

# Apply Internal Approval Stage List to Doc Codes

03/28/2025 3:19 pm MDT

Once a stage list with internal approval has been created, it will need to be set as the stage list for the appropriate doc code(s). The stage list can be set on a project individually. Alternatively, if you work with the same customer often (using the same code list), the stage list can be set from the company profile.

## Set from Project

To set stage lists on a project, navigate to **Project Menu > Cards > Code List**.

In the doc code grid, click the cell drop-down in the "Stage List" column and choose the appropriate stage list from the available options. Once the stage list has been set for all appropriate doc codes, click "Save."

Tools	Doc Code	Doc Code Name	Level	Required	Stage List	Routing Scenario	Reference Date	Type
<input type="checkbox"/>	DB01	Databook	Order	1/1	IFA	- Select -	AO: After Order	Generated (Sub
<input type="checkbox"/>	DB03	Data Book Table of Contents/Index	Order	1/1	IFR-IFF	- Select -	AO: After Order	Generated (Sub
<input type="checkbox"/>	GD04	General Catalog Data	Item/Model (TE)	2/2	IFA	- Select -	AO: After Order	Generated (Sub
<input type="checkbox"/>	GD10	Instrument Data Sheets	Tag No. (TE)	17/17	IFA	- Select -	AO: After Order	Generated (Sub
<input type="checkbox"/>	RI16	Material Test Reports (MTR's)	Tag No. (TE)	17/17	Hide Cards from Cus...	- Select -	AO: After Order	Generated (Sub



To set the stage list for doc codes on a project, the stage list must first be created/made available on the project (**Project Menu > Set Up > Stage Lists**). If the stage list with internal approvals was created at the Admin level after the project began, it will not be automatically available (must be imported via "Import for Instance" button).

## Recommended: Applying routing scenarios

Once the stage list with internal approval has been set on the appropriate doc code(s), you can pre-select internal routing via the "Routing Scenarios" column. If a routing scenario is not set, document routing will need to be manually selected for each document that requires internal approval.

You can choose to use a pre-existing routing scenario (if applicable), or create a new routing scenario by clicking "Add New."

Valve Project (0005678) Code List

Cards Code List

Grid row colors

Tools	Doc Code	Doc Code Name	Level	Required	Stage List	Routing Scenario	Reference Date	Type
	DB01	Databook	Order	1/1	IFA	- Select -	AO: After Order	Generated (Sub)
	DB03	Data Book Table of Contents/Index	Order	1/1	IFR-IFF	- Select -	AO: After Order	Generated (Sub)
	GD04	General Catalog Data	Item/Model (TE)	2/2	IFA	- Select -	AO: After Order	Generated (Sub)
	GD10	Instrument Data Sheets	Tag No. (TE)	12/12	IFA (IA)	- Select -	AO: After Order	Generated (Sub)
	RI16	Material Test Reports (MTR's)	Tag No. (TE)	12/12	IFA	Add New Per Stage	AO: After Order	Generated (Sub)

Apply Download CSV Template Upload Data via CSV Delete Selected Save

A form will appear to the right. In the form, enter a name and choose the appropriate DocBoss users from the "Internal approval" section. Once complete, click "Save."

Valve Project (0005678) Code List

Cards Code List

Grid row colors

Tools	Doc Code	Doc Code Name	Level	Required
	DB01	Databook	Order	1/1
	DB03	Data Book Table of Contents/Index	Order	1/1
	GD04	General Catalog Data	Item/Model (TE)	2/2
	GD10	Instrument Data Sheets	Tag No. (TE)	12/12
	RI16	Material Test Reports (MTR's)	Tag No. (TE)	12/12

No more pages Show on page: 50

### New Routing Scenario

Name \*

Internal Approval

Use as default

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Settings

Collapse All Expand All

Assign reviewers to NULL cards

**Internal approval**

Doc Controller \*

Alysha Mosveen x

Preparer \*

Alina Sonke x

Checker \*

Select or type ahead...

Approver \*

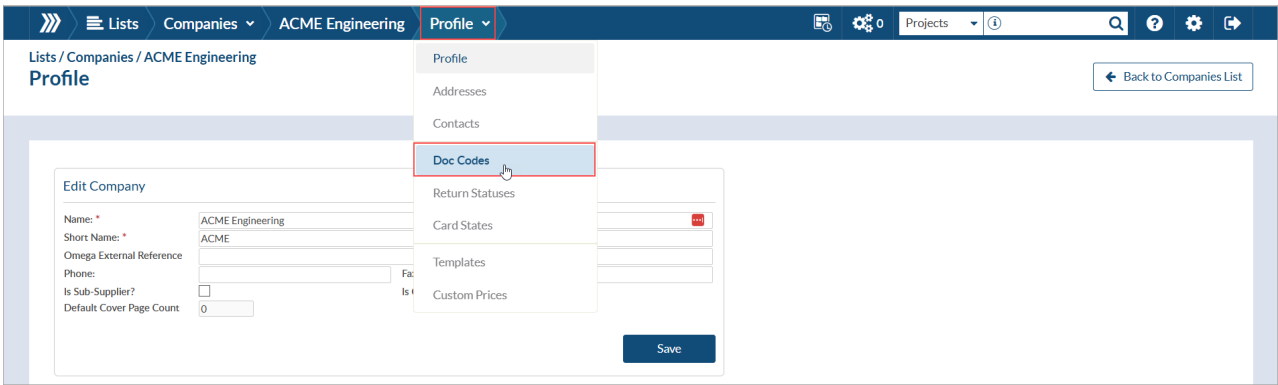
Alysha Mosveen x

Assign these reviewers when file returned from

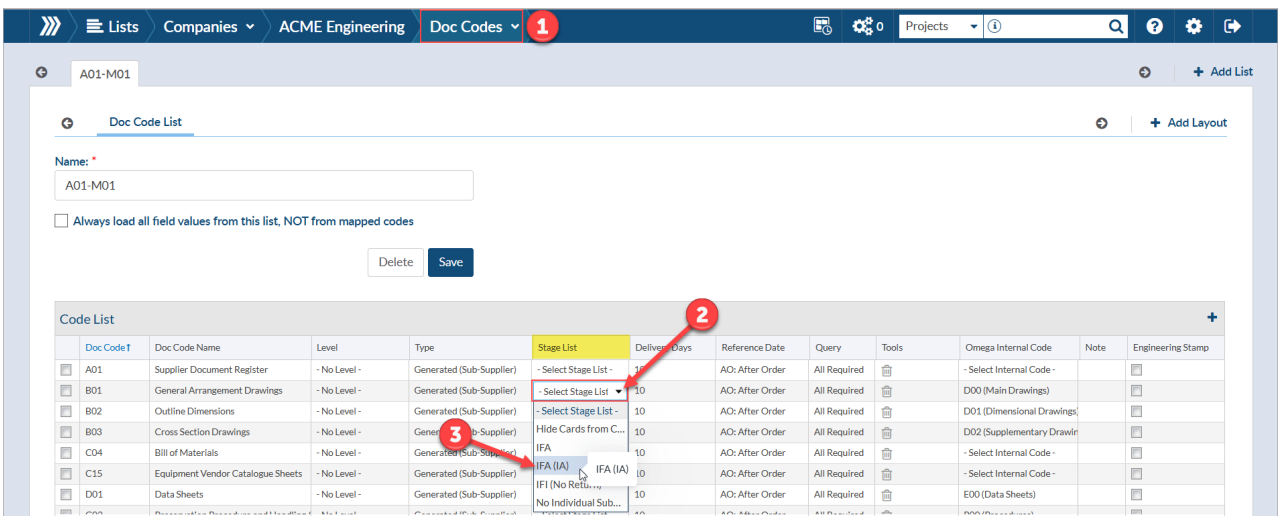
Cancel Save

## Set from company profile

To set stage lists from the company profile, navigate to **System Menu > Lists > Companies > [Company Name]**. From the company profile, navigate to **Profile Menu > Doc Codes**.



In the doc code grid, click the cell drop-down in the "Stage List" column and choose the appropriate stage list from the available options. Once the stage list has been set for all appropriate doc codes, click "Save." If you would like to apply routing scenarios, it can be done from the project.



To set the stage list for doc codes in the company profile, the stage list must first be created at the Admin level (**System Menu > Admin > Stage Lists**). If the stage list with internal approvals was created in a project, it will not be available as an option.

## Next steps:

### 1. Internal Approval Workflow (Example)