

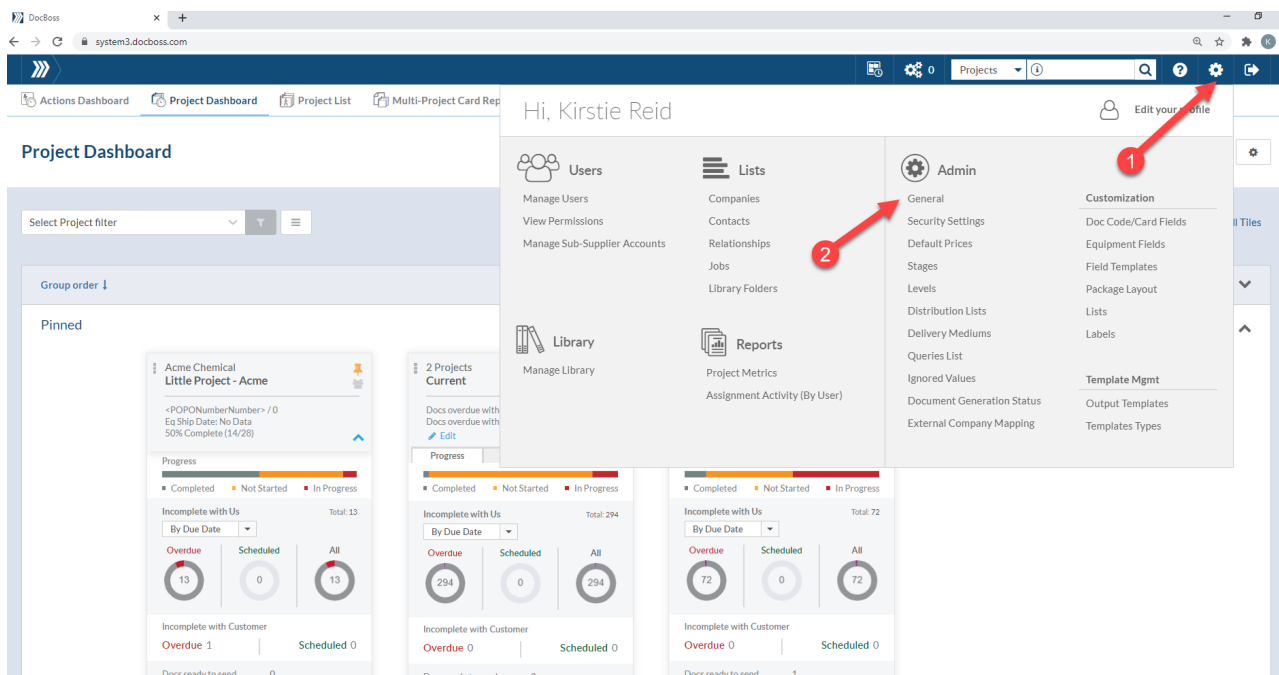
# Set Date Format

09/16/2024 2:21 pm MDT

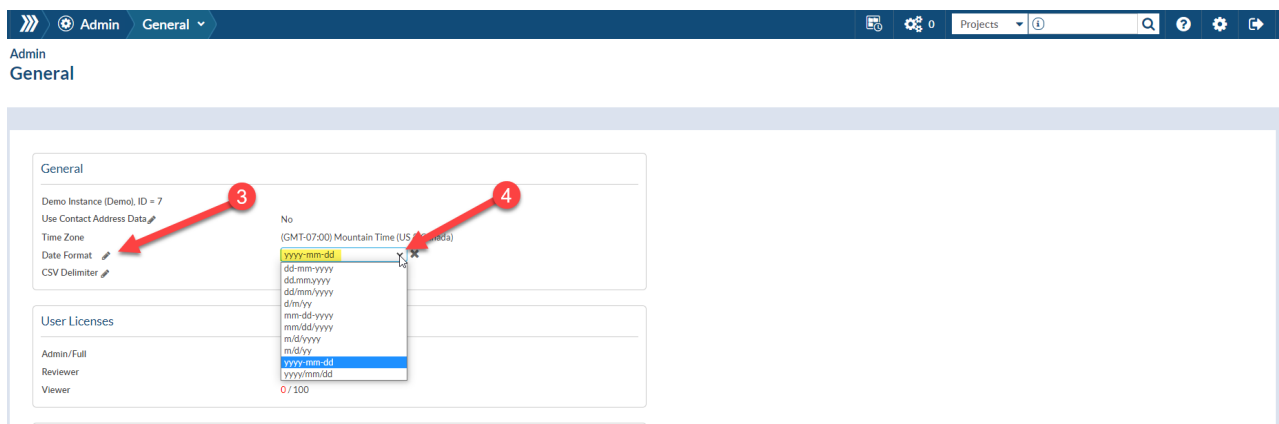
Date formatting can be set in Docboss in three places:

- On specific projects, under Project > Set Up > Main
- On Project Templates, under Project Settings > Date Format
- Under Admin, for the whole system

To see the current date settings for the whole system in DocBoss or change the date format setting go to Settings > under Admin click on General.



Here you can see the current date format settings. If you'd like to change this, click on the edit icon and select the format from the drop down menu.



Alternatively, if you have a Customer that wants the date displayed differently than others, you can change the settings in the project. Starting in your project, go to Main

**Project Hub**

Project Hub | Outstanding Actions | Index Reports & Compilations | Prices & Estimates

LevelCo | D7 & OD Wolfe | Turn on Lenses

Key Metrics for Cards

Document Card Program

Incomplete cards with

Location

TC (Awaiting first receipt for stage) | 86 | 0 | 0 | 86

Wolfe (Awaiting first receipt for stage) | 2 | 0 | 0 | 2

Ready to send | 1 | 0 | 0 | 1

Set Up

- Main
- Stage Lists
- LevelCo Return Statuses
- Expedite Settings
- Distribution Lists
- Project Fields Template
- Package Layout
- Card States

Scroll down to Settings and select the format by clicking on the drop down menu. Once you've made the changes be sure to Save Project.

Set Up Main

Save Project | Copy Project | Hide Project | Complete Project

Profile

Project Type: Order (selected) / Quote

Customer: LevelCo | Edmonton Office | Test 123

Project Description: - Select Job -

Job: Wolfe Sales Order | 7615

Package Number: 113038

PO Number: 0

PO Rev Number: - Select End User -

End User: - Select Address -

End User Address: 2021-01-22

End User Reference: 2021-02-19

Initial Guess for Drawing Approvals

Default Users/Lists

Wolfe Doc Control User: Kirstie Reid

Wolfe Project Engineer User: Kirstie Reid

Wolfe Drafting User: - Select User -

Wolfe Project Manager User: Kirstie Reid

LevelCo/End User Engineer: - No Contact Selected -

LevelCo/End User Expediter: - No Contact Selected -

LevelCo/End User Doc Controller: - No Contact Selected -

Use Code/Status Lists from: LevelCo Lists (selected) / Wolfe Internal Lists

Doc Code List: AA

LevelCo Return Status List: 1234

Status for Stage Auto Completion: Customer Final Status

Settings

Enable Grid Search for Large Project

Delivery output (checked)

Doc No. Override (Sub-Supplier)

Enable Mapping to Internal Codes

Card Name Suffix: [ ]

LevelCo Turn Around: 15 (working days)

Instance Turn Around: 10 (working days)

Action Turn Around: 5 (working days)

Date format: yyyy-mm-dd

Document Auto-Numbering Format

LevelCo | Make Doc No. (LevelCo) required

Output Settings

Stamp: LevelCo Stamp | XLS: Default Stamp Template [XLS] (sys)

Cover Pages: LevelCo Cover Page | PDF: Default Cover Page (system) | CSV/XLS: Default CSV Cover Page [CSV] (sys)

Sub-Supplier Cover Page | PDF: Default Sub-Supplier Cover Page [ ]

Submittals

Batching: Normal (selected) / Separate submittal per file

LevelCo Transmittal | PDF: Default Transmittal Template (sys) | CSV/XLS: Default CSV Transmittal Template

Sub-Supplier Transmittal | PDF: Default Sub-Supplier Transmittal [ ]

Internal / 3rd Party Transmittal: Uses the Sub-Supplier transmittal templates

Delivery Medium: Email (selected) | Show Delivery Medium in Submittal PopUp

Require Name for Doc Access: Yes

Add Comments Page to Document on Submittal: Yes

Submittal Numbering Format

Type of Format: Pattern per Target

LevelCo Submittal Pattern: T-<Sequence###>

Sub-Supplier Submittal Pattern: TSI-<Sequence###>

Internal / 3rd Party Submittal Pattern: TII-<Sequence###>

Ad-Hoc Submittal Pattern: TIA-<Sequence###>

Submittal Notification Emails

LevelCo: Customer submittal notification (sys) | Ad-Hoc: Ad-Hoc submittal notification (sys)

Sub-Supplier: Sub-Supplier submittal notification (sys) | Internal / 3rd Party: Internal submittal notification (sys)

Email FROM Address: Use do-not-reply@docboss.com | Contact Info: Use User Email Address

Default to send notification to customer: Yes

Include hyperlink into email: Yes

Include files in email: No

Attachments size limit (MB): 15

Other: Estimation: Default Estimate Template (system)

Formats

Changing File Name Format

Type of Format: Single Pattern

File Name Format: <DocNo>LevelCo<OR>DocNoWolfe\_Rev<RevOemo>\_Sub-SubmittalCountCustomer

Suffix added to all comment files: \_Comment

Suffix added to all native files: \_Native

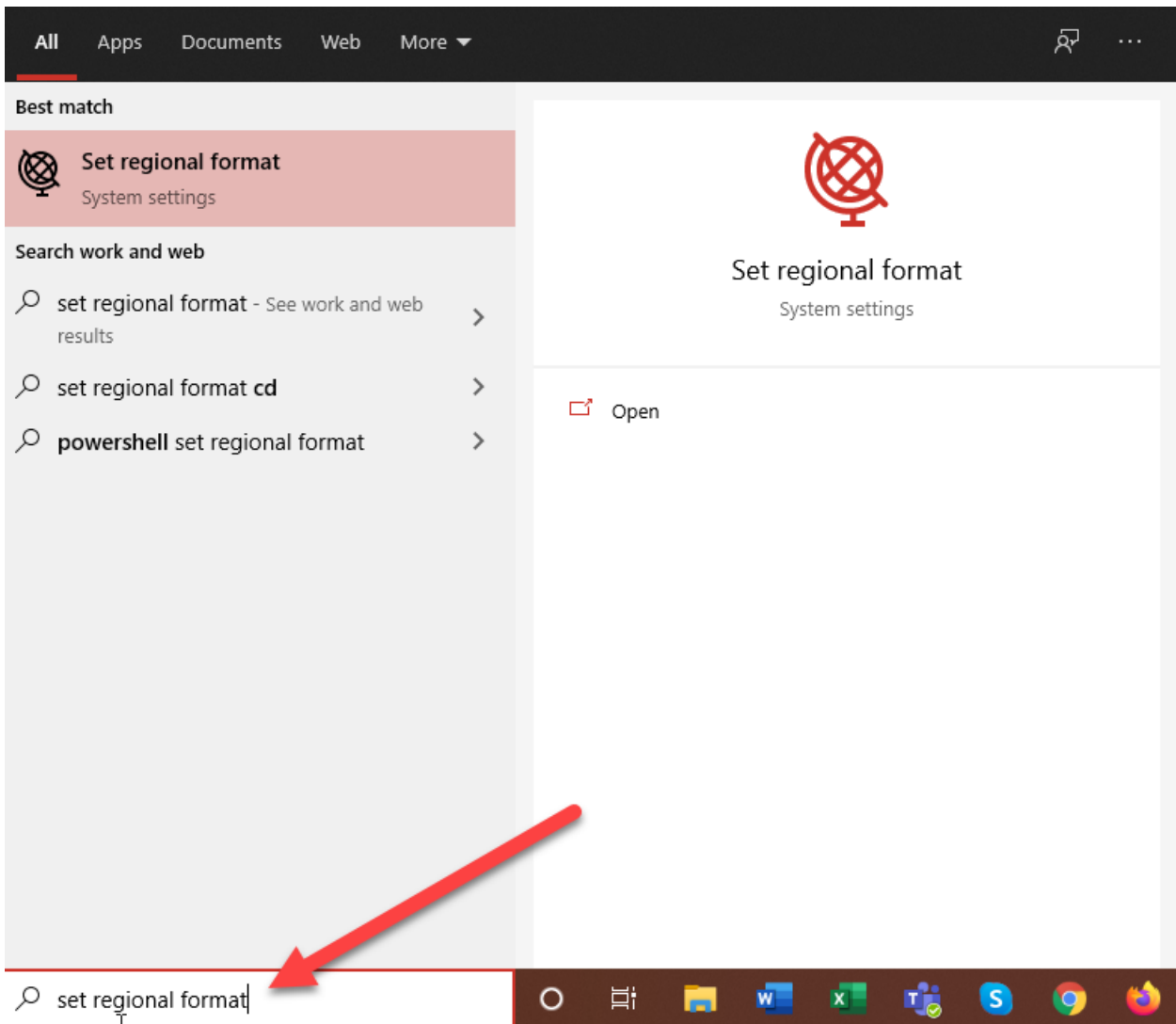
Document Header Format

<ProjectName>

\*Use OR operator to take first non-null value. OR must be in caps, and the only two characters b/lv two variables

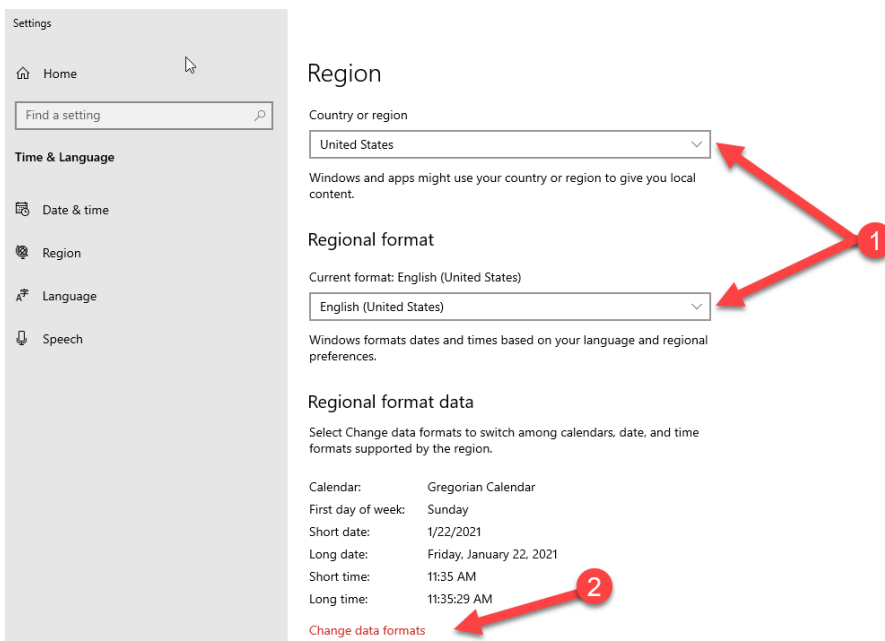
Align: Left | Offset: 0

To update Excel's regional formatting - On your PC type "Set Regional format" in your search bar.



Set your Country or region (1) and select Change Date Format (2)

Note: If using MM/DD/YYYY or M/D/YY set your country to United States.



Select the drop down for "Short Date" and choose the date format that matches your date setting in DocBoss



You may need to close and re-open excel for the changes to take effect.

## Date errors while uploading CSV files

If you are getting date format errors when uploading CSV files into DocBoss it is likely caused by Excel's regional settings. When Excel opens on your PC it displays date formats according to your regional settings. See our [article here](#) for more information.