

# User Guide

Cash Advance

Supervisor Mode



## CONTENTS

Contents .....	0
1 Approval Screen .....	1
2 Approval .....	2
2.1 Approve or Reject Cash Advance .....	2
3 Summary .....	3
3.1 Approve or Reject Cash Advance .....	3
4 Report .....	4

## 1 APPROVAL SCREEN

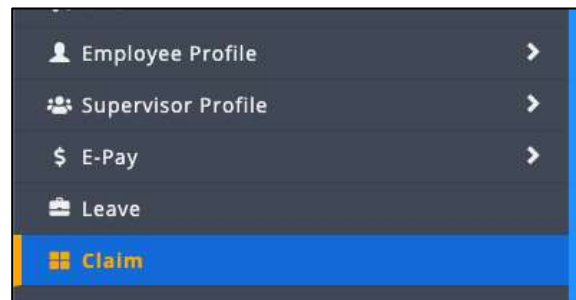


Figure 1.1



Figure 1.2

Click on "Claim" in the side bar as shown in Figure 1.1. After that click on the "Approval" on the top menu as shown in Figure 1.2

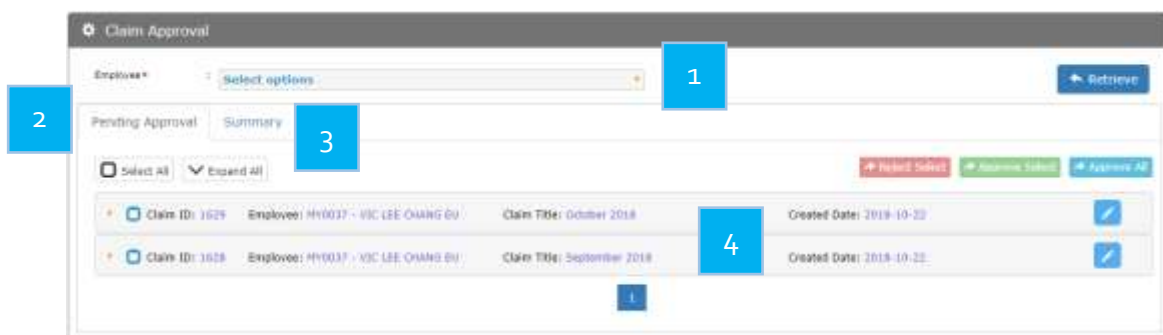


Figure 1.3

- 1 Employee selections
- 2 Pending Approval Tab

- 3 History Tab
- 4 Pending item list

## 2 APPROVAL

### 2.1 Approve or Reject Cash Advance



Figure 2.1

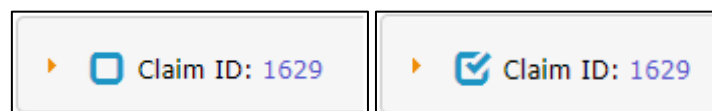


Figure 2.2

Figure 2.3

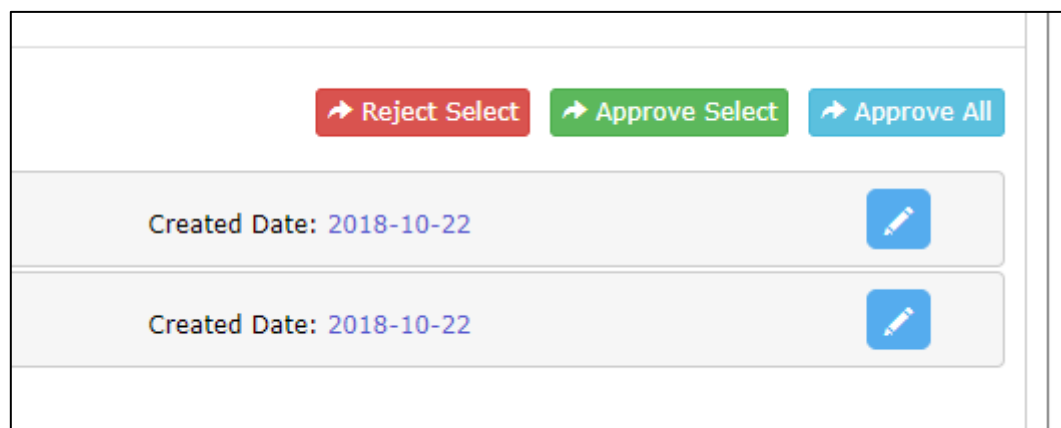


Figure 2.4

Follow the steps to approve a cash advance:

1. Select whichever item to approve by ticking the ☐ which shown in Figure 2.2 it will become as shown in Figure 2.3
2. Click **Approve Select** as shown in Figure 2.4 to approve the ticked Cash Advance(s)
3. (Optional) Supervisor can expand the item to tick only certain items within the claim group to approve

Follow the steps to reject a cash advance

1. Select whichever item to approve by ticking the ☐ which shown in Figure 2.2 it will become as shown in Figure 2.3
2. Click **Reject Select** as shown in Figure 2.4 to approve the ticked Cash Advance(s)
3. (Optional) Supervisor can expand the item to tick only certain items within the claim group to reject

Alternatively, supervisor can click **Approve All** as shown in Figure 2.4 to approve all items straight away.

### 3 SUMMARY

#### 3.1 Approve or Reject Cash Advance

Cash Advance item(s) that is/are in the summary tab still be able to reject (**to be provided the Cash Advance (s) has yet to be processed**)

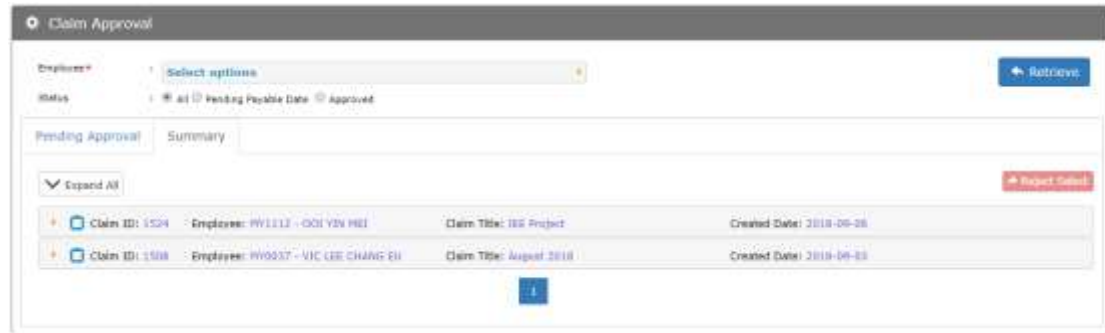


Figure 3.1

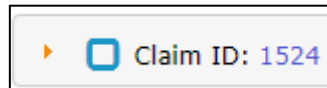


Figure 3.2

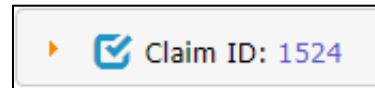


Figure 3.3

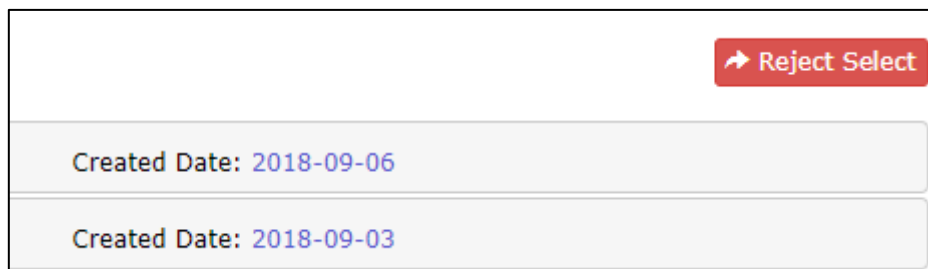


Figure 3.4

Follow the steps to reject a Cash Advance

1. Select whichever item to approve by ticking the ☐ which shown in Figure 3.2 it will become as shown in Figure 3.3
2. Click **Reject Select** as shown in Figure 3.4 to approve the ticked Cash Advance(s)
3. (Optional) Supervisor can expand the item to tick only certain items within the claim group to reject

## 4 REPORT

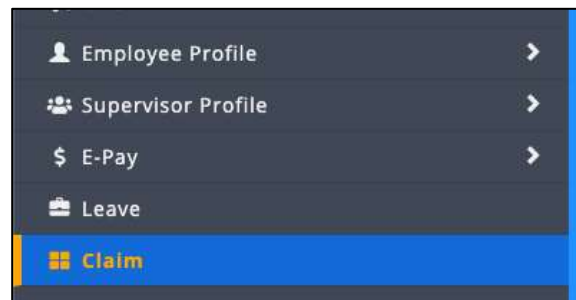


Figure 4.1



Figure 4.1

Click on "Claim" in the side bar as shown in Figure 4.4. After that click on the "Report" on the top menu as shown in Figure 4.2

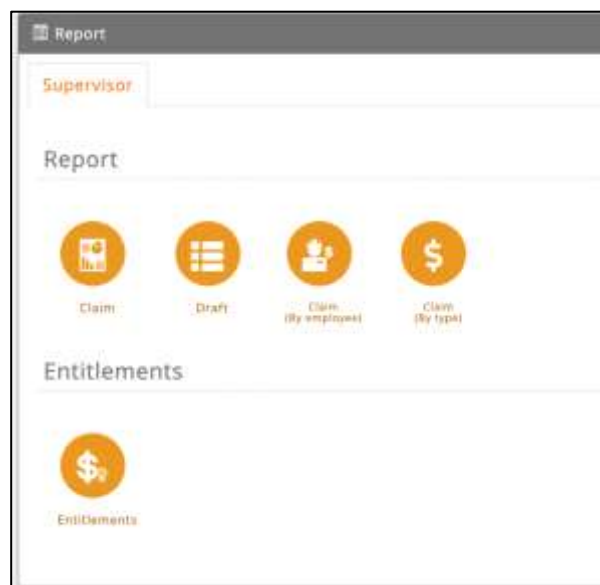


Figure 4.3

Click "Claim" as shown in Figure 4.3 then a new window will be popped up to show the report

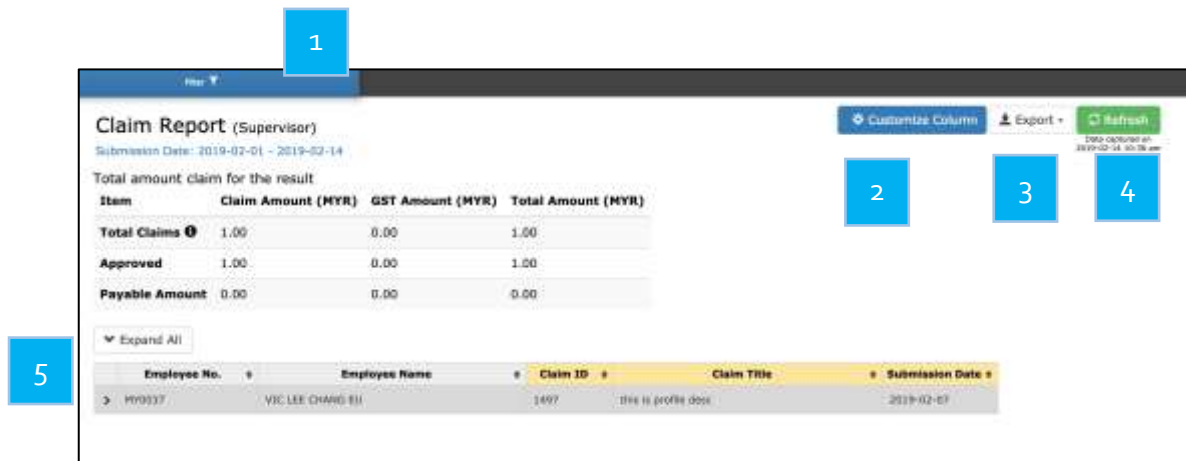


Figure 4.4

- 1 Filter option
- 2 Enable/disable column options
- 3 Export
- 4 Refresh to get latest data
- 5 Report content

**Apply Filter**

Retrieve Clear Filter

Date Type: Submission Date 2

From: 2019-06-01 To: 2019-06-02

Employment Status: 2 selected

Job Class: Select options

Claim Group: Select options

Claim Type: Select options

Department: Select options

Claim ID: Select options

Cash Advance: Select options

Employee: Select options

Location: Select options

Division: Select options

Sub Department: Select options

Charge Code: Select options

Status: Select options

Claim Amount: From to

Claim Total Amount: From to

Invoice Date From: Invoice Date To:

Approval Date From: Approval Date To:

Payable Date From: Payable Date To:

Figure 4.5

To filter click the "Filter" at the top-left side which shown in Figure 4.4 and filter options will expand out as shown Figure 4.5. After filtration has been made, click **Retrieve** to retrieve the data based on filtration.

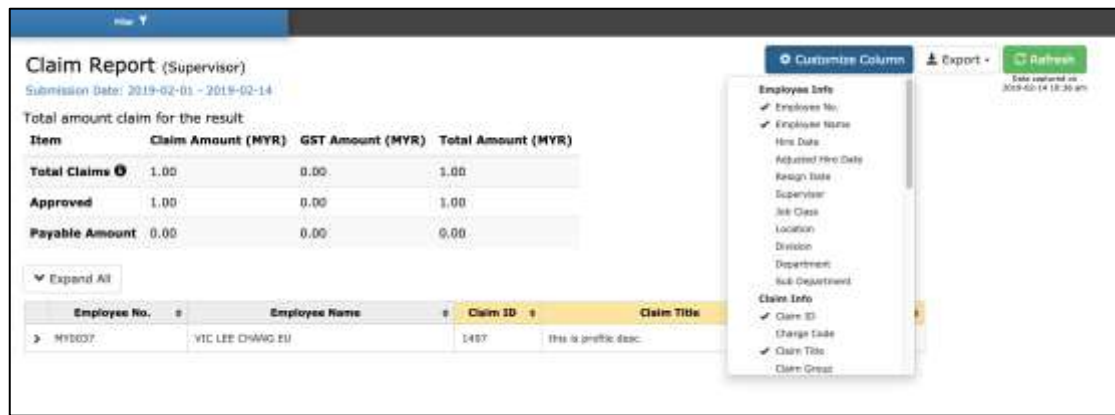


Figure 4.6

To enable/disable the column(s) to show in the report content, click **Customize Column** as shown in Figure 4.6 and a list of column names will be displayed. Enable/disable based on the report you prefer.



Figure 4.7

To export click the **Export** as shown in Figure 4.7, a list of option will be shown as shown in Figure 4.7 to export out the format of the report that you want.

The exported report will be based on the "Customize Column" options.