

Sending documents via Ad-Hoc

08/21/2024 8:06 am MDT

Ad-Hoc submittals are special, in that they do NOT affect the workflow of your documents. It is simply a way to get documents to anyone outside the company, recording they were sent, and leaving the status/stage etc unaffected.

They should be reserved for limited use - often the best solutions are to add workflows (via stage lists) to your documents.

To send documents via an Ad-Hoc submittal:

Step 1:

Navigate to the cards list, and select the documents you wish to send, and click **Other Actions > Add to Ad-Hoc**.

Card List
Standard Query

The screenshot shows a table with columns: Tools, Document, Doc Code, Doc Code Name, Doc No. (Alpha), Status (Combined), Stage, Submittal Count (ACME), and Line No. List (ACME). The first four rows are selected. A dropdown menu is open over the 'Other Actions' button, with 'Add to Ad-Hoc Queue' highlighted. Red circles 1, 2, and 3 mark the selection checkboxes, the 'Other Actions' button, and the 'Add to Ad-Hoc Queue' option respectively.

Tools	Document	Doc Code	Doc Code Name	Doc No. (Alpha)	Status (Combined)	Stage	Submittal Count (ACME)	Line No. List (ACME)
<input type="checkbox"/>		M02	Material Test Certificate	000031-M02-001-01	X+	IFI	1	1.3
<input checked="" type="checkbox"/>		Q03	Quality Plan	000031-Q03-001-01	X+	IFI	1	1.3
<input checked="" type="checkbox"/>		B14	Vendor Sub-Orders	000031-B14-002-01	X+	IFI	1	1
<input checked="" type="checkbox"/>		L14	Functional Test Reports	000031-L14-001-01	2+	IFI	1	1.3
<input checked="" type="checkbox"/>		E09	Installation Drawings	000031-E09-001-01	X+	IFI	1	1.3
<input type="checkbox"/>		M02	Shipping And Packing Documents	000031-M02-001-01	X+	IFI	1	1.3
<input type="checkbox"/>		B02	Vendor Document Register	000031-B02-001-01	X+	IFI	0	1.3

Step 2:

Navigate to outgoing submittals screen, choose the documents in the Ad-Hoc grid and click Start Submittal.

Cards In/Out
Outgoing Submittals

The screenshot shows two submittal grids. The top grid is 'ACME Submittal' and the bottom grid is 'Ad-Hoc Submittal'. A red arrow points from the 'Ad-Hoc Submittal' grid to the 'Start Submittal' button. The 'Ad-Hoc Submittal' grid has two rows, with the first row selected. The 'Start Submittal' button is highlighted in blue.

Select	Card Name(Auto)	Level	Reference	Doc Code	ACME Doc #	Wolfe PA Rev #	Stage	Status	Link	Sub-Supplier Comments	ACME Comments	Internal Comments	Is Drawing	Expected File Name
<input checked="" type="checkbox"/>	NA_148941	Order	148941	NA Weld Procedures (WPS and PQR) & Weld Maps	V8548-05-01_034	000	IFI	X+	002-NA-0001-001_REV000_SUB001.pdf				No	002-NA-0001-001_REV
<input type="checkbox"/>	ND_148941	Order	148941	ND Surface Preparation, Painting and Coating Schedules	V8548-05-01_020	000	IFI	X+	002-ND-0001-001_REV000_SUB001.pdf				No	002-ND-0001-001_REV

Step 3:

Complete Submittal details

Start Submittal

Add Header/Footer	Card Name(Auto) ↑	Level	Reference	Doc Code	Doc No. (Acme)	Rev # (Demo)	Stage	Status	Due to Acme
<input checked="" type="checkbox"/>	D16 PT-104	Tag (TE)	PT-104	D16 Instrument Data Sheet		A	IFI	X(-)	2021-08-27

No more pages | Show on Page: 20 | Items on page: 1

Submittal Settings

Send to	Sub-Supplier	Sub-Supplier *	- Select Sub-Supplier -
Document Comments	Leave Blank		
Cover Pages	No Cover Pages		
Submittal Number	T(A)-001	Submittal Date	2021-08-25 15:10:06
Submittal Comments	<input type="text"/>		
Distribution List	Select distribution list		
Include markups	<input checked="" type="checkbox"/>	Sequence	1

Send submittal email notification

Notification Settings

Email Template	Ad-Hoc submittal notification (system)
Email Subject	Demo Instance Submittal Notification
Include transmittal in email	PDF
<input type="checkbox"/> Include files in email	
<input checked="" type="checkbox"/> Include hyperlink in email	

Add Supporting (Uncontrolled) Documents to Email

DROP FILE(S) HERE

Add Supporting (Uncontrolled) Documents to this Submittal

DROP FILE(S) HERE

Once transmitted, remove documents from Ad-Hoc Queue

Note: If you choose to Add New Cover Page the cover page will be applied based on who you are sending the Ad-Hoc to. If you are sending the submittal to your customer, DocBoss will apply the Customer Cover Page defined in your project Main page, if you are sending to your sub-supplier, DocBoss will apply the Sub-Supplier Cover Page defined in your Output Templates.