

Process for Approval Expense Claim

This video will show users the process for Approval Expense Claim

Navigate to HRMS, Expense Claim, Approve Expense Claim.

STEP-BY-STEP:

1. Go to HRMS menu
 2. Select Expense Claim
 3. Select a claim document with Pending Approval status to open from the List View
 4. Click on Approve Expense Claim button
 5. Click Post Expense Claim button to post the entries to accounts
 6. Select Approvals from the left menu.
User will see the list of Expense Claim documents approved by the person in charge.
Right click on a document in the list view to see options available (i.e. Show document, Approve Document, Show History)
 7. Open an Expense Claim document and click on the Posting tab to view the posted Journal Entries.
 8. Go to Accounts menu
 9. Select Payments and click Create New Payment
 10. Select an Employee from the list of Creditors.
 11. Enter mandatory fields: Memo, Payment Means, Account. (mandatory fields in red color or marked with red x)
 12. Tick on checkbox for Expense Claim to be paid in the table below.
The selected entry will go to the bottom half of the table for payment.
 13. Click Confirm Payment button.
 14. Click Post Payment button.
 15. Go back to Expense Claim document and select Payments tab.
The posted Payment will be reflected on the Payments tab of the Expense Claim document.
-