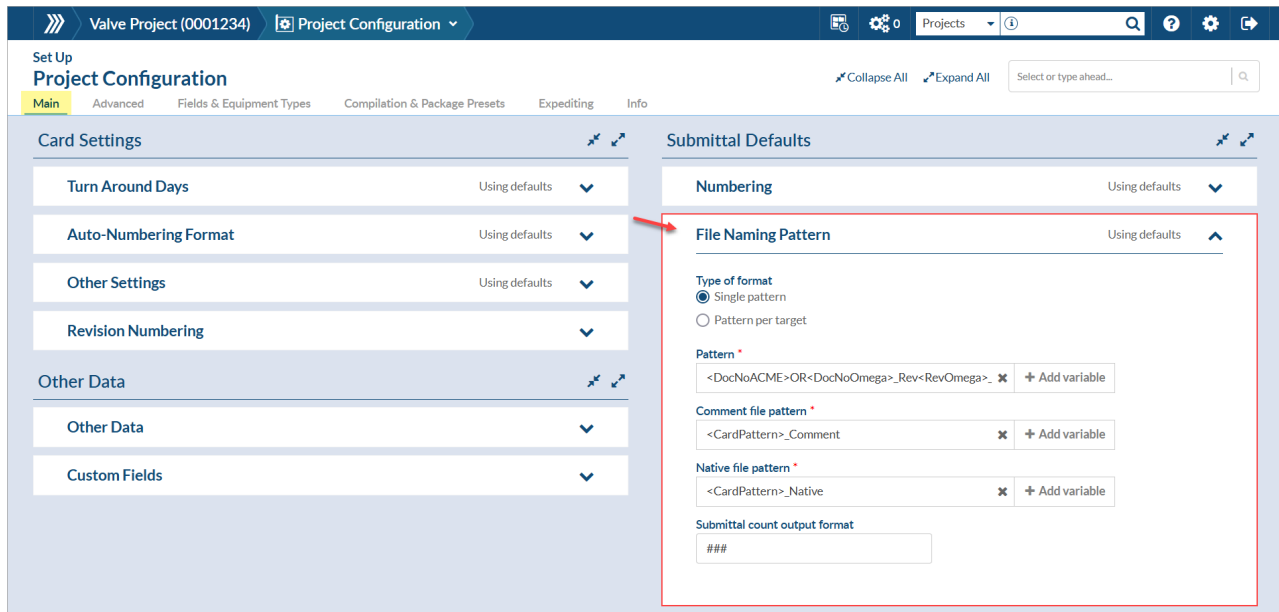# File Naming Pattern

10/01/2025 2:18 pm MDT

The file naming format is used to generate the file names on any Outgoing Submittals.
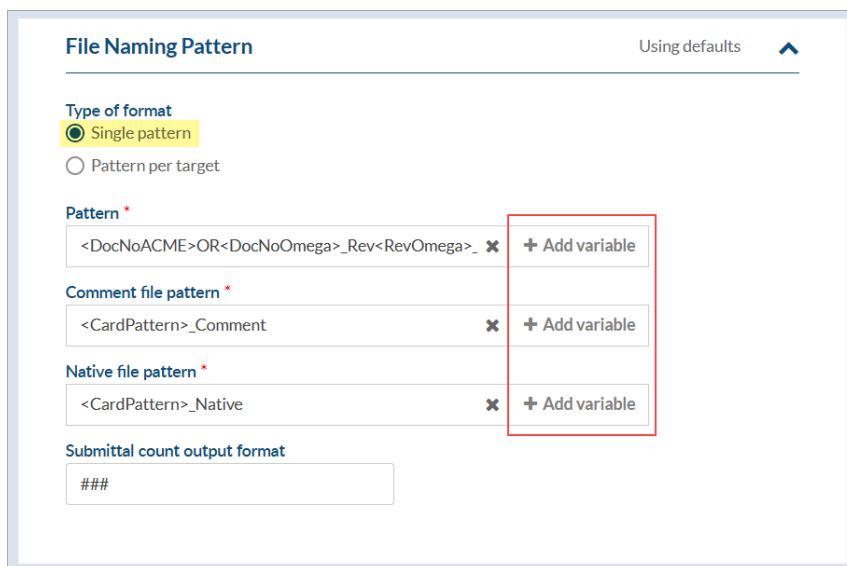
Navigate to the **Project Menu > Set Up > Project Configuration**. From the "**Main**" tab, expand the "File Naming Pattern" section.

Single pattern format

Single Pattern - Choosing a Single Pattern the SAME file name will be displayed on all the Outgoing Files. Select the desired variables by clicking the "+ Add variable" button. Plain text can also be included in the pattern.

Pattern per target

Pattern per Target - Different file name options can be selected for each type of submittal or download.

Select **Pattern per target** and configure each pattern as you would in single pattern format (above).

For Example:

Format = <SupplierDocNumber>_r<PrimaryDocRev>.
- I clicked the *Internal* DOC #, then typed "_r", then clicked *Internal* Rev #

Note 1: Using the "Customer" or "Internal" Document numbers will take advantage of the auto-numbering formats which were previously defined. If you select a variable that contains no data the file name will be empty.

Note 2: If you want to change the digit placeholders for Revision or Submittal Number Count, those settings are in the "Output Doc Settings" area (also on the main setting page of the project). The format of these outputs is defined hash marks. If Rev# is "1", and the field has three hash marks (i.e. ###), the output will be 001. If ##-###, the output would be 00-001. You can clear this field if you want to output exactly the value in the rev field (i.e. 1).

Note 3: For Native and Comment file formats, the **<CardPattern>** variable outputs the outgoing file name pattern for the applicable target. For example, if a customer requires comment files to have the same file naming convention as the primary files, but with "_Comment" appended, then the pattern to use would be: "<CardPattern>_Comment".

Native and comment file patterns

Comment and Native files can be named using variable-based patterns, just like the primary files:

Variables include:

- **<CardPattern>**: Uses the file name pattern defined for active files going to the target.
- **<UploadedFileName>**: Uses the name of the file when first uploaded to DocBoss.

- **<PreviousRevision>**: Provides the revision number of the PREVIOUS revision of the file sent to the customer. This will be empty if it is the first submittal.

The initial default is "<CardPattern>_CRS" (or "<CardPattern>_Native").

An example change might be to use the upload file name, rather than the card pattern (doc number, etc.) as the comment/native outgoing file name. If a user uploads a comment file named "Doc001.pdf", and uses <UploadedFIleName>_CRS as the comment pattern, the output would be "Doc001_CRS.pdf".

IF statements

IF statements can be applied to Outgoing File Name formats.

When your documents need to have the Title added to the outgoing file name but drawings do not, the following IF statement can be used in the File Name Format

IF("<CustField1>"="Y","<DocNoAcme>_Rev<RevAcme>","<DocNoAcme>_Rev<RevAcme>_<Title>")

The result:

If Drawing = Y: 4530KR-ISO-0001-001_Rev0.pdf

If Drawing = N (therefore a document): 4530KR-GEN-0001_Rev0_**General Document**.pdf

Note that each variable or text value **must be surrounded by quotation marks.**

CardType variable

A hidden variable<CardType> is available to determine whether a card is manual or auto generated. It can be useful for file naming patterns. The available values are "Manual" and "Auto". This variable is not presented as a button in the variable list but may be used by typing the value in.

Usage Example:

IF("<CardType>"="Manual", "<Reference>","<SupplierDocNumber>")

Results:

If Manual card display Reference

If Auto-generated card display Document Number

The OR operator

Use OR operator to take first non-null value. OR must be in caps, and the only two characters between two variables.

Parameters

You may use the following parameters inside the file name format variables

For all variables

|Split("-",X,"Y") where - is delimiter, X is segment (integer), Y is optional parameter, text to replace value in segment in the case if delimiter is not found inside value, or there is no X segment inside value.

|Length(X,"Y") where X is integer, Y is optional parameter, ellipsis

|Uppercase

For list variables only

|Separator="X", where X is text/symbol

|Count=X where X is integer (or |count(X) or |count(X,"Y")

|All="TEXT" outputs TEXT if ALL equipment list values are assigned to card

|Multiple="TEXT" outputs TEXT if MORE THAN ONE equipment list value is assigned to card (but not all). {This is specifically useful if the customer wants tag numbers (hopefully not) as part of the file name. If there are 20 tags in project, and 15 are assigned to this card, they rarely want 15 tags as part of the file name.}