Approval Groups

This is the main browse screen for Approval Groups.

Buttons:

New: Create a new Approval Group.

Edit: Edit the selected Approval Group.

Delete: Delete the selected Approval Group.

Audit: Allows a user to search all audit records when an approval table has been modified.

Reports: Print or export the Approval Group list grid.

Status: Controls the Approval Group list grid display by status (All, Active, Inactive).

Show Deleted: Controls the Approval Group list grid display to include previously deleted Approval Groups.

Approval Group List Grid:

Approval Group: The Approval Group ID.

Name: The Approval Group name.

Branch: The Approval Group's associated default account segment. See Default Account segment setup.

Sort Order: The order Approval Group tables are reviewed when Non-Stand Alone table setup is used. See Non-Stand Alone setup.

Active: Indicates if the Approval Group is active or inactive.

Deleted: Indicates if the Approval Group has previously been deleted.

Has Tables: Indicates if the Approval Group has approval tables.

Create New Approval Group:

Approval Group ID: This identifier can be alpha-numeric and serves as a system ID for easy reference. It should be succinct: "10", "DT Br", "Aqua", etc.

Description: This field allows you to provide a longer name for the group: "Downtown Branch Management", "Aquatics personnel", etc. Any name entered will be included in approval table selection dropdown menus.

Default Account Segments: Depending on your system settings there may be one or two segment selection fields. These optional fields enable you to tie your approval groups to GL account segments. Any segments used, branch, dept, etc., are automatically applied to all users' conditions in approval tables built for the Approval Group. For example, in the above screenshot, if Branch is set as "10", when approval tables are established for the Approval Group all users would have a default approval condition of "Branch = 10".

Sort Order: The order in which the Approval Groups are reviewed when using Non-Stand Alone Approval Table setup. See Non-Stand Alone Approval table setup.

Save: Save Approval Group changes.

Save+More: Save Approval Group changes and begin work on adding a new Approval Group.

Cancel: Leave Approval Group setup without saving changes.