

Assign Stage List to Doc Code

04/10/2025 3:29 pm MDT

After adding stages to a stage list, the list can be assigned to one or more doc codes. To assign a stage list to a doc code, navigate to **Project Menu > Cards > Code List**. If you are looking to change an active stage list mid-project, see our support article: [Update/Change Stage List Mid-Project](#).

Assign stage list

By default, a stage list will automatically be assigned to each doc code based on the project template settings (Project Menu > Set Up > Project Template > Project Settings).

To assign a different stage list to a doc code, click on the stage list (directly in the grid) for the appropriate doc code and choose a different list from the available options. Once the new stage list is selected, click "Save" (bottom right).

Valve Project (0005678) Code List

Grid row colors

Tools	Doc Code	Doc Code Name	Level	Stage List	Type	Reference Date	Required
	GD04	General Catalog Data	Item/Model (TE)	IFA	Generated (Sub-Supplier)	AO: After Order	2/2
	GD10	Instrument Data Sheets	Tag No. (TE)	IFA (IA)	Generated (Sub-Supplier)	AO: After Order	500/500
	R116	Material Test Reports (MTR's)	Tag No. (TE)	IFA	Generated (Sub-Supplier)	AO: After Order	500/500
	DB01	Databook	Order	Hide Cards from Customer	Compilation	AO: After Order	1/1
	DB03	Data Book Table of Contents/Index	Order	IFA	Compilation	AO: After Order	1/1

Buttons: Apply, Download CSV Template, Upload Data via CSV, Delete Selected, Save



If a new stage list was added at the Admin level, the list will need to be imported into the project before it can be used. To do this, navigate to **Project Menu > Set Up > Stage Lists**. Click the import icon in the grid (top right), select the list, and click "Save."

Valve Project (0005678) Stage Lists

Set Up Stage Lists

Grid Row Colors

Tools	Name T
	Hide Cards from Customer
	IFA
	IFA (IA)
	IFA-IFC-IAB
	IFR-IFF
	No Individual Submission

Buttons: Hide disabled stage lists

Import from Instance

Import Stage Lists from Instance Lists

Select	Name T	Owner
<input checked="" type="checkbox"/>	IFA-IFC-IAB	Alysha Mosveen
<input type="checkbox"/>	IF (No Return)	Alysha Mosveen

Buttons: Save

Next steps:

1. Stage List Workflow (Example)
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