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Approval Tables

This screen displays all created Approval Tables. The list grid may be limited by Approval Source (Purchase Order, Journal Entry, Invoice, or Payment batch).

Menu Buttons

New: Opens the new Approval Group add screen.

Clone Selected: Copies the selected Approval Table and allows the user to select which Approval Type, Approval Group, and Approval Table name to use for the resulting table.

Global Copy: Allows the user to copy multiple Approval Tables at once and select which Approval Type, Approval Groups, and Approval Table names should be used for the resulting tables.

Edit: Opens the Approval Group edit screen for the selected Approval Table.

Delete: Deletes the selected Approval Group. Deleting an Approval Table does not remove it from the system, but prevents it from being included in future Approval workflow determinations.

Preview Approval Table: Opens the Preview Approval Table window and allows the user to test Approval Table setups with sample entry GL distributions.

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

Reports: Prints or exports the Approval Tables list.

Grid Selections

Status: Controls the display of Approval Tables by status (All, Active, Inactive).

User/Group: Controls the display of Approval Tables by including Users/Groups.

Approval Table: Controls the display of Approval Tables by Approval Table name(s).

Show Deleted: Controls the display of approval tables and includes previously deleted tables.

Approval Source: Controls the display of Approval Tables by selected Approval Source(s).

Approval Group: Controls the display of Approval Tables by selected Approval Group(s).

View: Controls which information columns are displayed in the Approval Tables list grid.

Create New Approval Table

Approval Type: The name of the Approval Type to which the Approval Table being created will be associated.

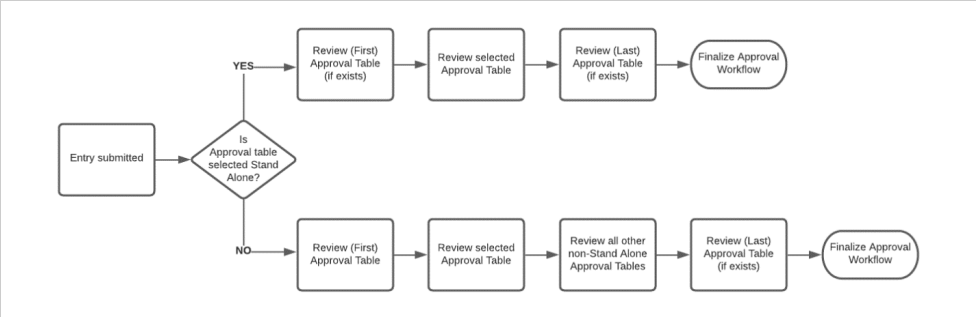
Approval Group: The name of the Approval Group for which the Approval Table is being created.

Approval Table: This is the name of the Approval Table being built. It, along with the Approval Group ID and Approval Group Description, will be displayed in concatenated form in system screens. For example, if Approval Group "**DT Br**" is used and the Approval Table name is saved as "**Invoice review**," the table name in all entry screens will be "**DT Br - Downtown Branch Management - (Invoice review)**"; The Approval Group ID, Approval Group Description - Approval Table Name.

Description: This field allows you to provide a more in-depth description of the purpose of the Approval Table.

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

Stand Alone Table: When selected, the Approval Table will be the lone Approval Table reviewed for user conditions to determine the approval workflow for an entry. See the example below.



Display in Selection Dropdowns: Controls whether the approval table is displayed in entry screen selection dropdowns.

Use Email Notifications: Controls whether email notifications will be used for the Approval Table. The setting will default to the Approval Type system setting, but may be changed for the individual Approval Table.

Use Text Message: Controls whether text messages will be used for the Approval Table. The setting will default to the Approval Type system setting, but may be changed for the individual Approval Table.

Approval Table List Grid

New: Add a new line to the Approval Table.

Delete: Delete the highlighted line from the Approval Table.

Delete All: Delete all lines from the Approval Table.

Move up: Move the highlighted line up in the Approval Table order.

Move down: Move the highlighted line down in the Approval Table order.

Cut: Cut the highlighted line to be pasted to another location in the Approval Table order.

Copy: Copy the highlighted line to be pasted to another location in the Approval Table order.

Paste: Paste a previously cut/copied Approval Table line.

Show Advance Options: Shows/hides the "**If Group, require all users?**", "**Do not use group default segment(s)**" and "**Disregard Approval Type Conditions**" grid columns.

Search Users: Open the Search Users list to find a user to add to the Approval Table.

Condition: Open the Conditions menu for the selected Approval Table line.

Copy Condition to All Rows: Copies the conditions for the selected row to all other rows of the approval table.

Approval Table

User/Group: The user or Sign-On user group for the highlighted Approval Table line.

If Group, Require all users?: When the Approval Table line is a Sign-On group, this checkbox indicates if all users within the Sign-On Group must approve an entry before it moves to the next approver.

Do not use group default account segment(s): When Default Account Segments are activated, this checkbox overrides their use for the selected Approval Table line.

Disregard Approval Type Conditions: When Default Approval Type conditions are activated, this checkbox overrides their use for the selected Approval Table line.

Proxy Approver 1: User who should approve in place of the Approval Table line user in the event they are listed as out of office.

Proxy Approver 2: User who should approve in place of Proxy Approver 1 in the event they are listed as out of office.

Additional Notified (Email address): An email address that should receive a notification when an entry reaches the highlighted Approval Table line.

Minimum Amount: The minimum amount for an entry to require the Approval Table line to be included.

Maximum Amount: The maximum amount above which the entry requires the Approval Table line to be included.

Condition: Listed conditions that, when satisfied, result in the inclusion of the Approval Table line in an entry’s approval workflow.

Notes: An information-only field that provides the user with the ability to describe the purpose of the approval table line for future reference.

If no conditions are met, use this user/group: The user that should be included in an entry’s approval workflow in the event that no other conditions are satisfied.

Proxy: The user who should approve in place of the user in the event they are listed as out of office.

Save: Save any changes made to the Approval Table.

Save+More: Save any changes made to the Approval Table and begin work on a new Approval Table.

Cancel: Leave the Approval Table add/edit screen and discard changes.