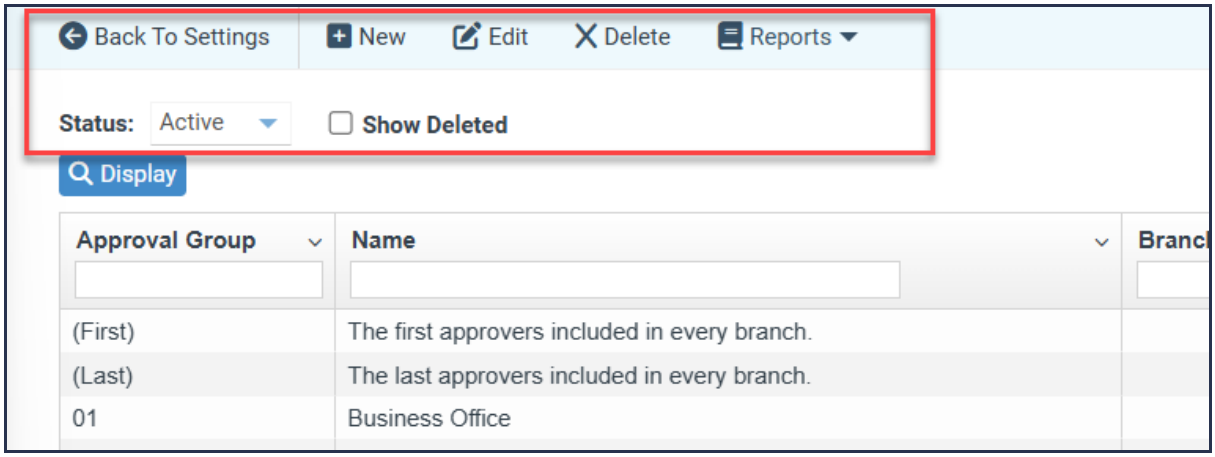
Last Modified on 09/28/2026 3:14 pm EDT

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.

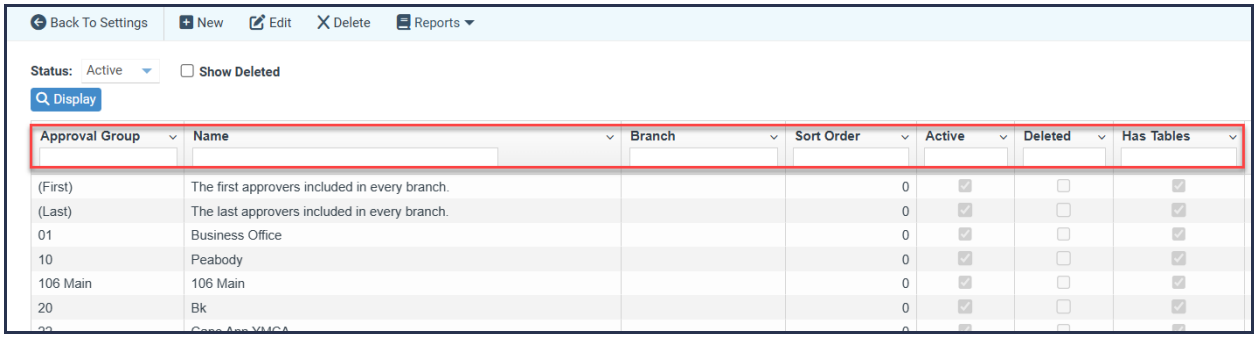
Delete: Delete the selected Approval Group.

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



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.

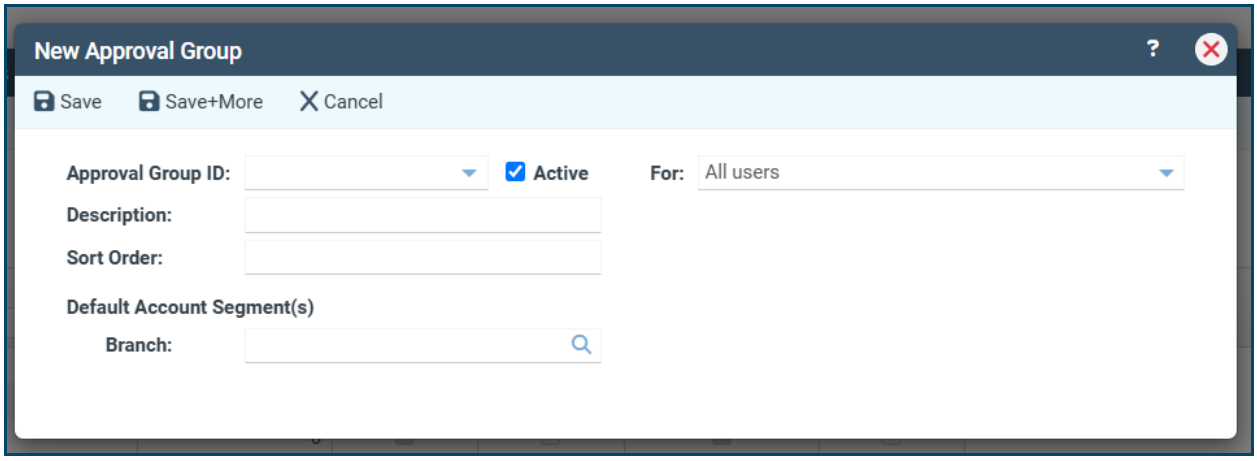
Active: Indicates if the Approval Group is active or inactive.

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 alphanumeric 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.