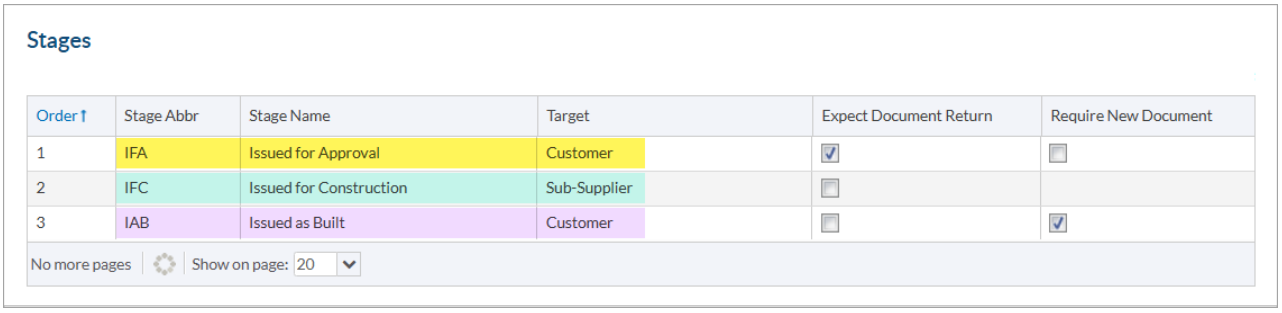
Stage List Workflow (Example)

04/17/2025 3:00 pm MDT

To provide an overview of the stage list workflow, a common scenario is outlined below.

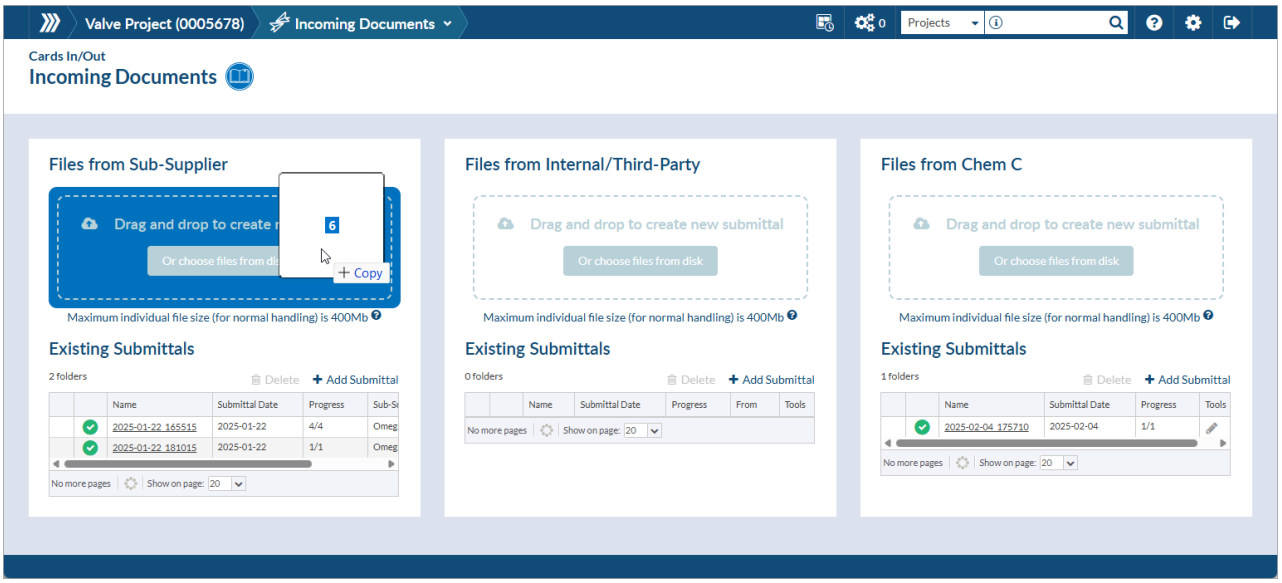
A common scenario is as follows:

1. A document is issued for customer approval (IFA) - *Document return expected*
2. Once approved by the customer, the document is issued for construction (IFC) to the sub-supplier - *No document return expected*
3. Finally, once IFC is complete, the document is issued as built (IAB) to the customer - *No document return expected*



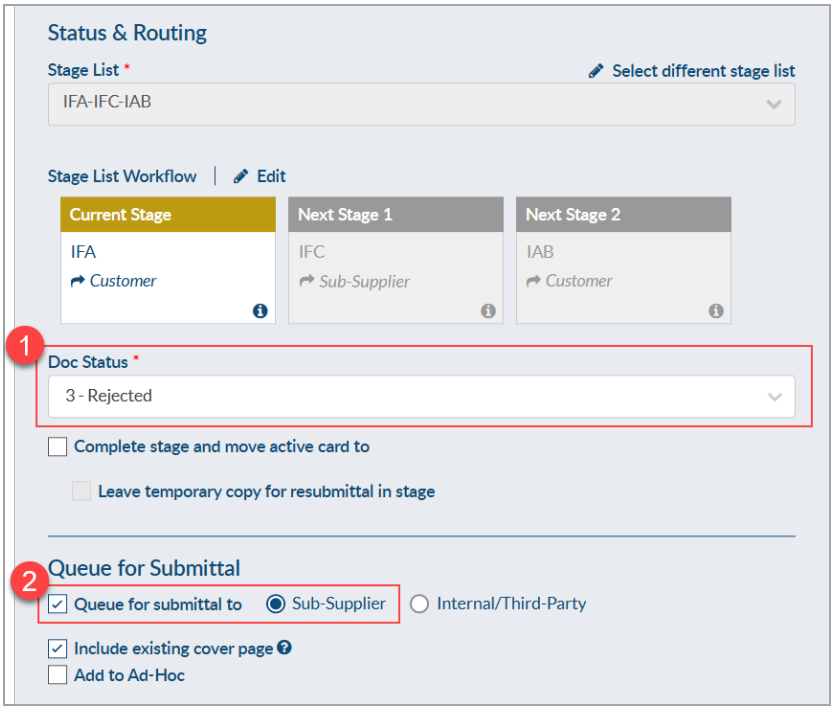
1. Document issued for customer approval (IFA)

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

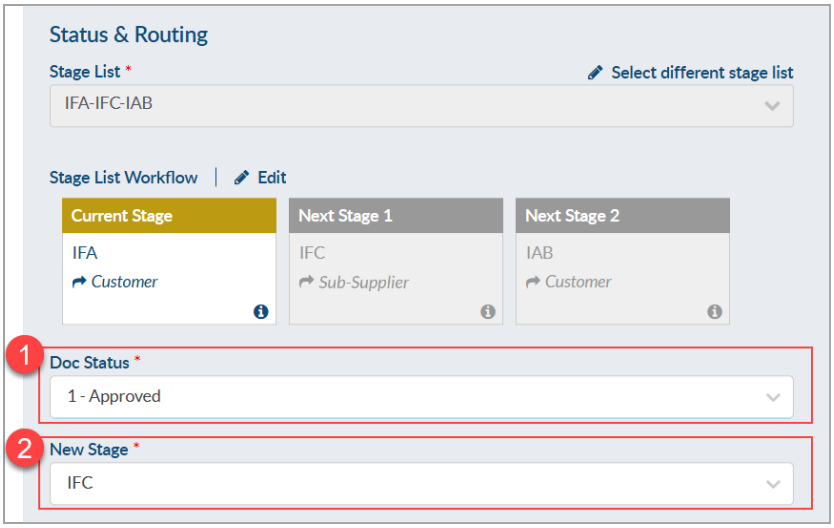


Once uploaded to DocBoss, you assign the drawing to the appropriate card. In this case, the card you assign the drawing to is set to go through three stages, starting with "Issued for Approval (IFA)." Once processed, the card is queued for submittal to the target (e.g, customer), and you start the submittal.

The customer returns the drawing with the status "Rejected." Because the drawing was rejected, the card remains in the current stage (IFA) and you queue the drawing for submittal back to the sub-supplier to make the requested changes.

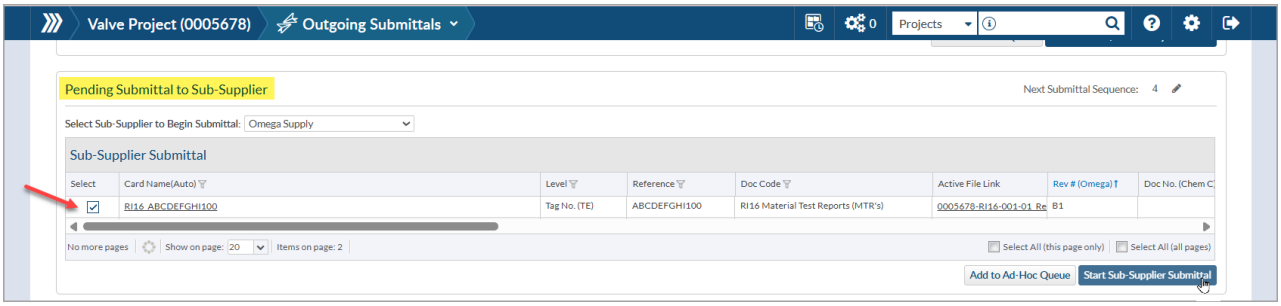


The sub-supplier returns the drawing with the requested changes are applied. The drawing is queued for return back to the customer, and you start the submittal. The customer returns the drawing again, this time with the status "Approved." Automatically, the new stage is set to "IFC."



2. Document issued for construction (IFC)

After approval from the customer in the previous stage, the approved drawing is immediately queued for submittal to the sub-supplier.

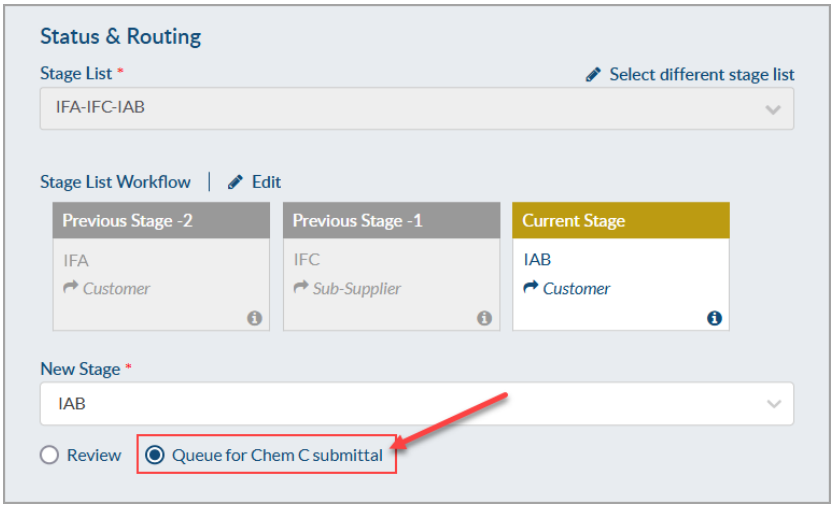


In this case, the IFC stage is set as "no return expected." Once the drawing is submitted to the sub-supplier, the IFC stage auto-completes and moves the card to the third and final stage (IAB).

3. Document issued as built (IAB)

While with the sub-supplier for construction, the drawing is marked up (i.e., the red-lined version) as they manufacture the equipment. Once construction is completed, the red-lined version of the drawing is returned from the sub-supplier.

Once returned, the red-lined version of the drawing is queued for submittal to the customer for their information/records (i.e., no return is expected).



After the drawing is submitted to the customer, the card will be completed (i.e., set to status "Z").

> At any point in the stage workflow, the status & routing options can be adjusted on individual cards if necessary. For more information, see our support article: Modify Stages from Edit/Assign Screen.

Learn more about stage lists:

1. Create Stage List
2. Add Stage(s) to Stage List
3. Assign Stage List to Doc Code
4. Stage List Workflow (Example)