for Approval

Cancel Add Stage

New Stage Options:

Add New Stage

Notes (Internal Use Only)

Target *

Customer ▼

Do not submit to customer

Require New Document?

Complete on Upload

If AwCR, complete stage? [?](#)

For Approval?

Document Return ▲

Expect Document Return

Wolfe PA Rev # Settings ▲

Reset Wolfe PA Rev #

Wolfe PA Rev # Char

Definitions of each selection:

Stage (Abbr): The stage abbreviation name

Stage Name: The stage name long form

Notes (Internal Use Only): Notes only visible to internal DocBoss users

Target: Destination for the document

Options are: Customer, Internal/3rd Party or Sub-Supplier

Require New Document (not required to check for the first stage): If checked the first status of the stage will be set to NULL and a new document will be expected to be uploaded from Incoming Documents screen.

*NOTE that if the Card has a routing the NEW document can't be uploaded from the Outstanding Actions. It should always be uploaded in Incoming Documents.

Complete on Upload: Enable "Require New Documents?" checkbox and this option will appear.

Require New Document?

Complete on Upload

Once a document has been uploaded to DocBoss the stage will automatically be completed.

For Approval?: Yes or No if the documents in the stage are being sent for approval

If AWCR, complete stage: If document is 'Approved with Comments, Resubmit', complete the stage.

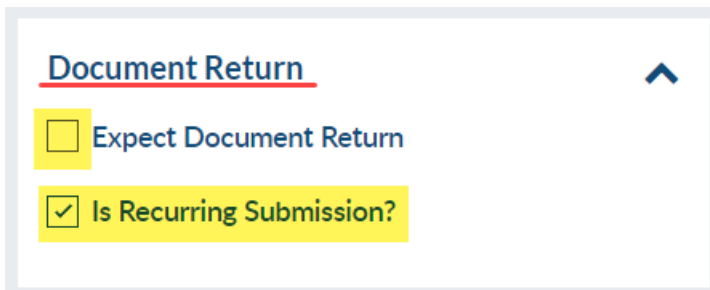
*NOTE: AWCR must be enabled in the status list AND in stage list to function correctly.

When a stage list contains several stages, if this checkbox is marked and the document is returned with the status that has this checkbox also enabled, then, the document is auto-transitioned to the next stage.

Expect Document Return: Yes or No if you are expecting the documents to be returned

*NOTE: If the document is not expected to be returned the stage will automatically be completed once the document is submitted.

Recurring Submission: Disable "Expect Document Return" and this will appear.



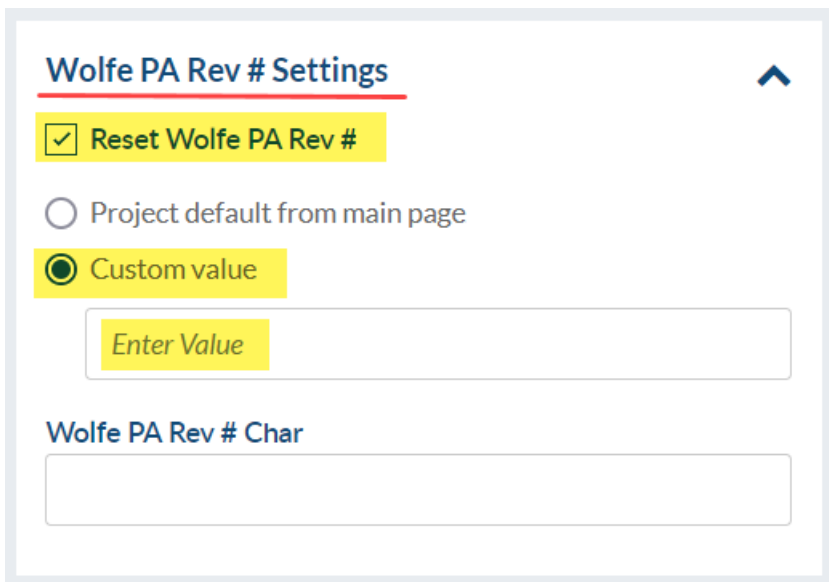
Document Return ^

Expect Document Return

Is Recurring Submission?

Select for documents you plan on submitting more than once (for example monthly reports)

Reset Primary Rev:



Wolfe PA Rev # Settings ^

Reset Wolfe PA Rev #

Project default from main page

Custom value

Enter Value

Wolfe PA Rev # Char

The project default revision value from main page can be reset to a custom value.

Primary Rev Char: The revision character which can be appended as a suffix or prefix to the document revision number.

Due Date Settings

(Not available for first Stage)

Due Date Settings

Reference Date

AC: After Completion of Previous Stage

Delivery Days

10

Reference Date: The Reference Date and Delivery days are combined to provide the next due date to customer. Note "AC"=After Completion of the Previous Stage.

Delivery Days: Numerical text, ie 10. Using the "AC" reference date and setting "10" delivery days means the date will be 10 days After Completion of the Previous Stage.

Click Save

Resubmittal: Stage Abbr and Stage Name

Once the Stage is added in the grid, there is also the option to set a different Stage abbreviation and Stage name for documents resubmitted to customer.

Big Project - 4530 Stage Lists

Set Up / Stage Lists
Stage List: IFA

Stages

Order	Stage Abbr	Stage Abbr (Resubmittal)	Stage Name	Stage Name (Resubmittal)	Target
2	IFA		Issued for Approval	Re-Issued for Approval	Customer

No more pages Show on Page: 20

If the Stage List should only contain one Stage, then there are no further steps and Stage List it is ready to be assigned to the Doc Codes.

Stage List with multiple Stages

If the Stage List should contain more than on Stage, click the + button to add them to the grid.

Big Project - 4530 Stage Lists

Set Up / Stage Lists
Stage List: IFA

← Back to List

Stages

Order	Stage Abbr	Stage Abbr (Resubmittal)	Stage Name	Stage Name (Resubmittal)	Target	Require New Document	Complete on upload	Expect Document Return	Refer
2	IFA		Issued for Approval	Re-Issued for Approval	Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Hide disabled stages

Save

Big Project - 4530 Stage Lists

Set Up / Stage Lists
Stage List: IFA/IFC/AB

← Back to List

Stages

Order	Stage Abbr	Stage Name	Target	Require New Document	Expect Document Return	Complete on upload	If AwCR, complete stage	Stage Name (Resubmittal)	Reset
1	IFA	Issued for Approval	Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	IFC	Issued for Construction	Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Reset
3	IAB	Issued As Built	Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Reset

Save

Assigning Stage Lists

By default, DocBoss will always begin by assigning the IFI - Issued for Information stage list. This can be changed in the Stage List column on the Doc Code Requirements grid.

Big Project - 4530 Code List (Requirements)

Code List (Requirements)

Tools	Doc Code	Doc Code Name	Stage List	Type	Level	Required	Routing Scenario	Routing Scenario Details	Cover Page / S
<input type="checkbox"/>	A01	Supplier's Deliverable List	IFI	Generated (Wolfe PA)	Order	1/1	- Select -		Cover page or
<input type="checkbox"/>	B01	General Arrangement incl. Dimensions and Inte	Hide Cards from Customer	Generated (Wolfe PA)	Order	1/1	- Select -		Cover page or
<input type="checkbox"/>	F02	Catalogue Data Sheets	IFA	Generated (Wolfe PA)	Order	1/1	- Select -		Cover page or
<input type="checkbox"/>	F04	Instrument Data Sheets	IFA/IFC/AB	Generated (Wolfe PA)	Order	1/1	- Select -		Cover page or
<input type="checkbox"/>	K14	Control Valve Size and Noise Calculation	IFI	Generated (Wolfe PA)	Order	1/1	- Select -		Cover page or
<input type="checkbox"/>	P01	Inspection and Test Plan & QA/QC Plan	IFR	Generated (Wolfe PA)	Order	1/1	- Select -		Cover page or
<input type="checkbox"/>	P06	Priced Spare Parts Quotation	No Individual Submission	Generated (Wolfe PA)	Order	1/1	- Select -		Cover page or

Download CSV Template Upload Data via CSV

Changes can be applied manually by clicking in each dropdown or by csv.

Changing Stage Lists

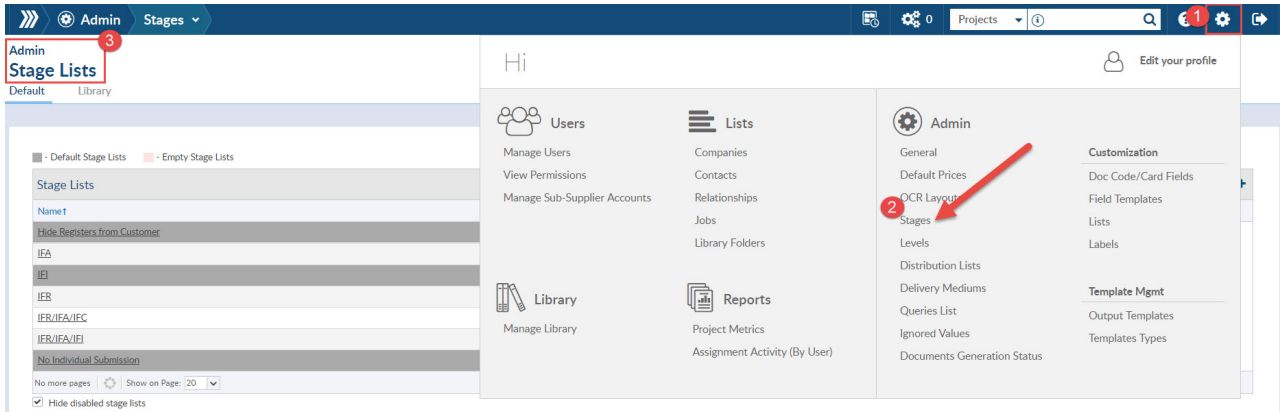
If you begin a project using a particular stage list and part way through you need to change to a new stage list, DocBoss will look at the current stage and try to find a match in the new list. If it can find a match that document will keep its current status and the current stage.

But if the new stage list assigned doesn't have the same stage abbreviations (and it contains multiple stages) then the system will still keep the current status but it will set the first stage of this new assigned list.

Admin

Creating Stage Lists under Admin

Default stage lists can be configured in the admin section which makes them available to any user for any project.



Admin permissions for the instance are required to create a default stage list.

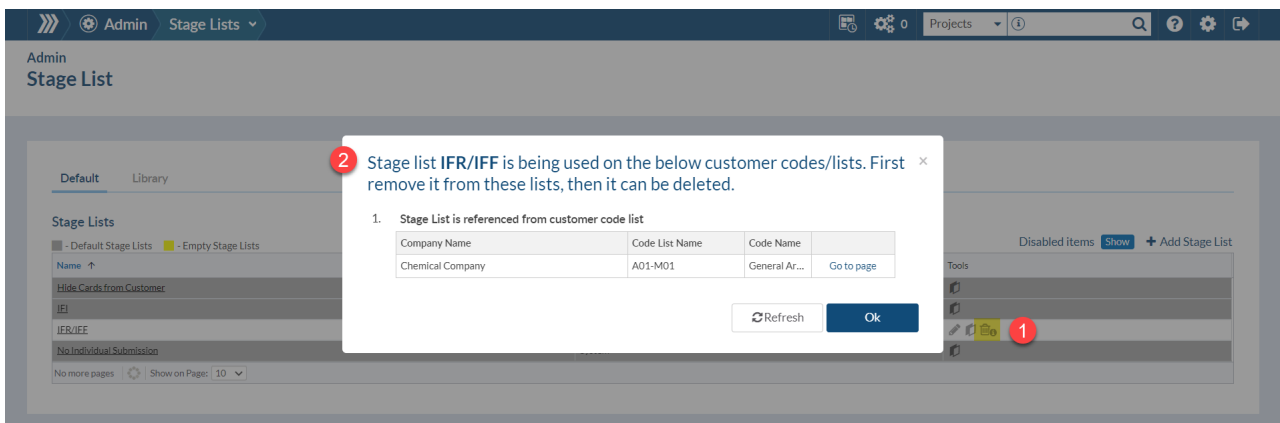
Admin permissions to the project are required to create project specific stage lists.

Removing Stage Lists under Admin

Users can also remove stage lists under the Admin screen.

If the stage list has been imported to or is being used on a specific project, that stage list will still be available under that project, and the system will not prevent or warn a user from deleting the list from the admin area.

However, if a stage list is assigned to any doc codes on a customer code list (found under **Companies > Profile > Code/Status/State**), DocBoss will not allow the user to proceed. The system will provide a listing of customer code lists containing the affected stage list. The user would need to remove the stage list from these before being able to delete the stage list from the admin area.



For more examples and details about Stages have a look at our video "[Working with Stages](#)".