

Processing Returned Files from Customer

08/02/2024 3:17 pm MDT

All returned files from a customer shall be assigned to a card and processed with return status and routing actions.

When a document is returned in a complete status (like Code 1 or Code A), there are no further actions required. See [what does stage complete mean](#).

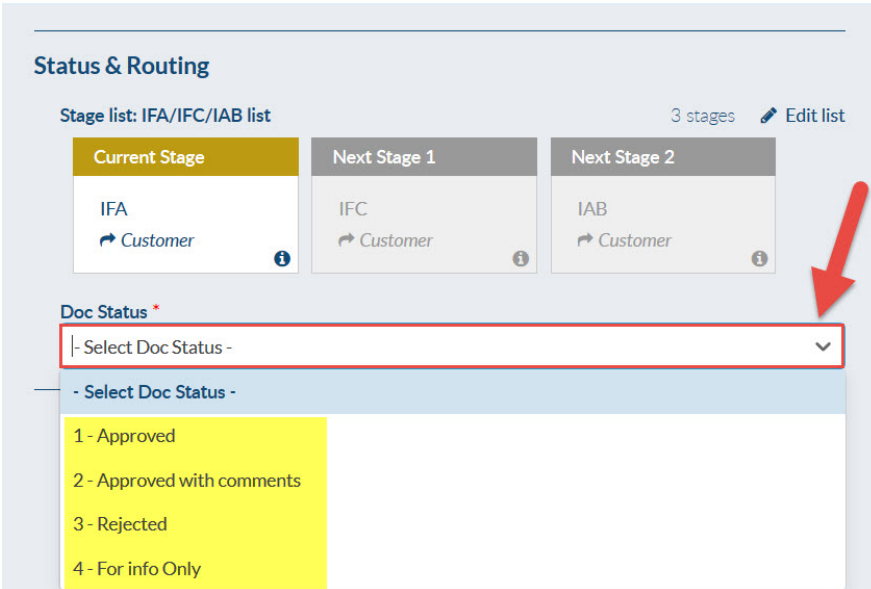
But when a document is code 2 (With comments, Rejected, etc.) and status is not completed, an action is required.

Processing

147569-D16-0002-001_r001.pdf

Viewer Off

 History



Status & Routing

Stage list: IFA/IFC/IAB list 3 stages [Edit list](#)

Current Stage	Next Stage 1	Next Stage 2
IFA ↶ Customer	IFC ↶ Customer	IAB ↶ Customer

Doc Status *

- Select Doc Status -

- 1 - Approved
- 2 - Approved with comments
- 3 - Rejected
- 4 - For info Only

Options to process a document returned with comments or rejected, are to send the file by email to a sub-supplier or to internal (if they are not DocBoss users) and there is also the option to choose a routing to a DocBoss user which can be directly processed in the system:

1. Queue for Submittal Sub-Supplier/Internal

If queue for submittal is selected to "Sub-Supplier" or to "Internal" the document will be moved to > Outgoing Submittals > Sub-Supplier/Internal grid waiting for transmittal.

Doc Status *

2 - Approved with comments

Complete Current Stage

Queue for Submittal

Queue for submittal to Sub-Supplier Internal

Send the original document + cover page

Add to Ad-Hoc

Outgoing Submittals

Pending Submittal to Sub-Supplier

Select Sub-Supplier to Begin Submittal: All Sub-Suppliers

Next Submittal Sequence: 1

Select	Sub-Supplier	Card Name(Auto)	Level	Reference	Doc Code	Customer Doc #	Stage	Link	Sub-Supplier Comments	Internal/3rd Party Comments	Wolfe PA Rev #	Status	Is Drawing	Send the original document + cover page	Expected File Name
<input type="checkbox"/>	ASCO	D16.8202	Tag (TE)	8202	D16 Instrument Data Sheet		IFA	147569-D16-0002-001_r001.pdf			1	2	No	<input checked="" type="checkbox"/>	147569-D16-00

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

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

[Add to Ad-Hoc Queue](#) [Start Sub-Supplier Submittal](#)

2. Internal (User) Routing

If a routing is selected the document will be moved to the "Outstanding Actions" area where the selected users can review the commented file, upload a new revision and include comments.

Internal (User) Routing

Doc Control User

Tunde Dorloti 

Engineer User

Brad Bowyer  Tunde Dorloti  

Drafter User

Tunde Dorloti  

Project Manager User

Tunde Dorloti 

Due to Engineer Date

23/11/2022 

When selecting the routings, there is also the possibility to assign routing to multiple people for each role:

- Each user appears in a removable block.
- Click the drop down to add more users to the routing.

The roles are sequential reviews and all users must complete the review for it to proceed to the next role.

If an action is not assigned, we assume there is no action required, and that you want the document to be reissued to the customer. Therefore the document will be placed in the Outgoing Submittals > Pending Submittal to Customer grid waiting for the transmittal.

We give a warning when there is no action assigned, to give a second chance to act on the card.

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Warning

You are attaching a document which is NOT in STAGE COMPLETE status and you have NOT identified any routing requirements.

You can proceed by clicking the Save button a second time, BUT without any routing, this document will immediately appear in the queue for re-transmittal to your customer

If you wish to read more about Internal User Routing options have a look at our articles about: [Internal Approval Cycle](#), [Document Workflow](#), [Complete an Outstanding Action](#) and [Assign an Action](#).

