

How can I create a stage that is only for internal routing?

08/27/2024 2:21 pm MDT

Sometimes [internal approval](#) will not be suitable for a project's needs, but a similar workflow with a structured internal review of documents is required. This article explains how to set up an internal routing stage using a combination of the [stage list](#) and [routing scenario](#) features.

Use internal approval if:

- You want to apply an internal approval status to the documents and have this visible as part of the card's combined status.
- You don't want any documents to go to the customer until an "approved" status is selected by a reviewer.
- After the internal review is complete, the document needs to go back to the sub-supplier, and then to the customer.

Use an internal routing stage if:

- Your workflow doesn't fit the pattern of *Internal Review > Sub Supplier > Customer*.
- You will need reviewers to comment or add markup on documents, but not apply a status.
- You don't need to view the internal review status as part of the card's combined status.

Setup

Create stage list

For the stage with internal routing, select:

- Require new document: YES
- Complete on upload: YES

Stage abbreviation *

Stage *

Notes (Internal Use Only)


Target *

Do not submit to customer

Require New Document?

Complete on Upload

For Approval?



This can be left as a single stage, or additional stages can be added before or after it.

- If it is the final/only stage in a list, once all routings are complete the status will be **Z** (system complete).
- If there are other stage(s) after the routing stage, once all routings are complete the card will automatically move to the next stage.

Create routing scenario

1. Create a new routing scenario.
2. Add a **Name** and **Affiliate**.
3. Expand the settings for **Assign these reviewers when file returned**.

New Routing Scenario 1 2 ✕

Name *
Internal routing stage

Affiliate *
Alpha Supply

Use as default

Settings

✕ Collapse all ✕ Expand all

Assign reviewers to NULL cards

Internal approval

Assign these reviewers when file returned from 3 ^

Customer

Sub-Supplier

Internal/3rd party

4. Select the source the file will come from (in the stage where the routing is desired).
5. Select the roles or specific user names for routing.
6. Clear the checkbox for **Only apply when file is out with [target]**.

4 Internal/3rd party ^

Doc Control
Select or type ahead...

5 Preparer
Select or type ahead...

Checker
Select or type ahead...

Approver
Select or type ahead...

6 Only apply when file is out with internal/3rd party (i.e. card is in * status)

7. Save

Add to project

Before using this, the stage list and routing scenario it uses will need to be imported to the project if they are not on it already.

Then, on the Code List (Requirements), select the routing scenario created for internal routing. If the stage list has any stages which do not require automated internal routing, select **Per stage** as the routing scenario option.
