

Initial Submission Dates

10/01/2025 12:20 pm MDT

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).

Admin
General

System Information

Omega Supply (Omega) ID =

Global Settings

Feature Management

Companies

Doc level
Order

Doc type
Generated (Sub-Supplier)

Delivery days (working days) *

10

Delivery reference
AO: After order

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 (Requirements)

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	Not Started	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"/>		D01	General Arrangement Drawings			g7, Tag8, Tag9

- 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 - Taxier: -
Stage: - Select Stage - ACME Status: - Select Status - State: - Select State - Supplier Code: -
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

1

Required	Tools	Doc
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	A01
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	D01
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	D01
<input type="checkbox"/>	<input checked="" type="checkbox"/>	D01
<input type="checkbox"/>	<input checked="" type="checkbox"/>	I04

Set Due to Customer Date

Set Due to Customer Date

3

Other Actions

2

Save

Cancel

Save

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

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

Add/Edit Data via CSV Save

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 -
Stage: - Select Stage - ACME Status: - Select Status - State: - Select State - Submittal: - Select Submittal - Internal Code: - Select Internal Code -
Location: - Select Location - Routing: - Select Routing - Compilation: - Select compilation -

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

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

Card List

1

Required	Tools	Doc Code	Title
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	A01	Vendor Document Register
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	D01	General Arrangement Drawings
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	D01	General Arrangement Drawings
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	D01	General Arrangement Drawings
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	I04	Inspection and Test Plan

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)

2

Download CSV

Cancel

Save

Download Status Report (CSV) Merge Selected Add/Edit Data via CSV 1 Save

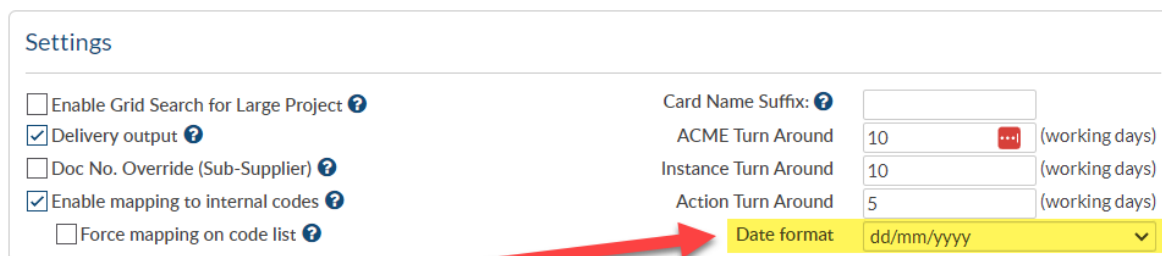
1) Click on "Add/Edit Data via CSV" button

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:



The screenshot shows the 'Settings' page. On the left, there are several checkboxes: 'Enable Grid Search for Large Project' (unchecked), 'Delivery output' (checked), 'Doc No. Override (Sub-Supplier)' (unchecked), 'Enable mapping to internal codes' (checked), and 'Force mapping on code list' (unchecked). On the right, there are input fields for 'Card Name Suffix', 'ACME Turn Around' (10), 'Instance Turn Around' (10), and 'Action Turn Around' (5), each followed by '(working days)'. At the bottom right, there is a 'Date format' dropdown menu set to 'dd/mm/yyyy'. A red arrow points from the 'Date format' dropdown to the text below.

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

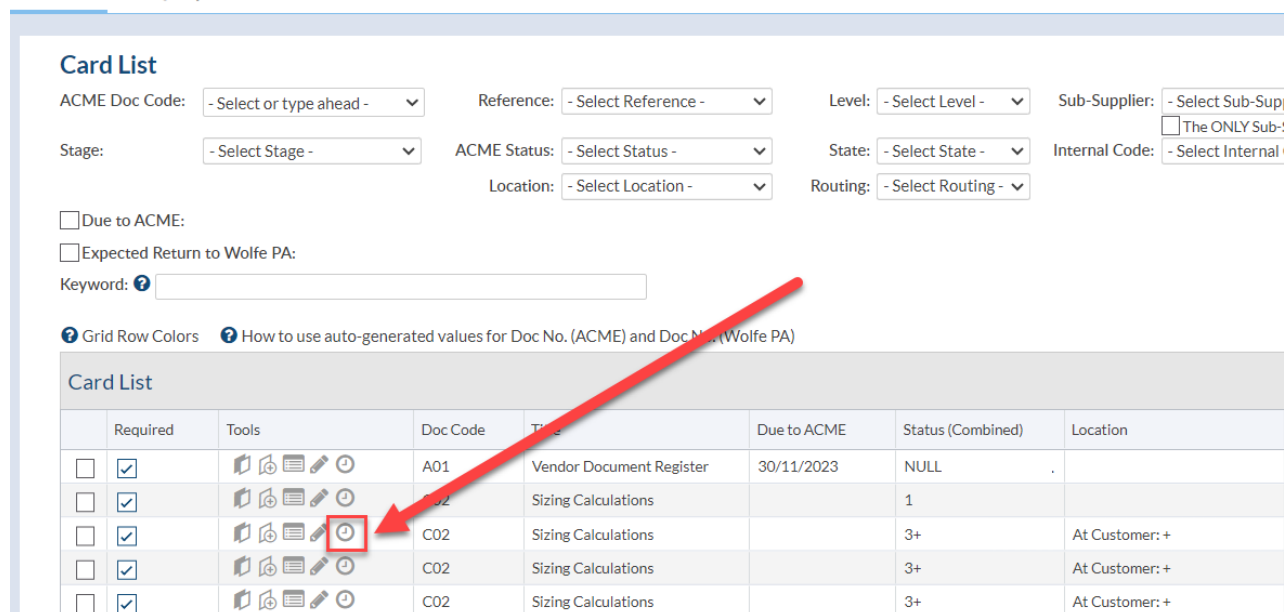
If the initial submission dates have not been set before creating the first submittal of the cards, and you wish to include them in a document index, the correct date should be set from each Card's history:

Cards

Card List

Standard

Query



The screenshot shows the 'Card List' page. At the top, there are several dropdown menus for filtering: 'ACME Doc Code', 'Reference', 'Level', 'Sub-Supplier', 'Stage', 'ACME Status', 'State', 'Internal Code', 'Location', and 'Routing'. Below these are checkboxes for 'Due to ACME' and 'Expected Return to Wolfe PA', and a 'Keyword' search field. A red arrow points from the 'Date format' dropdown in the previous screenshot to the 'Edit' button (represented by a circular icon with a pencil) in the 'Tools' column of the 'Card List' table. The table has columns: 'Required', 'Tools', 'Doc Code', 'Title', 'Due to ACME', 'Status (Combined)', and 'Location'. The table contains five rows of data.

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

Project 18 - 4531TD-5 / Card History
4531TD-5-A00-0010 (C02_Tag10)

File History

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

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

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View 1 21/12/2023 12:38:24 (latest) Status: 3+ Rev: 1

Page 1 / 3 75%

Edit History Record

4531TD-5-A00-0010

Wolfe PA Rev #

0

Doc No. (Sub-Supplier)

Doc No. (End User)

Submittal Count (ACME)

0

Due to ACME

30/11/2023

Expected Date

Cover Page / Stamps

Cover page only (no stamp)

Cancel

Save as new before

Save as new after

Save