

Manage Approval Matrices

Last Modified on 23/02/2021 3:05 pm GMT

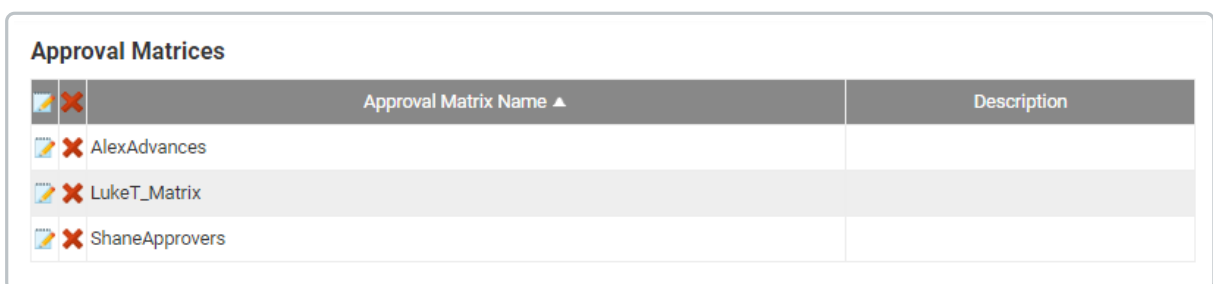
Permissions









You will require an Access Role with the following permissions:

- Approval Matrices

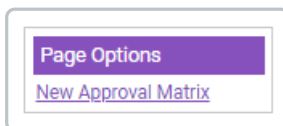
Add an Approval Matrix

1. Navigate from the Home page to **Administrative Settings | User Management | Approval Matrices**.

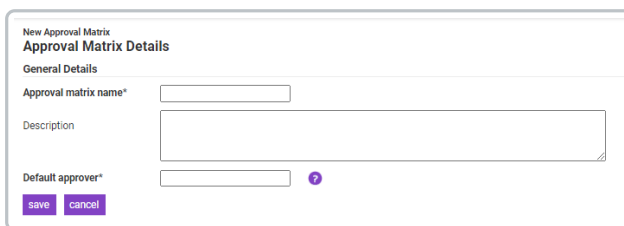


Approval Matrices		
 	Approval Matrix Name ▲	Description
 	AlexAdvances	
 	LukeT_Matrix	
 	ShaneApprovers	

2. Click **New Approval Matrix** from the Page Options menu.



3. Complete the following details:



New Approval Matrix
Approval Matrix Details
General Details

Approval matrix name*

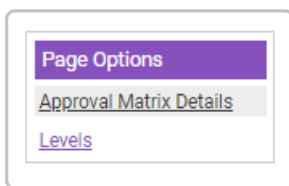
Description

Default approver* ?

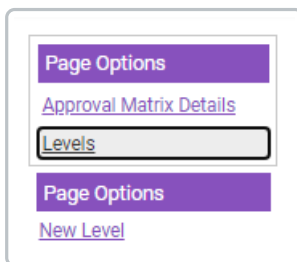
Field	Description
Approval Matrix Name*	Enter a name for the approval matrix.
Description	Enter a description for the approval matrix.

Field	Description
Default Approver*	<p>Enter the default approver.</p> <p>This should be a signatory who can sign off any claim value. This will only be used in instances where the system is unable to allocate the claim to another approver, for instance if a level is incomplete, or for holidays where a delegate has not been assigned.</p> <p>This will allow you to select an Employee, Team or Budget Holder.</p>

4. Click **Levels** from the Page Options menu.



5. Click **New Level** from the Page Options menu.



6. Enter the following details:

New Level





Approval limit*

Approver*

Field	Description
Approval Limit*	Enter the approval limit for this level of the approval matrix.
Approver*	<p>Enter the approver for this level of the approval matrix.</p> <p>This will allow you to select an Employee, Team or Budget Holder.</p>

- Click **Save**. This will return you to the Approval Matrix Details menu displaying the new level. Repeat this process to add new levels to the Approval Matrix.

Approval Matrix: Asd
Approval Matrix Details








 	Approval Limit ▲	Approver Type	Approver
 	100.00	Employee	Kieron Sykes



- Once you have specified each of the levels, click **Save**.

Manage Approval Matrices

The Approval Matrices menu allows you to do the following:

Approval Matrices

 	Approval Matrix Name ▲	Description
 	AlexAdvances	
 	LukeT_Matrix	
 	ShaneApprovers	

Action	Description
Edit	Click  to edit an existing Approval Matrix.
Delete	Click  to delete an existing Approval Matrix.
