

# Initial Submission Dates

07/19/2024 2:06 pm EDT

When creating a new Project, the initial submission dates (original scheduled dates) are set by default to 10 days after order date indicated in Main.

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)

Project 18 - 4531TD-5 Code List (Requir... Projects

Grid Row Colors

Code List (Requirements)

Select	Tools	Doc Code	Doc Code Name	Level	Required	Reference Date	Delivery Days	Stage List
<input type="checkbox"/>		A01	Vendor Document Register	Order	1/1	AO	10	IFI
<input type="checkbox"/>		C02	Sizing Calculations	Tag (TE)	14/14	AO	20	IFI
<input type="checkbox"/>		D01	General Arrangement Drawings	Item/Model (TE)	3/3	AO	20	IFI
<input type="checkbox"/>		D16	Instrument Data Sheet	Order	1/1	AO	20	IFI
<input type="checkbox"/>		I04	Inspection and Test Plan	Sub-Supplier	1/1	AO	30	IFI
<input type="checkbox"/>		K05	Operating and Maintenance Manual	Item/Model (TE)	3/3	BM	40	IFI
<input type="checkbox"/>		M18	Hardness Test Report	Tag (TE)	14/14	BS	10	IFI
<input type="checkbox"/>		M20	Material Test Certificates	Tag (TE)	14/14	BS	10	IFI
<input type="checkbox"/>		N02	Shipping And Packing Documents	Order	1/1	AS	10	IFI

No more pages Show on Page: 20 Apply Download CSV Template

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.

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.

### Card List

ACME Doc Code:  Reference:  Level:  Tagged Units:  S

Stage:  ACME Status:  State:  Submittal:  In

Location:  Routing:  Compilation:

Due to ACME:  
 Expected Return to Wolfe PA:  
Keyword:

[Grid Row Colors](#) [How to use auto-generated values for Doc No. \(ACME\) and Doc No. \(Wolfe PA\)](#)

Card List							
	Required	Tools	Doc Code	Title	Due to ACME	Status (Completed)	Tag No. List
<input type="checkbox"/>	<input checked="" type="checkbox"/>		A01	Vendor Document Register	30/11/2023	Completed	Tag1, Tag2, Tag3, Tag4, Tag5, Tag6, Tag7, Tag8, T...
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		C02	Sizing Calculations			
<input type="checkbox"/>	<input checked="" type="checkbox"/>		D01	General Arrangement Drawings			g7, Tag8, Tag9

December 2023

December 2023

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6
7	8	9	10	11	12	13

Today Clear

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

## Card List

ACME Doc Code IN (A01 Vendor Document Register X, D01 General Arrangement Drawings X, I04 Inspection and Test Plan X)

ACME Doc Code: - Select or type ahead - Reference: - Select Reference - Level: - Select Level - Taxlier - supplier Code - Clear Search

Stage: - Select Stage - ACME Status: - Select Status - State: - Select State - Location: - Select Location - Routing: - Select Routing - Com

Due to ACME:  
 Expected Return to Wolfe PA:  
Keyword: ?

Grid Row Colors How to use auto-generated va

Card List

Required	Tools	Doc Code	Title	Due to Customer Date	Status (ACME)
<input checked="" type="checkbox"/>		A01	Vendor Document Register	09/11/2023	NULL
<input checked="" type="checkbox"/>		D01	General Arrangement Drawings	14/12/2023	NULL
<input checked="" type="checkbox"/>		D01	General Arrangement Drawings	14/12/2023	NULL
<input type="checkbox"/>		D01	General Arrangement Drawings	02/01/2024	2(+).d
<input type="checkbox"/>		I04	Inspection and Test Plan	28/12/2023	NULL

Other Actions Save

Set Due to Customer Date

Set Due to Customer Date

Cancel Save

Other Actions Save

Add to Ad-Hoc Queue

Set Due to ACME Date

Set Expected Date

Update Routing Scenario

Bulk Doc Download

No more pages Show on Page: 20 Items on page: 5 Total Found: 5

Show Completed Cards Show NULL Cards Hide Unrequired Cards Hide Merged Cards Add/Edit Data via CSV Save

Filter Set: - Select Filter Set - Create Filter Set Update Filter Set Edit Filter Set Delete Filter Set

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:

Card List

ACME Doc Code: - Select or type ahead - Reference: - Select Reference - Level: - Select Level - Tagged Units: - Select Unit - Sub-Supplier: - Select Sub-Supplier - Clear Search

Stage: - Select Stage - ACME Status: - Select Status - State: - Select State - Submittal: - Select Submittal - Internal Code: - Select Internal Code -

Due to ACME:  
 Expected Return to Wolfe PA:  
Keyword: ?

Grid Row Colors How to use auto-generated values for Doc No. (AC

Card List

Required	Tools	Doc Code	Title	Location	Routing	Status (ACME)
<input checked="" type="checkbox"/>		A01	Vendor Document Register			NULL
<input checked="" type="checkbox"/>		D01	General Arrangement Drawings			NULL
<input checked="" type="checkbox"/>		D01	General Arrangement Drawings			NULL
<input checked="" type="checkbox"/>		D01	General Arrangement Drawings			NULL
<input type="checkbox"/>		I04	Inspection and Test Plan	Pending to Customer: (+)	.d	2

Add/Edit Data via CSV file

Need some help? Click here to access our help pages about uploading cards via CSV

Delimiter \*

CSV File \* Browse

Date format for CSV uploads \* Project default

Clear card data if CSV field is empty (not recommended)

Download CSV

Cancel Save

No more pages Show on Page: 10 Items on page: 5 Total Found: 5

Show Completed Cards Show NULL Cards Hide Unrequired Cards Hide Merged Cards Download Status Report (CSV) Merge Selected Add/Edit Data via CSV Save

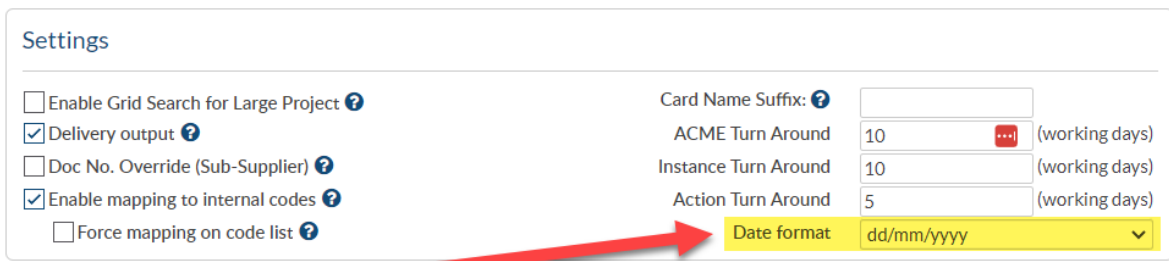
Filter Set: - Select Filter Set - Create Filter Set Update Filter Set Edit Filter Set Delete Filter Set

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:



Settings

Enable Grid Search for Large Project ?

Delivery output ?

Doc No. Override (Sub-Supplier) ?

Enable mapping to internal codes ?

Force mapping on code list ?

Card Name Suffix: ?

ACME Turn Around: 10 (working days)

Instance Turn Around: 10 (working days)

Action Turn Around: 5 (working days)

Date format: dd/mm/yyyy

Once the cards are submitted to customer, the data from Due to Customer 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>

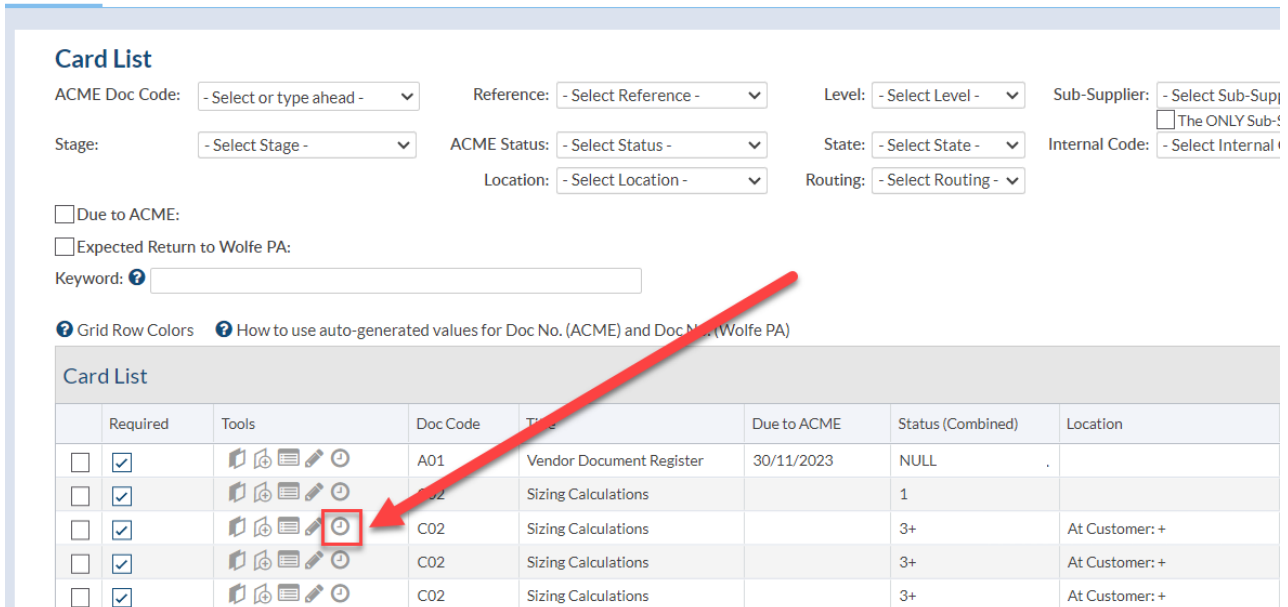
## Updating initial submission dates after document submittal

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:

### Cards

### Card List

Standard Query



Card List

ACME Doc Code: - Select or type ahead - Reference: - Select Reference - Level: - Select Level - Sub-Supplier: - Select Sub-Supl  
 The ONLY Sub-!

Stage: - Select Stage - ACME Status: - Select Status - State: - Select State - Internal Code: - Select Internal  
Location: - Select Location - Routing: - Select Routing -

Due to ACME:  
 Expected Return to Wolfe PA:  
Keyword: ?

? Grid Row Colors ? How to use auto-generated values for Doc No. (ACME) and Doc No. (Wolfe PA)

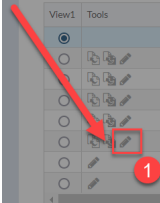
Required	Tools	Doc Code	Type	Due to ACME	Status (Combined)	Location
<input type="checkbox"/>	<input checked="" type="checkbox"/>	A01	Vendor Document Register	30/11/2023	NULL	.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	C02	Sizing Calculations		1	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	C02	Sizing Calculations		3+	At Customer: +
<input type="checkbox"/>	<input checked="" type="checkbox"/>	C02	Sizing Calculations		3+	At Customer: +
<input type="checkbox"/>	<input checked="" type="checkbox"/>	C02	Sizing Calculations		3+	At Customer: +

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:

### File History

Active send/return pairs Show Entries displayed on cover pages Show Grid Row Colors

View1	Tools	User	Recorded I	Status	Active SEND record	Active RETURN record	Out
		tunde@docboss.com	21/12/2023 12:38:24	3+	Y		T-03
		tunde@docboss.com	21/12/2023 12:36:56	3(+)			
		tunde@docboss.com	20/12/2023 12:49:21	3-	Y		T(S)
		tunde@docboss.com	20/12/2023 12:41:41	3(-)		Y	
		tunde@docboss.com	20/12/2023 12:31:29	X+	Y		T-03
		tunde@docboss.com	19/12/2023 18:54:15	X(+)			
		tunde@docboss.com	19/12/2023 18:42:40	NULL			
		tunde@docboss.com	19/12/2023 18:42:38	NULL			



### Edit History Record

4531TD-5-A00-0010

Wolfe PA Rev #  
0

Doc No. (Sub-Supplier)  
[Empty field]

Doc No. (End User)  
[Empty field]

Submittal Count (ACME)  
0

Due to ACME  
30/11/2023 2

Expected Date  
[Empty field]

Cover Page / Stamps  
Cover page only (no stamp)

Cancel Save as new before Save as new after Save