Internal Approval Workflow (Example)

03/31/2025 8:30 am MDT

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.**


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 list of reviewers will either be pre-loaded in the processing form (identified via routing scenarios), or will need to be manually added if no routing scenario is set.
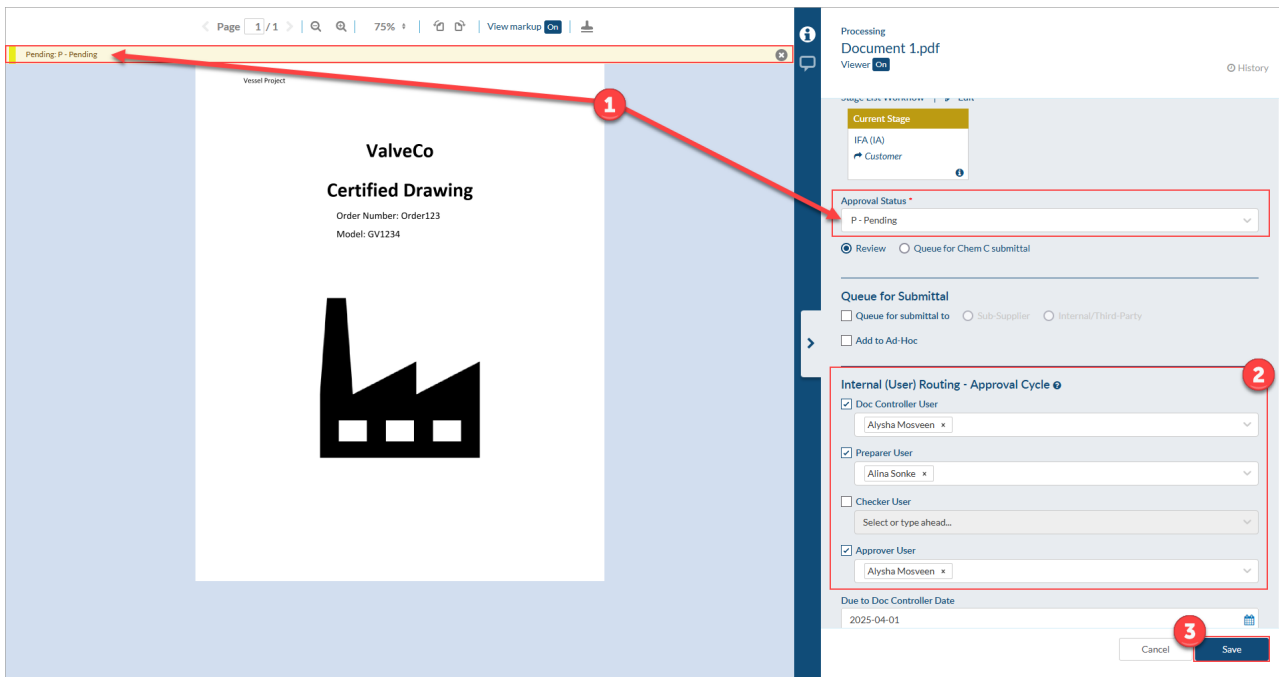
Once processed, the card status changes to X.{P}(+).dpa, which can be read in the following way:

X = Active file on card, but no customer status

{P} = Internal approval status is "pending"

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

dpa = The document is routed to the doc controller (d), preparer (p), and approver (a).

For more information about the status (combined) column, 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.

> **ℹ** 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 status.

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

Once each reviewer has had the opportunity to review the document, the document is queued for return to the source (e.g., sub-supplier). This workflow is the result of the "Confirm to source" stage option being enabled (see article for more information). The document is returned to the source in order to (a) provide them the result of the internal review (accepted, rejected, etc.), 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 back to the sub-supplier.

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 provide them the result of the internal review (i.e., accepted). Once sent to the source, the document will be immediately queued for submittal to the target (e.g., customer). This workflow is the result of 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.
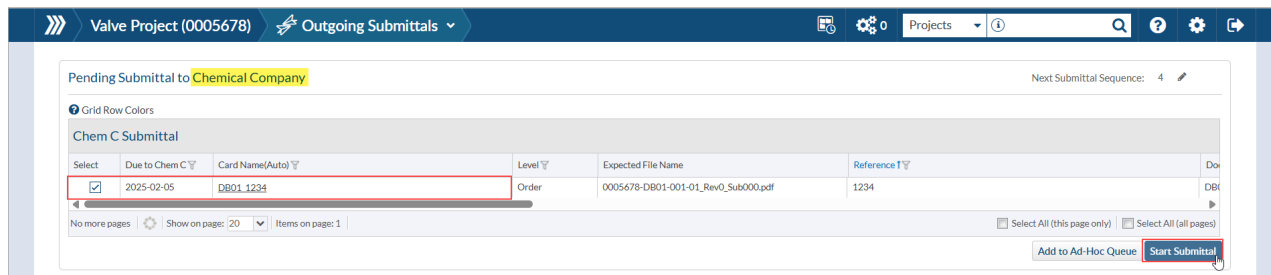
After sending the document to the target (e.g., customer), any further workflow will proceed as normal.

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