

Enable Internal Approval on Stage List

07/04/2025 4:09 pm MDT

To integrate internal approval into the document workflow, a stage list will need to be added that includes internal approval.

If you intend to use internal approval on multiple projects, you can add the stage list at the Admin level. If you only plan to use internal approval on a specific project, you can add the stage list directly to the project.

From Admin

To add internal approval to an Admin-level stage list, navigate to **System Menu > Admin > Stage Lists**.

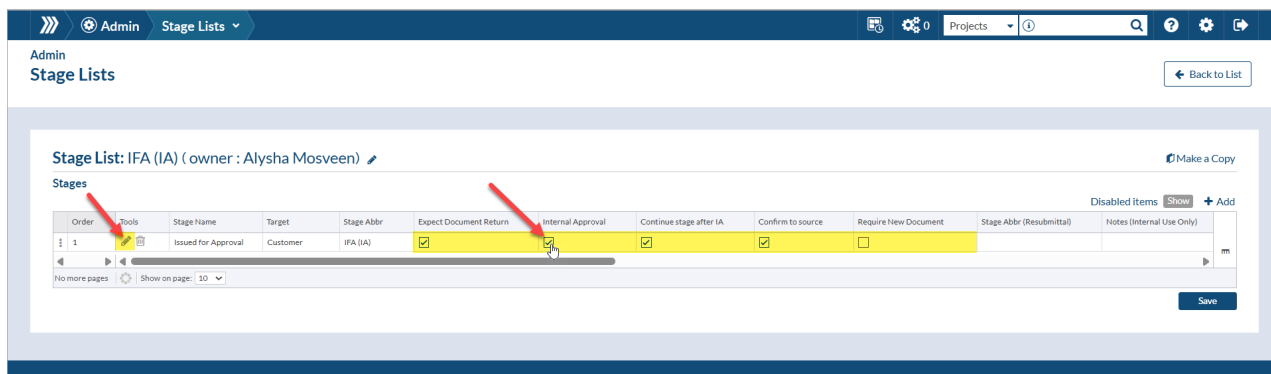
In a [new or existing stage list](#), create a new stage by selecting the "+ Add" button above the grid. Name the stage to your preferences, choose the appropriate target (customer, sub-supplier, or internal/third-party), and check the box that reads "Internal Approval?"

The screenshot shows the 'Create Stage' form in the Admin Stage Lists interface. The form is titled 'Create Stage' and includes the following fields and options:

- Stage abbreviation ***: IFA (IA)
- Stage ***: Issued for Approval
- Notes (Internal Use Only)**: (Empty text area)
- Target ***: Customer (dropdown menu)
- Do not submit to customer**: ☐
- Require New Document?**: ☒
- Complete on Upload**: ☐
- If AwCR, complete stage?**: ☐ (with a help icon)
- For Approval?**: ☐
- Exclude cards in this stage from the overdue cards reports**: ☐
- Document Return**:
 - Expect Document Return**: ☒
 - Internal Approval?**: ☒ (highlighted with a red box and a red arrow)

At the bottom of the form are 'Cancel' and 'Save' buttons.

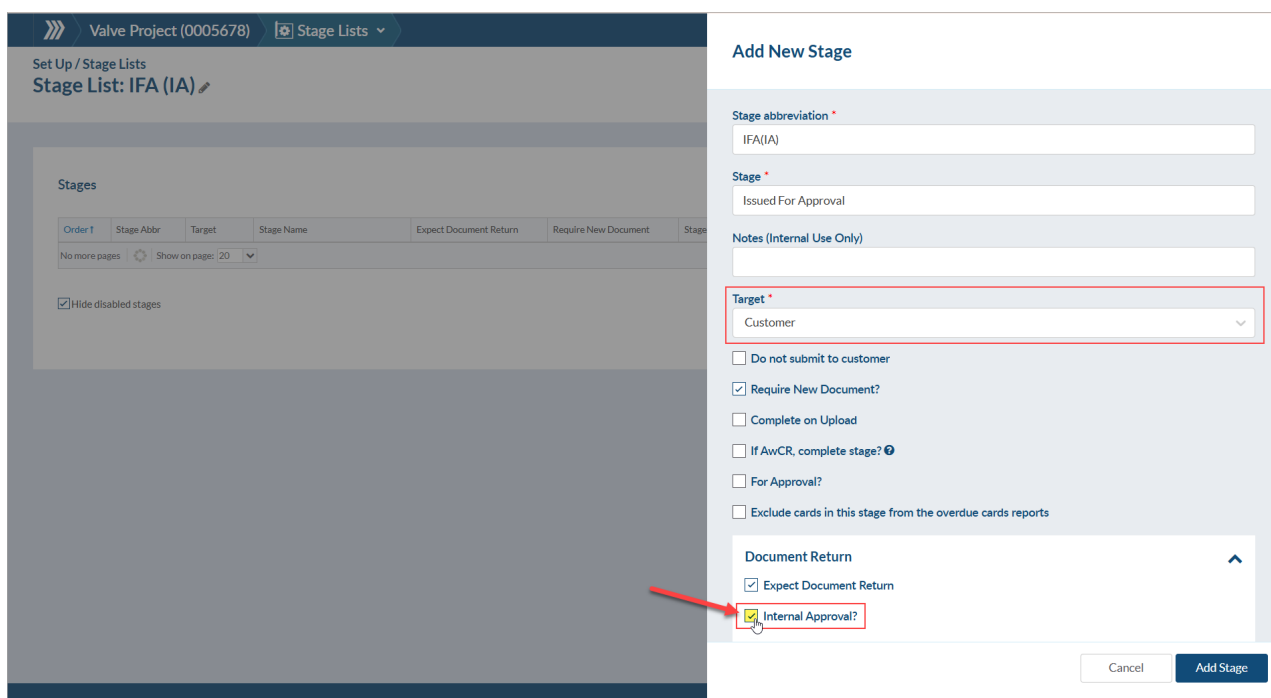
If you would like to make a change to an existing stage, use the check boxes/drop-downs in the grid to make the desired changes **or** click the pencil icon under "Tools" for the stage you would like to modify.



From Project

To add internal approval to a stage list on a Project, navigate to **Project Menu > Set Up > Stage Lists**.

In a **new or existing stage list**, create a new stage by selecting the "+ Add Stage" button above the grid. Name the stage to your preferences, choose the appropriate target (customer, sub-supplier, or internal/third-party), and check the box that reads "Internal Approval?"



If you would like to make a change to an existing stage, use the check boxes/drop-downs in the grid to make the desired changes.

Valve Project (0005678) Stage Lists

Set Up / Stage Lists
Stage List: IFA (IA)

Back to List

Stages

Tools	Order	Stage Abbr	Target	Stage Name	Expect Document Return	Internal Approval	Continue stage after IA	Confirm to source	Require New Document	Stage Abbr (Resubmittal)	Stage Name (Resubmittal)	Notes (Internal Use)
	1	IFA (IA)	Customer	Issued for Approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

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☒ Hide disabled stages Save



If a stage list is in-use on the project, the stages **cannot** be edited. To add an internal approval stage, you can (1) duplicate the stage list, (2) add an internal approval stage, and (3) change the stage list used for the doc code from the code list.

Workflow customization options

After a stage has been marked as internal approval, there are two customization options that appear:

- Source of original file:** Identifies where the original file will arrive from (Customer, Internal/3rd Party, or Sub-Supplier).
(if left blank, the source will be set by the grid the file is brought into and can be manually changed, if required)
- Confirm to source**
(included in the internal approval workflow)
 - Checked = Upon approval, the document will be queued for submittal back to the source (e.g., sub-supplier) to inform them of the documents' status (i.e., approved). The internal approval workflow will be completed once the submittal has been sent.
 - Unchecked = Upon approval, the document will **not** be queued for submittal back to the source (e.g., sub-supplier). The internal approval workflow will be completed immediately after approval.
- Continue stage after IA**
(immediately following completion of the internal approval workflow (including confirm to source, if applicable))
 - Checked = The document will be queued for submittal to the target (e.g., customer). Once submitted to the target, any additional workflow will proceed per the stage settings for submittal to target.
 - Unchecked = The document will **not** be queued for submittal to the target (e.g., customer), and the stage will auto-complete.

Document Return

☒ Internal approval?

Source of original file

1

Select or type ahead...

▼

2

☒ Confirm to source ?

3

☒ Continue stage after IA ?

Next steps:

1. [Apply Internal Approval Stage List to Doc Codes](#)
 2. [Internal Approval Workflow \(Example\)](#)
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