

How to re-submit documents that have been previously completed (approved)

04/30/2026 12:44 pm MDT

When a document it is returned by the customer with a status that have "stage complete" and this is the last or only stage, the cards it is marked as complete:

The screenshot shows the 'Card List' interface for 'Pump Project (5678)'. The interface includes a search bar, filter set dropdown, and a table of cards. The table has columns: Tools, Status (Combined), Status Group, Required, Doc Code, and Title. A red box highlights the 'Status Group' column for the first row, which contains the text 'Complete' with a red arrow pointing to it.

Tools	Status (Combined)	Status Group	Required	Doc Code	Title
<input type="checkbox"/>	1	Complete	<input checked="" type="checkbox"/>	B01	General Arrangement Drawings

Once a card it is marked as complete, there is no further workflow expected. If you are required to re-submit a completed card to the customer, the status must be reset to either X or NULL.

From the card list

To reset the status, navigate to **Project Menu > Cards > Card List** and click the pencil icon under "Tools". From the "Workflow ([Stage])" section, update the doc status to either:

- X - if the **existing** file should be re-submitted
- NULL - if a **new** version of the file is required

Processing

Viewer Off

Active File

Workflow (IFA)

Doc status *

1 - Approved

- Select doc status -

1 - Approved

2 - Approved with Comments, Resubmit

3 - Rejected

4 - For Information Only

NULL - Needs active file

X - Customer status not yet assigned

Z - System completed

Card Info



Note: If the card has gone through several stages, resetting the status to "NULL" will prompt you to confirm whether to restart the entire stage workflow (from the first stage), or restart the current stage only.

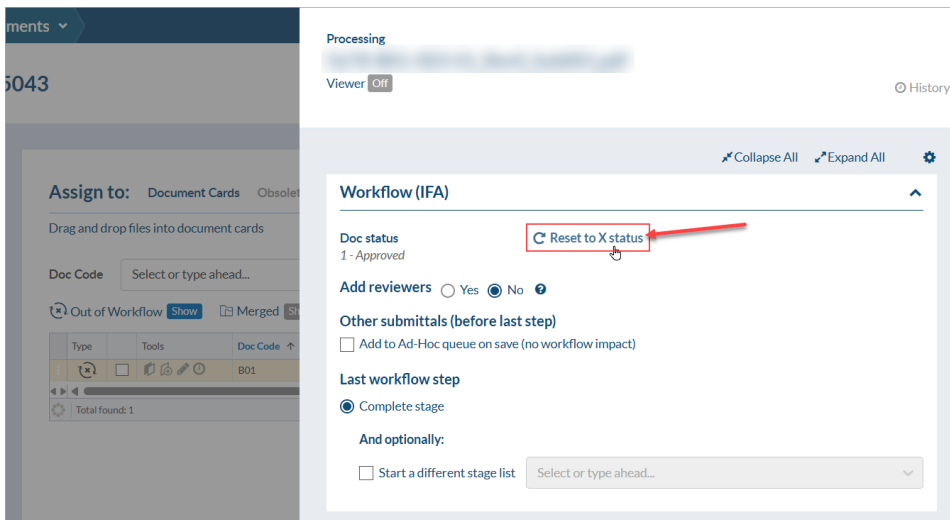
Confirmation

You have asked to set this card to NULL status, but it is not in the first stage of workflow. Would you like to keep the card in current stage, or reset entire document workflow?

KEEP EXISTING STAGE RESET TO START

From incoming documents

If a new version of the file needs to be submitted, the status can be reset from the incoming documents page (Project Menu > Cards In/Out > Incoming Documents). To do this, upload the file and assign it to the completed card. From the "Workflow ([Stage])" section, click the "Reset to X status" button.



Note: If the card has gone through several stages, resetting the status to "X" will queue the card for re-submittal in the **current stage**. If the card should be submittal in the first/a previous stage, changing the stage will automatically reset the status to "X" for re-submittal in the selected stage.

