

# Approval Groups

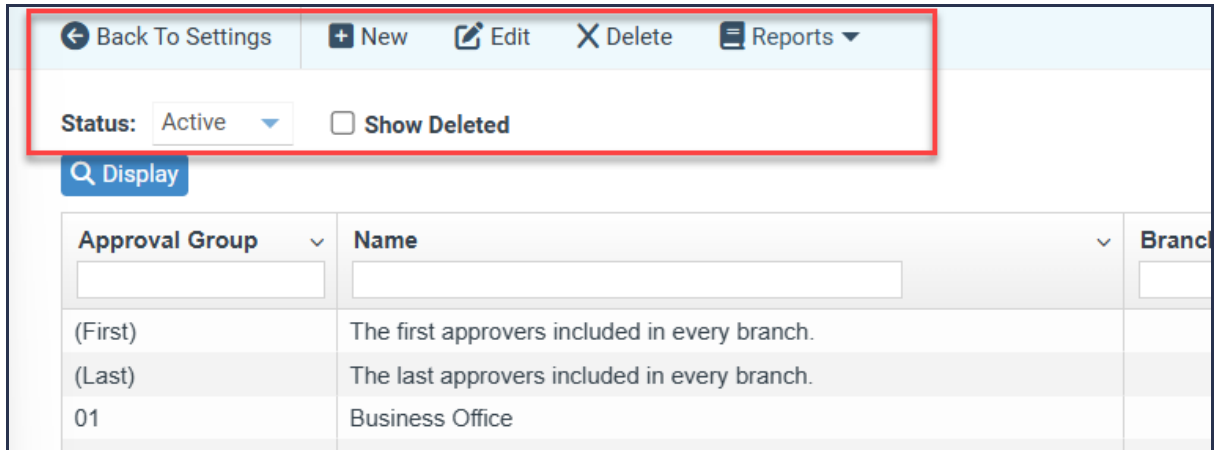
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## Approval Groups

[Settings](#) > [Document Approval](#) > [Approval Group](#)

This screen allows you to set up settings for document approval. To learn more about these settings, use the topics below.

### Main Menu Buttons



**New:** Create a new Approval Group.

**Edit:** Edit the selected Approval Group.

**Delete:** Delete the selected Approval Group.

**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

A screenshot of the 'Approval Group List Grid'. A red box highlights the header row of the table. The table has the following columns: 'Approval Group', 'Name', 'Branch', 'Sort Order', 'Active', 'Deleted', and 'Has Tables'. The table contains several rows of data:

Approval Group	Name	Branch	Sort Order	Active	Deleted	Has Tables
(First)	The first approvers included in every branch.		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(Last)	The last approvers included in every branch.		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
01	Business Office		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10	Peabody		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
106 Main	106 Main		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
20	Bk		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
22	Coop App YMCA		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**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:** When the Non-Stand Alone table setup is used, the order of the Approval Group tables is reviewed. See Non-Stand Alone setup.

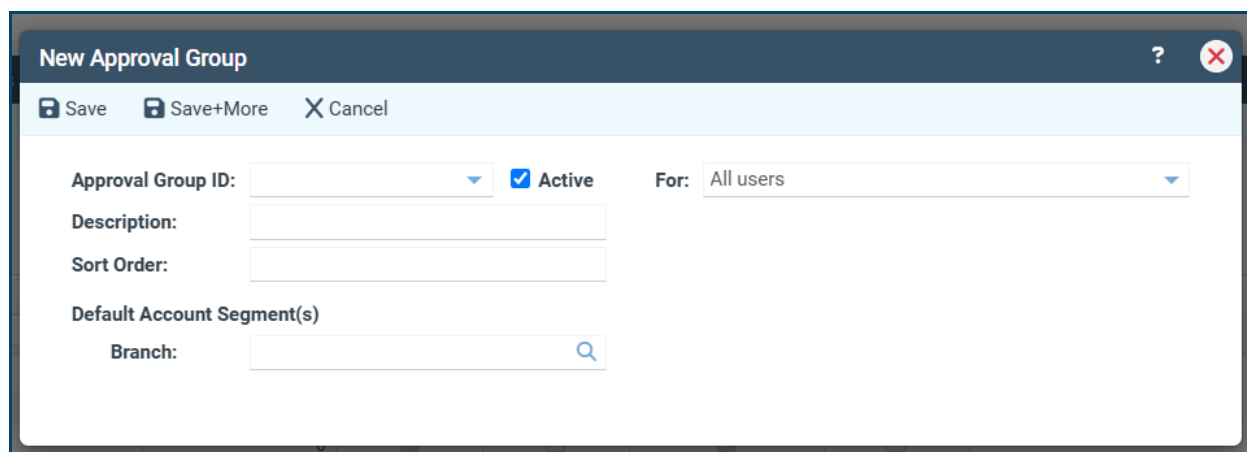
**Active:** Indicates if the Approval Group is active or inactive.

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

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

## Create a New Approval Group

*Settings > Document Approval > Approval Group > New*



**Approval Group ID:** This alpha-numeric identifier is a system ID for easy reference. It should be succinct, such as “10,” “DT Br,” “Aqua,” etc.

**Active:** This checkbox defaults to checked for new approval groups.

**For:** Use this dropdown to specify which users can access this new group.

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

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

**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”.

**Branch:** Allows you to tie this new approval group to just one branch. If left blank, all branches will have access.

**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.