Status (Combined) Column Explanation

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Overview

The **Status (Combined)** column is a quick way to get lots of information about a card's current status and location.

This column displays the following information about each card:

- Status
- Location, if not out with/pending to a submittal target (customer, sub-supplier, internal personnel who are not DocBoss users), and if a return is expected from that location after submittal.
- Routings, if applicable
- Internal approval status, if applicable

The **Status (Combined)** column relates to the document's progress within a single stage. If you are working with multi-stage lists, you may find it useful to keep the **Stage** column visible as well to provide context for the current status.

Reading the Status (Combined) Column

Status

DocBoss default statuses - these are used when no customer status is available (if the card has not yet been, or will not be, assigned a return status by the customer). By default, they are as shown below.

Value	Name	Description
NULL	NULL status	No active file on the card
X	Required for Order but Initial Submission not yet made	Not yet assigned a customer status, but has active file on the card
Z	System Completed document	File on the card, and completed without assigning a stage complete return status (most often for cards that are not submitted to the customer individually, like those in packages)

Company return statuses - an example is provided below, but these will vary based on the customer.

Value	Name
1	Approved
2	Approved with Comments
3	Rejected
4	Received for Information Only

Location

The location is denoted by the **status suffix** (appears after the status noted above). The status suffixes in DocBoss are as follows:

Value	Location

	Blank (with us)
(-)	Pending to sub-supplier (return expected)
<->	Pending to sub-supplier (no return expected)
(*)	Pending to internal (return expected)
<*>	Pending to internal (no return expected)
(+)	Pending to customer (return expected)
<+>	Pending to customer (no return expected)
-	With sub-supplier
*	With internal
+	With customer

Routings

Identified by a period and the **Role Suffix** of the user(s) assigned the card. The following is an example only, as the **Role Name** and **Role Suffix** fields are customizable under **Admin > General**.

Role	Role Name	Role Suffix
Role 1	Doc Control	.d
Role 2	Preparer	.p
Role 3	Checker	.c
Role 4	Approver	.a

When a card has routing applied to it, the action(s) will need to be completed (or the routing will need to be cleared) **before** the card will be queued for submittal to the designated location (see above).

Internal Approval Status

Listed in curly brackets { }. Value dependent on internal approval status list. For example:

Value	Name
{A}	Approved
{P}	Pending
{R}	Rejected

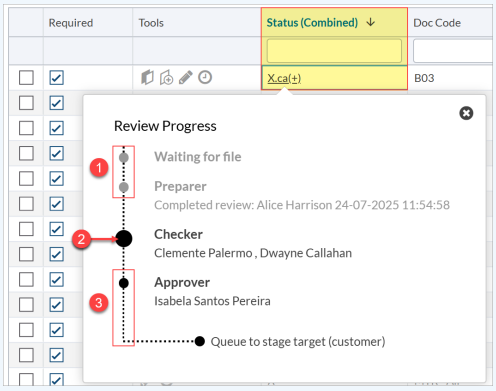
Examples

Assuming your instance uses the example values listed in the tables above, this is how you could interpret these Status (Combined) values:

Value	Components	Description
X+	Status: X Location: +	- The card has an active file on it (X), but has not yet received a customer status in the current stage. - The card is currently with the customer.

2.d(-)	Status: 2 Location: (-) Routing: .d	- The most recent customer status is "2 - Approved with Comments". - The card is in queue to submit to the sub-supplier (-) with a return expected, but... - ...before the card will be visible in the queue, the routing assigned to the Doc Control User (d) must be completed.
3.pca(+)	Status: 3 Location: (+) Routing: .pca	- The most recent customer status is "3 - Rejected". - The card is in the queue to submit to the customer (+) with a return expected, but... - ...before the card will be visible in the queue, all routings must be completed. The Preparer User (p), Checker User (c), and Approver User (a) must all complete their actions before the card can go back to the customer. (Also note, there could be more than one user in each role.).
X.c(*)(+)	Status: X Location: (*), then (+) Routing: .c	- The card is in the queue to submit to internal/3rd party with a return expected (*) and then to the customer (+) with a return expected, but... - ...before the card will be visible in the queue, all routings must be completed. The Checker User (c) must complete their action. - After all review has been completed, the card will be queued to internal/3rd party with return expected (*). - Once returned from internal/3rd party with an approved status, the card will be queued to customer with return expected (*)
X.{P.dp<->}(+)	Status: X Internal approval status: P Routing: .dp "Confirm to source" location: <-> Location after IA approval: (+)	- The card has an active file on it (X), but has not yet received a customer status in the current stage, but... - ...before the card will be visible in the queue, the internal approval cycle must be completed. The file is pending review, and the Doc Control User (d), and Preparer User (p) must all complete their actions before the card can be queued for return. - After all review has been completed, the card will be queued back to the source with no return expected (<->) and after submittal, the card will be queued to the customer with a return expected (+).
X.{A.pca<->}<+>	Status: X Internal approval status: A Routing: .pca "Confirm to source" location: <-> Location after IA approval: <+>	- The card has an active file on it (X), but has not yet received a customer status in the current stage, but... - ...before the card will be visible in the queue, the internal approval cycle must be completed. The file is currently in review (in "Approved" status), and Preparer User (p), Checker User (c), and Approver User (a) must all still complete their actions before the card can be queued for return. Note: The approval status will reflect the status given by the last reviewer, so the status *could* change. - After all review has been completed, the card will be queued back to the source with no return expected (<->) and after submittal, the card will be queued to the customer with no return expected <+>.

When routings are assigned on a card, a detailed overview of the workflow is available. To view workflow details, click on the value in the status combined column. A pop-up will appear outlining (1) the past workflow that has occurred, (2) where in the workflow the card currently stands, and (3) the future workflow that is expected to occur.



If the document is set to go through an internal approval cycle, the pop-up will also highlight the *expected* path after an internal status has been applied. For more information, see this article: Internal Approval Workflow Pop-Up.