

Apply Routing Scenario

01/02/2026 3:54 pm MST

After [creating routing scenarios](#), users can apply them to doc codes or cards.

Apply routing scenarios to doc codes (individual)

If a routing scenario is available to use on a project already, select it from the **Routing Scenario** dropdown and select **Save**.

To remove the routing scenario from a doc code, change the routing scenario back to the default "Select" option.

Apply routing scenarios to doc codes (bulk)

To update doc code routing scenarios in bulk, (1) select all of the codes that will use a particular routing scenario. Then (2) select **Apply** and (3) **Update Routing Scenario (for Codes)**.

Grid Rows Colors

Code List (Requirements)

Select	Routing Scenario Details	Routing Scenario	Doc Code ↑	Doc Code Name	Required	Level	Included In	Type
<input type="checkbox"/>		- Select -	B02	Vendor Document Register	1/1	Order	--	Generated (Sub-Supplier)
<input type="checkbox"/>		- Select -	D16	Instrument Data Sheet	12/12	Assembly	--	Generated (Sub-Supplier)
<input checked="" type="checkbox"/>		- Select -	E02	Cross Sect Dwg / Exploded View Diagram	14/14	Tag (TE)	--	
<input type="checkbox"/>		- Select -	K05	Operating and Maintenance Manual	3/3	Item/Mo	--	
<input checked="" type="checkbox"/>		- Select -	L14	Functional Test Reports	14/14	Tag (TE)	--	
<input type="checkbox"/>		- Select -	M08	Material Traceability Records	14/14	Tag (TE)	--	
<input checked="" type="checkbox"/>		- Select -	M17	Leakage Test Certificate	14/14	Tag (TE)	--	
<input checked="" type="checkbox"/>		- Select -	O02	Pressure Test Certificates	14/14	Tag (TE)	--	
<input type="checkbox"/>		- Select -	S06	Manufacturing Data Book	2/2	Shipment	--	

No more pages ⚙ Show on Page: 20 ▾

Set Query (to Codes)

Set NULL routings (to Codes)

Cover Page / Stamps (to Cards)

Charges (to Cards)

Update eSign (on Cards)

Update Routing Scenario (for Codes)

Create Packages (for Codes)

Create Translation Cards (for Codes)

2 Apply ▾ Download CSV Template

Then, select the appropriate routing scenario to apply to the codes and **Save**.

Update Routing Scenario

Routing Scenario

Select or type ahead... ▾

Routing scenario 1

Routing scenario 2

Cancel

Save

The changes will then be applied to all selected codes.

Code List (Requirements)

Select	Routing Scenario Details	Routing Scenario	Doc Code ↑	Doc Code Name	Required
<input type="checkbox"/>		- Select -	B02	Vendor Document Register	1/1
<input type="checkbox"/>		- Select -	D16	Instrument Data Sheet	12/12
<input type="checkbox"/>	Routing scenario 1	Routing scenario 1	E02	Cross Sect Dwg / Exploded View Diagram	14/14
<input type="checkbox"/>		- Select -	K05	Operating and Maintenance Manual	3/3
<input type="checkbox"/>	Routing scenario 1	Routing scenario 1	L14	Functional Test Reports	14/14
<input type="checkbox"/>		- Select -	M08	Material Traceability Records	14/14
<input type="checkbox"/>	Routing scenario 1	Routing scenario 1	M17	Leakage Test Certificate	14/14
<input type="checkbox"/>	Routing scenario 1	Routing scenario 1	O02	Pressure Test Certificates	14/14
<input type="checkbox"/>		- Select -	S06	Manufacturing Data Book	2/2

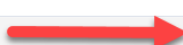
No more pages | Show on Page: 20

Apply routing scenarios to cards

If a routing scenario is only required for specific cards, it can be applied from the **Card List**.

From the **Card List**, select a routing scenario (or add a new scenario, if required) from the **Routing Scenario** column and save to apply.

Card List

	Routing Scenario Details	Routing Scenario	Card Name(Auto)	Doc No. (WI)	Doc Code	Title
<input type="checkbox"/>		- Select -	S06_1	S210715-S06-001-01	S06	Manufacturing Data Book
<input type="checkbox"/>		- Select -	B02_1234	S210715-B02-001-01	B02	Vendor Document Register
<input type="checkbox"/>		Add New	S06_2	S210715-S06-002-01	S06	Manufacturing Data Book
<input type="checkbox"/>		Per Stage	D16_4 KV-104	S210715-D16-001-01	D16	Instrument Data Sheet
<input type="checkbox"/>		Routing scenario 1	D16_5 KV-105	S210715-D16-002-01	D16	Instrument Data Sheet
<input type="checkbox"/>		Routing scenario 2	D16_6 KV-106	S210715-D16-003-01	D16	Instrument Data Sheet
<input type="checkbox"/>		Routing scenario 3	L14_ACT-111	S210715-L14-001-01	L14	Functional Test Reports
<input type="checkbox"/>		- Select -	E02_ACT-111	S210715-E02-001-01	E02	Cross Sect Dwg / Exploded View Diagram
<input type="checkbox"/>	Routing scenario 2	Routing scenario 2	O02_ACT-111	S210715-O02-001-01	O02	Pressure Test Certificates

To remove the routing scenario for a card, change the routing scenario back to the default "Select" option.