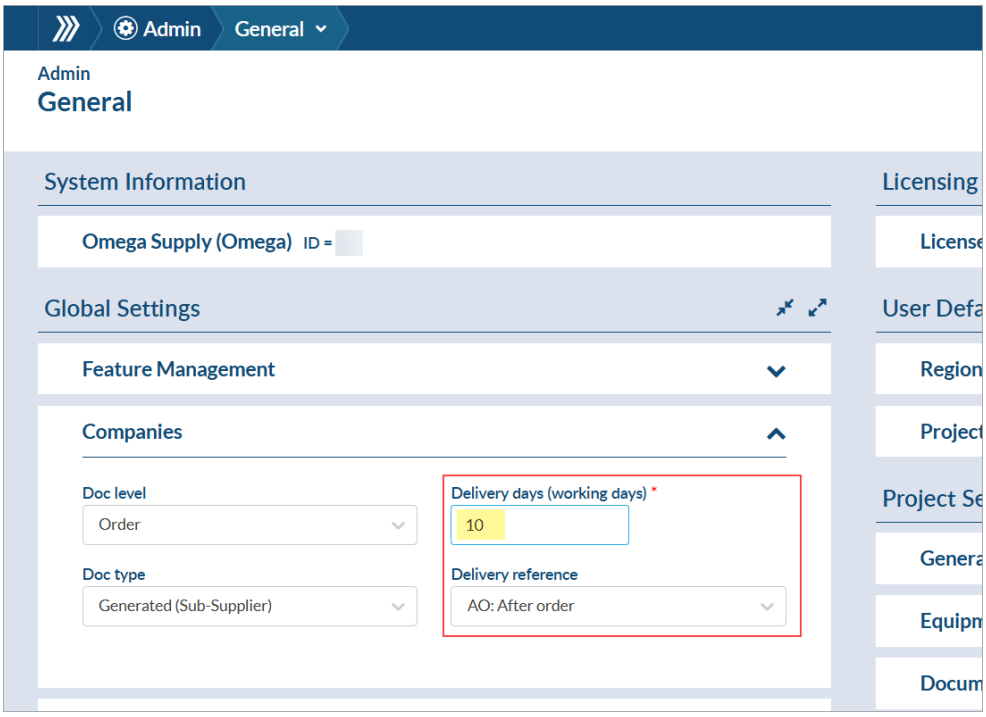
Initial Submission Dates

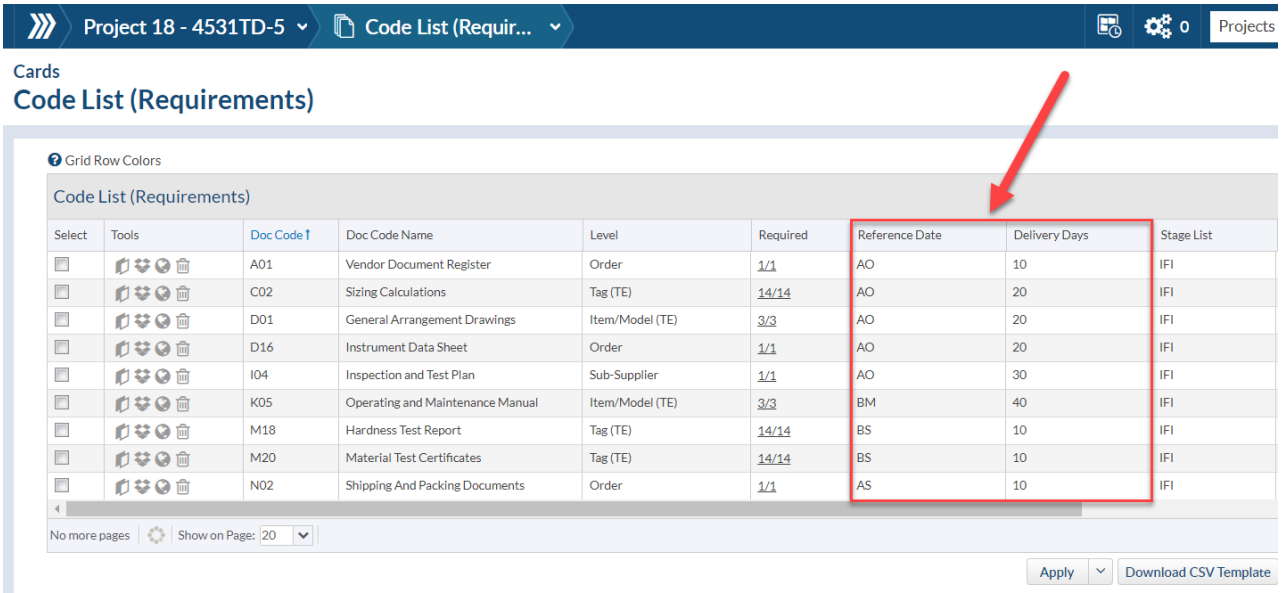
11/05/2025 4:36 pm MST

When creating a new Project, the initial submission dates (original scheduled dates) are set by default to 10 days after order date (global setting modifiable from System Menu > Admin > General).



This can be changed from the Code List using reference date and delivery days columns or specific dates can be selected on the Card List.

From Code List (Requirements)



Reference date has six options and is used to identify the anchor date from which we calculate delivery. Delivery days identifies the offset to the anchor.

For example: The Vendor Document Register initial submission date is calculated using the Delivery Days of "10" and Reference Date "AO" (After Order). So the Document Schedule initial submission date will be 10 days after Order.

Note: to calculate 2 calendar weeks users should select 10 (**working**) Delivery Days

AS: After shipment (based on ship date on equipment list/major tag)
BS: Before shipment (based on ship date on equipment list/major tag)
AO: After order (based on order date on setup>main)
ARAD: After receipt of approved Drawings (based on ARAD date on setup>main)
AM: After milestone (based on milestone date on equipment list/major tag)
BM: Before milestone (based on milestone date on equipment list/major tag)

The initial submission dates based on the selection from the doc codes are included in the Due to *Customer* column on the Card List and these are automatically applied to the auto-generated cards and also to manual cards.



If using the shipment date reference (before or after) and the card is linked to equipment with multiple shipment dates, the date **furthest in the future** will be used as the reference date.

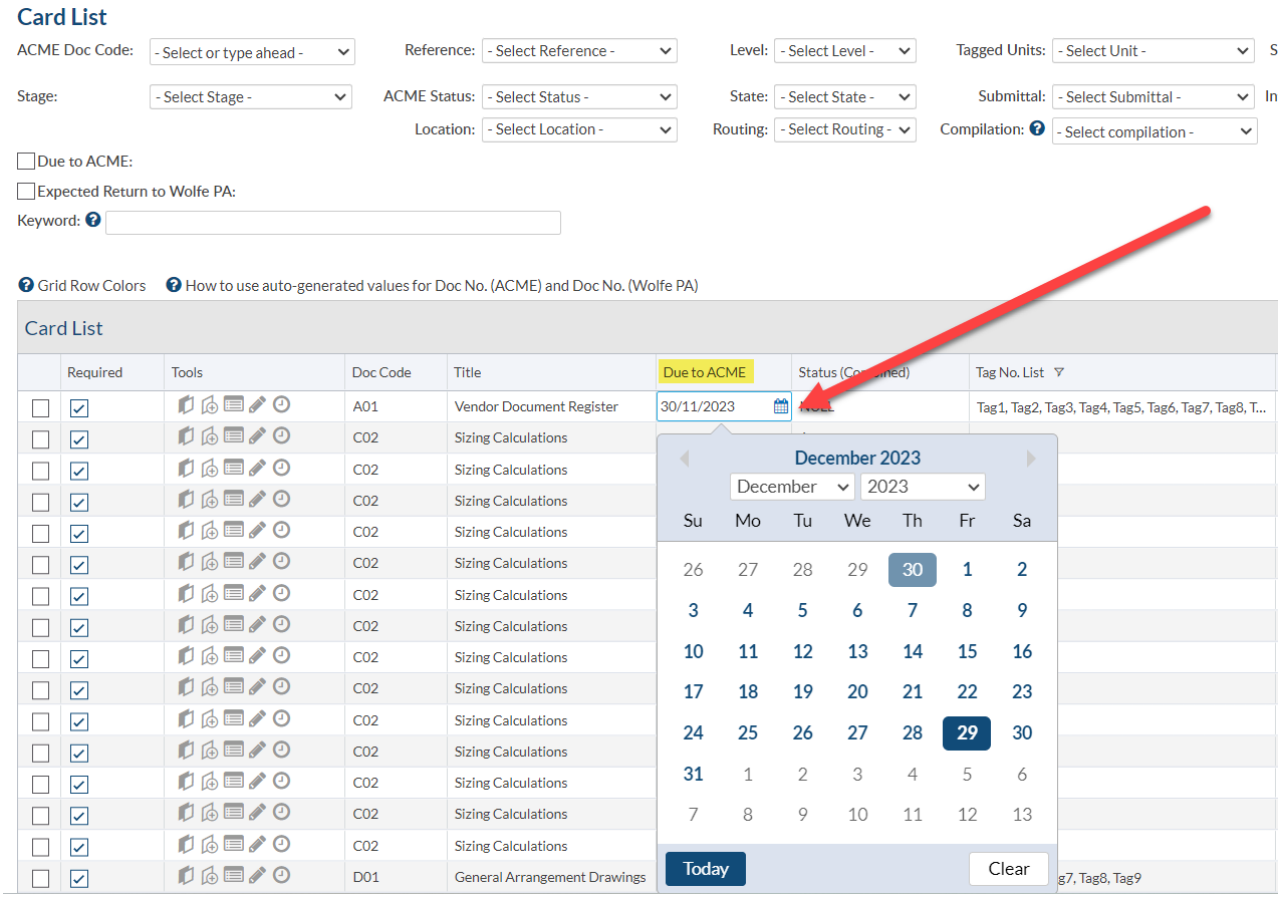
*Example: The final data book is due 10 days after the shipment date. The level is order, so the due date would be 10 days after the **last** unit ships.*

Reference date and delivery days can be set also on the company code list before creating the Project. This way the initial submission dates will be automatically calculated when adding the doc codes to the Project and it can be re-used in future Projects too.

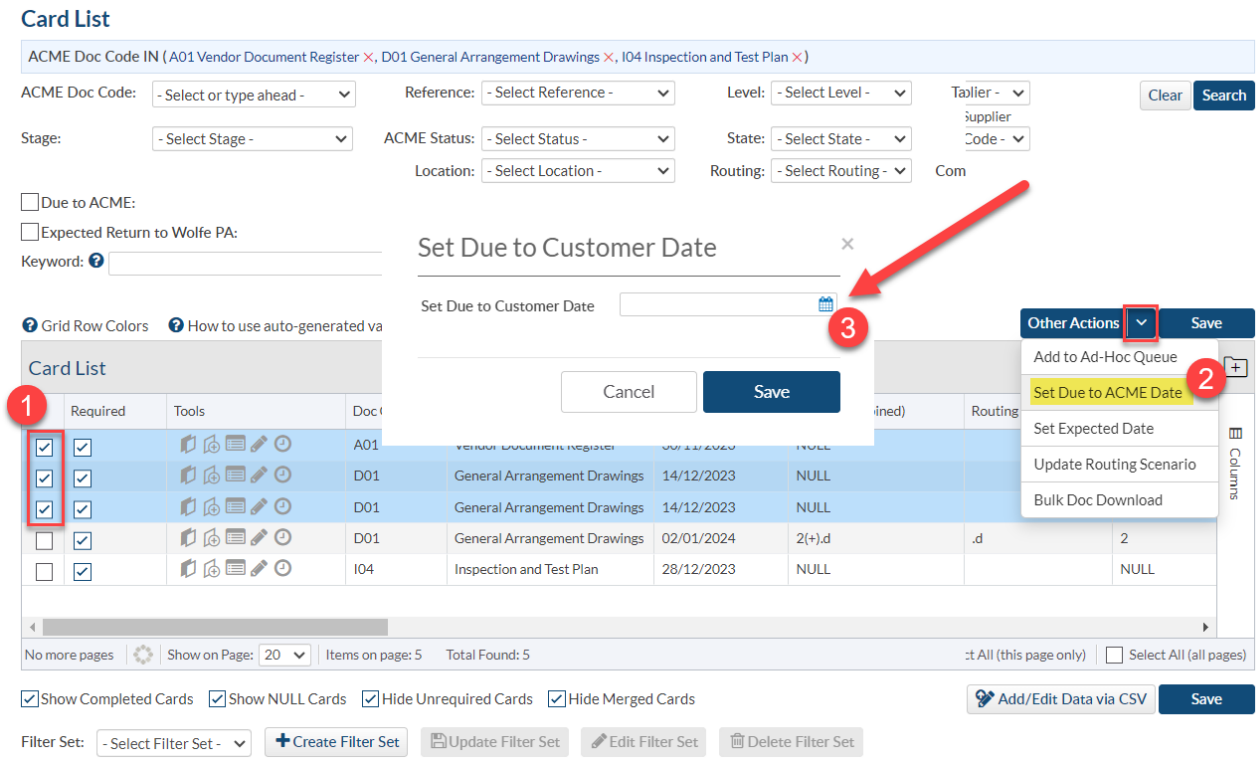
From Card List

There are several ways to change the initial submission dates on the Card List:

- Under Due to *Customer* column a new date can be selected manually for each card.



- If the same date it is applicable to several cards this can be assigned in bulk:

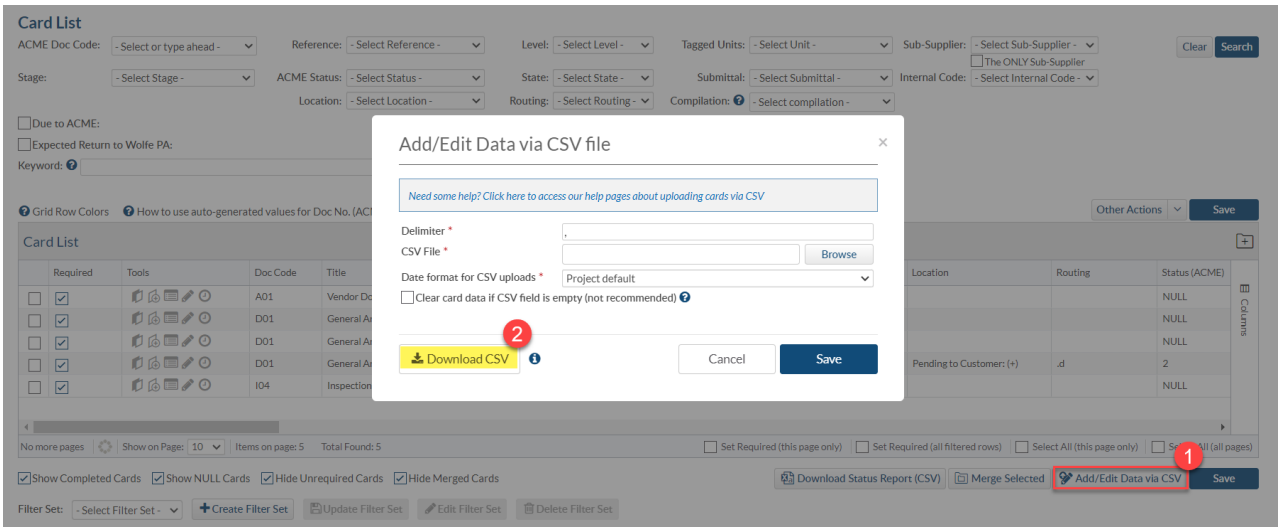


1) Select the cards you want to update. To select many cards at once, filter for all the cards which require the date changed, then check "Select All (All Pages)". This will only select cards which are part of the filtered set.

2) Click the drop down beside "Other Actions" and select option "Set Due to *Customer* Date"

3) Select which date you want to change and click Save

- Due to *Customer* dates can be changed also by CSV:

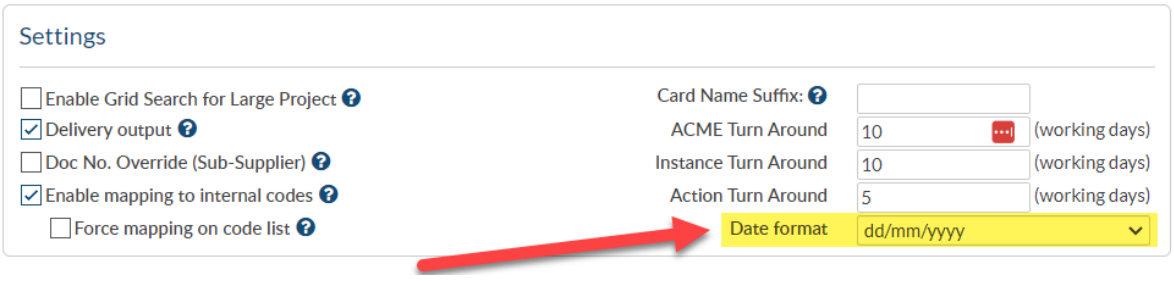


1) Click on "Add/Edit Data via CSV" button

2) Download CSV

Change the dates under Due to *Customer* column in the CSV, then save and upload. For more details about editing cards by CSV, see our article here.

*NOTE: The date format used on the CSV should be the same as the date format set in Main:

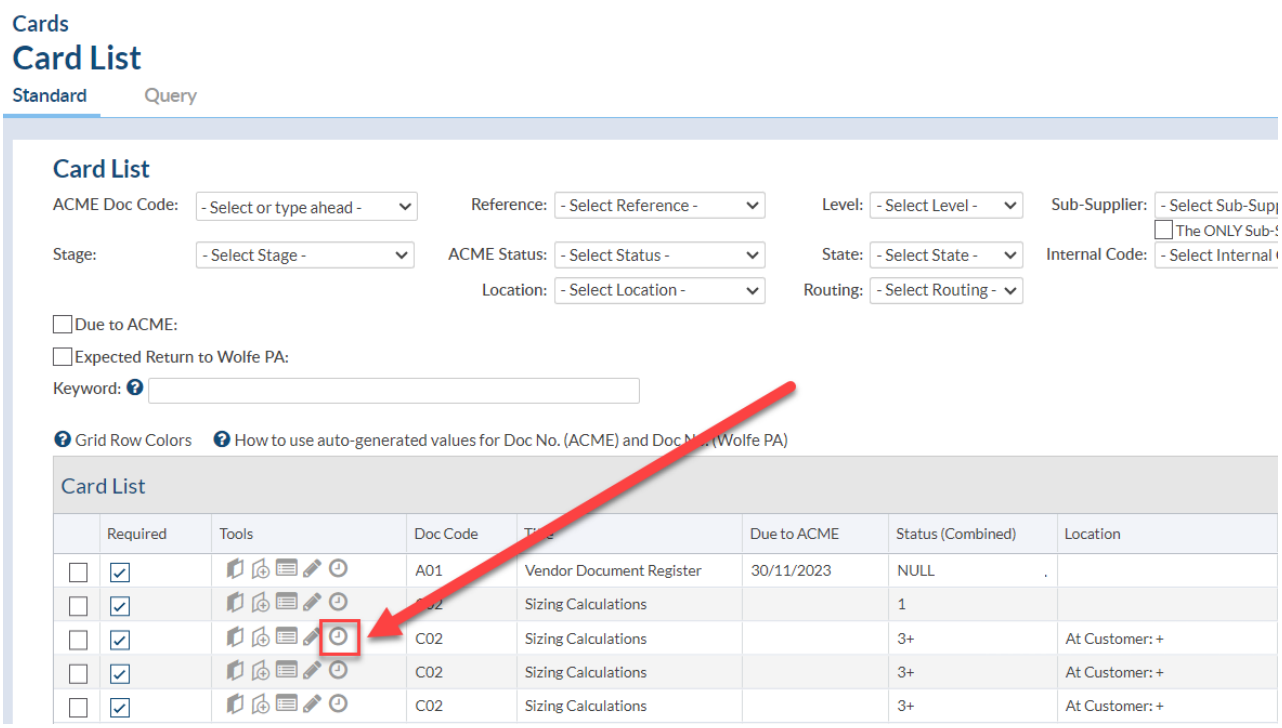


Once the cards are submitted to customer, the data from Due to *Customer* it is cleared and will be re-set to a new due date (10 days after the document has been returned) if the document has been received without complete status (ie. with comments or rejected).

The initial submission dates set before creating the first submittal of the cards will be saved as the original scheduled date in the card's history and can be included in Document Indexes (SDI reports) generated in DocBoss using the variable: <DocumentsByIndex.Original_Scheduled_Date>

Updating initial submission dates after document submittal

If the initial submission dates have not been set before creating the first submittal of the cards, and you wish to include them in a document index, the correct date should be set from each Card's history:



On the history tab, find the line with X(+) status which belongs before the first submittal has been created and click the Edit button to change the Due to *Customer* date:

