Create/Modify Internal Approval Status List

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Before using internal approval, a status list will need to be created. Once a status list is created, statuses can be added, removed, and/or modified to suit your company's process.

Create list

To create an internal approval status list, navigate to **System Menu > Lists > Companies.** Choose your internal company from the grid.

From your internal company profile, navigate to the "Internal Approval Statuses" page.

Initially, you will see a default list available that includes three statuses:

1. Approved (A)
2. Pending (* P)

3. Rejected (R)

If desired, you can choose to add additional approval statuses (e.g., Approved with comments) by clicking the "+ Add Approval Status" button (above the grid on the right). Additionally, you can modify the status names and/or descriptions to better match your company process. To do this, click directly in the grid and begin typing your preferred value(s). Once complete, click "Save" (bottom right).

Any changes made to an Internal Approval status list will only be applied **new** projects. If you update a list and enable Internal Approval on a project created **before** the updates were applied, the previous version of the list will be applied.

Add/modify approval statuses (on Project)

Internal Approval statuses can also be added/modified on individual projects. These changes will apply only to the one project, and will have no impact on the default list available from your internal company profile.

To add/modify internal approval statuses, navigate to **Project Menu > Set Up > Internal Approval Statuses.**

To add additional approval statuses (e.g., Approved with comments), click the "+ Add Approval Status" button (above the grid on the right). To modify the status names and/or descriptions, click directly in the grid and begin typing your preferred value(s). Once complete, click "Save" (bottom right).

Next steps:

1. Enable Internal Approval on Stage List

2. Apply Internal Approval Stage List to Doc Codes

3. Internal Approval Workflow (Example)