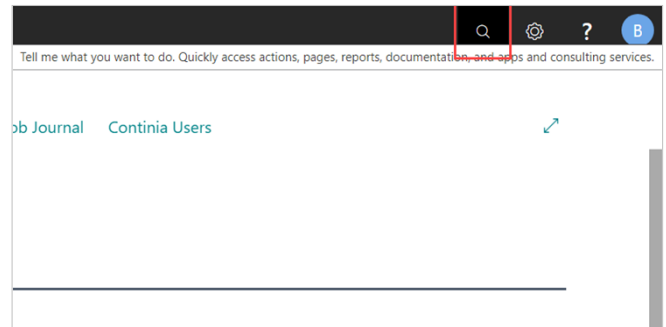
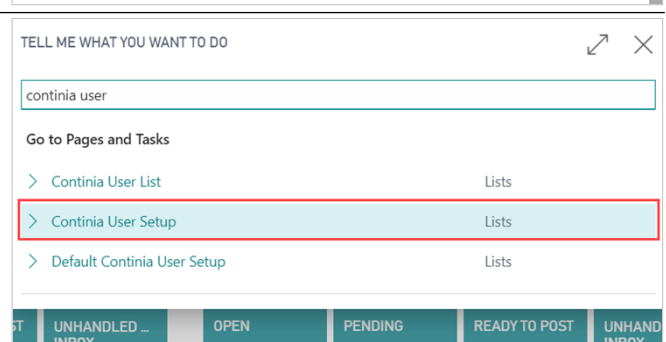


To create a user for Expense Management, go to Continia Users.

You find this by going to the "magnifier".

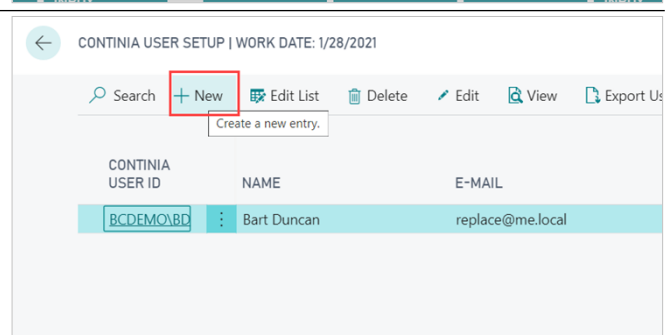


Type "Continia user" and choose "Continia User Setup".

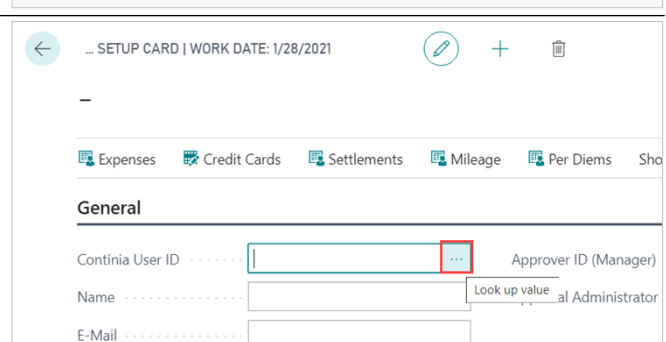


In Expense Management, you have 2 different user types: The Expense User and an Expense User, who is also an approver.

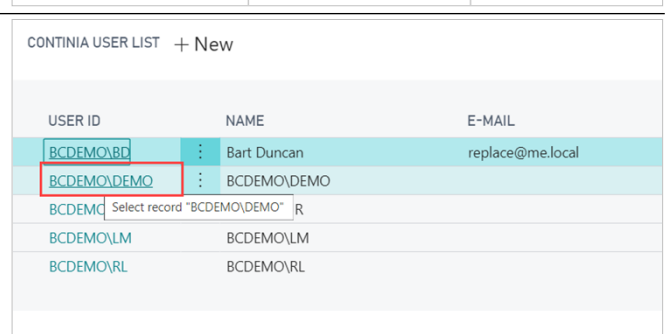
Start by creating all your approvers for Expense Management. Chose "New" in the navigation menu.



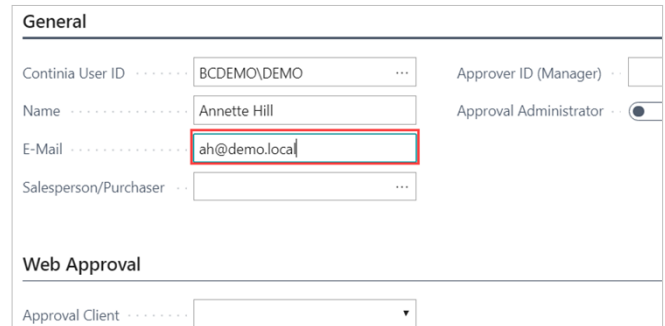
All approvers must be window users. You see the list by going to the lookup button on "Continia User ID".



Chose the windows user, who should be both an expense user and an approver.



Once you have chosen the window user, tab to the next field, "**Name**". This field is automatically filled in, when typing in the user's e-mail address. The e-mail is used for sending welcome e-mail and notification e-mails.



General

Continia User ID BCDEMO\DEMO ...

Name Annette Hill

E-Mail ah@demo.local

Salesperson/Purchaser ...

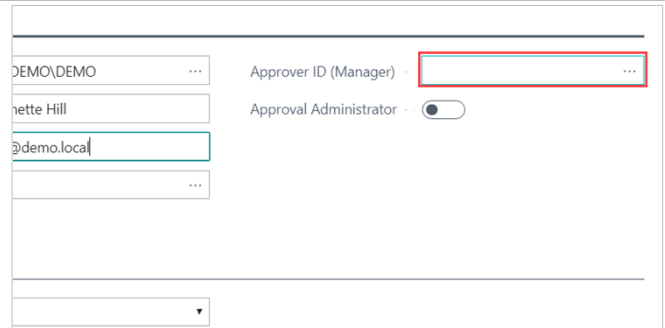
Approver ID (Manager) ...

Approval Administrator ... ☒

Web Approval

Approval Client

The next field to fill in is "**Approver ID**". This field is for users who need approval for documents submitted in Expense Management. Click on the lookup button to see a list of users who can be set as approvers. If the user is an approver with unlimited approval, their documents will automatically get the status approved, and the field will not show.



DEMO\DEMO ...

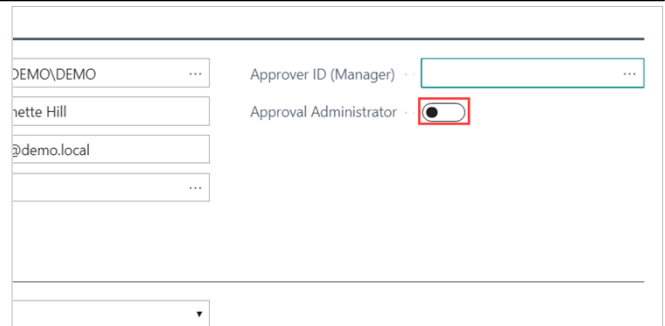
Approver ID (Manager) ...

Annette Hill

@demo.local

Approval Administrator ... ☒

The toggle field, "**Approval Administrator**", can be enabled if the approver should be able to use force approval of documents. When this is enabled the approver can reopen a document, edit and use force approval to avoid sending it out in approval flow again.



DEMO\DEMO ...

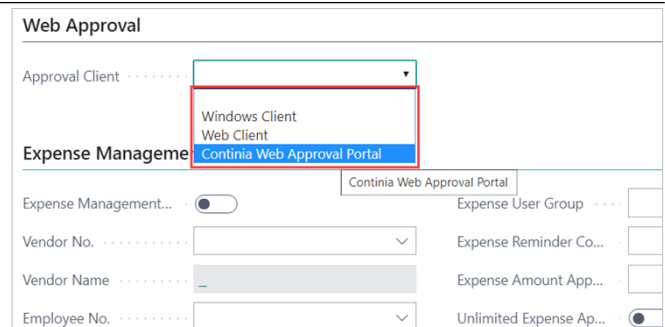
Approver ID (Manager) ...

Annette Hill

@demo.local

Approval Administrator ... ☒

Now you need to define where the approver should approve documents. This is used for sending approval status e-mail. This includes a hyperlink to access documents for approval in the selected client. You need to choose at least one of them. If Continia Web Approval Portal is chosen the user can approve both in the windows client, web client and in the Web Approval Portal.



Web Approval

Approval Client

Expense Management... ☒

Vendor No.

Vendor Name

Employee No.

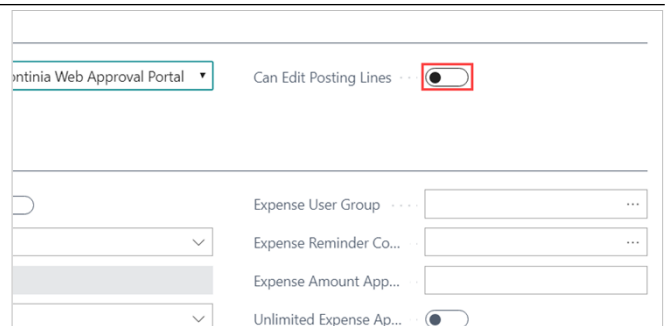
Expense User Group ...

Expense Reminder Co... ..

Expense Amount App... ..

Unlimited Expense Ap... .. ☒

If "**Continia Web Approval Portal**" is chosen the field "Can Edit Posting Lines" will appear. This specifies that the user can edit documents in the web approval portal.



Continia Web Approval Portal

Can Edit Posting Lines ... ☒

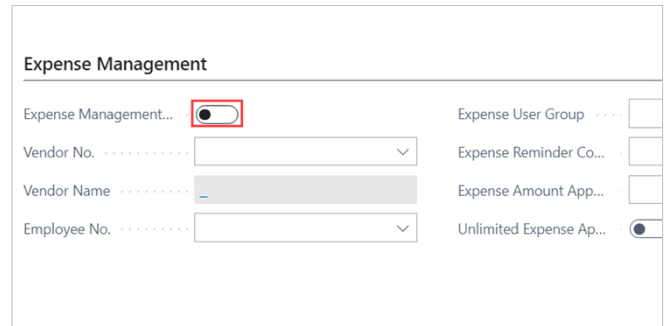
Expense User Group ...

Expense Reminder Co... ..

Expense Amount App... ..

Unlimited Expense Ap... .. ☒

Next field is important to set for all Expense Management Users. This enables Continia users to create expenses, mileage, per diems and settlements, both on the Expense App and the Expense portal.



Expense Management

Expense Management... ☒

Expense User Group ...

Vendor No.

Expense Reminder Co...

Vendor Name

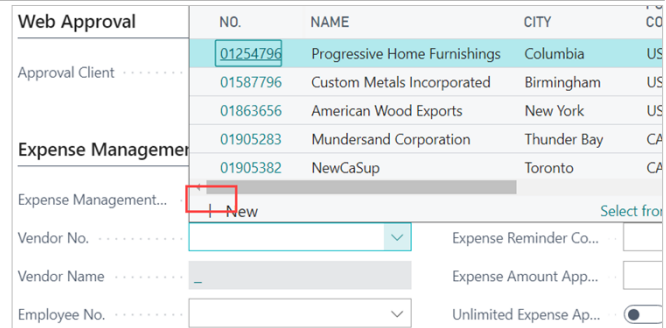
Expense Amount App...

Employee No.

Unlimited Expense Ap... ☒

Now you need to set up a vendor for the Expense Users.

You can choose the vendor you have created for the employee by going to the lookup button. The vendor number is used for posting. When the user needs to be reimbursed, it will be on this vendor where the balance can be seen.



Web Approval

NO.	NAME	CITY	CO
01254796	Progressive Home Furnishings	Columbia	US
01587796	Custom Metals Incorporated	Birmingham	US
01863656	American Wood Exports	New York	US
01905283	Mundersand Corporation	Thunder Bay	CA
01905382	NewCaSup	Toronto	CA

Approval Client

Expense Management

Expense Management... ☒ New Select from

Vendor No.

Expense Reminder Co...

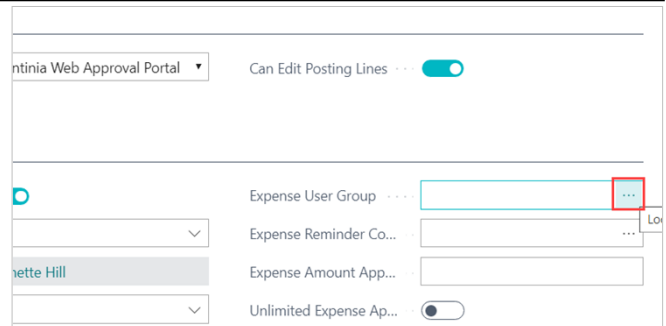
Vendor Name

Expense Amount App...

Employee No.

Unlimited Expense Ap... ☒

The next field is "**Expense User Group**". In this field you define groups of Continia users.



ntinia Web Approval Portal

Can Edit Posting Lines ☒

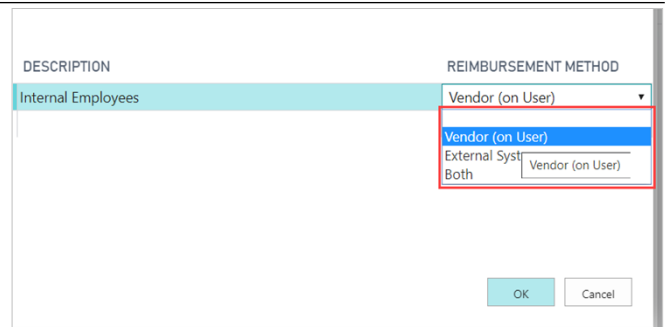
Expense User Group ...

Expense Reminder Co...

Expense Amount App...

Unlimited Expense Ap... ☒

For each group you must specify the Mileage Reimbursement Method: whether to post on the vendor, to post in an external system, or both. If the "**External System**" is chosen, no posting will be done in NAV/BC.



DESCRIPTION

Internal Employees

REIMBURSEMENT METHOD

Vendor (on User)

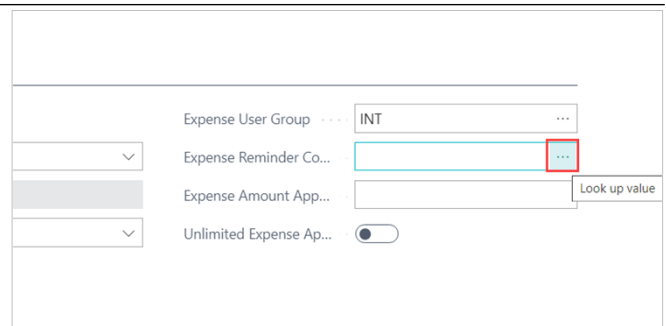
Vendor (on User)

External Syst

Both

OK Cancel

You can add an "**Expense Reminder Code**" if you want to. This is used, when sending out reminders to expense users.



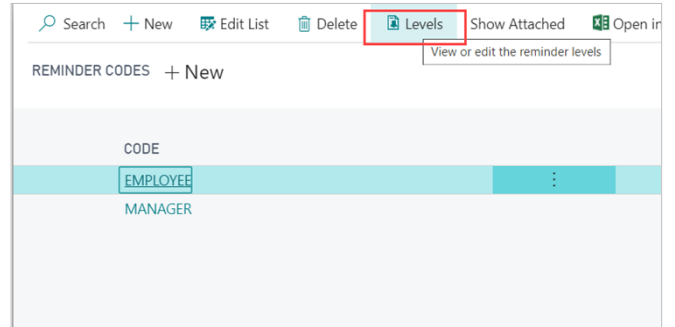
Expense User Group ... INT

Expense Reminder Co...

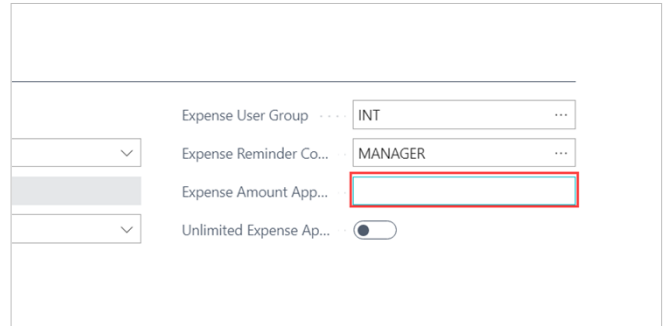
Expense Amount App... Look up value

Unlimited Expense Ap... ☒

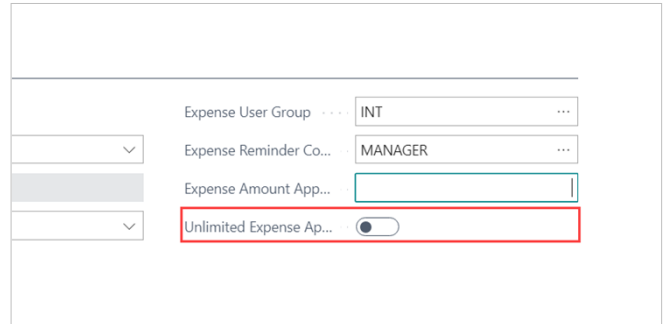
If you open the lookup and go to **"Levels"**, you can set up grace periods and create your own text, which will be the one used for reminder e-mails.



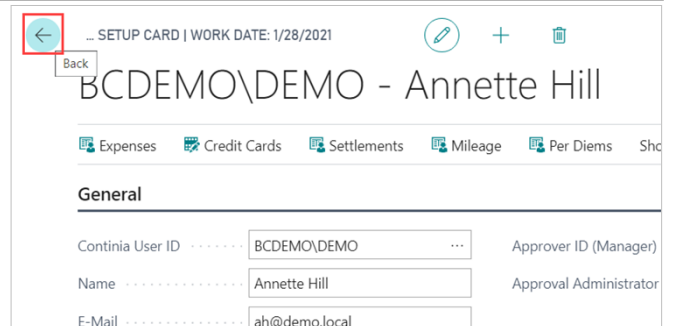
The next field is the second last field that you must consider to set up for an approver. **"Expense Amount Approval Limit"** is for approvers who are only allowed to approve up to a certain amount. Documents sent to this approver, above this limit, will after approval be sent to an additional approver with either a higher approval limit or with an **"Unlimited approval"** set.



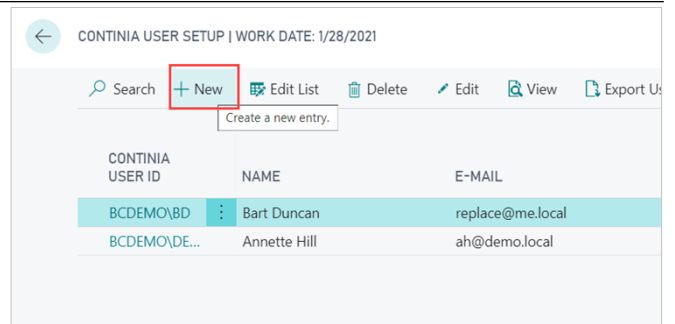
The final field, for the approver to define, is the **"Unlimited Expense Approval"**. If this is enabled, the user's documents will automatically be set with status "Released". Please bear in mind that in the set up of users and approvers, at least 1 approver should have **"Unlimited Expense Approval"** enabled.



Click on the back button

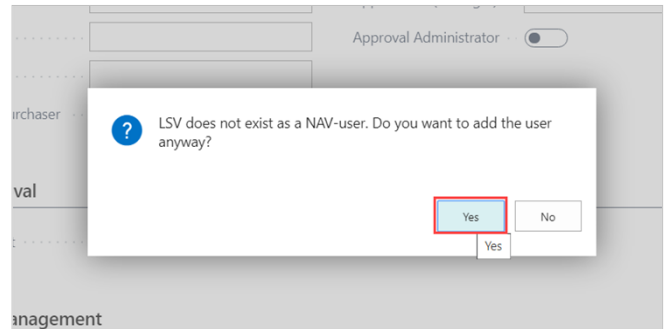


Now you have created an approver, and you are ready to create an expense user. Go to the navigation menu and choose **"New"**.

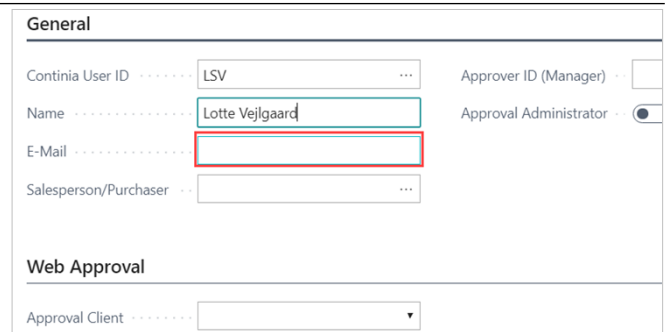


Once you have filled in the user name, the system will check if the user is a NAV-user, and ask you if you want to add the new user, even though it is not a NAV-user.

An expense user, who should not be set as an approver, does not need to be a NAV-user. So, for those users you can rest assured say **"Yes"**.

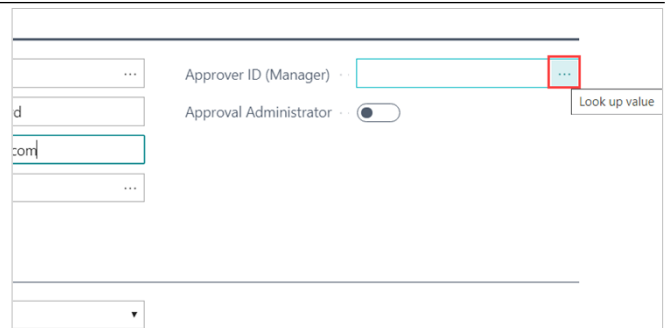


As this user is not listed as a NAV-user, you must fill in the **"Name"** manually, and then fill in the e-mail as with the approver.



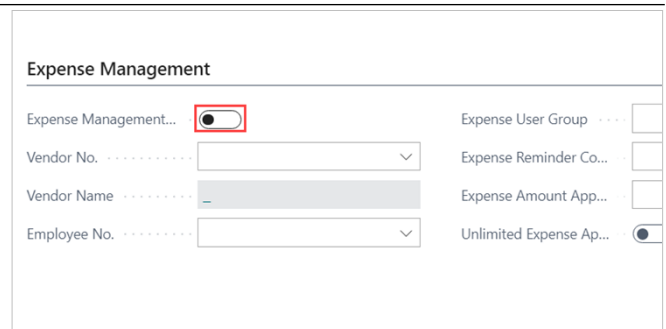
Go to the **"Approver ID"** and chose the approver for the expense user.

In the lookup button, you can choose the approver.

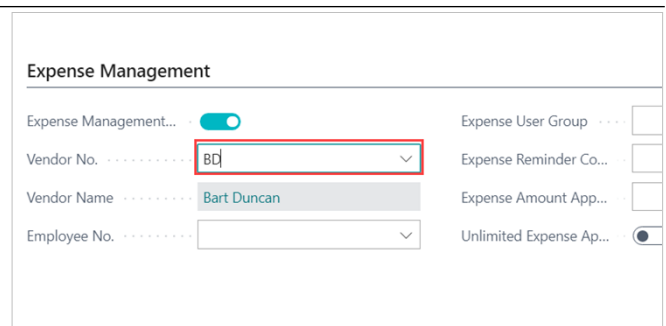


Now you must enable the user as an **"Expense Management User"**.

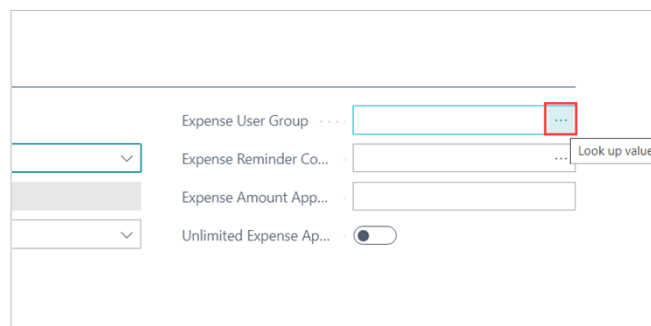
This enables the user to create expenses, mileage, per diems and settlements both on the Expense App and the Expense portal.



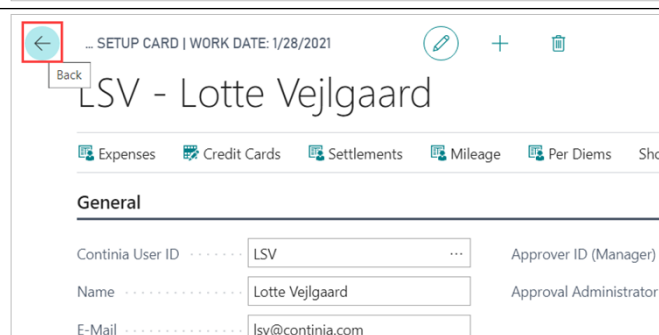
A vendor must be added to the user as well for the approver.



The "**Expense User Group**" must be set up for the approver as well.

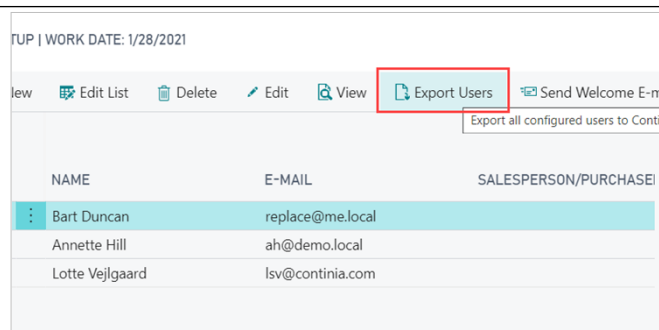


Now everything has been set up for the expense user, and you can go back to the overview of all users.



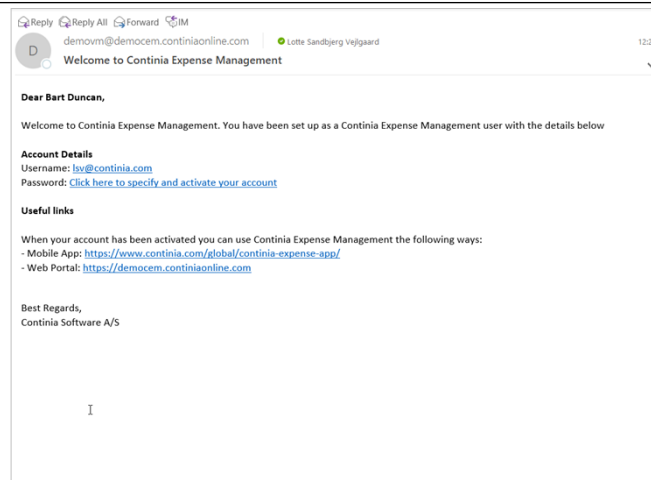
The last thing you must do, when you have created all your users, is to go to the navigation menu and choose "**Export Users**".

This will generate sending welcome e-mails to new users.



NAME	E-MAIL	SALESPERSON/PURCHASE
Bart Duncan	replace@me.local	
Annette Hill	ah@demo.local	
Lotte Vejlgard	lsv@continia.com	

The new users will receive a welcome e-mail. The e-mail contains a link to activate their user and create a password. There is also a link to download the Expense App and one to download the Expense Portal.



Reply Reply All Forward IM

demovm@democem.continiaonline.com | Lotte Sandbjerg Vejlgard 12:21

Welcome to Continia Expense Management

Dear Bart Duncan,

Welcome to Continia Expense Management. You have been set up as a Continia Expense Management user with the details below

Account Details
 Username: lsv@continia.com
 Password: [Click here to specify and activate your account](#)

Useful links

When your account has been activated you can use Continia Expense Management the following ways:
 - Mobile App: <https://www.continia.com/global/continia-expense-app/>
 - Web Portal: <https://democem.continiaonline.com>

Best Regards,
 Continia Software A/S

I