Temporary Cards

08/01/2024 9:29 am MDT

Temporary cards

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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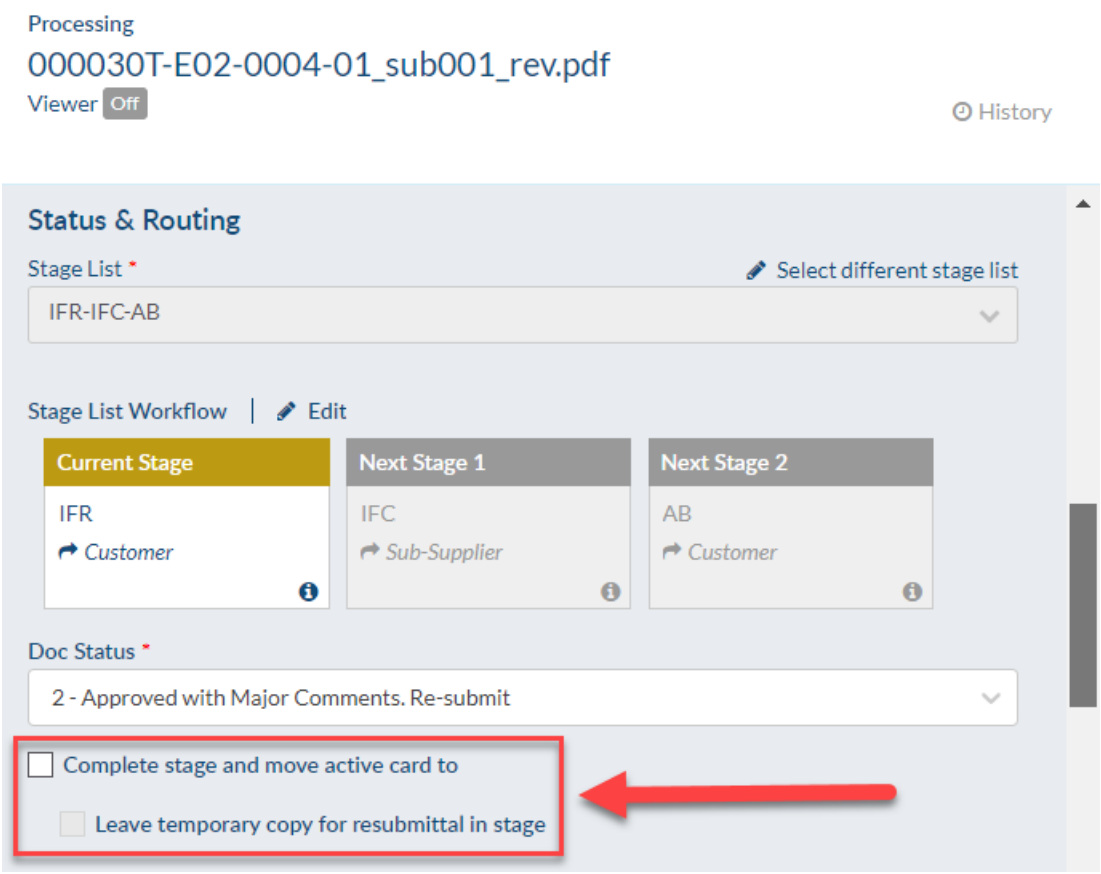
Use cases

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**), two checkboxes will appear below the **Doc Status** dropdown:



Complete stage and move active card to... must be selected for the second checkbox to be available.

Once each checkbox is selected, a dropdown appears prompting the user to choose a stage for the card:

1. **Complete stage and move active card to [next stage]**: if selected, the card will auto-complete the current stage and move into a later stage in the workflow (by default, the next stage). *Note: to have this checkbox automatically selected for an "Approved with Comments, Resubmit" return status, mark the return status as AwCR and select "If AwCR, complete stage" under the stage list > stage settings.*

2. **Leave temporary copy for resubmittal in stage** if the active card is moved to the next stage, users can choose to create a temporary copy of the card (by default, kept in the current stage) to await a full "Stage Complete" status.

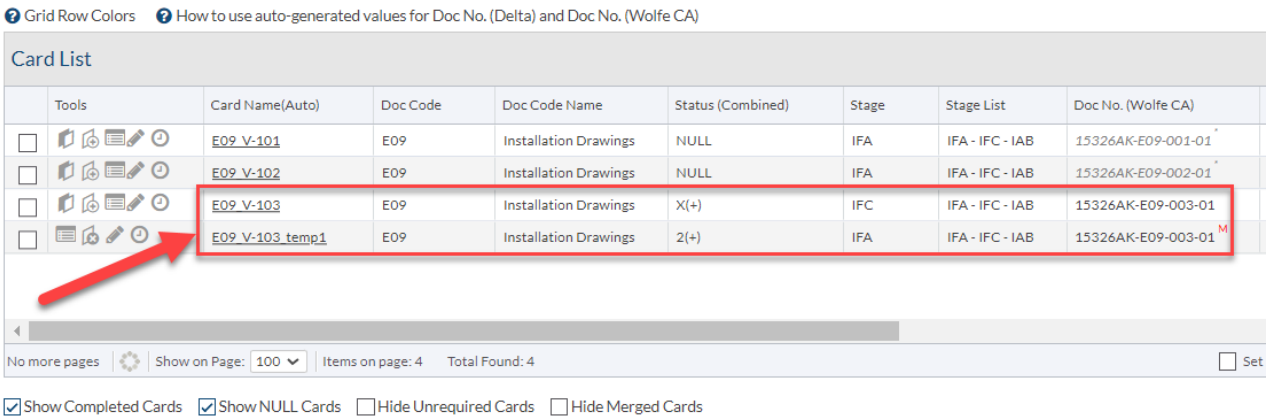
Routing

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).



Making submittals

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

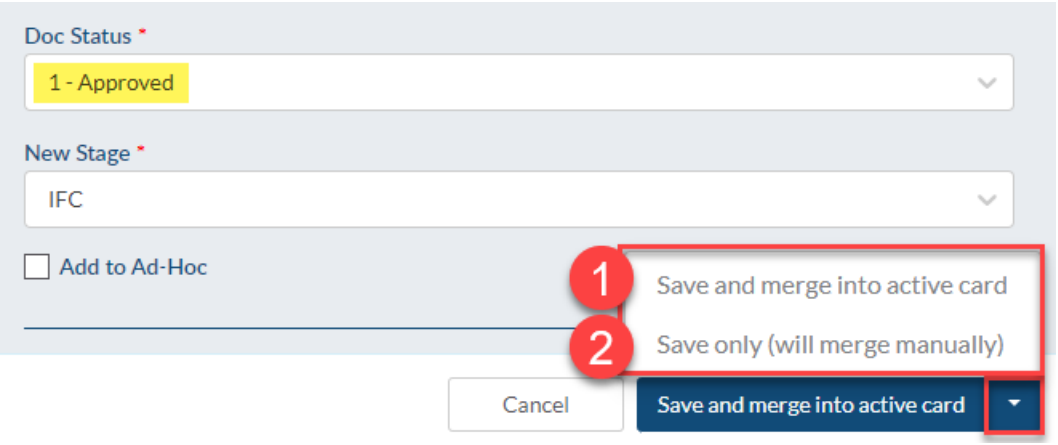
When submitting temporary cards, if the history record is included on the cover sheet template, the previous submittal history will include all records from *before* the temporary card was split off from the active card (as well as all SEND records created under the temporary card).

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,

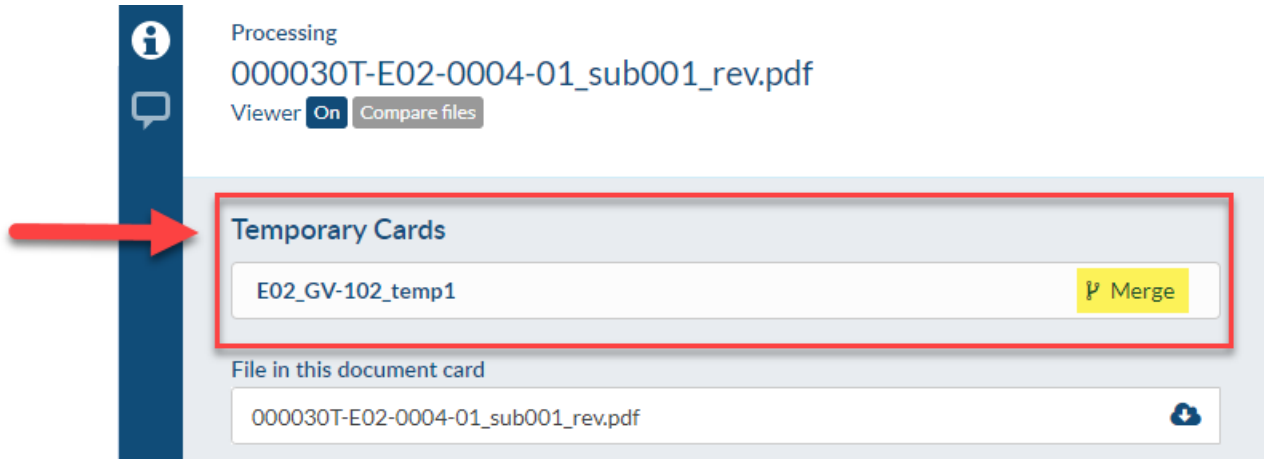
- The active card's file stays as the active file on the merged card
- The active card's metadata supercedes any metadata that is different on the temporary card (for example, if the document number was changed on the temporary card, the merged card will use the active card's number)
- The temporary 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.

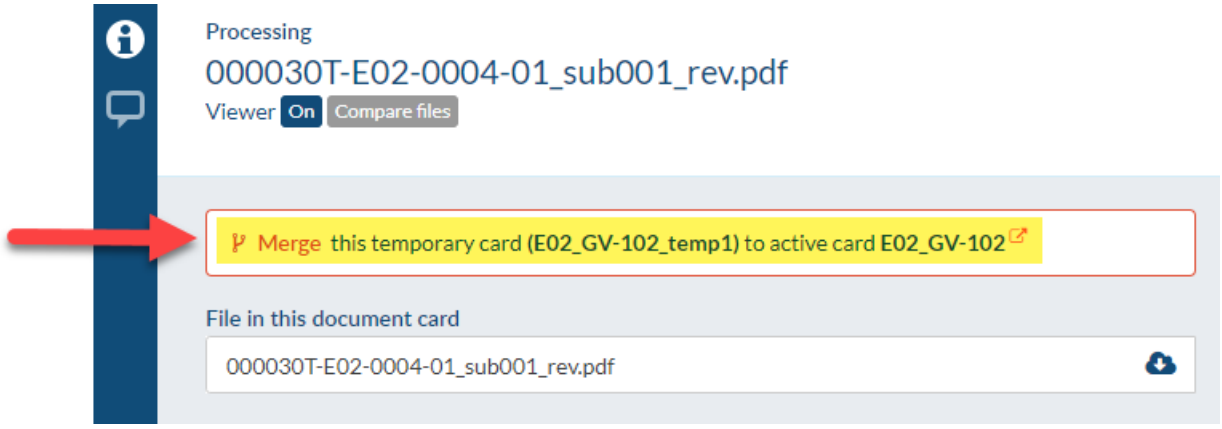
Edits made to active cards only apply to that card (except where otherwise noted).



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.

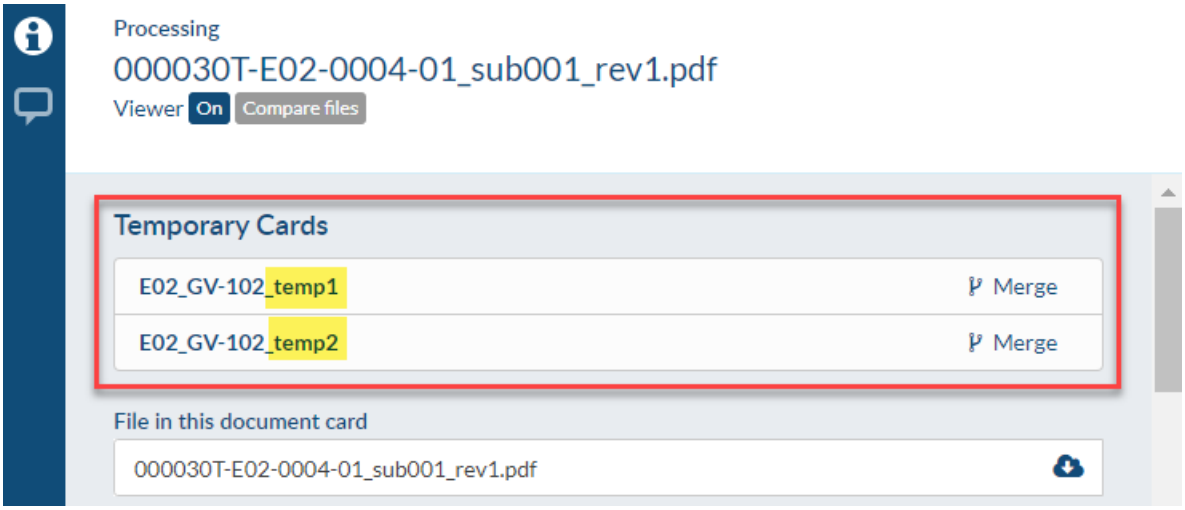


Select **Merge** to merge the temporary card back into the active card it was created from. To view the active card's history record, select the expand icon after the active card's name.

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.