

Routing Scenario

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The routing scenario feature allows users to predefine document workflow in detail.

For example, in the image below, DocBoss knows to assign a specific set of reviewers based on the file's return source (customer) and whether or not the stage is complete.

The screenshot displays the DocBoss interface for document routing. The top navigation bar shows 'Instruments Project (1234)', 'Incoming Document...', and 'From Delta Engin...'. The main content area is divided into several sections:

- File Staging Area:** A section for uploading files, with a 'Viewer' toggle set to 'Off'. It includes a 'Drag and drop files' area and a 'Maximum individual file size (for normal handling) is 300Mb' limit.
- Assign to:** A section for assigning documents to document cards. It includes a 'Doc Code' dropdown and a table of document cards.
- Doc Status:** A dropdown menu showing '2 - Approved With Comments - Resubmit'.
- Queue for Submittal:** A section for queuing documents for submittal, with options for 'Sub-Supplier' and 'Internal/3rd party'.
- Internal (User) Routing:** A section for routing documents to specific users. It includes checkboxes for 'Doc Control User' (selected, with 'Happy Gilmour' selected) and 'Project Engineer User' (selected, with 'Jessica Jones' and 'Lisa Simpson' selected). Other options include 'Drafting User' and 'Project Manager User'.

The 'Internal (User) Routing' section is highlighted with a red box, indicating the current configuration.

These defaults can be changed when assigning documents if needed, but having the defaults applied saves time if the same set of reviewers need to look at a document each time a specific situation occurs.

Routing scenarios can be configured based on who the document is being returned from (sub-supplier, internal, customer), for internal approval, for NULL cards, and even [per stage](#). They can also be assigned to individual doc codes or cards.

To get started, first [create routing scenarios](#), then [apply them to doc codes or cards](#).