

How to Create an Approval List

- On the user's menu panel go to **Common Info** folder then click **Approval List**
 - If there are existing records, **Search Approval List** screen will open
 - If there are no existing record, the new **Approval List** screen will open
- From **Search Approval List** screen click **New** toolbar button

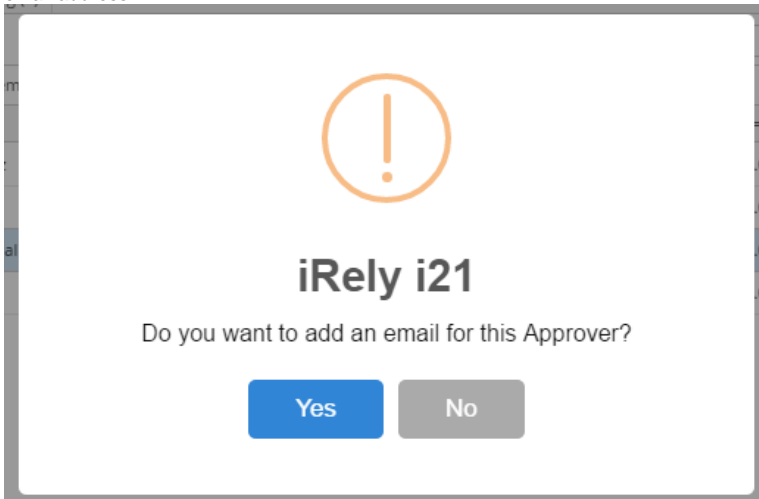
The screenshot shows the 'Approval List' window with a toolbar at the top containing 'New', 'Save', 'Search', 'Delete', 'Undo', and 'Close'. Below the toolbar are tabs for 'Details' and 'Audit Log'. A search bar contains 'Approval List'. Below the search bar is a toolbar with '+ Insert', 'X Remove', 'Move Up', 'Move Down', 'Export', 'View', and a 'Filter (F3)' button. The table has five columns: 'Approver (Single)', 'Approver Group', 'Amount Over', 'Amount <=', and 'Email Request'. The first row shows a checkbox in the 'Approver (Single)' column, and the 'Amount Over' and 'Amount <=' columns both display '0.000'. The status bar at the bottom shows 'Ready' and '1 of 1'.

- Enter the **Approval List** name
- Fill in the appropriate Approver (Single), Approver Group, Amount Over, Amount Equal to or Less than and Email Request

The screenshot shows the 'Approval List - admin' window. The search bar now contains 'admin'. The table has three rows. The first row is selected and shows 'IRELY ADMIN' in the 'Approver (Single)' column, with '0.000' in the 'Amount Over' column and '1,000.000' in the 'Amount <=' column. The second row shows 'Coffee Procurement' in the 'Approver Group' column, with '0.000' in the 'Amount Over' column and '0.000' in the 'Amount <=' column. The third row is empty. The status bar at the bottom shows 'Saved' and '1 of 1'.

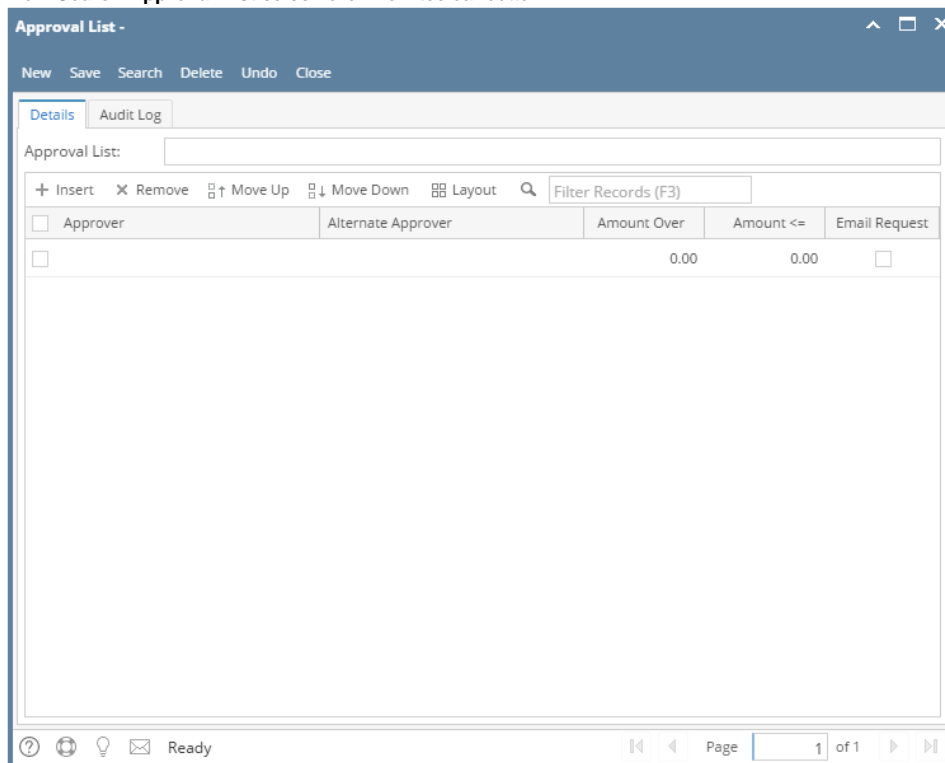
- Approver (Single)** - User entity set in a Vendor to approve vouchers.
 - If there is already a single approver in a row, Approver Group should be disabled
- Approver Group** - If the approver is a group, any of the users in the group can approve the transaction
- Amount Over** - Amount to approve by the approver
- Amount Equal to or Less than** - Amount to approve by the approver
- Email Request** - When a transaction is set for approval, approver/s will receive an email notification that he/she has Vouchers to approve

5. If the Email Request is checked, but the Approver does not have an email address, the system will prompt the user if he/she would like to add an email address



- a. If the Yes button is clicked, User Entity screen will open to be able to add the email address.
 - b. If the No button is clicked, Email Request will not be marked as checked
6. Click **Save** toolbar button to save the setup

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3. Enter the **Approval List** name

4. Fill in the appropriate Approver, Alternate, Amount Over, Amount Equal to or Less than and Email Request

Approval List - i21 Approver

New Save Search Delete Undo Close

Details Audit Log (0)

Approval List: i21 Approver

+ Insert X Remove Move Up Move Down Layout Filter Records (F3)

Approver	Alternate Approver	Amount Over	Amount <=	Email Request
<input type="checkbox"/> Beth Dela Paz	entity01	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> IRELY ADMIN	user01	1,000.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/>		0.00	0.00	<input type="checkbox"/>

- a. **Approver** - User entity set in a Vendor to approve vouchers
 - b. **Alternate Approver** - If the primary approver was unable to update the status, the Alternate approver can approve
 - c. **Amount Over** - Amount to approve by the approver
 - d. **Amount Equal to or Less than** - Amount to approve by the approver
 - e. **Email Request** - When a transaction is set for approval, approver/s will receive an email notification that he/she has Vouchers to approve
5. If the Email Request is checked, but the Approver does not have an email address, the system will prompt the user if he/she would like to add an email address

!

iRely i21

Do you want to add an email for this Approver?

Yes No

- a. If the Yes button is clicked, User Entity screen will open to be able to add the email address.
 - b. If the No button is clicked, Email Request will not be marked as checked
6. Click **Save** toolbar button to save the setup
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Approval List -

New Save Search Delete Undo Close

Details Audit Log (0)

Approval List:

Approve in Order: ☐

+ Insert × Remove Layout Filter Records (F3)

<input type="checkbox"/> Approver	Approver Level	Alternate	Amount Ov...	Amount <=	Email Approval Request
<input type="checkbox"/>			0.00	0.00	<input type="checkbox"/>

? Undo Redo Ready Page 1 of 1

3. Enter the **Approval List** name

Approval List:

4. Tick **Approve in Order** check box. Approve in Order shows that approvals are done one by one

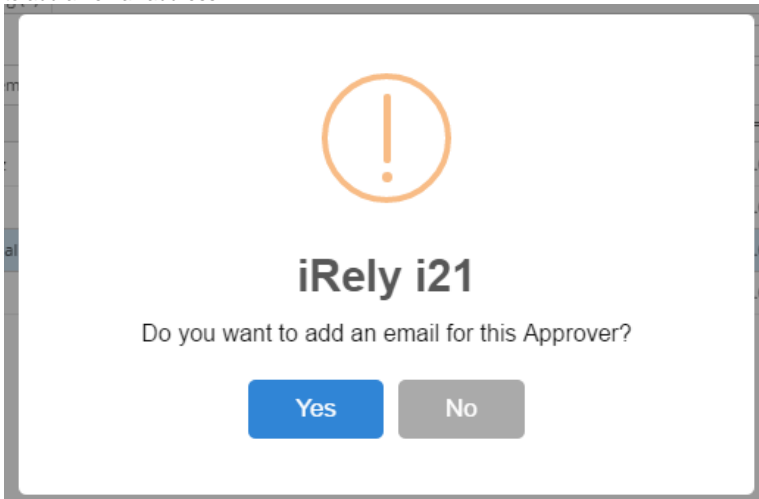
Approve in Order: ☒

5. Fill in the appropriate Approver, Approver Level, Alternate, Amount Over, Amount Equal to or Less than and Email Approval Request

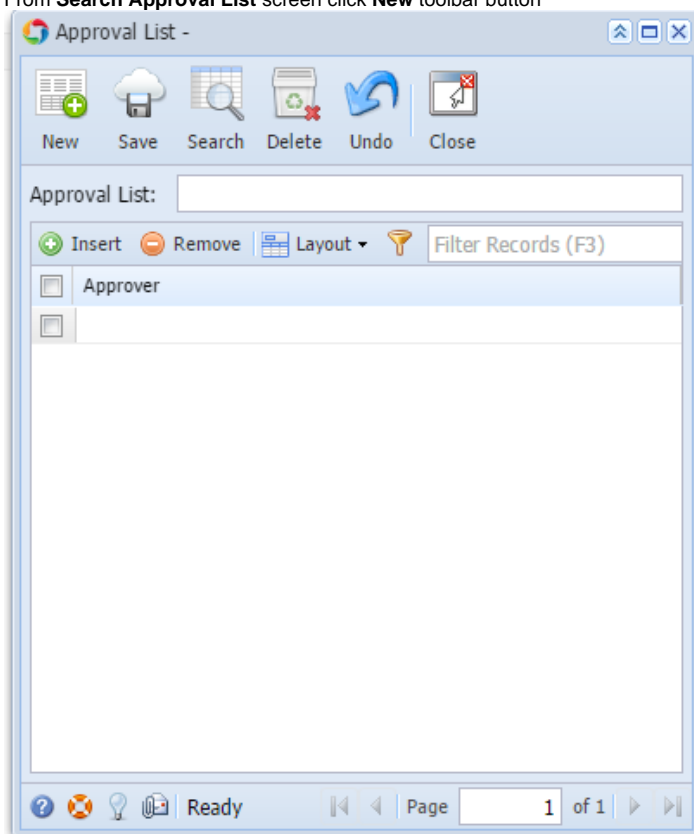
+ Insert		X Remove		Layout		Filter Records (F3)	
<input type="checkbox"/>	Approver	Approver Level	Alternate	Amount Ov...	Amount <=	Email Approval Request	
<input type="checkbox"/>	ADMIN	1	Maribeth Dela Paz	0.00	0.00	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	iRely Admin	2		0.00	0.00	<input checked="" type="checkbox"/>	
<input type="checkbox"/>				0.00	0.00	<input type="checkbox"/>	
<input type="checkbox"/>				0.00	0.00	<input type="checkbox"/>	

- Approver - User entity set in a Vendor to approve vouchers
- Approver Level - indicates who should approve first
- Alternate - If the primary approver was unable to update the status, the Alternate approver can approve
- Amount Over - Amount to approve by the approver
- Amount Equal to or Less than - Amount to approve by the approver
- Email Approval Request - When a voucher is set for approval, approver/s will receive an email notification that he/she has Vouchers to approve

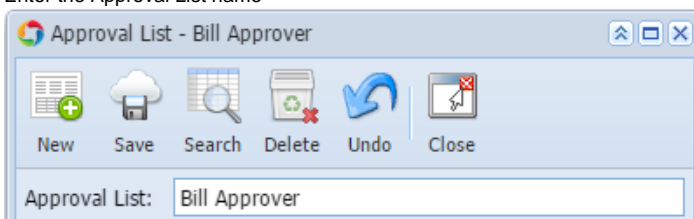
6. If the Email Approval Request is checked, but the Approver does not have an email address, the system will prompt the user if he/she would like to add an email address



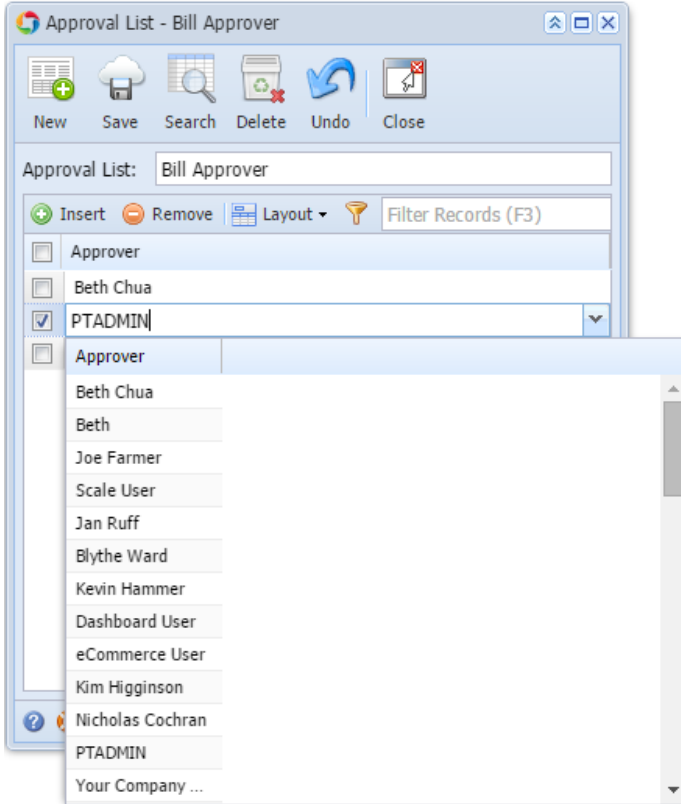
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7. Click **Save** toolbar button
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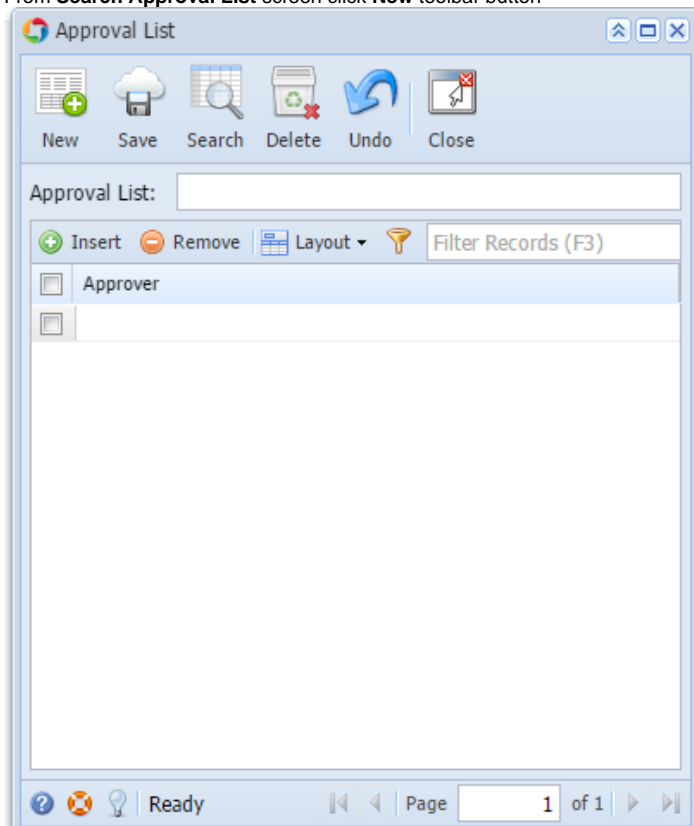


4. Click **Insert** button or click the blank row on the grid to select an approver

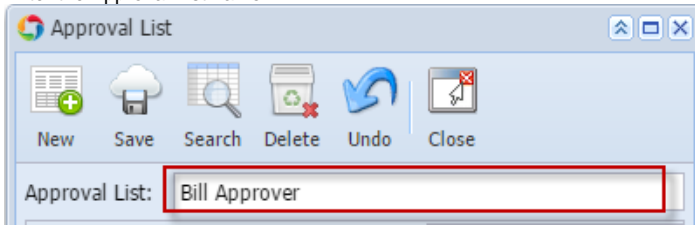


5. Click **Save** toolbar button

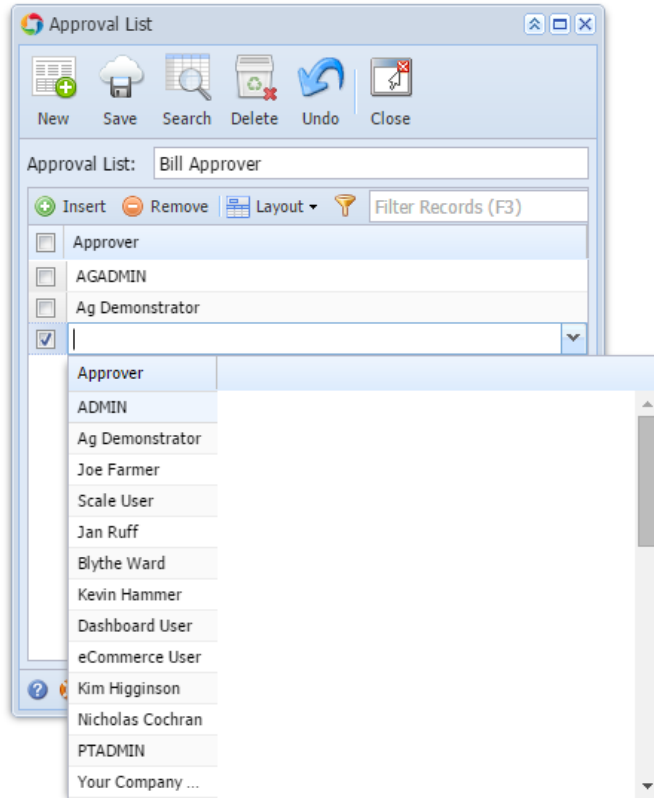
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