

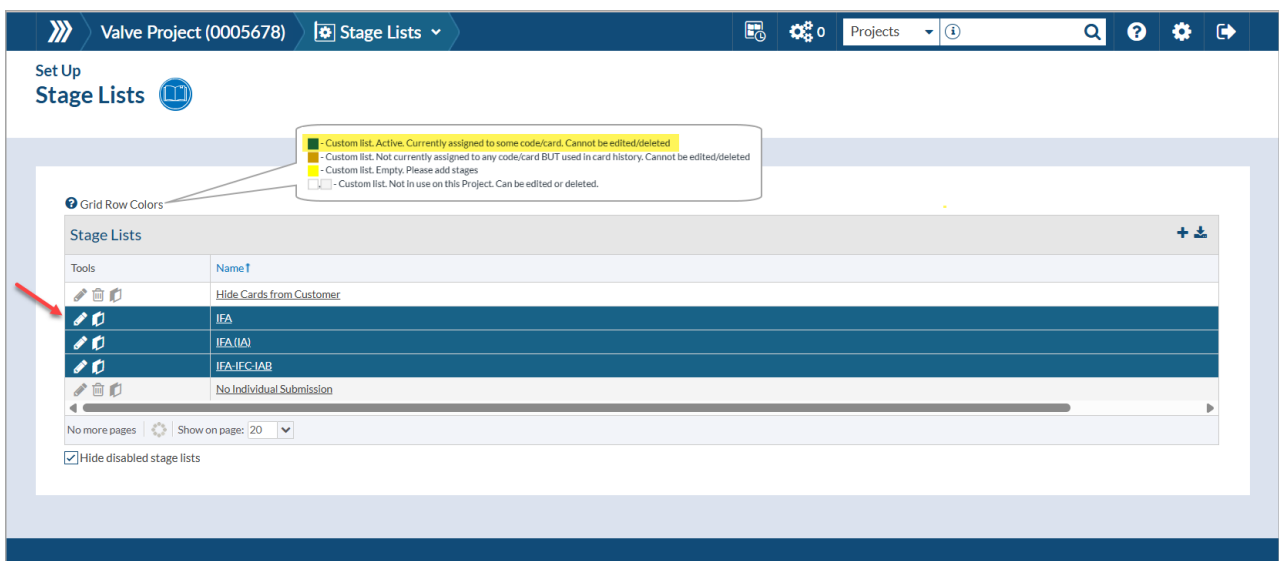
Update/Change Stage List Mid-Project

04/17/2025 12:13 pm MDT

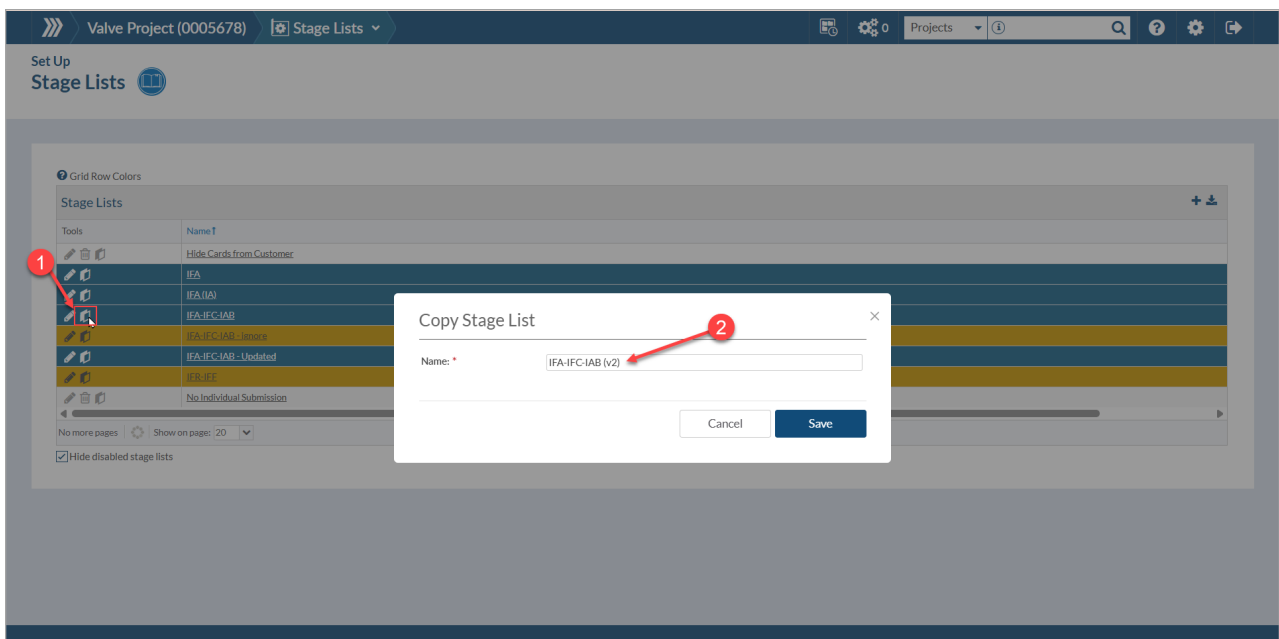
If your customer updates their requirements mid-way through an active project, it is possible to update stage lists to align with the updated requirements.

Changing Stage Lists

If a stage list is being actively used on the project, it can no longer be modified. Active stage lists are indicated in blue in the grid.



Because active stage lists cannot be modified, the stage list can instead be copied and modified as needed. To copy a stage list, click on the copy icon in the "Tools" column. Give the copied stage list a unique name, and click "Save."

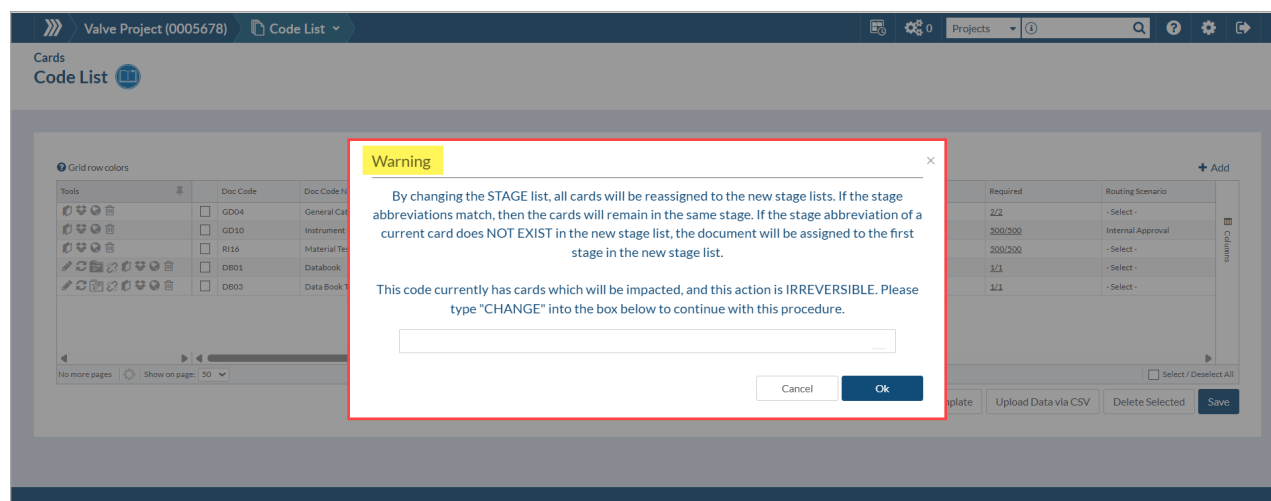


Make the required changes to the copied stage list (see support article: [Add Stage\(s\) to Stage List](#)), and set the stage list for the doc code (see support article: [Assign Stage List to Doc Code](#)).

Once the new stage list is set, DocBoss will look at the current stage of the documents and try to find a match (i.e., the same abbreviation) in the new stage list.

- If a match is found, the document will remain in the same stage.
- If a match cannot be found, the stage will be reset to the first stage of the new stage list.

The status of the document (see support article: [Status \(Combined\) Column Explanation](#)) will remain irrespective of a match being found.



list.

If the documents' current status and stage must be retained, the new stage list must include the **exact same stage abbreviations** that were used in the original stage list. If the abbreviations are different, the system will keep the current status but will update the stage to the first stage of the new stage