

Managing number of pages on returned documents

09/16/2024 1:36 pm MDT

When processing files returned from the customer, DocBoss expects that the page count has NOT changed.

DocBoss knows:

- Total pages sent (expected pages for return) i.e. 4
- Total pages of the actual document i.e. 3
- Total cover pages added on submittal. i.e. 1

If the number of pages RETURNED doesn't match the number of pages SENT, there are 4 possible situations:

1. The number of cover pages has changed (added/removed)
2. The customer has added comment pages
3. The customer has removed pages from the actual document (bad)
4. The customer has returned ONLY the coverpage.

DocBoss will show you that the number of total pages in the file does NOT MATCH. At that point you must tell DocBoss WHY.

And - its important.

DocBoss splits up your returned document based on these numbers. It saves the original, but it carves off cover pages, comment pages, and updates/replaces the source document if you force it.

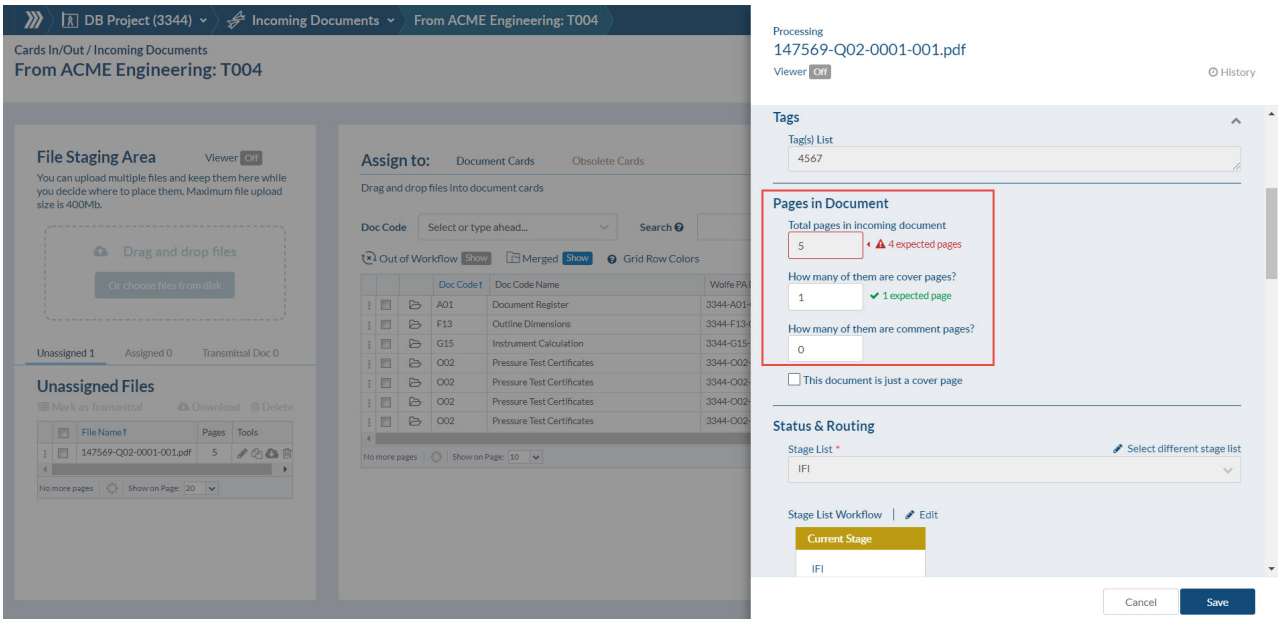
Note that a second error will pop up if you tell DocBoss the source document has changed. DocBoss will offer to use the original SENT document (i.e. if customer has stripped off some pages from the actual document, you don't want the system to use that in your final databook).

An example:

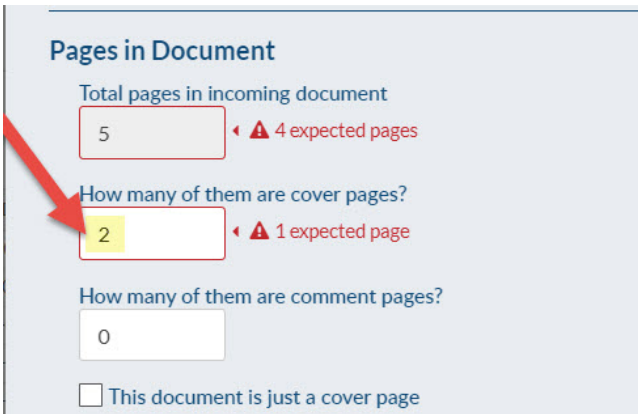
If, during the revision/approval of the document, the customer adds page e.g. they add an extra front page with a stamp (instead of adding the stamp directly on the original cover page), DocBoss will display page count errors and force some form of resolution.

In this case, the original document had 3 pages, and one cover page was added on submittal, making a total of 4 outgoing pages.

On return, there are 5 pages:

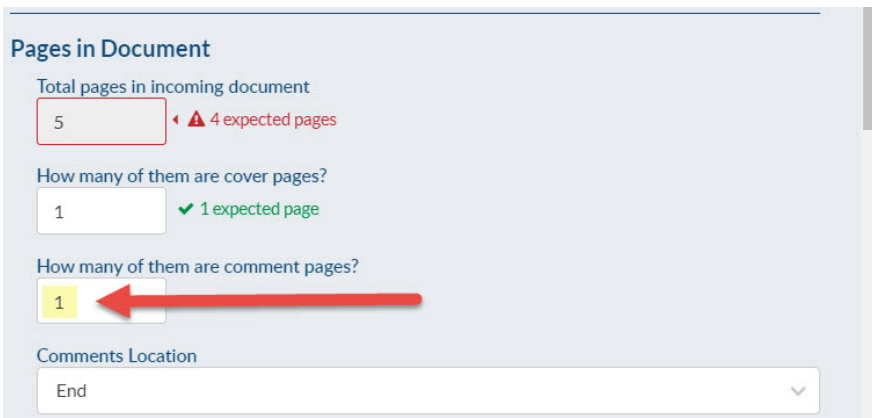


It's very important to legitimately explain changes to DocBoss. In this case, it was due to an extra cover page. The user must increase the cover page count to clear the errors.



Can I change page counts after assignment?

Using the previous example, is it possible to change the settings once the assignment has been completed? i.e. Instead of adding that extra count to the cover page field, can we set it as a comment page?



Because we split the file and store the data only during the assignment process, the answer is no. Once the document is saved and the incoming process is completed, the number of pages can't be changed. The only option is to upload again the file.

Steps to re-upload the document if you want to change page counts:

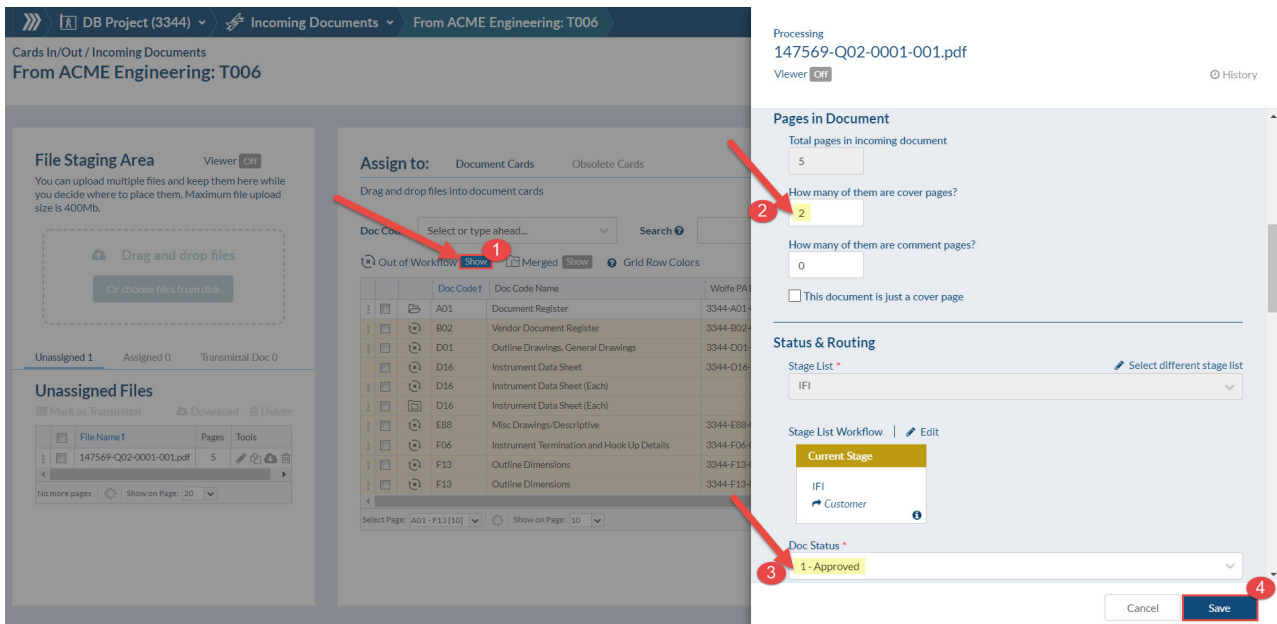
First - you must get a copy of the file.

The screenshot displays a software interface for document management. At the top, a navigation bar shows the current context: 'DB Project (3344)' > 'Incoming Documents' > 'From ACME Engineering: T006'. Below this, the page title is 'Cards In/Out / Incoming Documents' and 'From ACME Engineering: T006'. The interface is divided into two main sections. On the left, the 'File Staging Area' is visible, with a 'Viewer' toggle set to 'Off'. It contains instructions: 'You can upload multiple files and keep them here while you decide where to place them. Maximum file upload size is 400Mb.' A red box labeled '2' highlights a dashed-line area with a 'Drag and drop files' prompt and a button 'Or choose files from disk'. Below this, there are tabs for 'Unassigned 0', 'Assigned 1', and 'Transmittal Doc 0'. The 'Assigned Files' section shows a table with one file: '147569-Q02-0001-001.pdf' with 5 pages. A red box labeled '1' highlights a download icon in the 'Tools' column of this row. On the right, the 'Assign to:' section has tabs for 'Document Cards' and 'Obsolete Cards'. It includes a search bar for 'Doc Code' and a 'Search' button. Below are filters for 'Out of Workflow', 'Merged', and 'Grid Row Colors'. A table lists document cards with columns for 'Doc Code', 'Doc Code Name', and 'Wolfe PA Doc #'. The table contains five rows of data. At the bottom, there is a 'No more pages' indicator and a 'Show on Page: 10' dropdown menu.

Doc Code	Doc Code Name	Wolfe PA Doc #
O02	Pressure Test Certificates	3344-O02-0002-001
G15	Instrument Calculation	3344-G15-0001-001
O02	Pressure Test Certificates	3344-O02-0004-001
O02	Pressure Test Certificates	3344-O02-0001-001
A01	Document Register	3344-A01-0001-001

If you know which submittal, you can go into the "assigned" tab of the submittal, and download the document (then re-upload into the "drag and drop" area).

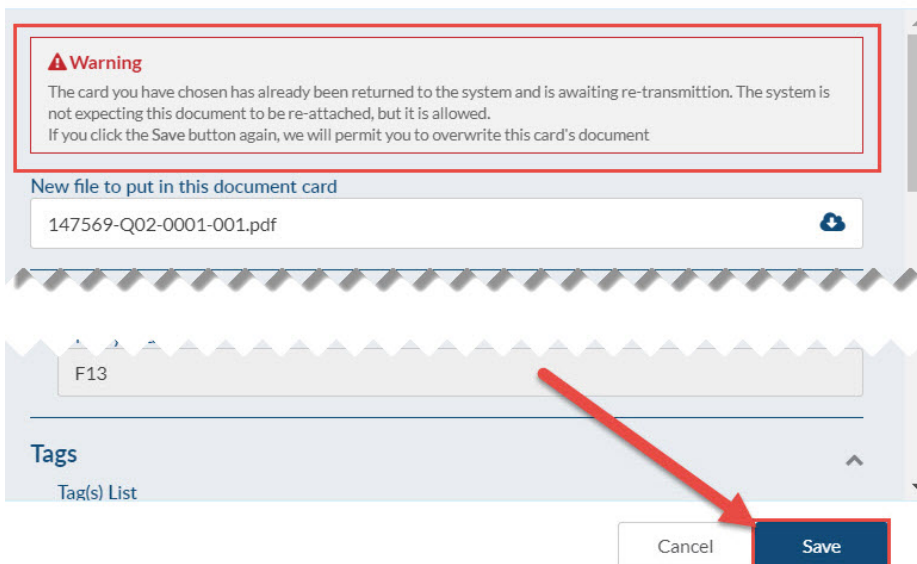
If you are unsure, you can go into the history of the card, and download the "original file". Then likewise, upload it. For more information about accessing a cards history, [click here](#).



Upload again the file in the Incoming Documents and assign it to the Card.

*Note that the Card is already processed so it's Out of Workflow. To be able to see "Out of Workflow" Cards, click on "Show".

Update the number of cover pages, indicate again the Status and finally click Save.



A new warning message will appear to remind you that this Card already has a file, and that if you click "Save" again the new file will overwrite the previous document (which is what you want).

How page count mistakes may

impact compilations

Example 1

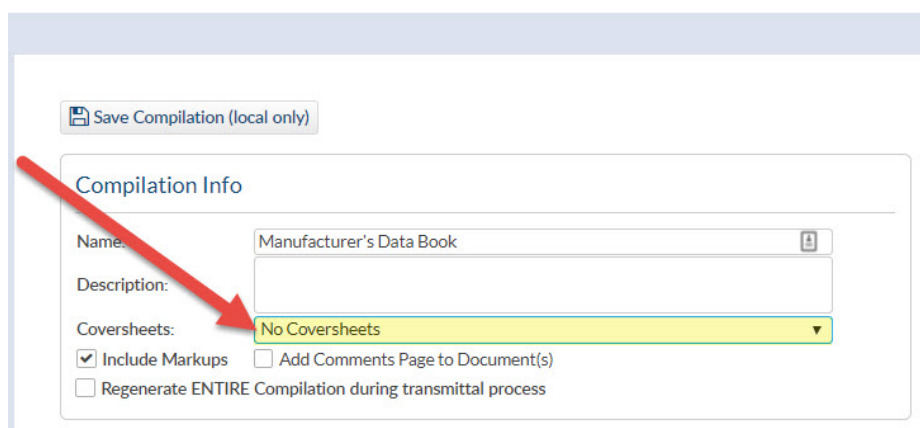
Lets assume the customer wants you to remove all document specific cover pages when you prepare the compilation. This can be done automatically in DocBoss - but if the counts are incorrect, it may produce some strange results.

If, using the previous example, that you tell the system there are 1 cover pages and 0 comment sheets, it **MUST** mean to DocBoss that the original document is now 4 pages, not the original 3. DocBoss has stripped the **NEW** cover page added by the customer (just the stamp) as the **SINGLE** cover page (1 page), and the remaining 4 pages (the original cover page plus the 3 page document) has been set in the system as the **NEW** original document. **NOTE** - you **WILL** see a warning telling you that the new document has a different page count that then original outgoing document. If you ignore it - this is accepted by the system.

When building the compilation, system will take the "new" original document (4 pages), so when you look in the compilation, you will strangely see the original cover page (which is now actually part of the **ORIGINAL** document). It can be confusion, because you have told docboss to remove "cover pages".



Index Reports & Compilations Edit Compilation



Save Compilation (local only)

Compilation Info

Name:

Description:

Coversheets: **No Coversheets**

Include Markups Add Comments Page to Document(s)

Regenerate ENTIRE Compilation during transmittal process

Follow this example where the user has set the number of the cover pages to 0. In this situation, DocBoss assumes the original document is now 5 pages, and the customer removed the original coverpage. So the 5 page document will be set as the new **ORIGINAL** document. See the error message below:

Pages in Document

Total pages in incoming document

5

⚠ 4 expected pages

How many of them are cover pages?

0

⚠ 1 expected page

How many of them are comment pages?

0

This document is just a cover page

⚠ Uh-oh, pages do not match

The last file in this document card had a different page count. It could be related to cover pages. Incoming document still be stored in history

Use incoming document

Use last transmitted document

Note that this is allowed, but a warning message will appear on screen to remind you to have another look to the number of the cover pages or if you would like to select the last transmitted document instead of incoming document (not recommended for this situation).

Example 2:

Lets assume, as in the above example, that we told system there were no cover pages for a document (when in fact there were 2).

Also - assume the compilations settings are to "Ensure every doc has cover sheet":

» DB Project (3344) » Index Reports & Compilations »

Index Reports & Compilations

Edit Compilation

Save Compilation (local only)

Compilation Info

Name: Manufacturer's Data Book

Description:

Coversheets: Ensure every doc has coversheet

Respect coversheet suppression for each card

Include Markups Add Comments Page to Document(s)

Regenerate ENTIRE Compilation during transmittal process

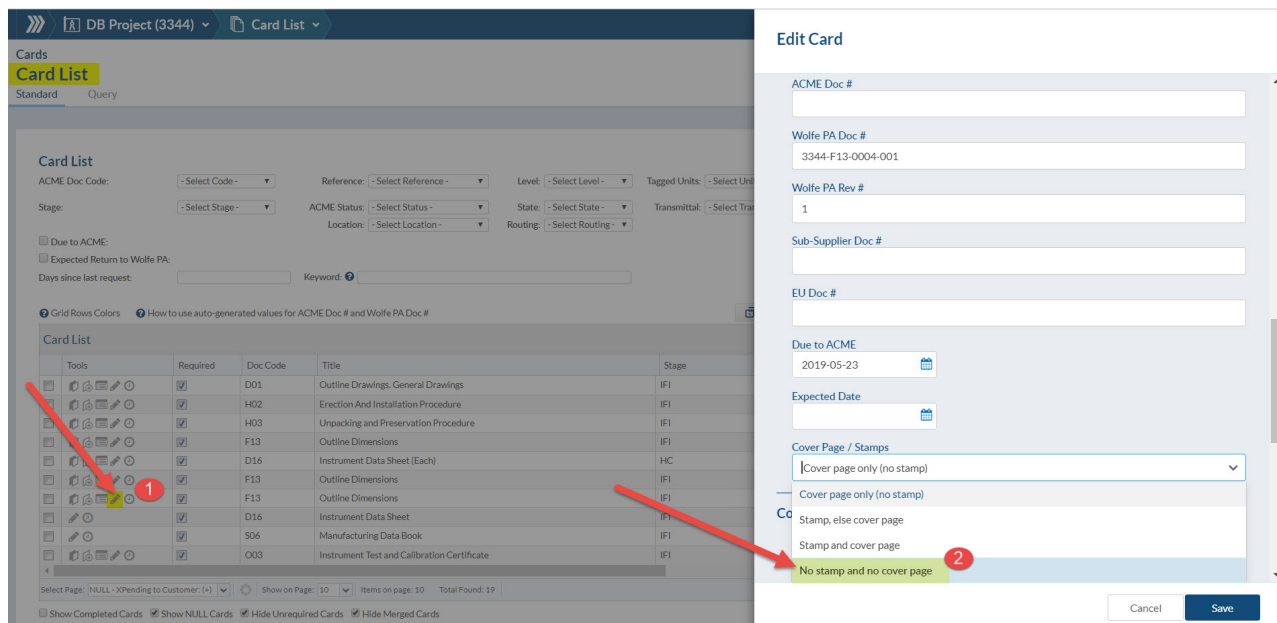
System will consider that this document has no cover pages, and therefore will add a new one!

Now the document will have the 2 cover pages from the original mistake. DocBoss thinks the 5 page document is the ORIGINAL document, and it will ADD A NEW COVER PAGE!.

Some quick troubleshooting can come up with a workaround if you are at the end of a project and just want to issue

the book without re-uploading and setting the pages correctly...

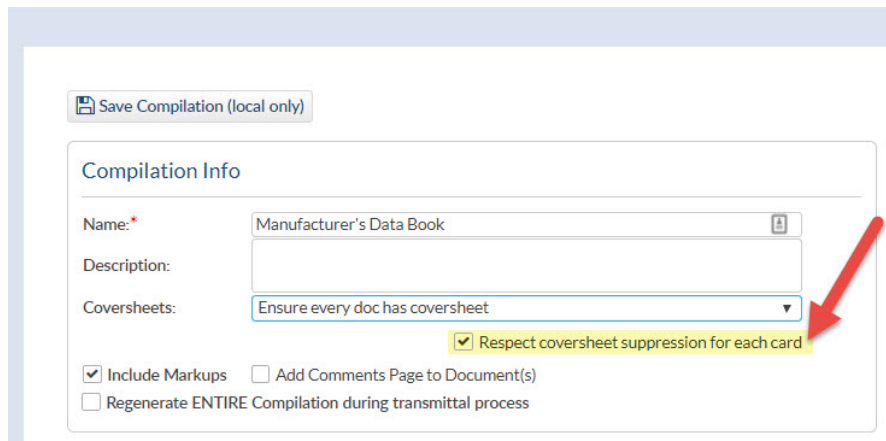
First: Change the cover page settings of the card to “No stamp and no cover page”. This tells DocBoss that we don't want to add a new cover page to this card on submittal.



If you ALSO enable “Respect cover sheet suppression for each card”, this preference for managing cover pages on submittals will also be respected during the generation of the compilation. So - no extra cover page will be added.



Index Reports & Compilations Edit Compilation



NOTE: If ALL cards were incorrectly assigned, you could just turn off cover pages for the entire book. But - if some are correct, and some are incorrect, this allows you to manage both.

Just an exercise in working with page counts! Feel free to contact support@docboss.com at anytime if you find yourself having trouble with the numbering of the document pages and cover pages.