

Internal Approval Workflow (Example)

07/08/2025 12:59 pm MDT

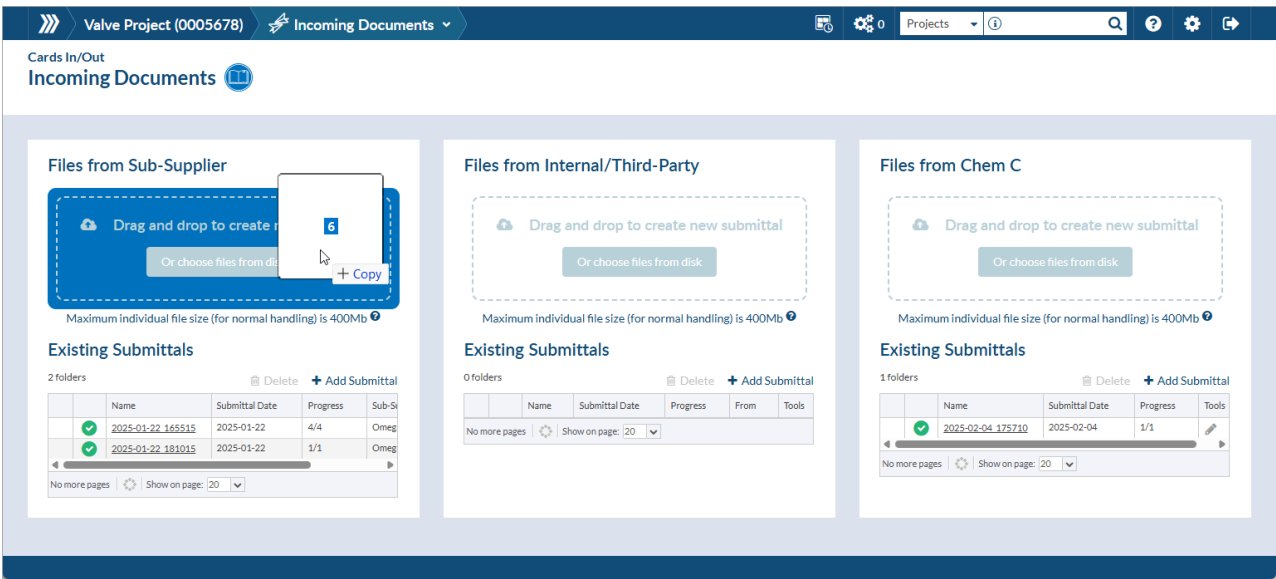
To provide an overview of the internal approval workflow, the most common scenario is outlined below.

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.

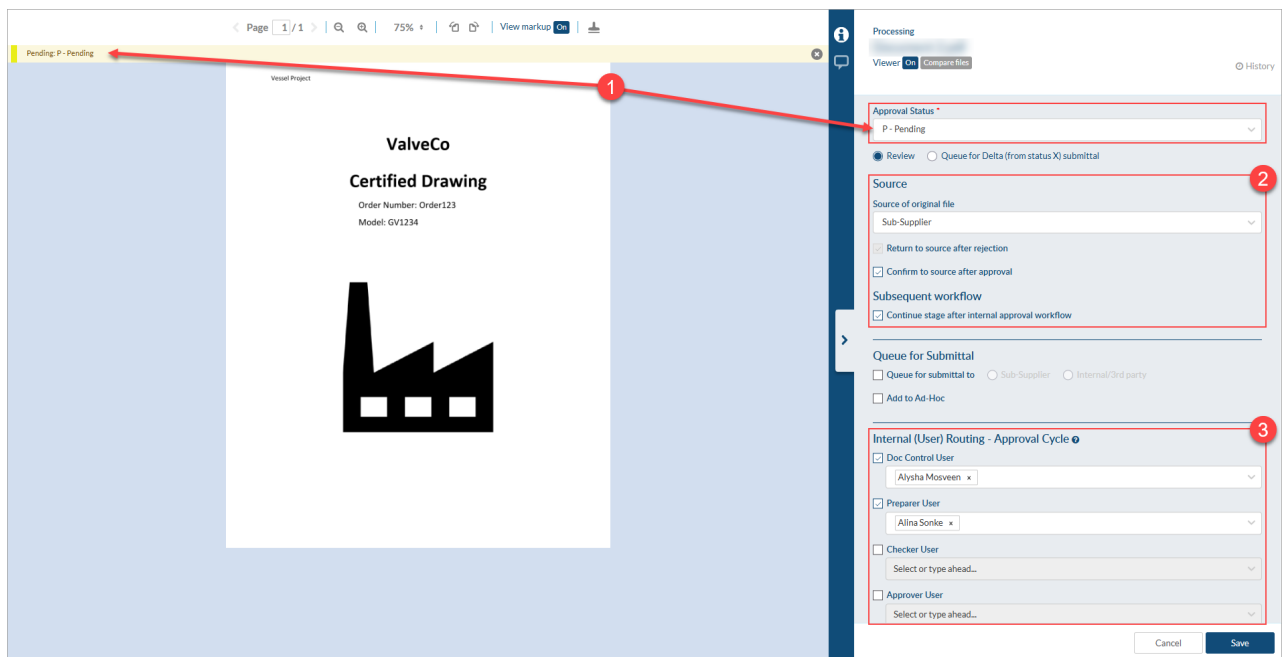
1. Receive and assign initial document

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 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.



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

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.

Page 1 / 1 75% View markup On

Rejected: 2025-07-08 by Alysha Mosveen: R - Rejected

Vessel Project

ValveCo

Certified Drawing

Order Number: Order123
Model: GV1234

Update model number 1

2

Outstanding Action

Review Progress (click to see full workflow): Doc Control Viewer On Compare files

History

Status & Routings

Approval Status *

R - Rejected

- Select Approval Status -

A - Approved

P - Pending

R - Rejected

Return to source after rejection

Confirm to source after approval

Subsequent workflow

Continue stage after internal approval workflow

Queue for Submittal

Queue for submittal to Sub-Supplier Internal/3rd party

Internal (User) Routing - Approval Cycle

Doc Control User

Cancel Save for later Complete action 3



status.

Reviewers will perform their review in sequential order, 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)

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.

Valve Project (0005678) Outgoing Submittals

Pending Submittal to Sub-Supplier

Next Submittal Sequence: 1

Select Sub-Supplier to Begin Submittal: Omega Supply

Sub-Supplier Submittal

Select	Card Name(Auto) ▾	Level ▾	Reference ▾	Doc Code ▾	Active File Link	Rev
<input checked="" type="checkbox"/>	GD10_03-LIT-3250A	Tag No. (TE)	03-LIT-3250A	GD10 Instrument Data Sheets	Document_1.pdf	0

No more pages Show on page: 20 Items on page: 1

Select All (this page only) Select All (all pages)

Add to Ad-Hoc Queue Start Sub-Supplier Submittal



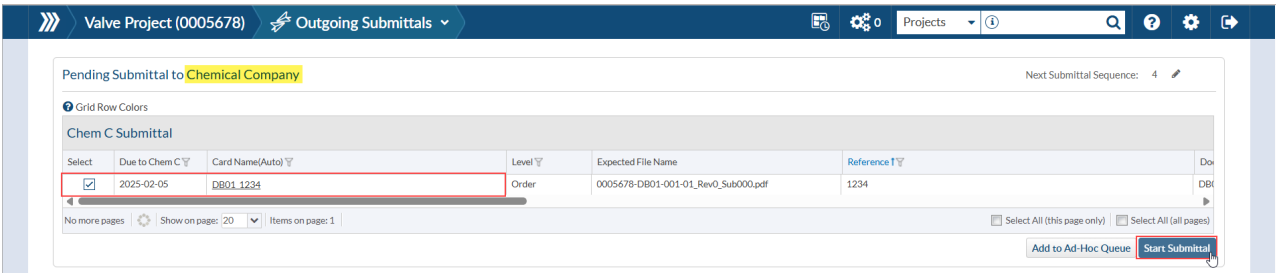
Because the "Confirm to source" stage option is enabled (see article for more information), the document will also be returned to the source once approved to inform them of the approved status, and no return is expected from them.

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.



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](#)