



EMPLOYEE ADVANCE

EPTISA SERVICIOS DE INGENIERÍA S.L
PMO

Tipo de manual / manual type: **Quick Guide**

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Index

1. INTRODUCTION	3
2. LOGIN	4
3. Employee Advance	6
3.1. Employee Advance Menu	6
3.2. Employee Advance Creation	7
3.2.1. Form Employee Information	7
3.2.2. Connection with New Eptisa Employee Expense (A.3)	8
3.2.3. Approval WorkFlow	9
3.3. Frequency Questions & Answers	9
3.3.1. Who has access?	10
3.3.2. How could I follow my Employee Advance?	10
4. Check Pending tasks	11
5. CONTACT MiTools Team	12

[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 2 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

1. INTRODUCTION

This manual describes the procedure for registering **EMPLOYEE ADVANCE**. This procedure is connected with A.3 Employee Expenses

Employee Advance will be registered using only [Mitools](#).

[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 3 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

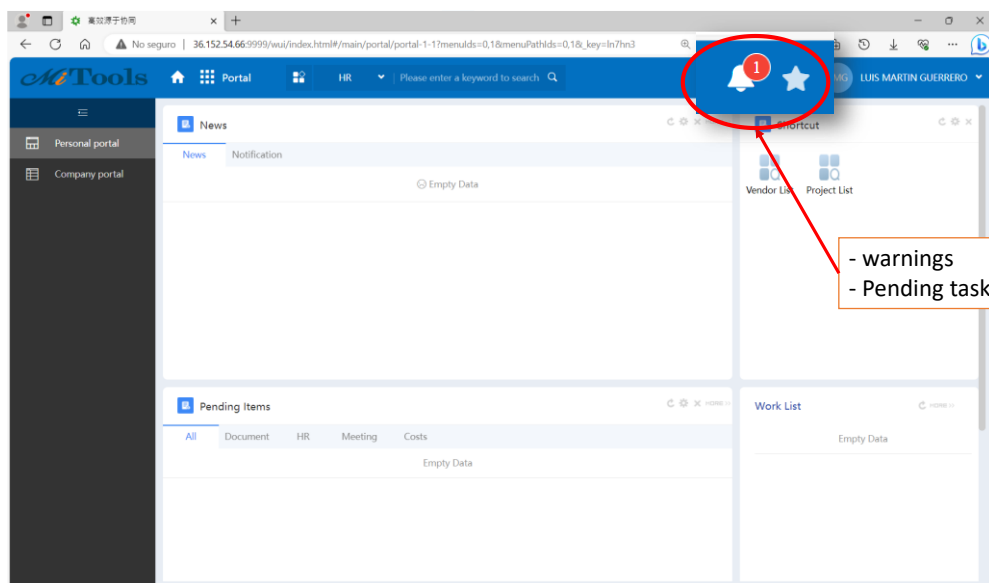
2. LOGIN

Access to the new platform typing the address **MITOOLS.EPTISA.COM** in the browser:
(It is advisable to use the Microsoft EDGE browser because Chrome causes access problems).



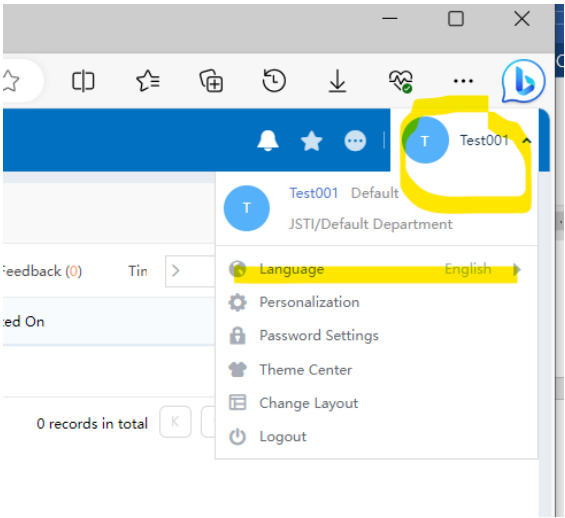
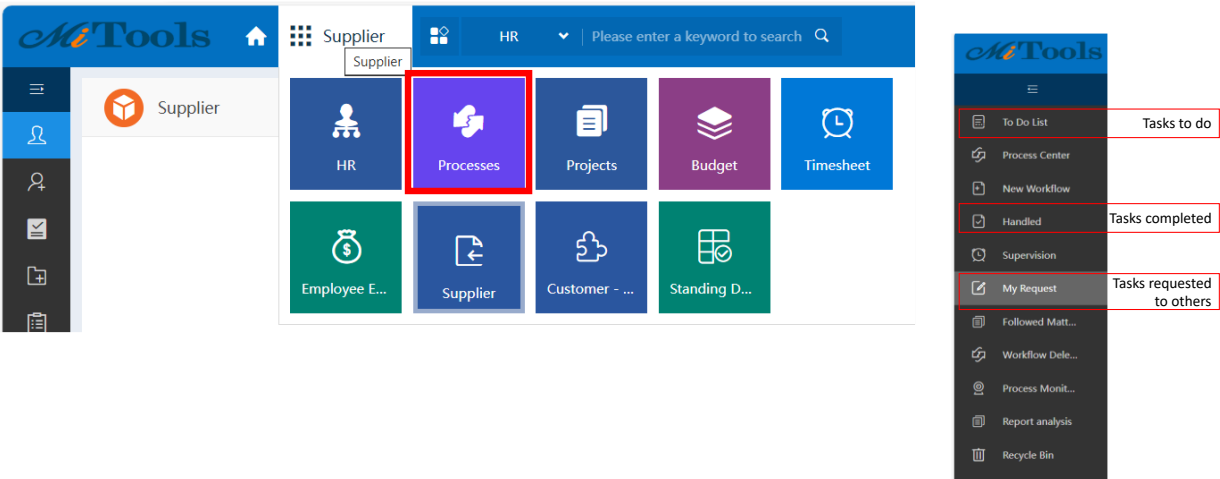
On the login screen, use the same username and password that you use on the eptisa intranet.
Additionally you have to enter the numerical code.

Once connected to the **Mitools** platform, the **homepage** is displayed.
A **pending task** warning symbol will appear on this screen.



You can also access the tasks by selecting **PROCESSES** from the menu.

[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 4 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

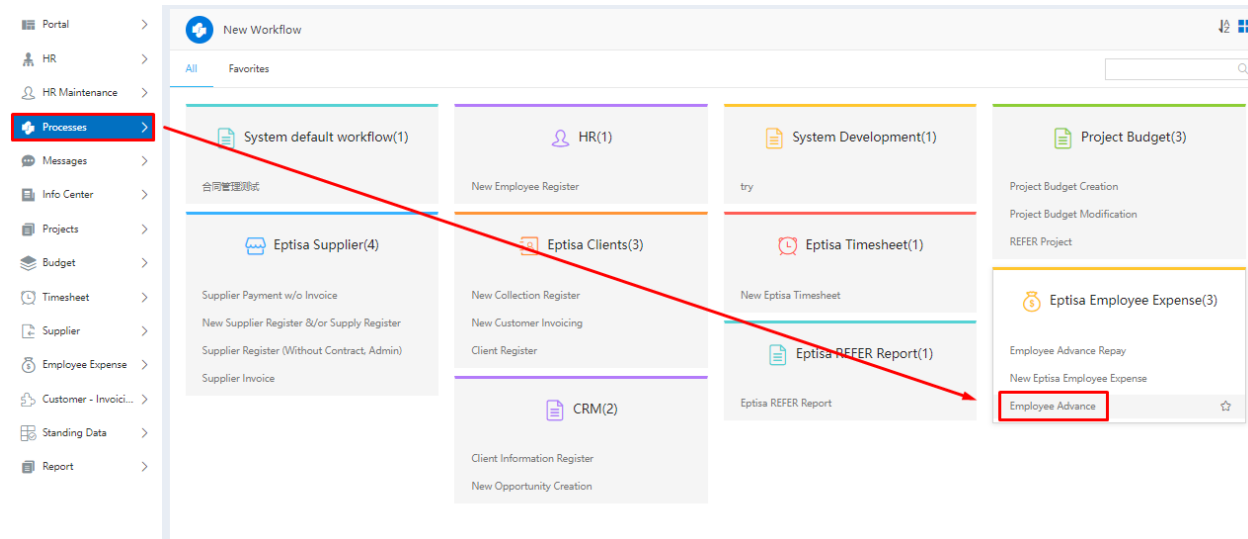
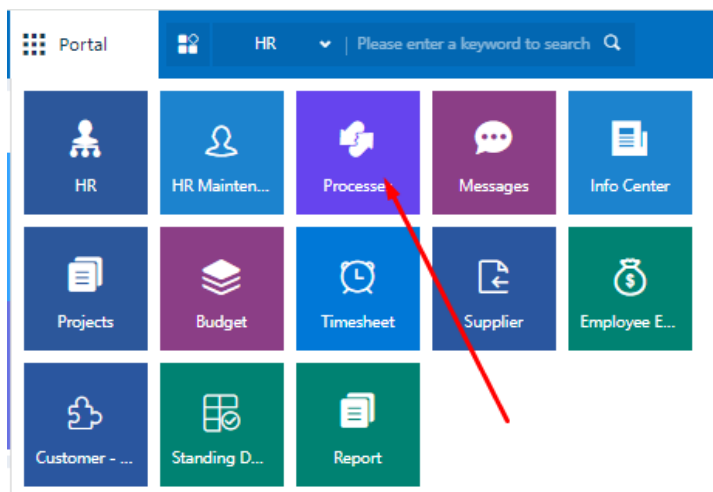


To change the language, select the drop-down menu that appears next to your name.

3. Employee Advance

3.1. Employee Advance Menu

This are the way for Employee Advance and the functions we have to work with:



[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 6 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

3.2. Employee Advance Creation

This is a workflow which follow similar functionalities than other. User just need to fill the form and push SAVE or SUBMIT button depending on the case.

The screenshot shows a web interface for creating an employee advance. At the top, there's a navigation bar with a blue circular icon, the text 'Workflow : Create - Employee Advance - Create', and three tabs: 'Workflow Form' (active), 'Workflow Chart', and 'Process status'. On the right, there are 'Submit' and 'Save' buttons. The main content area is titled 'Employee Advance' in blue text.

3.2.1. Form Employee Information

The screenshot shows the 'Employee Info' form. It has two columns of input fields. The left column contains: 'Title' (filled with 'Employee Advance-SFJADMIN-2024-06-24'), 'Application Date' (calendar icon, filled with '2024-06-24'), 'Employee Name' (filled with 'SFJADMIN'), 'Currency' (filled with 'EUR'), and 'Repaid Amount' (filled with '0.00'). The right column contains: 'Transaction ID' (with a question mark icon), 'Payer Company' (with a search icon and a red asterisk), and 'Advance Amount' (with a red asterisk). There are also small orange question mark icons next to the 'Repaid Amount' and 'Transaction ID' fields.

In this initial part, you need only provide:

- Payer Company (Company Code)
- Advance Amount

The number of **TRANSACTION ID** is an automatic field when the employee advance pass to the next node.

REPAID AMOUNT is required to leave empty, because this number is provide by AP Accountant.

[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 7 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

Employee Advance

Employee Info

Title

Employee Advance-SFJADMIN-2024-06-24

Application Date

2024-06-24

Employee Name

SFJADMIN

Currency

EUR

Repaid Amount

0.00

Transaction ID

Payer Company

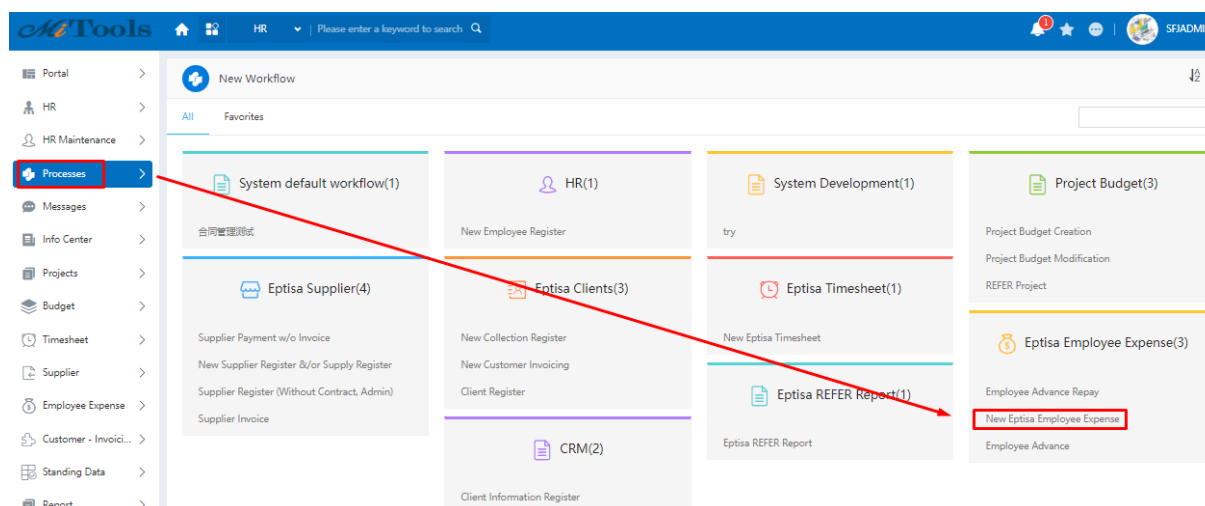
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Advance Amount

1000.00

3.2.2. Connection with New Eptisa Employee Expense (A.3)

This workflow is connected with New Eptisa Employee Expense.



[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 8 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

If you entry into Employee Expense, you can look a new section with Employee Advance Deduct information.

New Eptisa Employee Expense

2024-06-24

Title: New Eptisa Employee Expense-2024-06-24-SFIADMIN

Registrant: SFIADMIN

Beneficiary: SFIADMIN

Project Manager:

AP accountant:

SSL Director:

SL Director:

Project:

Project Status:

Project Blocked: ☐

Total Amount: 0.00

Total mount After Deduct: 0.00

Expense Detail

<input type="checkbox"/>	SN	Date	Description	Invoice Currency	Amount Without Tax	Tax Amount	Total Amount	Project Currency	Exchange Rate	Total Amount (Exchanged)	Cost Type
<input type="checkbox"/>	1	2024-06-24						EUR			

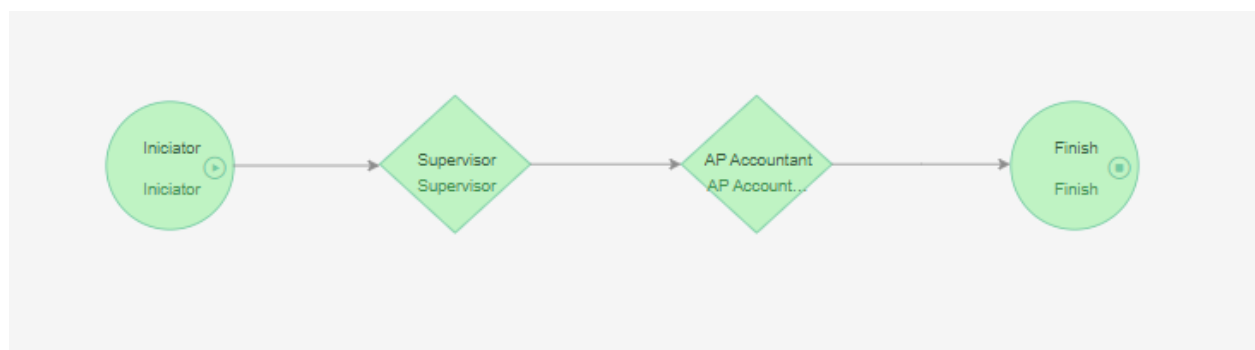
Employee Advance Deduct

<input type="checkbox"/>	SN	Employee Advance	Company	Currency	Advance Amount	Repaid Amount	Advance Balance	Deduct Amount
<input type="checkbox"/>	1	202406ES801005	801	EUR	1200.00	0.00	1200.00	
					1200.00	0.00		0.00

In this section, Employee Expenses detect your user name and provide de Employee Advance Deduct information automatically to know what the Advance Amount is. If you have expenses to provide, they can be deducted if you have an advance payment.

3.2.3. Approval Workflow

This is the approval workflow.



Is an easy workflow like other modules, only follow to supervisor and approve to follow to AP Accountant and approve for finish.

3.3. Frequency Questions & Answers

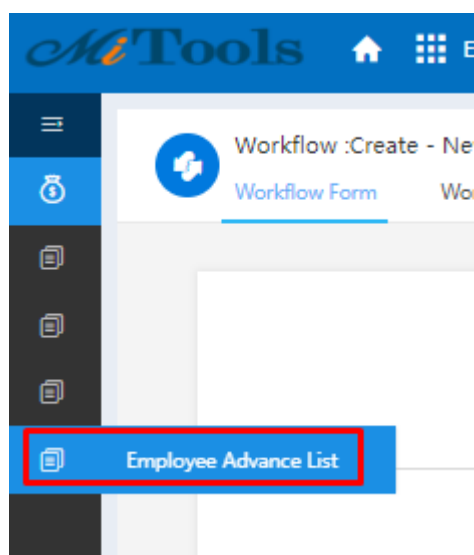
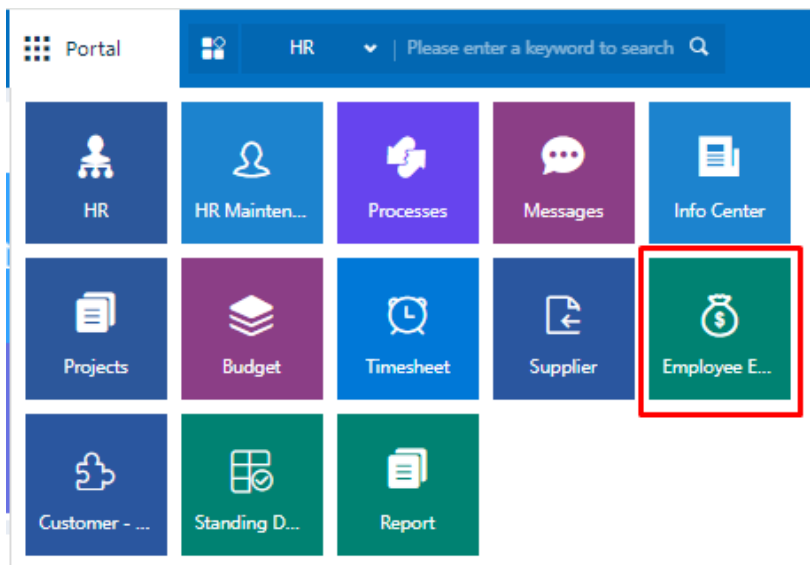
[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 9 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

3.3.1. Who has access?

For this workflow can access all employees for make his Employee Advance

3.3.2. How could I follow my Employee Advance?

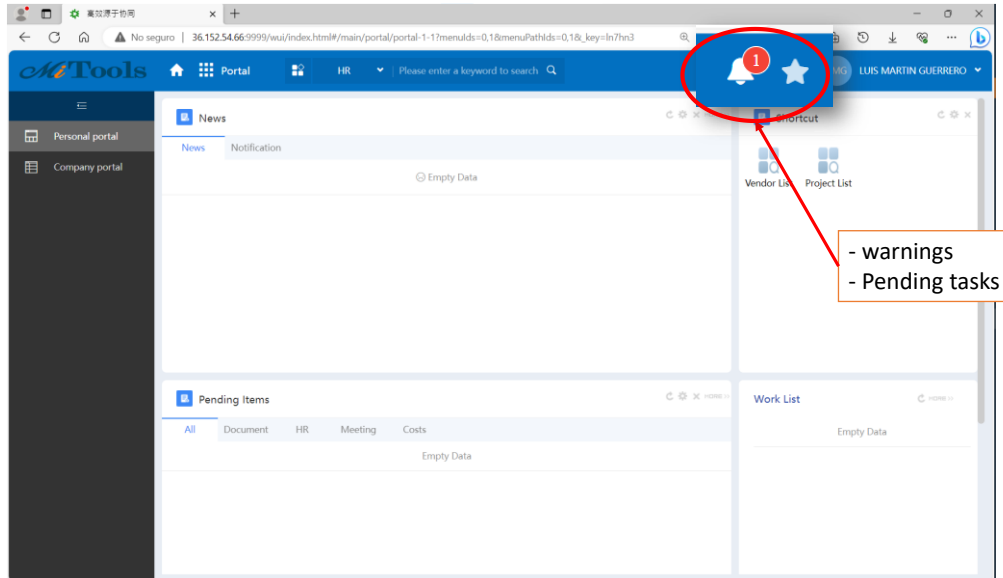
To follow your advance, you can go to the Employee Advance List.



[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 10 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

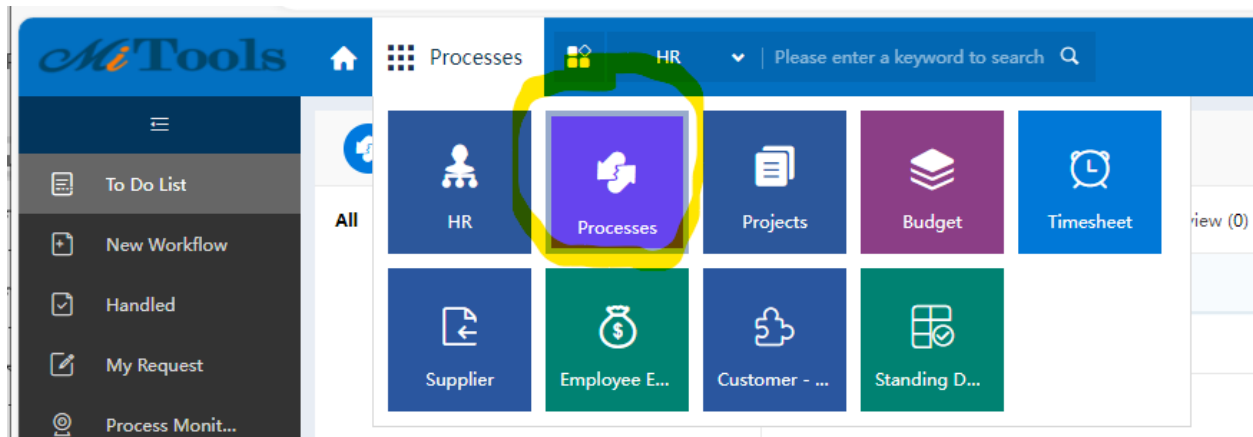
4. Check Pending tasks

A pending task warning symbol will appear on the homepage



Or you can select PROCEESS to check all tasks.

- To Do List : my pending tasks
- Handled : my tasks completed
- My Request : My requested tasks to others



[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 11 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

5. CONTACT MiTools Team

Please send any questions, issues, or information to email:

mitools.support@eptisa.com

[Quick Guide Advance]	[PMO]Uso Público / Public
Fecha /Date: 25/06/2024	Página 12 de 13
Edición/Edition: 01	Clasificación/Classification: Uso Público / Public

