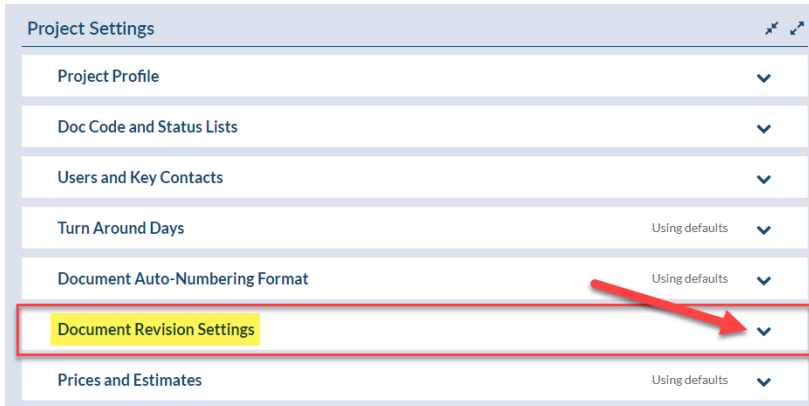


Document Revision Settings

10/23/2024 2:09 pm MDT

The document revision settings for a project are set under **Set Up > Main > Document Revision Settings**.

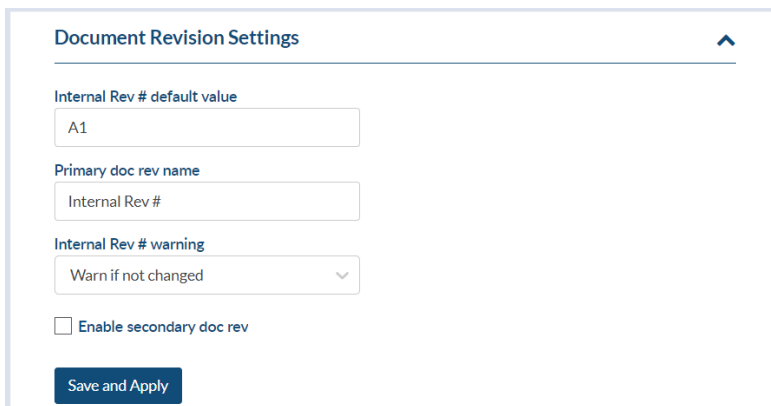
Set Up
Main



A screenshot of the 'Project Settings' menu. The menu items are: Project Profile, Doc Code and Status Lists, Users and Key Contacts, Turn Around Days (Using defaults), Document Auto-Numbering Format (Using defaults), Document Revision Settings (highlighted with a red box and a red arrow), and Prices and Estimates (Using defaults).

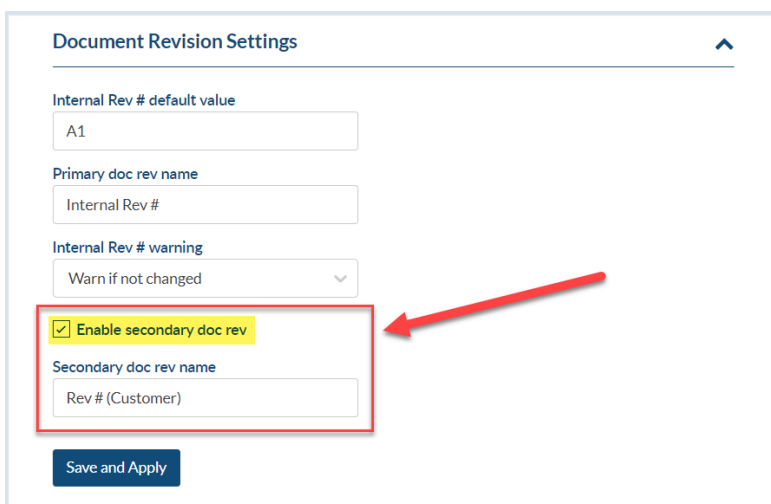
By default, DocBoss allows you to manage one revision number (primary doc rev), however you have the ability to manage two by enabling the secondary doc rev. If you want two check of the Enable Secondary Doc Rev. and you can name it accordingly, but there are no options for the secondary doc rev.

Only Primary Doc Rev Enabled



A screenshot of the 'Document Revision Settings' form. The 'Enable secondary doc rev' checkbox is unchecked. The other fields are: Internal Rev # default value (A1), Primary doc rev name (Internal Rev #), and Internal Rev # warning (Warn if not changed).

Secondary Doc Rev Enabled



A screenshot of the 'Document Revision Settings' form. The 'Enable secondary doc rev' checkbox is checked. The 'Secondary doc rev name' field is filled with 'Rev # (Customer)'. A red arrow points to the checked checkbox. The other fields are: Internal Rev # default value (A1), Primary doc rev name (Internal Rev #), and Internal Rev # warning (Warn if not changed).

Primary Doc Rev Default Value: the value that you want your default rev set to - example 1 or A

Primary Doc Rev Name: the reference that you are using to set the revision.

Primary Doc Rev Warning: When there is a change to the doc card you have three options for a warning using the drop down you can set accordingly.

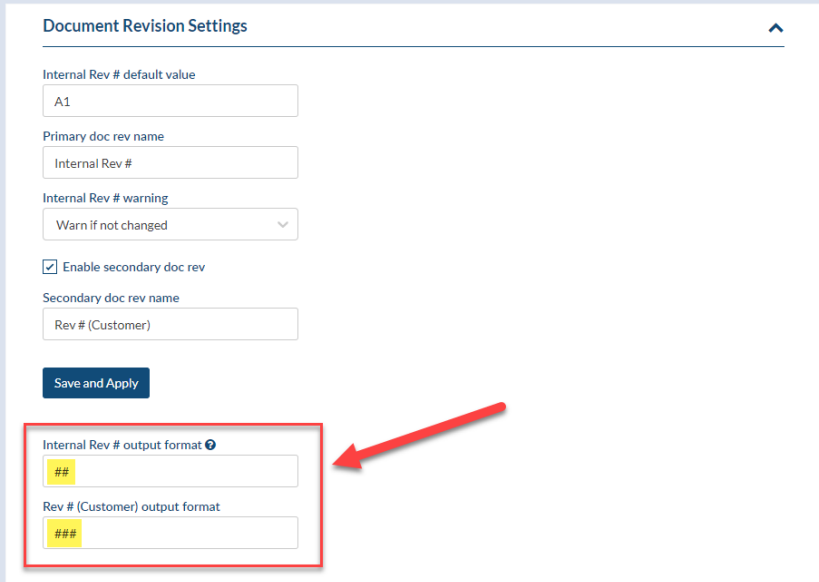
- None - there is no warning if you make a revision and do not change the primary rev number you will not get a notification
- Require New - if you make a revision to a card it is mandatory that you also change the primary rev number
- Warn if not changed - if you make a revision to a card and do not change the primary rev number you will get a pop up warning indicating that you have made a change but have not changed the revision.

Enable Secondary Doc Rev: This allows you to manage two revision numbers in the system

Secondary Doc Rev Name: (if secondary doc rev is enabled) this is the reference for the secondary doc number

Revision Format

The digits used in the revision format can be changed in Document Revision Settings > Rev # output formats:



The screenshot shows the 'Document Revision Settings' interface. It includes several input fields: 'Internal Rev # default value' (A1), 'Primary doc rev name' (Internal Rev #), 'Internal Rev # warning' (Warn if not changed), 'Enable secondary doc rev' (checked), and 'Secondary doc rev name' (Rev # (Customer)). A 'Save and Apply' button is present. At the bottom, two fields for 'Internal Rev # output format' (##) and 'Rev # (Customer) output format' (###) are highlighted with a red box. A red arrow points from the right towards the 'Internal Rev # output format' field.

Each # added corresponds to a digit in the output.

i.e. if Format contains ## the revision will be displayed as 01.