Create Stage List

04/08/2025 2:39 pm MDT

Before using stages, a stage list will need to be created. Stage lists can be added/modified at the Admin level, as well as on individual projects.

Create list (from Admin)

To create a stage list that can be used on any project, navigate to System Menu > Admin > Stage Lists.

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ct List	Hi,			Edit your profile		
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	Manage Users	Companies	General	Customization		
	View Permissions	Contacts	Security Settings	Project (Main) Fields		
	Manage Sub-Supplier Accounts	Relationships	2 Stage Lists	Doc Code/Card Fields		
er:	Jobs Distribution Lists		Equipment Fields			
			Compil. & Pkg Presets	Library Card Fields		
	Library	Reports	Queries List	Custom Lists (for Fields)		
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Click the "+ Add" button above the grid (top right) and give the list a name. We recommend naming the stage list by the stages it will contain (e.g., IFA-IFC-IAB).

Other available options include:

1. Do not display cards in SDI: If checked, cards using this stage list will not be listed on the SDI Report.

2. Auto-generate numbers for: By default, the cards will have the instance and customer auto-generated numbers added. This can be modified by selecting a different option (customer only, instance only, or neither of them).

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	Create Stage List	×		
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Grid row colors				Disabled items Show + Ad
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Once the new stage list is created, you will see it listed (highlighted in yellow, indicating that no stages have been

added).

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Create list (on Project)

To create a unique stage list specific to one project, navigate to Project Menu > Set Up > Stage Lists.

Valve Project (0005678)	🔄 Stage Lists 👻 🧃			🖪 🕰 o	Projects 💌 i	Q ?	٥	•
Set Up Stage Lists	Project Hub	Outstanding Actions	Index Reports & Compilations	Prices & Estimates				
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Stage Lists	Code List	Incoming Documents	Equipment List	Main			+ 4	
Tools Name Tools Hide Cards from Tool If A Tool If A (A) Tool	Card List Card to Unit Changes Obsolete Cards	Outgoing Submittals	Levels 2	Stare List Chem C Return Statuses Expedite Settings Internal Approval Statuses Distribution Lists Project Template Compil. & Pkg Presets Routing Scenario Card States		,		>
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Once on the page, the instructions are the same for creating stage lists from Admin (see instructions outlined above).

Next steps:

- 1. Add Stage(s) to Stage List
- 2. Assign Stage List to Doc Code
- 3. Stage List Workflow (Example)