

Single Stage Workflow (Example)

08/26/2025 4:02 pm MDT

To provide an overview of a **single stage** 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 - *Document return expected*
3. Finally, once construction is complete, the document is issued as built (IAB) to the customer - *No document return expected*

To achieve this workflow in distinct phases, [create a new stage list](#) for *each* individual stage; one stage list for the IFA stage, one for the IFC stage, and one for the IAB stage.

Stage List: IFA					
Order	Stage Abbr	Stage Name	Target	Expect Document Return	Require New Document
1	IFA	Issued For Approval	Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>

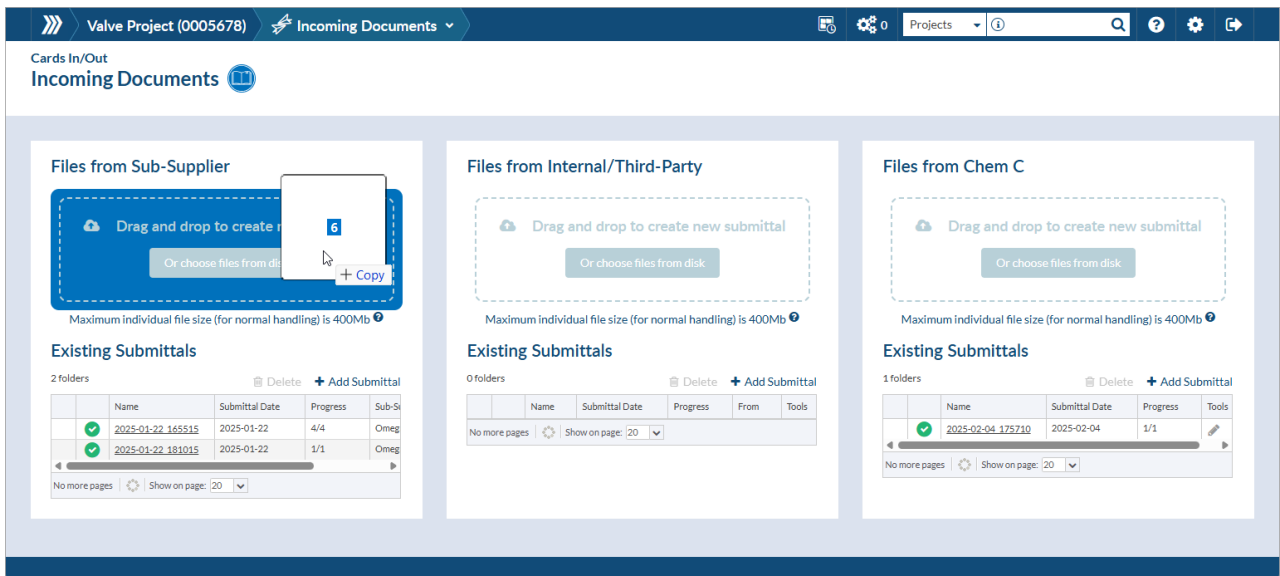
Stage List: IFC					
Order	Stage Abbr	Stage Name	Target	Expect Document Return	Require New Document
1	IFC	Issued for Construction	Sub-Supplier	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Stage List: IAB					
Order	Stage Abbr	Stage Name	Target	Expect Document Return	Require New Document
1	IAB	Issued as Built	Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Once all three stage lists are created, set the stage list on the doc code to the **first stage** in the workflow. In this case, set the stage list to "IFA."

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. 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.

Status & Routing

Stage List *

IFA

Select different stage list

Stage List Workflow | Edit

Current Stage

IFA

Customer

1 Doc Status *

3 - Rejected

Complete stage and move active card to

Leave temporary copy for resubmittal in stage

2 Queue for Submittal

Queue for submittal to Sub-Supplier Internal/Third-Party

Include existing cover page ?

Add to Ad-Hoc

The sub-supplier returns the drawing with the requested changes 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."

Since it has been approved, the document is ready to move to the next stage. To do this, select the "Start a different stage life (on save)" option and choose the next stage in the workflow from the drop-down list. In this case, set the next stage list to "IFC."

Status & Routing

Stage List * [Select different stage list](#)

IFA

Stage List Workflow | [Edit](#)

Current Stage

IFA

[Customer](#)

1 **Doc Status ***

1 - Approved

2 ☒ **Start a different stage list (on save)**

3 IFC



If a new stage is not selected upon receiving an approved status, the card will move to status "1" and will remain in the current stage. If/when additional workflow is required, a new stage list can be selected by editing the card and selecting a different stage list.

Status & Routing

Stage List * [Select different stage list](#)

IFA

Stage * [Edit stages](#)

IFA

Doc Status *

1 - Approved

2. Document issued for construction (IFC)

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

Valve Project (0005678) [Outgoing Submittals](#)

Pending Submittal to Sub-Supplier

Next Submittal Sequence: 4

Select Sub-Supplier to Begin Submittal: Omega Supply

Sub-Supplier Submittal

Select	Card Name(Auto)	Level	Reference	Doc Code	Active File Link	Rev # (Omega)	Doc No. (Chem C
<input checked="" type="checkbox"/>	RI16_ABCDEFGHI100	Tag No. (TE)	ABCDEFGHI100	RI16 Material Test Reports (MTR's)	0005678-RI16-001-01_Re	B1	

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[Add to Ad-Hoc Queue](#) [Start Sub-Supplier Submittal](#)

In this case, the IFC stage is set to expect a returned document. Once the drawing is submitted to the sub-supplier, the card will remain in the current stage until the document is returned.

Once the document is returned, it is ready to move to the third and final stage (IAB). To do this, select the "Start a different stage life (on save)" option and choose the next stage in the workflow from the drop-down list. In this case, set the next stage list to "IAB."

Status & Routing

Stage List * [Select different stage list](#)

IFC

Stage List Workflow | [Edit](#)

Current Stage

IFC

[Sub-Supplier](#)

☐ Review ☐ Queue for Sub-Supplier (from status X) submittal ☒ Complete

1 ☒ Start a different stage list (on save)

2 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, this new 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).

Status & Routing

Stage List * [Select different stage list](#)

IAB

Stage List Workflow | [Edit](#)

Current Stage

IAB

[Customer](#)

New Stage *

IAB

☐ Review ☒ Queue for Chem C submittal

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



To learn about sequential (multi-stage) stage lists (with automated workflow progression), see the following article: [Introduction to Stages & Stage Lists](#).