Edit the Routing of a Card

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During the course of managing cards, you define routing and submittal requirements. This is typically managed by DocBoss as you upload documents to the system because you have already assigned your specific workflow instruction.

However – Once you have processed a document, you may need to edit the workflow you have designed.

Maybe you have :

- queued a document for submittal to your sub-supplier, but instead want it to go directly to the target (customer)
- routed a document to the wrong user
- etc..

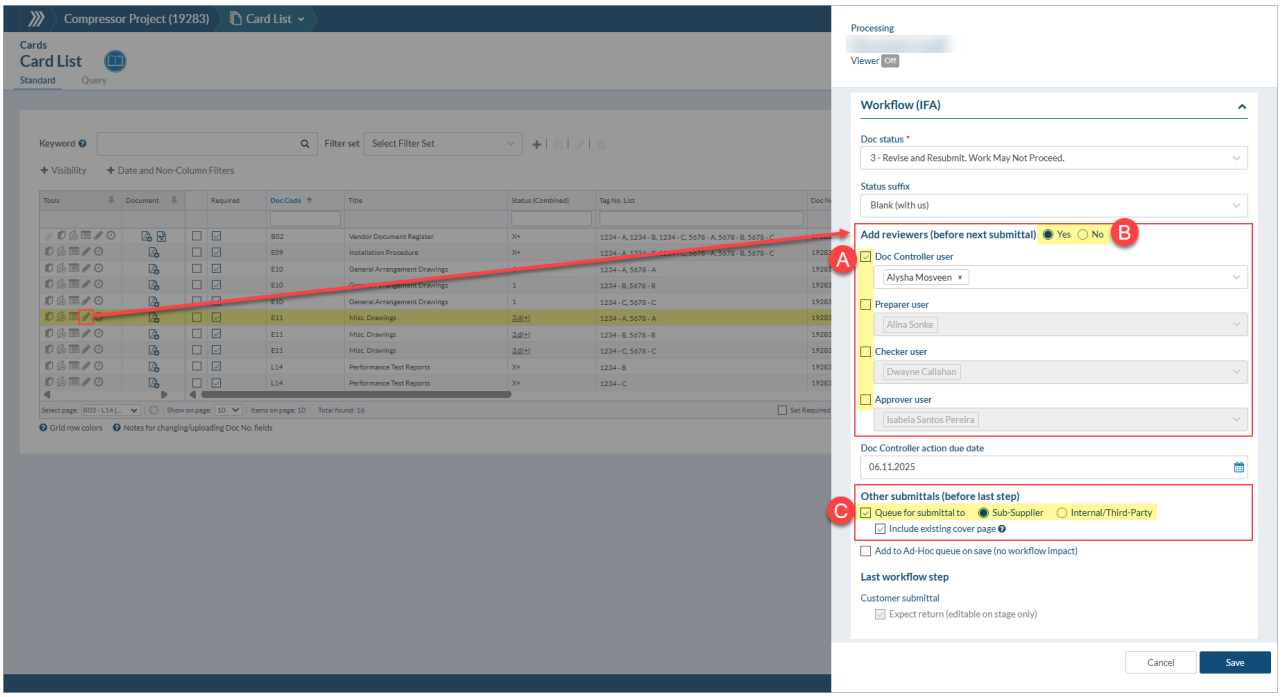
To edit the routing of a card, navigate to the card list (**Project Menu > Cards > Card List**) and click the pencil icon under "Tools" of the card that requires adjustment.

From the card edit form, you can:

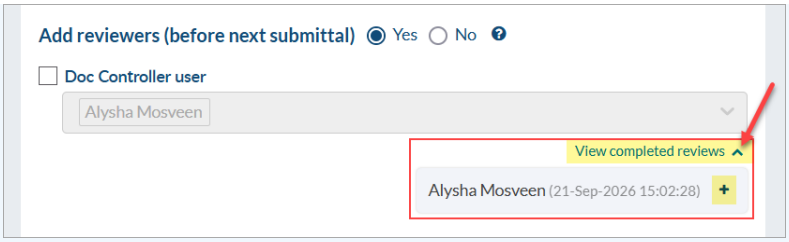
A. Adjust the existing routings

B. Remove <u>all</u> user routings

C. Adjust/remove other (pre-stage target) submittals



Once a user completes their review, there will be a record of it available under their assigned role. From the drop-down, you can quickly re-route the card to the same person to review the card again.



User routing can be adjusted in bulk from the**Outstanding Actions** screen. For details, see this article: Re-Assign Action.

TIP: If cards are typically routed to the same individual(s), routing scenarios can be applied to cards to route them automatically. If the card has existing routings, applying a routing scenario will **not** override them but **will** apply to any future workflow (e.g., next customer return).

Note: You do not have to select Queue for transmittal to “Internal” just because you are using the Internal (User) Routing function. If the document is continuing to the internal submittals queue even after all outstanding actions have been completed, make sure to uncheck the "Queue for submittal to" option on the card.

If you make a mistake, you have the ability to revert a document to a previous revision at anytime throughout the process. For instructions to revert to a previous version, see this article: Revert File and Meta-Data.