

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

09/16/2024 1:22 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:

Card List								
	Required	Tools	Card Name(Auto)	Doc Code ↑	Title	Status (Combined)	Status Group ▾	Stage
<input type="checkbox"/>	<input checked="" type="checkbox"/>		B01_AE-1340-1	B01	General Arrangement Drawings	1	Complete	IFI
<input type="checkbox"/>	<input checked="" type="checkbox"/>		B01_PIT-17-16-1	B01	General Arrangement Drawings	1	Complete	IFI
<input type="checkbox"/>	<input checked="" type="checkbox"/>		B01_PIT-17-16-2	B01	General Arrangement Drawings	1	Complete	IFI
<input type="checkbox"/>	<input checked="" type="checkbox"/>		B01_PIT-17-36-1	B01	General Arrangement Drawings	1	Complete	IFI
<input type="checkbox"/>	<input checked="" type="checkbox"/>		B01_PIT-17-36-2	B01	General Arrangement Drawings	1	Complete	IFI
<input type="checkbox"/>	<input checked="" type="checkbox"/>		B01_PIT-17-36-11	B01	General Arrangement Drawings	1	Complete	IFI

Once a card it is marked as complete, there is no further workflow expected.

If there is a new file uploaded and assigned to a completed card, the system will just replace the last assigned file with the most recent one but the status of the card will remain unchanged.

If it is required to re-submit a completed card to the customer, first the status of the cards should be modified to NULL or to X.

- Set to NULL - if there will be a new file uploaded and assigned to the card
- Set to X - Required for Order but Initial Submission not yet made - if the last assigned file to the card should be sent to the customer (in this case the card will be automatically placed in the Outgoing Submittals).

The screenshot shows the 'Card List' interface with a dropdown menu open for 'Doc Status'. The menu options are:

- 1 - No Comments - Certified Final
- 2 - Revise as noted
- 3 - Revise as noted and re-submit for review Work may not proceed
- 4 - Review Not Required
- NULL - NULL status
- X - Required for Order but Initial Submission not yet made

Red circles and arrows highlight the 'Doc Status' dropdown (1) and the 'NULL' and 'X' options (2).