# Internal Approval Workflow (Example)

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To provide an overview of the internal approval workflow, the most common scenario is outlined below.

#### This common scenario is as follows:

1. The initial document is brought in from the source (e.g., sub-supplier) and is assigned to DocBoss users for internal review.

2. Assigned DocBoss users will review the document and apply a status (e.g., approved, rejected, etc.).

3. Following review, the document is queued for return to the source (e.g., sub-supplier) in order to (a) let them know the result of the internal review, and (b) prompt further revisions, if required.

4. Once the document has been internally approved, it will be queued for submittal to the target (e.g., customer), and any further workflow will proceed thereafter.

### 1. Receive and assign initial document

Once an initial document is received from the source (e.g., sub-supplier), you bring it into DocBoss via **Project Menu > Cards In/Out > Incoming Documents.** 

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Once uploaded to DocBoss, you assign the document to the appropriate card. In this case, the card you assign the document to is set to receive internal review, and the approval status is pending review.

The stage settings (as defined on the stage list) will be pre-populated in the "Source" section, and can be adjusted for the individual card, if required. The list of reviewers will either be pre-loaded (if using routing scenarios) or will need to be manually added to the "Internal (User) Routing - Approval Cycle" section.

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Once processed, the card status changes to X.{P.dp<->}(+), which can be read in the following way:

X = Active file on card, but no customer status

#### {**P.dp**<->}=

- **P** = Internal approval status is "pending,"
- dp = Card is routed to the doc controller (d), and the preparer (p)
- <-> = After an "approved" status is reached via internal approval, it will be queued for return to the source (in this case, the sub-supplier) with no return expected

(+) = The location is pending submittal to the target (in this case, the customer) with return expected

A detailed overview of the card workflow can be found in two places:

1. Card list > Status combined column

2. Outstanding actions > Card form > Review Progress (workflow viewer)

For more information about the workflow popup, see our support article.

### 2. Document review

After you assigning the document to the appropriate card, the file is sent for review.

Each reviewer will see the document as an outstanding action (**Project Menu > Outstanding Actions**), and they will have the opportunity to (1) add markups, and (2) assign/change the approval status.

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			Continue stage after internal approval workflow	
			Queue for Submittal	
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Reviewers will perform their review in <u>sequential order</u>, with the doc controller reviewing first, and the approver last. Each subsequent reviewer will have the option to change the status. If different statuses are chosen by different reviewers, the **most recent** approval status will be the accepted

## 3. Return to source (e.g., sub-supplier)

status.

Once each reviewer has had the opportunity to review the document, the document is queued for return to the source (e.g., sub-supplier). The document is returned to the source in order to (a) provide them the result of the internal review, and (b) prompt further revisions, if required.

In this case, the source of the document was the sub-supplier, so the card will be queued for submittal to the sub-supplier.

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Because the "Confirm to source" stage option is enabled (see article for more information), the document will also be returned to the source once approved to inform them of the approved status, and no return is expected from them.

### 4. Return to target (e.g., customer)

Once the document has been internally approved, it will be first be queued for submittal to the source (e.g., sub-

supplier) to inform them of the approved status. Once submitted to the source, the document will be immediately queued for submittal to the target (e.g., customer). This workflow is the result of both the "Confirm to source" and "Continue stage after IA" stage options being enabled (see article for more information).

In this case, the target of the document was the customer, so the card will be queued for submittal to the customer.

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After sending the document to the target (e.g., customer), any further workflow will proceed as normal. In this case, we'd be expecting a return from the customer with their feedback, and would continue the workflow until approved by the customer.

#### Learn more about internal approval:

- 1. Introduction to Internal Approval
- 2. Enable Internal Approval
- 3. Create/Modify Internal Approval Status List
- 4. Enable Internal Approval on Stage List
- 5. Set Internal Approval Stage List