

# Create/Modify Internal Approval Status List

03/31/2025 8:30 am MDT

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.

The screenshot shows the 'Lists > Companies' page. At the top, there are navigation icons and a search bar. Below the navigation, the page title 'Lists Companies' is displayed. The main content is a table with the following columns: ID, Name, Short Name, Phone, Fax, Is Sub-Supplier?, Is Customer?, Is Internal?, Omega External Reference, Default Cover Page Count, and Tools. The table contains several rows, with the row for 'Omega Supply' (ID 458) highlighted in yellow. Below the table, there are pagination controls and an 'Excel Import/Export' button.

ID	Name	Short Name	Phone	Fax	Is Sub-Supplier?	Is Customer?	Is Internal?	Omega External Reference	Default Cover Page Count	Tools
503	ABC Engineering	ABC	1234567890			✓			0	
494	ACME Engineering	ACME				✓			0	
495	Chemical Company	Chem C				✓			0	
458	Omega Supply	Omega					✓		0	
496	Sub-Supplier	Sub-1			✓				0	
24239	Valve Company	ValveCo			✓	✓			0	

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

The screenshot shows the 'Omega Supply Profile' page. The breadcrumb navigation is 'Lists > Companies > Omega Supply > Profile'. The page title is 'Lists / Companies / Omega Supply Profile'. On the left, there is an 'Edit Company' form with fields for Name, Short Name, Omega External Reference, Phone, and Default Cover Page Count. On the right, there is a dropdown menu for 'Profile' with options: Profile, Affiliate Admin Settings, Addresses, Contacts, Doc Codes, Return Statuses, Internal Approval Statuses (highlighted), and Card States. A 'Save' button is located at the bottom right.

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).

The screenshot shows the 'Internal Approval Statuses' configuration page for 'Omega Supply'. At the top, there is a breadcrumb trail: Lists / Companies / Omega Supply / Internal Approval Statuses. Below this, there is a 'Name' field containing 'Internal Approval - Default' and a 'Save' button. A table below shows the current approval statuses:

Name	Description	Approved	Tools
A	Approved - No Comments	<input checked="" type="checkbox"/>	
AwCR	Approved - With Comments (Resubmit)	<input type="checkbox"/>	
*P	Pending - No Status Applied	<input type="checkbox"/>	
R	Rejected - Apply Changes (Resubmit)	<input type="checkbox"/>	

At the bottom right of the grid, there is a '+ Add Approval Status' button and a 'Save' button.



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).

The screenshot shows the 'Internal Approval Statuses' configuration page for 'Valve Project (0005678)'. At the top, there is a breadcrumb trail: Valve Project (0005678) / Internal Approval Statuses. Below this, there is a 'Name' field containing 'Internal Approval - Default' and a 'Save' button. A table below shows the current approval statuses:

Name	Description	Approved	Tools
A	Approved - No Changes Required	<input checked="" type="checkbox"/>	
*P	Pending	<input type="checkbox"/>	
R	Rejected - Changes Required	<input type="checkbox"/>	

At the bottom right of the grid, there is a '+ Add Approval Status' button and a 'Save' button.

## Next steps:

1. Enable Internal Approval on Stage List
  2. Apply Internal Approval Stage List to Doc Codes
  3. Internal Approval Workflow (Example)
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