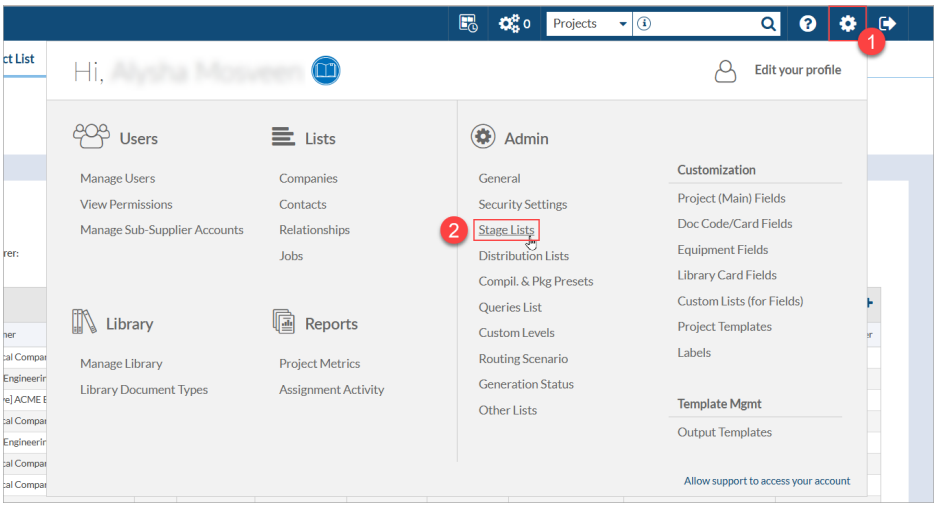
Create Stage List

09/28/2026 8:11 am 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.**

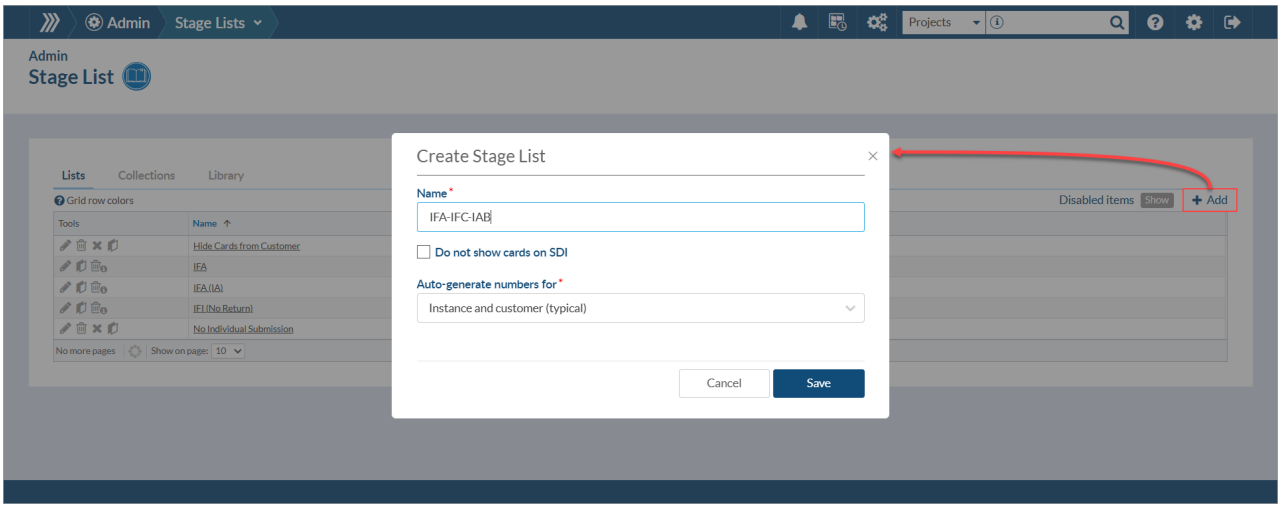


Click the "+ Add" button above the grid (top right) and give the list a name. We recommend naming the stage list by the stages it will contain (e.g., IFA-IFC-IAB).

Other available options include:

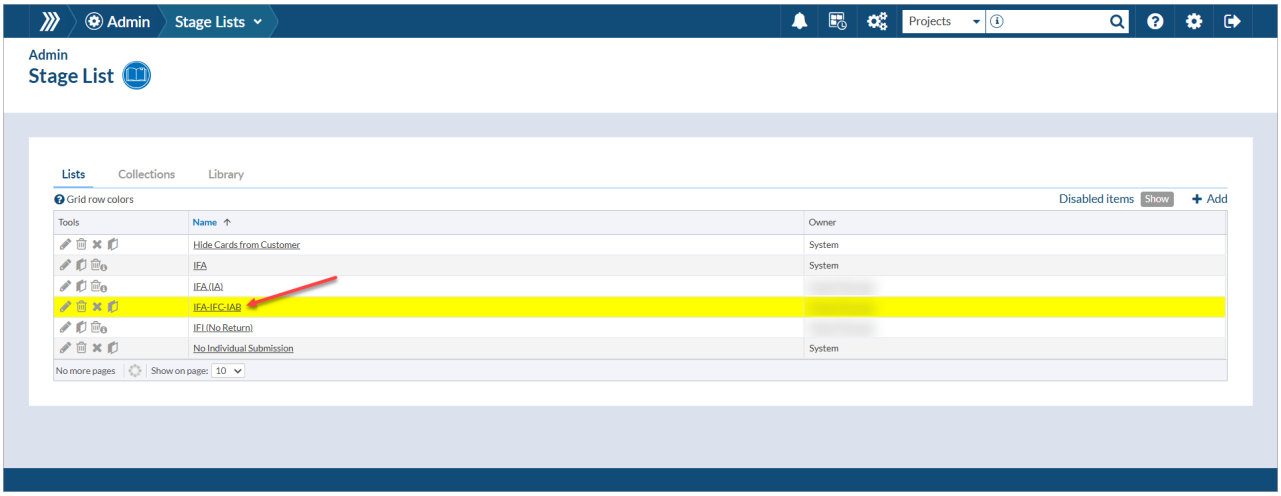
1. Do not display cards in SDI: If checked, cards using this stage list will not be listed on the SDI Report.

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).



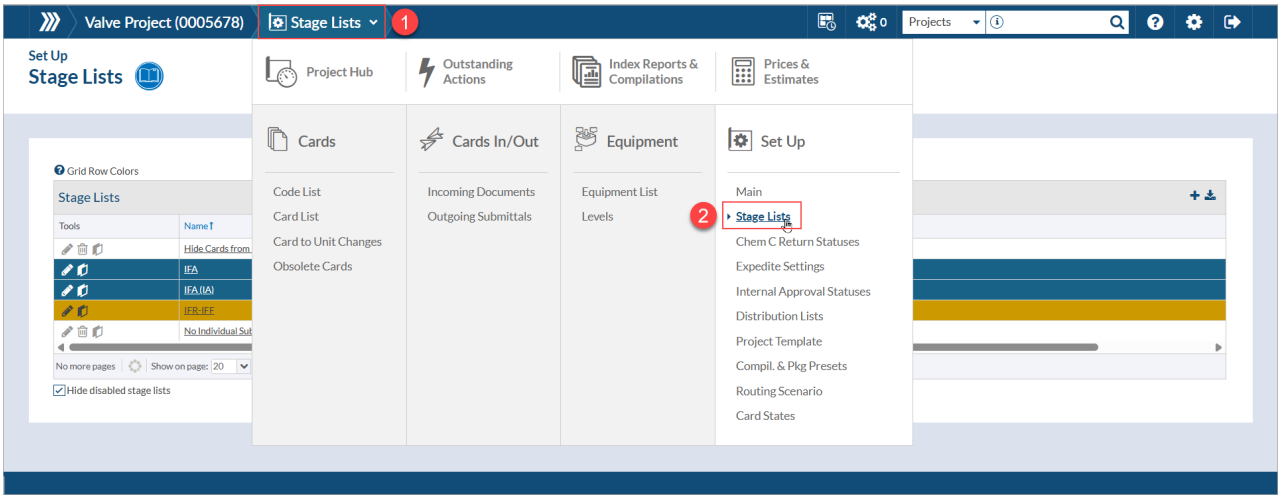
Once the new stage list is created, you will see it listed (highlighted in yellow, indicating that no stages have been

added).

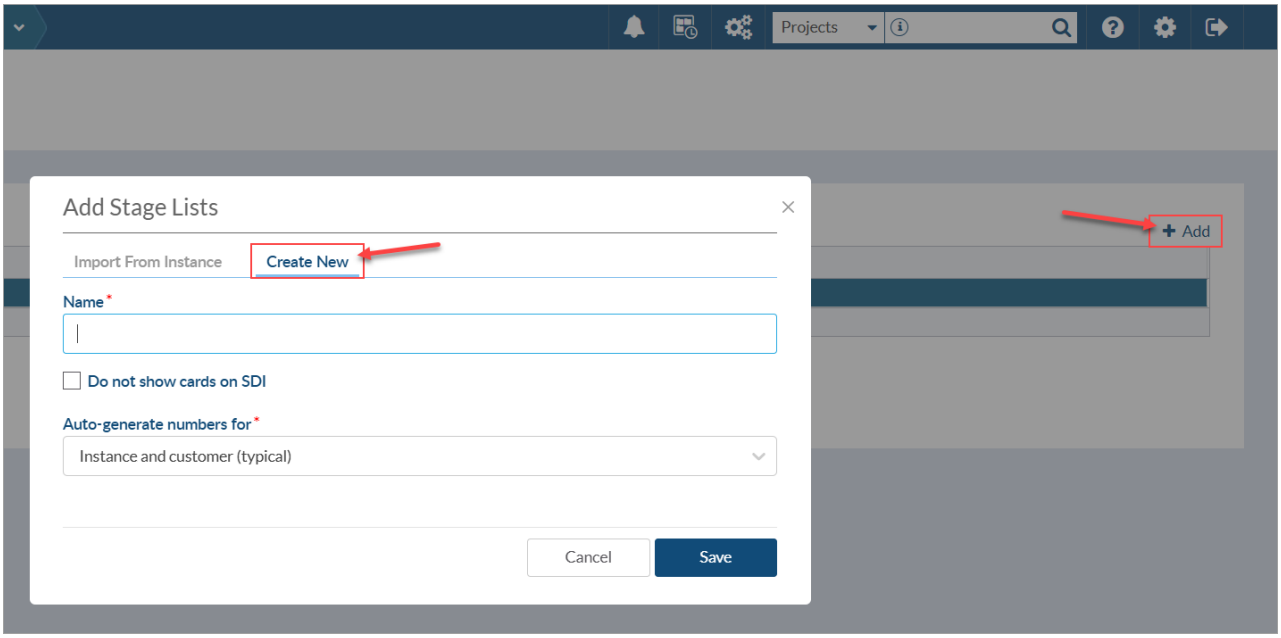


Create list (on Project)

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



Once on the page, click the "+ Add" button above the grid (top right) and switch to the "Create New" tab. Then, follow the instructions outlined above.



Next steps:

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