Last Modified on 07/10/2026 2:52 pm EDT

Approval Types

1. Approval Types

General Tab

Allow adding attachments during workflow: Enables users' ability to add attachments to entries under review.

Allow editing attachments during workflow: Enables users' ability to edit attachments for entries under review.

Allow use of reviewers: When selected, entries created may be sent to users for review and edit prior to submission for approval. Reviewers are granted limited permissions for entries sent to them for review. For example, reviewers with no accounts payable system access may change anything about an invoice sent to them (vendor, GL account(s), amounts, etc.) before submitting it for approval. Outside of the sent entry, however, their normal permissions apply.

Allow adding additional users to workflow: Enables users to choose additional approvers to include in an entry's approval table.

- **Before Workflow:** Allows users to place chosen users at the beginning of approval tables prior to system-selected approvers.
- **After Workflow:** Allows users to place chosen users into the approval workflow after the system-selected approvers, prior to any (Last) table approvers.

Enable Disapprove and Resubmit Function: When enabled, the Disapprove and Resubmit function disapproves an entry and assigns the disapproving user as the Reviewer. The user then has the capability to modify the entry prior to resubmitting it for approval.

Include Due Date: Enables entries to include a due date for approval and allows the user to set a default number of days by which an entry must be approved.

- **Allow Due Date Change (only shown if Include Due Date enabled):** Allows the user to override a calculated approval due date.

Show Ship-To Address: When selected, the Ship-To address will be displayed on the setup screens for approval tables. When an approval table is selected in the Purchase Order entry screen, its Ship-To address is used for the purchase order. Ship-To addresses are not used with Journal Entries, AP Invoices, or Payment batches, so when these Approval Types are edited, the field is deselected by default.

Include (First) Table: When selected, Approval Tables for the (First) Approval Group are evaluated for approver conditions.

Include (Last) Table: When selected, Approval Tables for the (Last) Approval Group are

evaluated for approver conditions.

Default Approval Conditions: Default conditions are applied to all approver lines within approval tables built for the Approval Type.

Communications Tab

Use Notifications: When selected, users will be notified that entries have been submitted for their approval, are reminded of entries still awaiting their approval, and/or warned that documents awaiting their approval have not been approved by their due date.

- **Notification Purpose:** Dropdown to select the notification type for which the following settings are established (Waiting on next user, First Reminder, Second Reminder, First Warning, Second Warning).

Email: When selected, notifications will be sent via email from the system administrator's email address.

- **Subject:** Specifies the subject wording that will be used for notification emails.

Include Attachments: When selected, entry attachments will be included with all notification emails.

Include Approve/Disapprove Buttons: When selected, approve, disapprove, and disapprove & resubmit action buttons will display in notification emails. Deselect this option if users are required to approve from within the system and not from email/mobile devices.

Reminder/Warning Email Log: A listing of all reminders and warnings sent for the Approval Type.

Use Reminders: When selected, approvers will receive reminder notification(s) on the stated days prior to an entry’s due date.

Use Warnings: When selected, approvers will receive warning notifications on the stated days following an entry’s due date.

Text Message: When selected, notifications will be sent via text message.

NOTE: *System settings must already be established to enable SMS messaging. Please see SMS setup instructions.*

Permissions Tab

For: If “All Users” is selected, there are no restrictions, and all users may use the approval tables associated with the approval type being edited. If a “User/Group” is selected, access to the approval type may be limited to specified users or groups of users. Any user or group not selected will not be eligible to use any approval tables associated with the approval type being edited.

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2. Approval Groups

New: Opens the New Approval Group add screen.

Edit: Opens the Approval Group edit screen.

Delete: Deletes the selected Approval Group.

Reports: Prints or exports the Approval Groups list.

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 the 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 for the Approval Type being edited.

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3. Approval Tables

New: Opens the New Approval Table add screen.

Edit: Opens the Approval Table edit screen.

Delete: Deletes the selected Approval Table.

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

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.

Reports: Prints or exports the Approval Groups list.

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

Don't Show Stand-Alone Tables: Prevents display of stand-alone tables in the Approval Table grid display.

Status: Controls the display of approval tables by status (All, Active, Inactive).

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

Approval Table List Grid

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

Stand Alone: Controls whether the approval table is reviewed individually (stand-alone) or in conjunction with other approval tables (non-stand-alone).

Approval Table: The Approval Table name.

Approval Group: The Approval Group for which the Approval Table exists.

Group Default Account Segment(s): The default account segment(s) assigned to the Approval Group of the Approval Table.

Sort: Indicates the order in which the Approval Table is reviewed in the event that there is more than one Approval Table for an Approval Group.

Notifications: Indicates if notifications are used for the Approval Table.

For User/Group: Indicates if there are permissions in place limiting access to the Approval Table.

Active: Indicates if the Approval Table is active. Inactive Approval Tables are not reviewed.

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

Approval Type Menu Buttons

Previous: Moves to the preceding setup step. (to 1. Approval Type from 2. Approval Groups, for example.

Next: Moves to the next setup step. (to 2. Approval Groups from 1. Approval Type, for example.

Finish: Finalize Approval Type setup.

Save: Save any changes made to the Approval Type setup.

Save as New: Save any changes made to the Approval Type setup as a new Approval Type.

Cancel: Leave Approval Type setup without saving changes.