

# Internal Approval Cycle

07/19/2024 2:00 pm EDT

Internal approval is often of interest to companies who are doing some engineering on behalf of their customer. They want to work with their suppliers to ensure the documents are correct, prior to sending them on to their customer.










When enabled, an internal approval cycle is initiated when cards are first received by your company (from suppliers or other 3rd parties). Cards are sent to your users (via routing), who in turn apply an internal status (similar to customer statuses). The cards are then queued for return to their source. After return, if cards have been "approved", they continue their workflow to be sent to the stage target (generally the customer).

## Using Internal Approvals

### Enable Internal Approvals

The first step is to enable the option for your company. This is done through the Admin screen.

Navigate to Settings > General > Project Default Options.

Project Default Options	
Last Project Pattern 	<ProjectName> (<SalesOrderQuote>)
Default Stage List 	IFI
Default Project Fields Template 	Default (with MTR fields)
Force Mapping on Codes List (Requirements) 	No
Copy Units, Default Levels and Stage Lists 	No
Default Delimiter for Bulk Assign 	"_"
<u>Enable Internal Approval Statuses </u>	Yes 
<b>Outgoing File Name Format </b>	
Type of Format	Pattern per Target
Pattern	<DocNoWolfePA>_r<WolfePARev>.pdf
Customer Pattern	<DocNoCustomer>OR<DocNoWolfePA>_Rev<WolfePARev>_Sub<SubmittalCountCus

Once enabled in the admin area, Internal Approval can be managed individually (enabled/disabled) on each Project on the Project Fields Template.



Set Up

# Project Field Template: Default (Tunde Dorloti)



## Project Settings

Default EQ Number	Tag ▾	Manual Cards Module	No ▾
Default Level	Order ▾	Major Tags Module ?	No ▾
Enforce Sub-Supplier Selection	Yes ▾	Enable Submittal CP Bookmark	Yes ▾
Allow Sub-Supplier Access	No ▾	Submittal CP Bookmark Pattern	<Title>
<b>Enable Internal Approval Statuses</b>	<b>Yes</b> ▾		
Doc Control role is mandatory	Yes ▾		
Engineer role is mandatory	Yes ▾		
Drafter role is mandatory	No ▾		
Project Manager role is mandatory	No ▾		
Remove sticky note drawing from PDFs ?	No ▾		
Require recipient to authenticate when accessing submittals ?	No ▾		

## Set up internal approval list

Internal approval status lists are created on the **Internal** company.

The APPROVED checkbox has the same function as the complete checkbox on the customer return status list. It indicated the card may continue on its workflow after return to its source. There is also a PENDING option which must remain. That status is applied when cards first start the cycle.

These values can be changed to your companies statuses. The default values are A, P, R; but could be 1,2,3,4 or A,B,C,D or whatever your company wishes to use for approval statuses.

Lists / Companies / Wolfe PA / Code/Status/State

### Internal Approval Statuses

[← Back to Companies List](#)

Internal Approval - Default + + Add List

Name:

\* P is used as initial status or if need to restart internal approval process

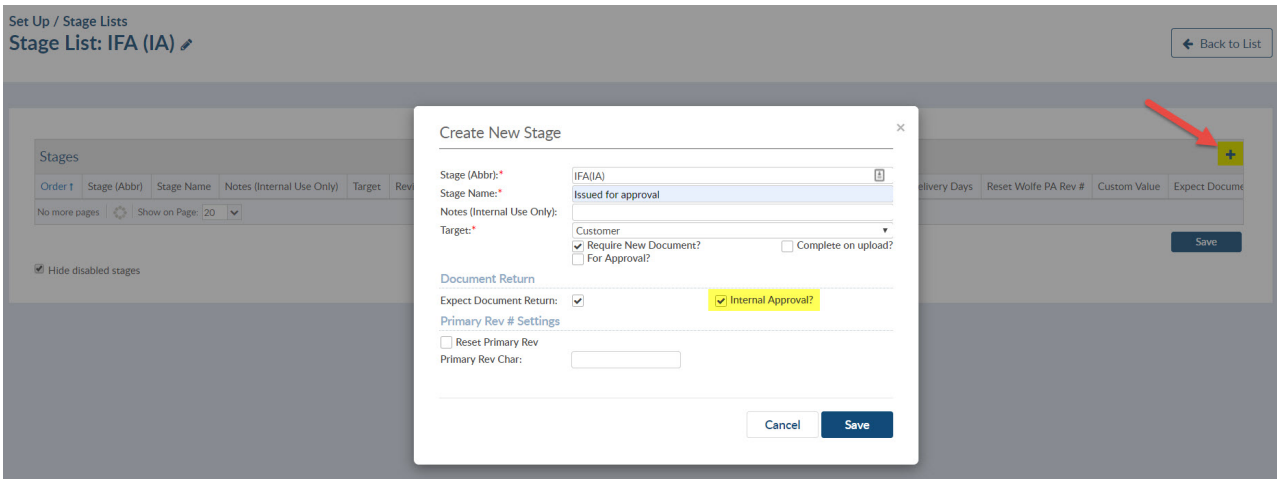
Name I	Description	Approved	Tools
A	Approved	<input checked="" type="checkbox"/>	
P	Pending	<input type="checkbox"/>	
R	Rejected	<input type="checkbox"/>	

No more pages Show on Page: 20 ▾

Hide disabled Save

## Enable internal approval on stage list

The internal approval workflow is enabled on any specific stage. Simply check the "Internal Approval" checkbox when creating a new stage.

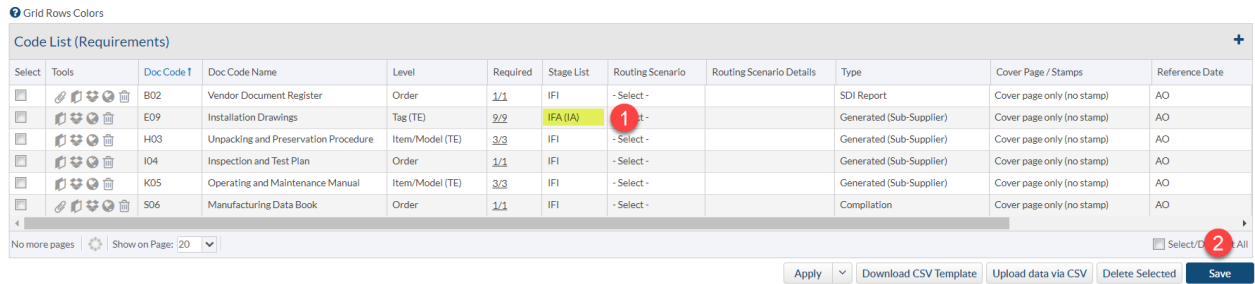


## Apply internal approval routing scenarios

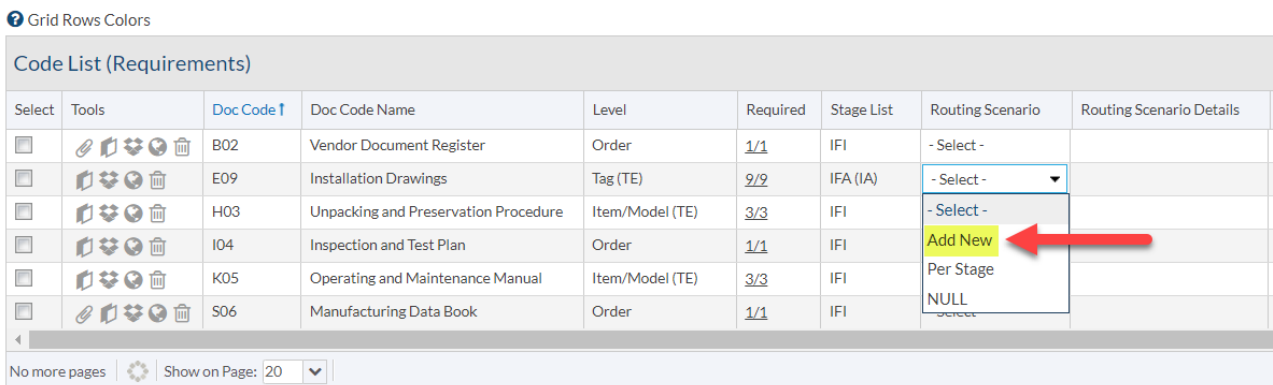
Internal approval is applied through routing scenarios.

Routing scenarios are most commonly applied in a project's **Code List (Requirements)** screen.

In the **Code List**, for the doc code(s) which will require internal approval, select a **Stage List** that includes an internal approval stage. Save the changes.



In the **Routing Scenario** column, click within the grid in the row for one of the doc codes that will require internal approval. If the project already includes the appropriate routing scenario, select it. If not, select **Add New**.



On the slide that pops up, enter a name for the scenario and select the pencil (edit) icon next to **Internal approval**.

# New Routing Scenario



1

Name \*

IA

Use as default

## Settings

Assign reviewers to NULL cards



Internal approval

2



Assign reviewers when file attached from customer (when stage not complete)



Assign reviewers when file attached from customer (when stage complete)



Assign reviewers when file attached from sub-supplier



Only apply when file is out with sub-supplier (i.e. card is in - status)

Assign reviewers when file attached from internal



Cancel

Save

Select the required roles and users, then save.

## New Routing Scenario




Name \*

IA

Use as default

### Settings

Assign reviewers to NULL cards 

Internal approval 

1

Doc Control \*

Alina Kleinsasser x

Project Engineer \*

Clark Kent x Harry Potter x

Drafting \*

Select or type ahead...

Project Manager \*

Alina Kleinsasser

Cancel

Save 

The internal approval routing scenario is now applied to all of the cards in the selected doc code.

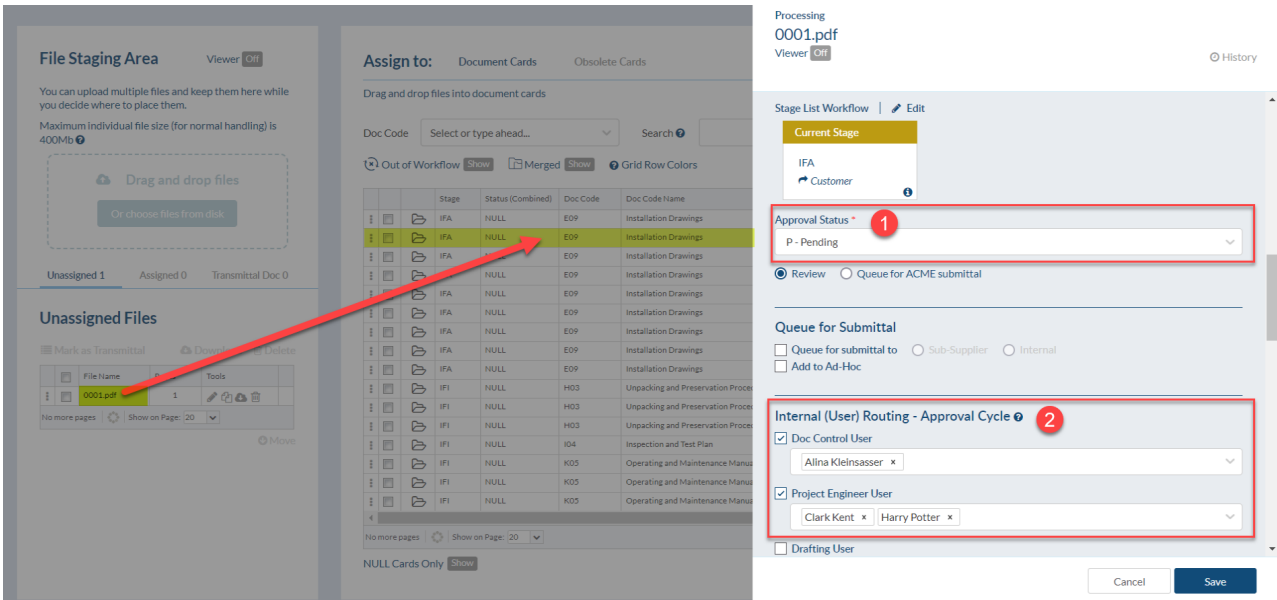
To apply internal approval to multiple doc codes at once or to specific cards, see [here](#).

# Internal approval workflow

## Upload document, and apply approval status

When a document is assigned to a card with internal approval workflow, the user will see

- 1) The approval status set to "Pending", and
- 2) The list of reviewers for the approval cycle.



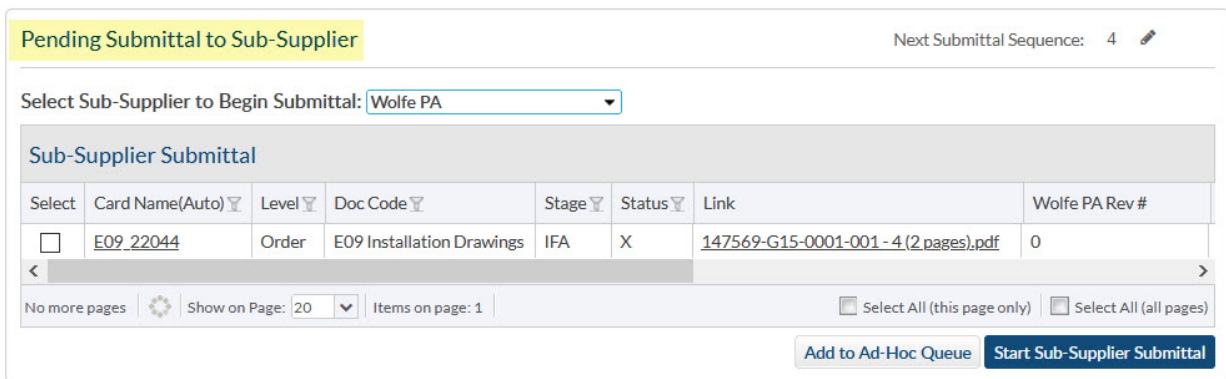
As the document makes its way through the **outstanding actions** for each of the reviewers, they will have the opportunity to add markups, and assign/change the approval status.

## Return to source

Once all reviewers have **completed their review**, the document will be queued for return to the original **source** to inform them whether the document has comments or if it was accepted internally.

In this case, the source of the document was Sub-Supplier, so the card will show in the out to sub-supplier queue.








\*Note that source is set by the Type which was selected on the Code List (i.e Generated Sub-Supplier or Generated Internal).




If the document was approved, after sending to source, it will be placed also in the outbound to customer queue which is the target and normal **workflow** will be enabled.

Grid Rows Colors

## ACME Submittal

Select	Card Name(Auto) 	Tools	Level 	Doc Code 	Stage 	Status 	Link	Doc No. (Internal) 
<input type="checkbox"/>	E09_22044		Order	E09 Installation Drawings	IFA	X	<a href="#">1011-1213-E09-0001-001_E09.pdf</a>	1011-1213-E09-0001-001

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 Submittal

# Variables

Variables are available for the Sub-supplier/Internal cover sheets and transmittal documents. These show the internal approval status of the document, so your submitters know whether the document has been approved or rejected.