

# Sending documents via Ad-Hoc

05/11/2026 12:14 pm 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.



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

To add documents to the Ad-Hoc submittal queue, navigate to **Project Menu > Cards > Card List** and select the documents you wish to send. Then, expand the options under "More Actions" and choose "Add to Ad-Hoc Queue".

The screenshot shows the 'Card List' interface for 'Pump Project (4531)'. The table contains three rows of documents, all with a status of '2(+)' and 'Misc. Drawings'. A red box labeled '1' highlights the selection checkboxes in the first column. A red box labeled '2' highlights the 'More Actions' dropdown menu, and a red box labeled '3' highlights the 'Add to Ad-Hoc Queue' option within that menu.

Tools	Status (Combined)	Document	Doc Code	Title	Doc No. (WI)	Local
<input checked="" type="checkbox"/>	2(+)		B02	Misc. Drawings	4531-B02-007-01	Pend
<input checked="" type="checkbox"/>	2(+)		B02	Misc. Drawings	4531-B02-006-01	Pend
<input checked="" type="checkbox"/>	2(+)		B02	Misc. Drawings	4531-B02-004-01	Pend

To start an Ad-Hoc submittal, navigate to **Project Menu > Cards In/Out > Outgoing Submittals** and scroll down to the "To Ad-Hoc" section. Choose the documents you wish to send in the grid, and click "Start Submittal"

» Pump Project (4531)
» Outgoing Submittals
Projects
Q
?
⚙️
➡️

Cards In/Out  
**Outgoing Submittals**
Sequence for Next Submittal
Collapse All
Expand All

Available to Submit (19)    Submittals Sent

To Delta (11)

To Internal (4)

To Sub-Supplier (1)

**To Ad-Hoc (3)**

selected: 3

Card Name(Auto)	Level	Reference	Doc Code	Doc No. (Delta)	Rev # (WI)	Stage	Status	Due to Delta	Active File Link	Comments (Sub-Supplier)	Com
<input checked="" type="checkbox"/> B02_CV9876	Item/Model (TE)	CV9876	B02 Misc. Drawings		0	IFR	2(+)	2026-05-11	4531-B02-004-01_Rev0_Sub001.pdf		
<input checked="" type="checkbox"/> B02_GV1234	Item/Model (TE)	GV1234	B02 Misc. Drawings		0	IFR	2(+)	2026-05-11	4531-B02-006-01_Rev0_Sub001.pdf		
<input checked="" type="checkbox"/> B02_GV5678	Item/Model (TE)	GV5678	B02 Misc. Drawings		0	IFR	2(+)	2026-05-11	4531-B02-007-01_Rev0_Sub001.pdf		

No more pages    Show on page: 20    Items on page: 3    Total found: 3

Select all (this page only)     Select all (all pages)

Remove from Ad-Hoc Queue    **Start Submittal**

From the "Start Submittal" form, select the distribution list and adjust the submittal settings as needed. See the following articles for more information:

- [Sending Documents \(Outgoing Submittals\)](#)
- [Options for outgoing \(submittal\) notification emails](#)
- [Distribution Lists](#)

When you're ready to send, click "Start (and Send Email)".



Note: Because Ad-Hoc submittals are not part of the regular document workflow, they do **not** appear in the sub-supplier/customer portal and can only be accessed via the email sent to the applicable contacts.