

# Temporary Cards

05/11/2026 4:17 pm MDT

Creating a temporary card allows users to track two workflows, and combine them back together after the temporary workflow is completed. For example, if a drawing is returned from the customer with status “Approved with Comments, Resubmit”, the user can continue the workflow for the active card into the next stage, but keep a copy of the card in the current stage to await the customer’s final approval. Once this is received, the cards can be merged back together.

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## Use cases

Situations where a temporary card may be helpful:

- Customer has returned document approved with comments, and supplier wants to proceed with fabrication but still wants to track receipt of final approved document from customer.
- A document returned from the customer has to be submitted to two submittal targets simultaneously, and the status of both has to be tracked.

## Create a temporary card

When returning a document from the customer, if an **in progress** return status is selected (any return status not marked as **stage complete**) and the "Last workflow step" is changed to the "Complete stage" option, there is the option to create a temporary card to facilitate resubmittal. Note that if the stage includes settings for **approved with comments (AwC)** statuses, the last workflow step will automatically prompt the completion of the current stage.

**Workflow (IFA)**

Doc status \*  
2 - Approved with comments, resubmit

Add reviewers  Yes  No

Other submittals (before last step) ⓘ  
 Add to Ad-Hoc queue on save (no workflow impact)

Last workflow step  
 Customer submittal  
 Complete stage ⓘ (card will be moved to IFI)

And optionally:  
 Start a different stage list Select or type ahead...  
 Leave temporary copy for resubmittal in stage IFA

Once saved, the active card will be moved to the next stage and the temporary card remains in selected stage (by default, it will be set to the current stage) to await a full "stage complete" status.

## Routing

If a temporary card is created, any routings applied to the returned document will apply ONLY to the temporary card, NOT the active card (though the active card may receive a routing in its next stage if a routing scenario applies.)

## Workflow

Temporary cards will appear as regular cards in a project's **Card List** grid. To identify them, note the "temp[#]" suffix on the **card name**, or add the **"Temporary Copy"** column to the card list grid (additional columns are available from the vertical bar on the right of the grid).

Tools	Required	Doc Code	Title ↑	Status (Combined)	Card Name(Auto)	Doc No. (Omega CAN)	Temporary Copy	Stage	Stage List
<input type="checkbox"/>	<input checked="" type="checkbox"/>	RI14	Calibration Certificates	X(+)	RI14_Pressure_Transmitter	0005678-RI14-001-01		IFI	IFA-IFI
<input type="checkbox"/>	<input checked="" type="checkbox"/>	RI14	Calibration Certificates	2(+)	RI14_Pressure_Transmitter_temo1	0005678-RI14-001-01 <sup>M</sup>		IFA	IFA-IFI

## Making submittals

Submittals with active cards function just as they would with any other card.

When submitting temporary cards, if the history record is included on the cover sheet template, the previous submittal history will include all records from *before* the temporary card was split off from the active card (as well as all SEND records created under the temporary card).

## Returning documents

When returning documents to the active card, this functions just as it would with any other card.

When returning documents to a temporary card,

- If the return status is **in progress** (not marked as complete), the card remains separate from the active card and its workflow continues in its current stage.
- If the return status is marked as **stage complete** (ie. Approved), there are two options for processing the file:

1. **Save and merge into active card** (default): this merges the temporary card into the active card (as now that the held over card has received a document back approved, that card's workflow is complete).
2. **Save only (will merge manually)**: if further workflow needs to happen with the temporary card even though the customer has fully approved it, this option can be selected to keep the temporary card separate from the active card. It can be manually merged back into the active card later through the card **Edit** slide ([see below](#)).

## Merging temporary cards into active cards

Temporary cards can be merged into the active card they were split off from in two ways:

1. When returning documents ([as above](#))
2. Manually ([see below](#))

When a temporary card is merged into an active card,

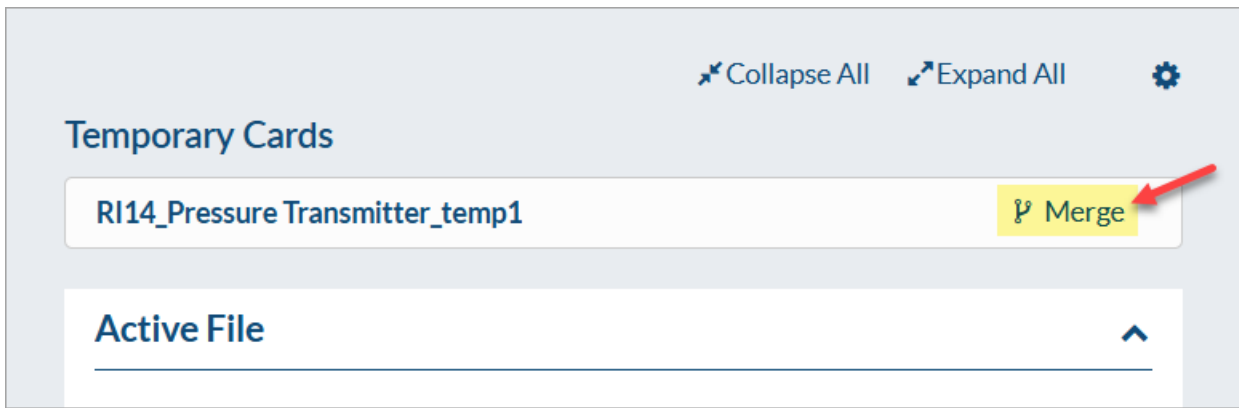
- The active card's file stays as the active file on the merged card
- The active card's metadata supercedes any metadata that is different on the temporary card (for example, if the document number was changed on the temporary card, the merged card will use the active card's number)
- The temporary card's file and history are saved into the merged card's history record (temporary card entries appear in gray on the history record)

## Edit temporary cards

### Editing active cards (with linked temporary cards)

At the top of the active card's edit slide is a list of its linked temporary cards. The **Merge** option on the right allows the user to manually merge temporary cards back into the active card.

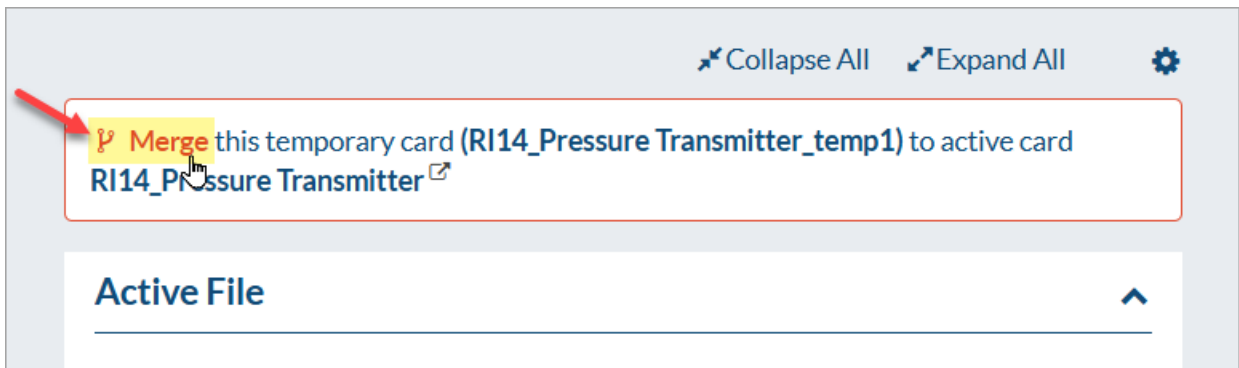
Edits made to active cards only apply to that card (except where otherwise noted).



## Editing temporary cards

At the top of a temporary card's edit slide, the active card it is linked to is identified.

Edits made to temporary cards only apply to that card (except where otherwise noted). However, the temporary card's metadata will be replaced with the active card's metadata when they are merged back together.



Select **Merge** to merge the temporary card back into the active card it was created from. To view the active card's history record, select the expand icon after the active card's name.

## Additional notes

### Multiple temporary cards

It is not possible to create a temporary card from an existing temporary card. However, it is possible to create multiple temporary cards (one additional per each subsequent return of the document) from the same active card. These are managed separately, but all remain linked back to the active (original) card.

### SDI Reports

When the temporary and active cards are separate, they will appear as separate lines on SDI reports, and include their own submittal history (if applicable to the template). If this is undesirable, contact DocBoss support for assistance filtering these out of SDI Reports.

Once temporary cards are merged back into active cards, they (and their submittal history) will not appear on SDI reports.

