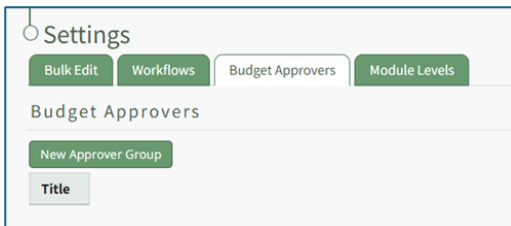


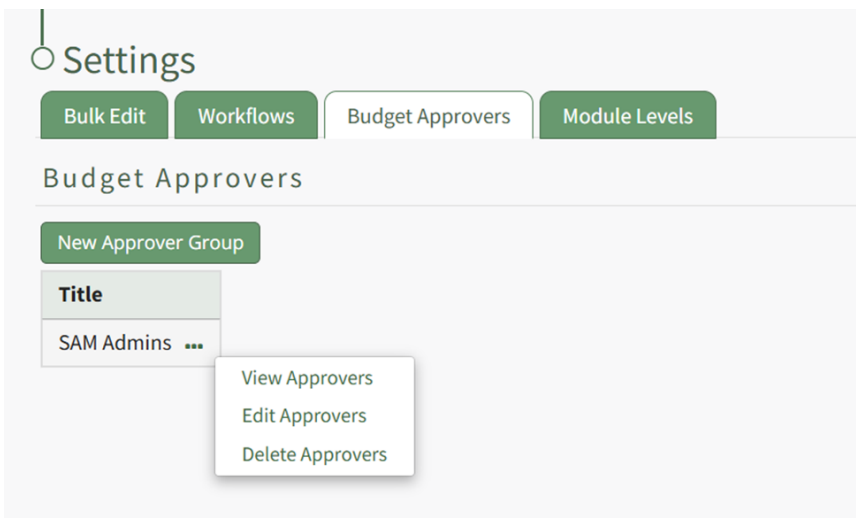
Actions Settings Page: Budget Approvers Tab

The Budget Approvers Tab allows for the designation of the individuals who will have permission to authorize the budgetary items that KASTrack tracks for Action Groups.



Selected budget approvers will appear according to their given title in a table under the Budget Approvers tab.

The Budget Approvers receive notifications when 1) a budget item receives all required approvals and 2) when a budget item has been rejected that can be customized on this tab.



Select the “New Approver Group” button to create new budget approval groups.

How To: Create a New Budget Approver Group

To create a new budget approver group, open the Budget Approvers Tab on the Settings Page in the Actions Module from the Main Menu.

Settings

Bulk Edit

Workflows

Budget Approvers

Module Levels

Budget Approvers

New Approver Group

Title

Approver Group 1 ...

Approver ...

DFE Approver Group ...

Click the New Approver Group button opening the New Budget Approver Modal.

New Budget Approver



Title

Who to notify when a budget item has received all required approvals:

- The user who submitted the budget item
- All users who have approved the budget item
- All users in all approval groups
- Account holder
- Account holder's supervisor(s)

Who to notify when a budget item has been rejected:

- The user who submitted the budget item
- All users who have approved the budget item
- All users in all approval groups
- Account holder
- Account holder's supervisor(s)

Approvers [Add An Approver](#)

Save

Cancel

Input a title for the budget approver group.

There are five options of who the system should notify when a budget has received all required approvals or when it has been rejected: the user who submitted the budget item, the users who have approved the budget item, all users in all approval groups, the account holder, and the account holder's supervisor(s). Multiple, all, or no checkboxes can be selected.

To add an approver, click the "+ Add An Approver" button and the modal expands.

Add an individual account or a certification role and identify if their approval is required or optional. Multiple approvers can be added in this expansion, or you can click “+Add an Approver” again if the permissions/requirements need to be different for the different approvers.

There are two checkboxes associated with adding an approver. The first is in regard to when approval will be given. The “Only allow approval when all above required groups have been given approval” checkbox will not mark a budget item as approved until all required groups have been approved.

The second checkbox impacts when alerts regarding a budget will be sent. The “Send alerts to all approvers in this group when their approval is required for a budget item” opens an additional checkbox when selected. Select the “Only send an alert to this group when all above required groups have been given approval” to send an alert when a required signatures have been received.

After making the appropriate selections, the modal will state how many budget items will be affected by the changes being made.

You have the choice to “Mark as Approved any budget items that will become fully approved when this form is saved” or to “Clear existing approvals for any budget items that will become fully approved when this form is saved.” You cannot select both.

Once all changes to approvers and approval notifications for the budget have been made, select the “Save” button and you will return to the Budget Approvers Tab of the Budgets Page.

Clicking the three-dot icon to the right of the budget approval group title will open the Budget Approvers Content Menu. The options in that menu are explained on the table below.

Budget Approvers Tab Context Menu Option Explanation Table	
Option	Explanation
View Approvers	Selecting the "View Approvers" option opens the View Budget Approver Modal which states the Budget Approver Group ID number and title.

Edit Approvers	Selecting the "Edit Approvers" option opens the Edit Budget Approver Modal where notifications and budget approver information can be altered.
Delete Approvers	Selecting the "Delete Approvers" option opens the Delete Budget Approvers Confirmation Modal, which states the title of the budget approver group being deleted and asks for confirmation before permanent deletion.

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