

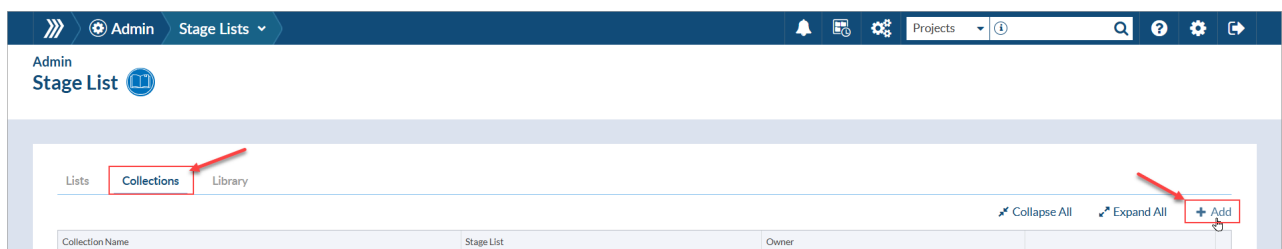
Create & Manage Stage List Collections

09/21/2026 2:04 pm MDT

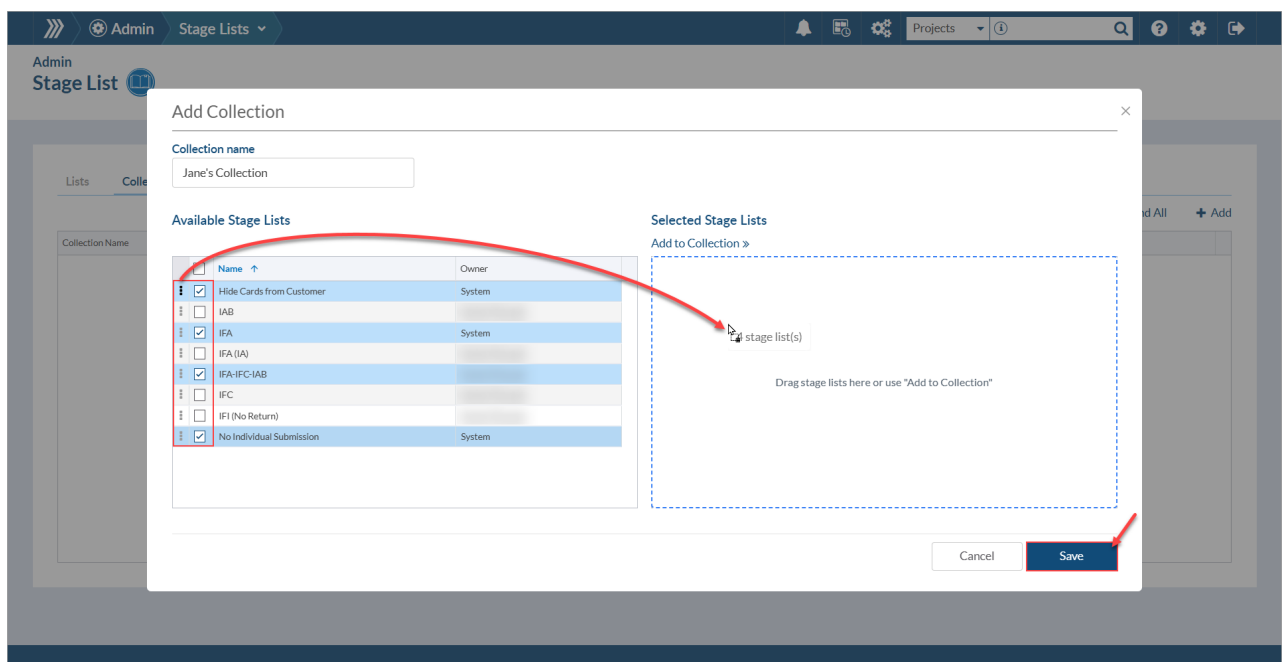
Stage lists can be organized into named collections in order to facilitate the import of stage lists into new/existing projects.

Create a collection

To create a new stage list collection, navigate to **System Menu > Admin > Stage Lists**. Switch to the "Collections" tab, and click "+ Add".



Choose the stage lists that should be included in the collection by marking the checkbox and dragging-and-dropping them to the "Selected Stage Lists" area. Once added, click "Save".



The new collection will be added to the grid, and the stage lists it includes can be reviewed by expanding the drop-down. The collection can also be edited by clicking the pencil icon under "Tools".

Lists Collections Library				Collapse All Expand All Add	
Collection Name	Stage List	Owner			
▼ Jane's Collection					
	Hide Cards from Customer	System			
	IFA	System			
	IFA-IFC-IAB				
	No Individual Submission	System			



The same stage list can belong to more than one collection, and grouping does not change how a stage list behaves - it only controls which stage lists are brought into a project.

Import collection(s) into projects

The collection(s) that should be imported into projects (at project initiation) can be defined on **Project Configuration** templates. To begin, navigate to **System Menu > Admin > Customization > Project Config. Templates**. Open the template you'd like to modify and navigate to the **"Advanced"** tab.

Customization
Project Config. Templates

Admin / Customization
Project Configuration Template: Default Project Fields Template

Main
Advanced
Fields & Equipment Types
Compilation & Package Presets
Expediting
Info

Users
Roles
Doc Codes & Cards
Project Setup
Feature Man
Equipment Li

By default, the option to import ALL stage lists into new projects will be selected. If only specific collections should be imported, select the option to "Choose collections of stage lists to load".

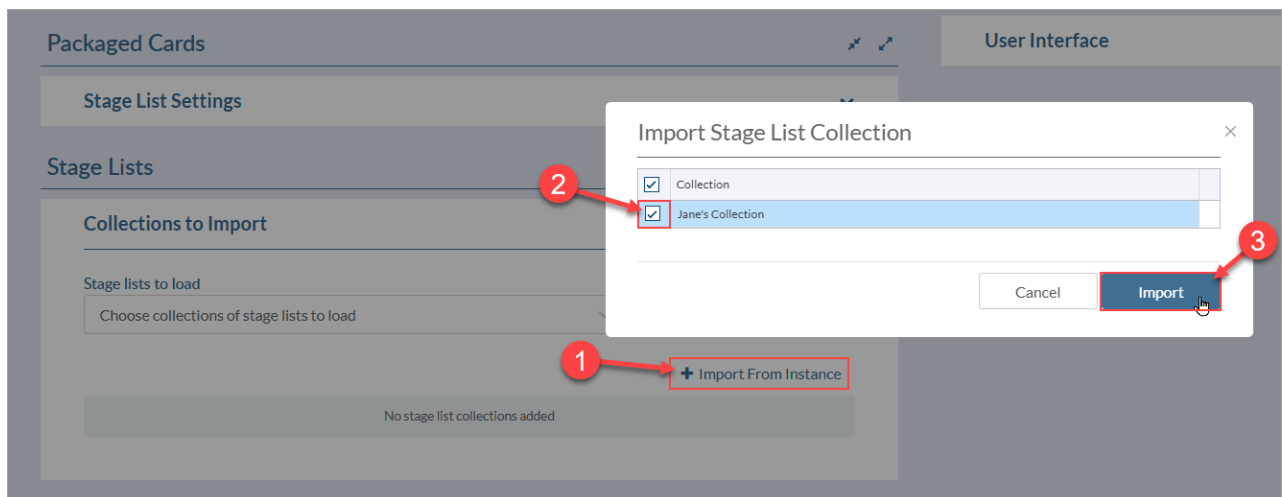
Stage Lists

Collections to Import

Stage lists to load
Load ALL stage lists
Load ALL stage lists
Choose collections of stage lists to load

Portal Access

To select the collection(s) that should be imported, click **"Import From Instance"**, choose the collection(s) to import, and select **"Import"**.



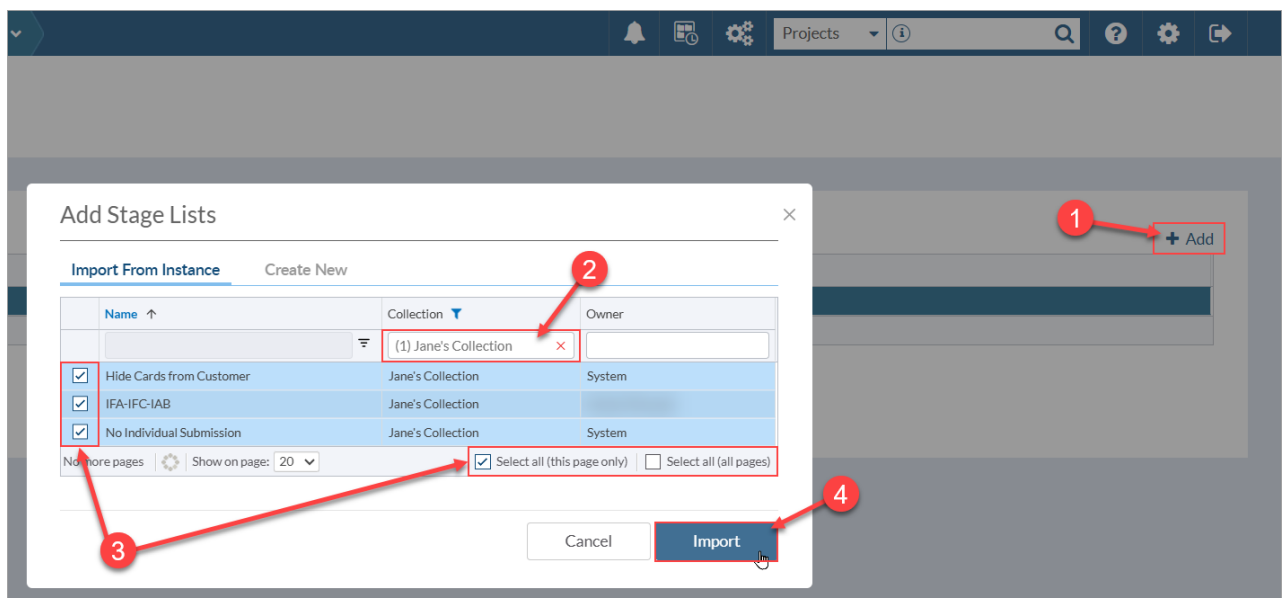
When this project template is used to create a **new project**, the selected collection(s) will be imported into the project automatically.



Note: If "Choose collections of stage lists to load" option is selected but no collections are imported, new projects will have **no stage lists imported automatically** (other than the stage list selected as the default for new doc codes - *Advanced > Doc Codes & Cards > Stage list*).

Import into existing projects

To import a collection of stage lists into an existing project, navigate to **Project Menu > Set Up > Stage Lists** and click "+ Add" (1). Filter the available stage lists by the collection(s) that should be added (2), select the stage lists from the grid (3), and click "Import" (4).



Only the stage lists which are not already added to the project will be available for import - if a stage list in the collection has already been added to the project, it will not be duplicated.

