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Groups

Users > System Groups

It is good practice to organize users into groups so that you can maintain permissions for an entire group rather than individual users.

Name: The name of the group (i.e., Administrators).

Group Type: In the Approval System, Groups can be assigned to an approval table. In the past, only users could be placed in an approval table. Because groups can now be added, the Group view might have more Groups. The Group Type field is a column to help to organize Groups. You might, for example, input "**Approval**" for those Groups that you plan to use for the Approval System. On the browse of Groups, you can sort the view by the column for Group Type. Group Type is entered on the Group Edit view.

Description: An optional description.

Dft access level: The default for all security for this group. Normally, this is set to "**00 - Not Allowed**". If this is an administrator, you may want to set it to "**99- Highest Security**". That way, any time you get an upgrade that has a new task, this group will automatically have full access to it.

Run Approval for users One by One: If this box is checked and this group is used in the approval process, the order of the users for approval will be the sort order column and then the user column. If the box is not checked and this group is used in the approval process, then all members of this group will be notified at the same time.

Show only enabled users: If this box is checked, only enabled groups will be visible on the screen; all others will be hidden.

Members: Determines what members or users are included in this group. For more information, see permissions.

- **User, Full Name, Description:** Defined under user setup.
- **Approval Sort Order:** The order in which the users in the Group should be reviewed when the group is in an approval table. If no order is stated, the users are reviewed alphabetically.
- **Proxy Approver:** Is the user to whom an approval should be sent if the indicated approver is out of the office when a group is listed in an approval table?
- **User Status:** In the approval system, if a user is out of the office and they are the next person to approve the item, then the process will skip them. It will go to their "**Proxy Approver,**" or if that is blank, the process will continue with the next row of the approval

table. If this user is the last user in the approval table, then the administrators will receive a notification to “look at this item because the last approver (User Name) is out of the office and so they should review it and approve as needed.”

- **Usage:** Defined by Permissions set under *General Ledger > Usage > 01-Allow (Accounting) and Sales > Usage > 01-Allow (Sales)*

To maintain the security for a group, select the group and click Permissions.
