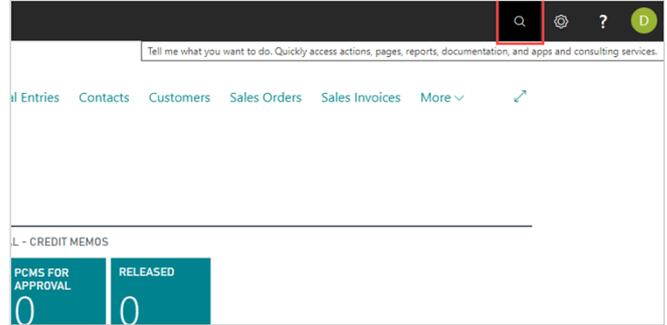
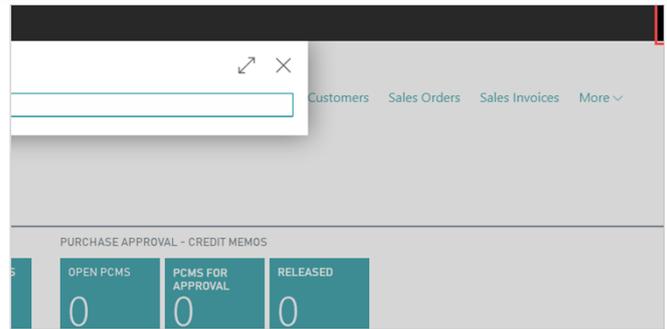


For any person using Document Capture, a record must be configured in Continia User Setup. The Continia User records live across all companies in a database similar to a Business Central user account. For each company, the user's specific company parameters must be configured in the individual companies' Continia User Setup page.

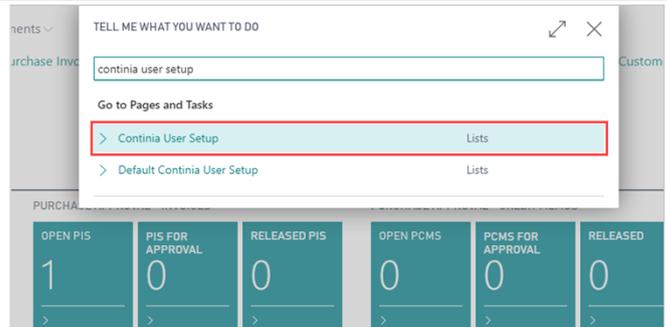
Select the "magnifier" to find the Continia User Setup.



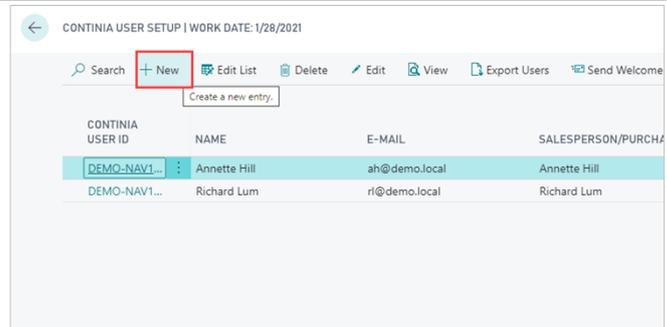
Enter the text: "continia user setup" to start searching.



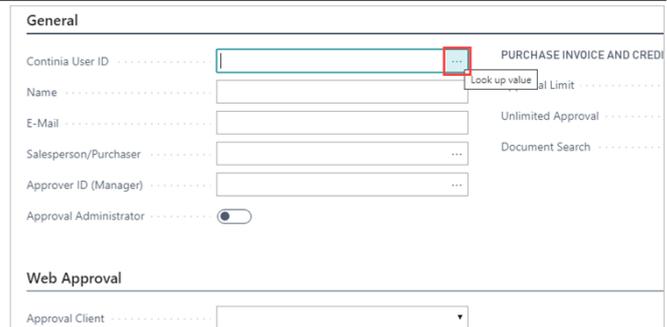
Select "Continia User Setup Lists".



In the Continia User Setup page we currently have two users: Annette Hill, who is the manager with unlimited approval, and the purchaser Richard Lum who has limited approval. When setting up approvals, it is recommended to start with creating the top-level approvers first and then work your way down the hierarchy. This makes the process much easier as you then can link the manager to the lower level approvers. Let's begin creating a new approver. Select "New" in the ribbon.



In the Continia User Setup Card, the first step is to look up the "Continia User ID".



The Continia User List shows all the users configured in the Business Central Database. The column "Access to Companies" has a number in two of the three lines. This tells us that two of the three users already are created as Continia users. Choose the user **"BD"**.

USER ID	NAME	E-MAIL	ACCESS TO COMPANIES
DEMO-NAV140W1\BD	DEMO-NAV140W1\BD		
DEMO-NAV140W1...	Annette Hill	ah@demo.local	1
DEMO-NAV140W1...	Richard Lum	rl@demo.local	1

Confirm the choice by selecting the **"OK"** button.

NAME	E-MAIL	ACCESS TO COMPANIES	LOGIN TYPE
DEMO-NAV140W1\BD			Windows
Annette Hill	ah@demo.local	1	Windows
Richard Lum	rl@demo.local	1	Windows

Just below the Continia User ID, the name of the approver is shown. The next step is to associate the user with a corresponding **"Salesperson/Purchaser"** code.

General

Continia User ID DEMO-NAV140W1\BD PURCHASE INVOICE AND CREDIT

Name Bart Duncan Approval Limit Unlimited Approval

E-Mail Document Search

Salesperson/Purchaser **[Dropdown]** Look up value

Approver ID (Manager) Look up value

Approval Administrator

Web Approval

Approval Client [Dropdown]

Here you choose the code/name that matches the user you currently are creating. In this scenario **"Bart Duncan"** is a good choice.

CODE	NAME	COMMISSION %	PHONE
AH	Annette Hill	0.00	
BD	Bart Duncan	0.00	
DC	Debra L. Co	0.00	
JR	John Roberts	5.00	
LM	Linda Martin	0.00	
MD	Mary A. Dempsey	5.00	
PS	Peter Saddow	5.00	
RL	Richard Lum	0.00	

Select **"OK"** to confirm the choice.

NAME	COMMISSION %	PHONE NO.
Annette Hill	0.00	
Bart Duncan	0.00	
Debra L. Core	0.00	
John Roberts	5.00	
Linda Martin	0.00	
Mary A. Dempsey	5.00	
Peter Saddow	5.00	
Richard Lum	0.00	

The new Continia User, Bart Duncan, is expected to have a restriction to his approval limit. Therefore the manager of Bart Duncan must be assigned. Look up Bart's manager in the field "**Approver ID (Manager)**".

In this scenario "**Annette Hill**" is a suitable choice.

CONTINIA USER ID	NAME
DEMO-NAV140W1\BD	Bart Duncan
DEMO-NAV140W1\DEMO	Annette Hill
DEMO-NAV140W1\RL	Richard Annette Hill

Confirm the choice by selecting the "**OK**" button.

To assign the approver administrative approval rights, activate the "**Approval Administrator**" switch. For now, we will leave it off.

As mentioned earlier, Bart Duncan will be assigned a limited approval amount. If the approvers are assigned an unlimited amount, you enable the "**Unlimited Approval**" setting.

To grant the approver an amount limit, fill in the value in the "Approval Limit" field.

Today, Bart Duncan is granted 2000 as his maximum approval limit.

In the field "Document Search", you can control if the user is allowed to search for documents on the Web Approval Portal. This option is only available for the Continia Web Approval Portal.

You can choose between two options: All Document or Own Documents only. For Bart Duncan the right setting is: "Own documents only".

With the Continia Web Approval Portal installed, the value in the field "Approval Client" is automatically set to "Continia Web Approval Portal".

If you want to, you can easily change where the user approves the documents. This property is also used when sending out approval status e-mail with documents to approve. The status e-mail includes a hyperlink with direct access to the documents for approval in the selected client.

The last setting on the Continia User Setup Card is the switch "Can Edit Posting Lines".

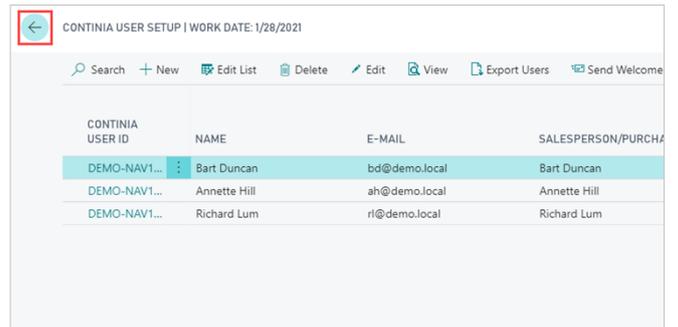
In the Continia Web Approval Portal, the user can edit the posting lines on the web approval portal when this property is enabled. The accounts and dimensions that a user can use on the Web Approval Portal, are defined by the "Assigning Permissions" configured directly on the user or through Approval User Groups. Let's grant Bart Duncan the privilege: "Can Edit Posting Lines".

When finished, select "Back" to return to the Continia User Setup.

Viewing the Continia User Setup list, everything regarding Bart Duncan is perfectly set up.

CONTINIA USER ID	NAME	E-MAIL	SALESPERSON/PURCHASER
DEMO-NAV1...	Bart Duncan	bd@demo.local	Bart Duncan
DEMO-NAV1...	Annette Hill	ah@demo.local	Annette Hill
DEMO-NAV1...	Richard Lum	rl@demo.local	Richard Lum

Select "**Back**" to return to the role center.



CONTINIA USER SETUP | WORK DATE: 1/28/2021

Search + New Edit List Delete Edit View Export Users Send Welcome

CONTINIA USER ID	NAME	E-MAIL	SALESPERSON/PURCHA
DEMO-NAV1...	Bart Duncan	bd@demo.local	Bart Duncan
DEMO-NAV1...	Annette Hill	ah@demo.local	Annette Hill
DEMO-NAV1...	Richard Lum	rl@demo.local	Richard Lum