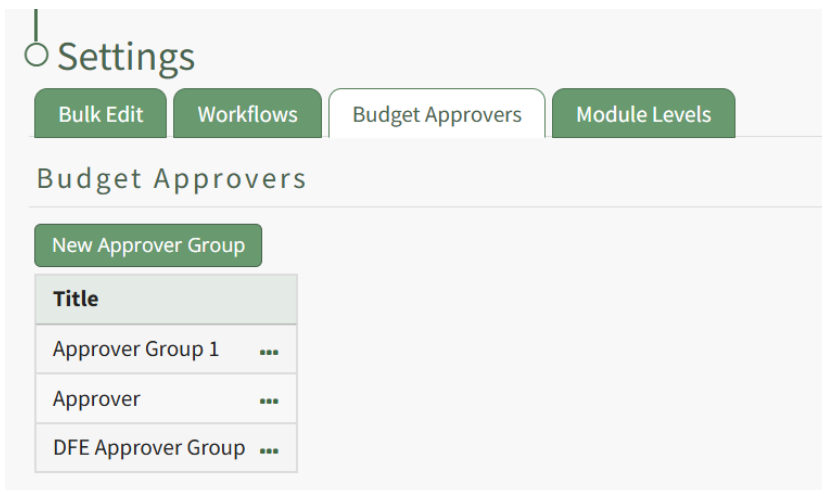


Create a New Budget Approver Group

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



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](#)

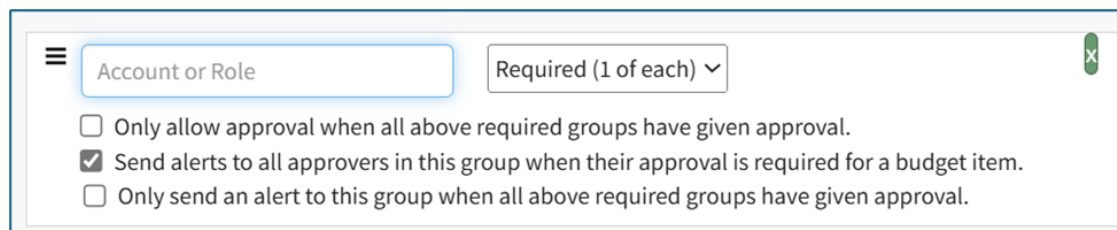
Save

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.

A screenshot of a modal form for adding an approver. At the top left is a hamburger menu icon. Next to it is a text input field with the placeholder text "Account or Role". To the right of the input field is a dropdown menu labeled "Required (1 of each)" with a downward arrow. In the top right corner of the modal is a green close button with a white 'X'. Below the input field and dropdown are three checkboxes with their corresponding labels:

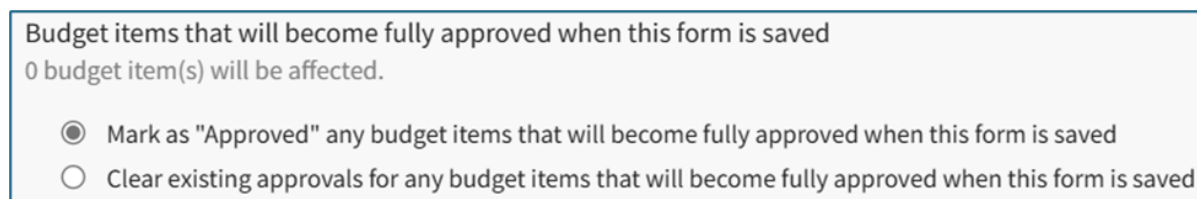
- ☐ Only allow approval when all above required groups have given approval.
- ☒ Send alerts to all approvers in this group when their approval is required for a budget item.
- ☐ Only send an alert to this group when all above required groups have given approval.

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.

A screenshot of the bottom section of the modal, which has a light gray background. It contains the following text:

Budget items that will become fully approved when this form is saved

0 budget item(s) will be affected.

Below this text are two radio button options:

- ☒ Mark as "Approved" any budget items that will become fully approved when this form is saved
- ☐ Clear existing approvals for any budget items that will become fully approved when this form is saved

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.