

Introduction to Stages & Stage Lists

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Stage lists provide a way to set different workflows for different types of documents. Whether a single or multi-step submittal process is required, stage lists allow you to move through these stages in DocBoss.

By default, DocBoss populates some default stage lists (see [article](#) for more information), but additional stage lists can be added and customized to meet your requirements.

What is a stage?

A stage is the workflow that occurs until a complete status is reached (e.g., approved, for information). A document may require multiple revisions/submissions, but once a [complete status](#) is received from the target (e.g., customer), the stage is considered complete.

The completion of a stage will either (1) prompt the start of the next stage (if applicable), or (2) set the card as completed.

Each stage contains a stage abbreviation (e.g., IFA) and a stage name (e.g., Issued for Approval). In addition, a target (e.g., customer) is identified for each stage.

Order	Stage Abbr	Stage Name	Target	Internal Approval	Expect Document Return	Continue stage after IA	Confirm to source	Require New Document	If AwCR, complete stage	Do not submit to customer
1	IFI	Issued For Approval	Customer	N	Y	N	N	N	N	N

What is a stage list?


A stage list is a sequence of one or more individual stages that reflects the larger document lifecycle. A stage list allow a single document to be tracked through a series of separate workflows; once a stage is completed, the document will automatically move to the next stage.

A common scenario is as follows:

1. A document is issued for customer approval (IFA) - *Document return expected*
2. Once approved by the customer, the document is issued for construction (IFC) to the sub-supplier - *No document return expected*
3. Finally, once IFC is complete, the document is issued as built (IAB) to the customer - *No document return expected*

Stages

Order ↑	Stage Abbr	Stage Name	Target	Expect Document Return	Require New Document
1	IFA	Issued for Approval	Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	IFC	Issued for Construction	Sub-Supplier	<input type="checkbox"/>	<input type="checkbox"/>
3	IAB	Issued as Built	Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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Topics:

1. Create Stage List
 2. Add Stage(s) to Stage List
 3. Assign Stage List to Doc Code
 4. Stage List Workflow (Example)
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