

# Enable Internal Approval

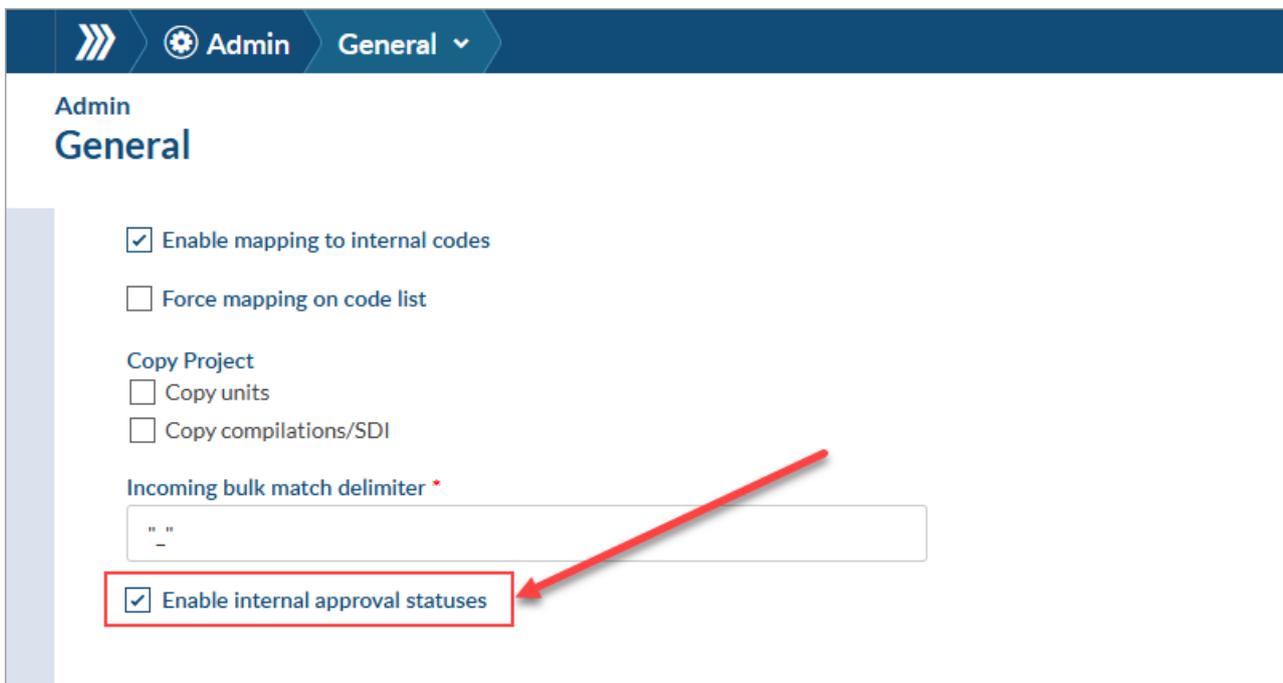
03/31/2025 8:22 am MDT

In order to use internal approval, the function will need to be enabled from both admin and project settings.

## Enabling from Admin Settings

Before internal approval can be used on a project, the option will need to be enabled from your admin settings.

To enable internal approval, navigate to **System Menu > Admin > General > Project Options**. From the "Defaults" section, check the box that reads "Enable internal approval statuses." Once checked, click save (bottom right).



The screenshot shows the 'Admin General' settings page. The breadcrumb navigation at the top reads 'Admin > General'. The page title is 'Admin General'. The settings include:

- Enable mapping to internal codes
- Force mapping on code list
- Copy Project
  - Copy units
  - Copy compilations/SDI
- Incoming bulk match delimiter \*
- Enable internal approval statuses

A red arrow points to the 'Enable internal approval statuses' checkbox, which is also highlighted with a red box.

## Enabling on Project

Once internal approval has been enabled from the admin level, the function can be used on projects. To enable internal approval on any given project, navigate to **Project Menu > Set Up > Project Template > Project Settings**. Scroll down to the "Enable Internal Approval Statuses" option and choose "Yes" from the drop-down. Once selected, the change will be auto-saved.

» Instruments (45313AM) Project Template 1

Set Up  
Project Template: Default Project Fields Template (system) | [Print] [Refresh]

2 Project Settings

- Doc Code/Card Fields
- Additional Unit Types
- Combination Fields
- Equipment Fields
- Project (Main) Fields
- Doc Code Queries
- Compilation / Package Presets

### Project Settings

Default EQ Number  
Tag

Stage List  
IFA

Default Level  
Order

Default Cover Page / Stamps  
Cover page only (no stamp)

Enforce Sub-Supplier Selection  
Yes

Allow Sub-Supplier Access  
No

3 Enable Internal Approval Statuses

- No
- Yes
- No
- yes

Preparer role is mandatory  
No

## Next steps:

1. Create/Modify Internal Approval Status List
2. Enable Internal Approval on Stage List
3. Apply Internal Approval Stage List to Doc Codes
4. Internal Approval Workflow (Example)