

Add/Edit Routing Scenario

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

Topics

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- [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 Installation Procedure	 - 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

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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.

Edit Routing Scenario

Name *
Demo Routing Scenario

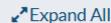
Use as default

Settings

1 Assign reviewers to NULL cards

2 Internal approval

3 Assign these reviewers when file returned from

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 these reviewers when file attached from:

A - 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.

B - 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.

C - 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.

D - 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.

User assignment

When a role is selected, a specific user(s) can be identified OR the role can be left blank. If blank, the applicable role user(s) on the project (as identified on [project main](#)) will be pulled for use in the routing scenario.

If using a dynamic routing scenario and the role user(s) on the project change after the routing scenario is applied, the originally listed users will remain routed. If the routed users should be updated to reflect the new role users, this can be done in one of two ways:

1) Open the routing scenario details (from the code list) and choosing to either (a) update the routing scenario only for the selected code, or (b) update the routing scenario for all doc codes where the routing scenario is applied.

2) Select the doc codes from the code list, expand the "Actions" drop-down, choose the "Update Routing Scenario" option, and select the same routing scenario as was previously selected.



If the role is left blank on a NULL or internal approval routing scenario and there is no project user assigned to the role, a warning will appear to prompt an adjustment of the project users. This warning will appear above the grid on the Card List, as well as on the project's Routing Scenario page.

The warning will (a) indicate which role(s) requires configuration, and (b) provide the ability to refresh the routing scenario once the required role(s) have been configured.

On the Routing Scenario page, the impacted routing scenario will be highlighted in red. Once a user is assigned to the role in question, the routing scenario will be highlighted in light red to indicate that it should be re-applied. To re-apply the routing scenario, either select the plus (+) icon under "Tools" OR click the link in the warning message.

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

Code List (Requirements)

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**.

Valve Project (S210715) ▾ Card List ▾ 1

Cards

Card List

Standard Query

Card List

Delta Doc Code: - Select or type ahead -

Stage: - Select Stage -

Due to Delta:
 Expected Return to WI:
Days since last request: []

Grid Rows Colors How to use auto-ger

Card List

Routing Scenario Details Routing Scenario

Per Stage Per Stage - Select -

Project Hub

Outstanding Actions

Index Reports & Compilations

Prices & Estimates

2

Cards

Code List (Requirements)

Card List

Card to Unit Changes

Obsolete Cards

Request Cards from Supplier

Cards In/Out

Incoming Documents

Outgoing Submittals

Equipment

Equipment List

Levels

Set Up

Main

Stage Lists

Delta Return Statuses

Expedite Settings

Distribution Lists

Project Template

Compil. & Pkg Presets

Routing Scenario

Card States

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.

Set Up
Routing Scenario Management

Routing Scenario List

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

Disabled items Show + Add Routing Scenario Import from Instance

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**.

Hi, Happy Gilmour

Project Hub

Key Metrics for Cards

Document Card Progress 0% Complete

Incomplete cards with us

Location

Users

Manage Users
View Permissions
Manage Sub-Supplier Accounts

Lists

Companies
Contacts
Relationships
Jobs

Library

Manage Library
Library Folders

Reports

Project Metrics
Assignment Activity (By User)

Admin

General
Security Settings
Stage Lists
Distribution Lists
Compil. & Pkg Presets (List)
Queries List
Custom Levels
Routing Scenario
Generation Status
Other Lists

Customization
Project (Main) Fields
Doc Code/Card Fields
Equipment Fields
Custom Lists (for fields)
Project Templates
Labels

Template Mgmt
Output Templates

Allow support to access your account

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

Admin
Routing Scenario Management

Affiliate

Routing Scenario List

Name	Affiliate	Default	Tools
Compilations routing	Wolfe Instruments	Y	
Drawings routing	Wolfe Instruments	N	
Drawings routing	Wolfe Systems	N	

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.
