

Modify Stages from Edit/Assign Screen

08/29/2025 9:32 am MDT

When bringing in/returning a document, the stages of the selected stage list will appear in "Status and Routing" section of the processing form.

The screenshot shows the 'Status & Routing' section of a document processing form. It includes a 'Stage List' dropdown (labeled 1) with 'IFA-IFC-IAB' selected. Below it is the 'Stage List Workflow' section (labeled 2) showing 'Current Stage' as 'IFA' and 'Next Stage 1' as 'IFC'. To the right is the 'New Stage' dropdown (labeled 3A) set to 'IFA'. Below these are radio buttons for 'Review' and 'Queue for Chem C submittal'. To the right of the 'Status & Routing' section is the 'Doc Status' section (labeled 3B) with a dropdown set to '1 - Approved' and a 'New Stage' dropdown set to 'IFC'. Below the 'Doc Status' section is another 'Doc Status' dropdown set to '3 - Rejected' and checkboxes for 'Complete stage and move active card to' and 'Leave temporary copy for resubmittal in stage'.

The information provided is as follows:

1. The stage list that is set for the card.
2. The stage list workflow, informing you of the current stage the document is in, and the next stage that will be entered once the current stage is completed (if applicable).
3. The stage that will be entered once the card is processed.
 - A. If the document is being brought in for the first time (e.g., from sub-supplier), the new stage will be the first stage in the stage list (e.g., IFA).
 - B. If the document is being returned (e.g., from customer), the new stage will depend on the status of the document.
 - a. If the document is given a completed status (e.g., approved, for information), the new stage will be the next stage in the stage list.
 - b. If the document is given an incomplete status, the document will remain in the current stage.

Change/edit stage list

On the processing form, you have the option to select a different stage list, or to edit the stage list workflow for this particular card.

Select different stage list

To select a different stage list, select the option (above the stage list section) and choose the appropriate list from the available options. Once selected, the stage list workflow will be updated in accordance with the chosen stage

list.

Processing Document 2.pdf
Viewer On History

0

☐ This document is just a cover page

Status & Routing

Select different stage list

Stage List *

IFA-IFC-IAB

Hide Cards from Customer

IFA

IFA (IA)

IFA-IFC-IAB

IFR-IFF

No Individual Submission

Edit stage list workflow

To edit the stage list workflow for the card, click the "Edit" button beside the stage workflow title. The available options are as follows:

1. Marker that identifies the current stage. If you want to change the stage, move the marker.

2. Option to edit the details of the stage.

3. Option to add a pre-created stage to the stage list work flow (from the stages library).

Note: The stage library (System Menu > Admin > Stage Lists > Library) is a list of pre-defined stages that can be added to stage lists (see support article: [Stages Library](#)).

4. Option to re-arrange the stages in the stage list (drag and drop).

5. Option to add a NEW stage to the workflow.

Stage List Workflow | Edit

Current Stage

IFA

Customer

Next Stage 1

IFC

Customer

Next Stage 2

IAB

Customer

Edit stage list for card: 0005678-RI16-002-01

Add or drag a stage to the new list

Current position in the workflow

Name *

IFA-IFC-IAB

☐ Do not display cards in SDI

Auto-generate numbers for

Instance and Customer (typical)

Active Stages List

IFA

IFC

IAB

+ Add New Stage

Stages Library

Abbreviation

Cancel

Apply to current card

Apply edits to multiple cards

If updates are made, the stage list will be saved as a new stage list, requiring a unique name. After clicking apply (to current card or to multiple cards), the updated stage list (and associated stages) will show in the processing form.

Status & Routing

Stage List *

[Select different stage list](#)

IFA-IFC-IAB - Updated

Stage List Workflow | [Edit](#)

Current Stage	Next Stage 1	Next Stage 2
IFA Customer	IFC Customer	IAB Customer