

Enable Internal Approval on Stage List

03/31/2025 8:24 am 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**.

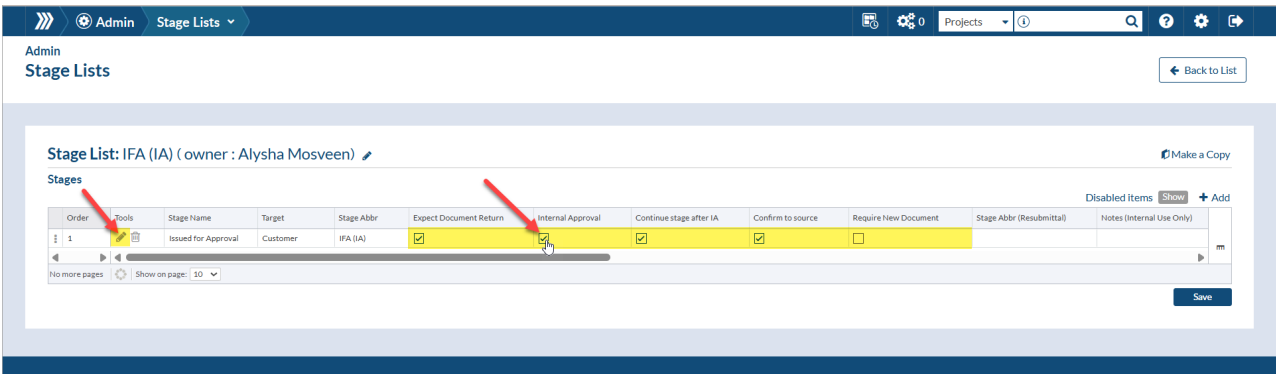
In a [new or existing stage list](#), create a new stage by selecting the "+ Add" button above the grid. Name the stage to your preferences, choose the appropriate target (customer, sub-supplier, or internal/third-party), and check the box that reads "Internal Approval?"

The screenshot shows the 'Create Stage' dialog box in the Admin Stage Lists interface. The dialog is titled 'Create Stage' and has a close button (X) in the top right corner. It contains several sections:

- Stage abbreviation ***: A text input field containing 'IFA (IA)'.
- Stage ***: A text input field containing 'Issued for Approval'.
- Notes (Internal Use Only)**: A text input field.
- Target ***: A dropdown menu with 'Customer' selected. This section is highlighted with a red box.
- Options**: A list of checkboxes:
 - Do not submit to customer
 - Require New Document?
 - Complete on Upload
 - If AwCR, complete stage? ⓘ
 - For Approval?
 - Exclude cards in this stage from the overdue cards reports
- Document Return**: A section with a blue arrow icon on the right, containing:
 - Expect Document Return
 - Internal Approval? This checkbox is highlighted with a red box and a red arrow points to it.

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

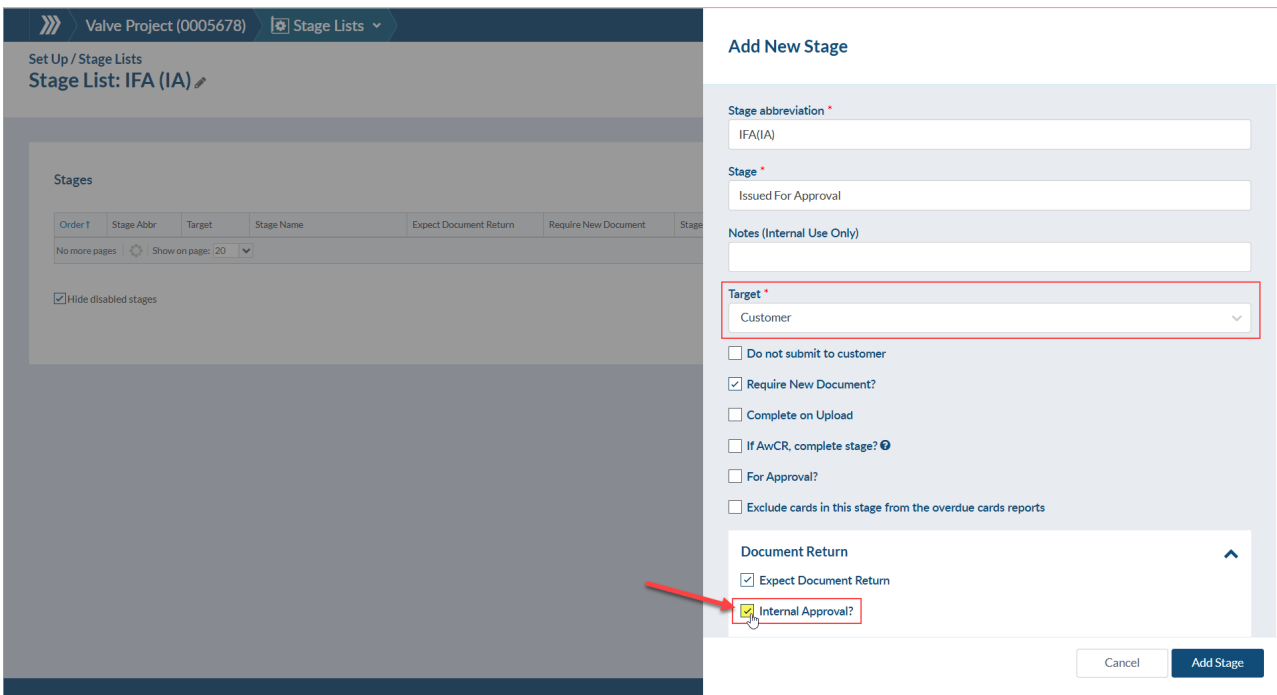
If you would like to make a change to an existing stage, use the check boxes in the grid to make the desired changes or click the pencil icon under "Tools" for the stage you would like to modify.



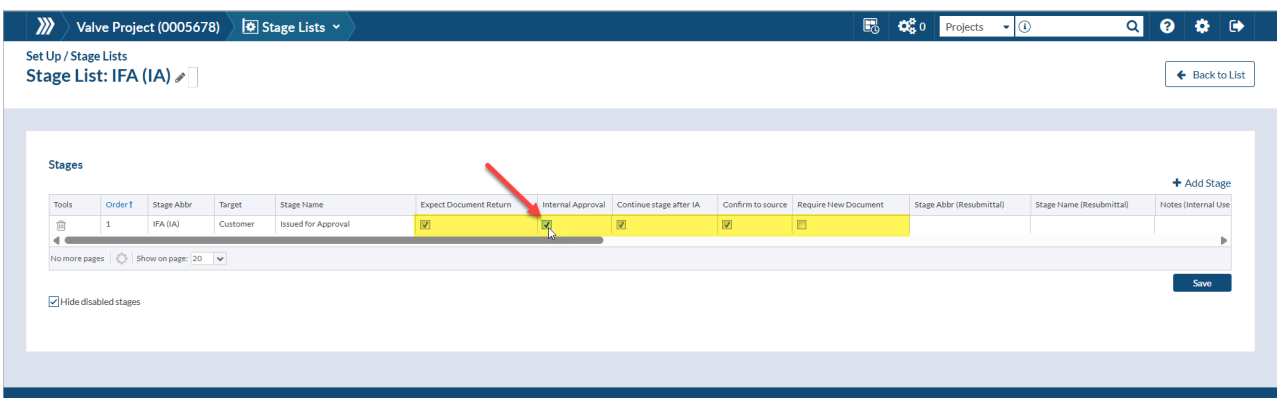
From Project

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 in the grid to make the desired changes.





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:

1. Confirm to source

(included in the internal approval workflow)

1. 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.
2. 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.

2. Continue stage after IA

(immediately following completion of the internal approval workflow (including confirm to source, if applicable))

1. 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.
2. Unchecked = The document will **not** be queued for submittal to the target (e.g., customer), and the stage will auto-complete.

Document Return		
<input checked="" type="checkbox"/>	Internal Approval?	
2	<input checked="" type="checkbox"/> Continue stage after IA	
1	<input checked="" type="checkbox"/> Confirm to source	

Next steps:

1. [Apply Internal Approval Stage List to Doc Codes](#)

2. [Internal Approval Workflow \(Example\)](#)