

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 a document titled "5678-B02-001-01_Rev0_Sub001.pdf". The document is currently in a "Rejected" status. The "Workflow (IFR)" section is highlighted with a red box, showing the following configuration:

- Doc status:** 3 - Rejected
- Add reviewers (before next submittal):** Yes (selected), No
- Doc Control user:** Alysha Mosveen
- Preparer user:** Jessica Jones
- Checker user:** Select or type ahead...
- Approver user:** Select or type ahead...
- Doc Control action due date:** 2026-02-25

The interface also shows a "File Staging Area" with a "Drag and drop files" button, and a table of document cards with columns for Type, Tools, Doc Code, and Doc. The "Unassigned Files" section shows a list of files, including the current document.

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](#).