

Add/Edit Routing Scenario

09/16/2024 1:48 pm MDT


This article explains how to add or edit routing scenarios. For an overview of routing scenario functions, see [this article](#) first.

Topics


- Add routing scenarios
- Edit routing scenarios
- Add/edit routing scenarios for all new projects

Add routing scenarios

Typically, users will manage routing scenarios from the **Code List (Requirements)** screen of a specific project.

 Grid Rows Colors

Code List (Requirements)					
Select	Doc Code ↑	Doc Code Name	Routing Scenario	Routing Scenario Details	Level
<input type="checkbox"/>	B02	Vendor Document Register	- Select -		Order
<input type="checkbox"/>	E09	Installation Drawings	- Select -		Tag (TE)
<input type="checkbox"/>	H03	Unpacking and Reservation Register	- Select -		Item/Model (TE)
<input type="checkbox"/>	I04	Inspection and Test Plan	- Select -		Order
<input type="checkbox"/>	K05	Operating and Maintenance Manual	Add New		Item/Model (TE)
<input type="checkbox"/>	S06	Manufacturing Data Book	Per Stage		Order

No more pages |  Show on Page: 20

In the **Routing Scenario** column, click within the grid in the row for the doc code that requires a routing scenario. Select **Add New** to create a routing scenario.

New Routing Scenario



Name *

Use as default

Settings

1

Assign reviewers to NULL cards



2

Internal approval



3

Assign reviewers when file attached from customer (when stage not complete)



4

Assign reviewers when file attached from customer (when stage complete)



5

Assign reviewers when file attached from sub-supplier



Only apply when file is out with sub-supplier (i.e. card is in - status)

6

Assign reviewers when file attached from internal/3rd party



Only apply when file is out with internal/3rd party (i.e. card is in * status)

Cancel

Save

There are several options available to configure. Any number of these can be selected.

1 - Assign reviewers to NULL cards:

Applies to any cards which have status NULL. This can be used to assign cards to the user who is responsible for adding the initial documents to the applicable cards.

2 - Internal approval:

Only available if [internal approval](#) is enabled on at least one stage in the selected doc code's stage list.

3 - Assign reviewers when file attached from customer (when stage not complete):

Applies when (1) a document is assigned to a card through the **Files from Customer** grid on the **Incoming Documents** screen, and (2) the return status selected does NOT have "stage complete" selected.

4 - Assign reviewers when file attached from customer (when stage complete):

Applies when (1) a document is assigned to a card through the **Files from Customer** grid on the **Incoming Documents** screen, and (2) the return status selected does have "stage complete" selected.

5 - Assign reviewers when file attached from sub-supplier:


Applies when (1) a document is assigned to a card through the **Files from Sub-Supplier** grid on the **Incoming Documents** screen.


6 - Assign reviewers when file attached from internal/3rd party:


Applies when (1) a document is assigned to a card through the **Files from Internal/3rd party** grid on the **Incoming Documents** screen.



Select the edit icon next to any number of the routing options to configure the reviewers assigned.




Settings


Assign reviewers to NULL cards 


Internal approval 

Assign reviewers when file attached from customer (when stage not complete) 

Doc Control
Happy Gilmour  

Project Engineer
Jessica Jones  Lisa Simpson  

Drafting
Select or type ahead... 

Project Manager
Select or type ahead... 

Roles marked as mandatory (with an asterisk) must have specific users chosen if the role is enabled (by selecting its checkbox).

For roles NOT marked as mandatory, if they are enabled but left empty, DocBoss will prompt users to choose specific reviewers for those roles each time a document is assigned to a card (for cards with the applicable routing scenario assigned).

Once complete, select **Save** to save the routing scenario configuration, and then select **Save** below the grid to apply to routing scenario to the doc code.

Edit routing scenarios

Routing scenarios can be edited from the **Code List (Requirements)** screen or the **Card List** screen by selecting the text in the **Routing Scenario Details** column.

Grid Rows Colors

Select	Tools	Doc Code ↑	Doc Code Name	Level	Required	Stage List	Routing Scenario	Routing Scenario Details	Type
<input type="checkbox"/>		B02	Vendor Document Register	Order	1/1	IFI	- Select -		SDI Report
<input type="checkbox"/>		E09	Installation Drawings	Tag (TE)	9/9	IFA (IA)	IA	IA	Generated (Sub-Supplier)
<input type="checkbox"/>		H03	Unpacking and Preservation Procedure	Item/Model (TE)	3/3	IFA (IA)	IA	IA	Generated (Sub-Supplier)
<input type="checkbox"/>		I04	Inspection and Test Plan	Order	1/1	IFA (IA)	IA	IA	Generated (Sub-Supplier)
<input type="checkbox"/>		K05	Operating and Maintenance Manual	Item/Model (TE)	3/3	IFI	- Select -		Generated (Sub-Supplier)
<input type="checkbox"/>		S06	Manufacturing Data Book	Order	1/1	IFI	- Select -		Compilation

After editing a routing scenario, users can choose one of three options to apply the changes:

1. **Update across entire project**
2. **Save as new**
3. **Just update this code** (if selected, the routing scenario will display as **Manual** to show that it has been modified individually)

Routing scenarios can also be edited under the project's routing scenario settings. In a project, (1) open the project menu and (2) select **Set Up > Routing Scenario**.

On the **Routing Scenario Management** screen, select the pencil icon under the **Tools** column to edit any of the routing scenarios available on the project.

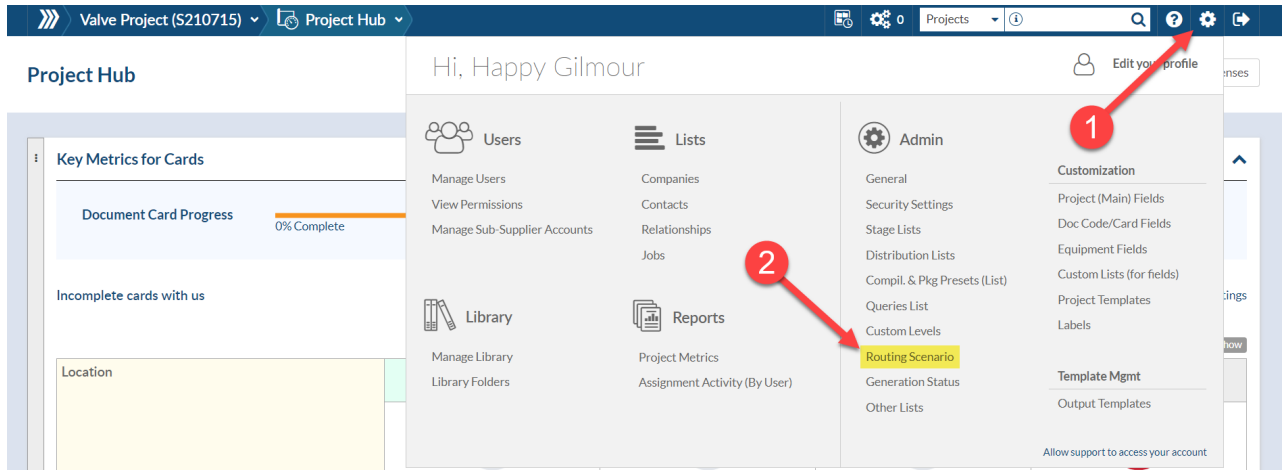
Name ↑	Default	Tools
Routing scenario 1	N	
Routing scenario 2	N	
Routing scenario 3	N	

This screen also allows users to add new routing scenarios or import existing scenarios from the instance list.

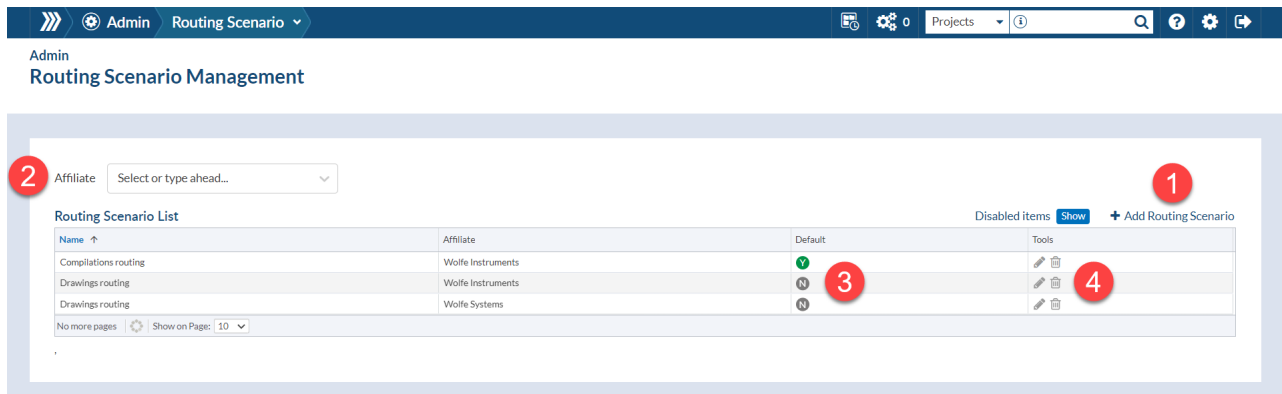
Add/edit routing scenarios for all new projects

Admin users can add or edit routing scenarios under the instance settings to apply to all new projects.

From the settings gear, navigate to **Admin > Routing Scenario**.



On the **Routing Scenario Management** screen, the grid displays the existing routing scenarios which will be available to use on all new projects.



To add a new scenario, (1) select **Add Routing Scenario** and complete the information. This is the same as adding a routing scenario directly to a project, with an additional field to select the affiliate which the routing scenario will belong to.

To filter routing scenarios by affiliate, (2) choose an affiliate from the dropdown at the top left of the grid.

To set a routing scenario as the default for a specific affiliate, check the **Use as default** box when creating a new scenario, or (3) toggle this option on/off for existing scenarios under the **Default** column.

To edit or disable a routing scenario, (4) select the icons under the **Tools** column.