

# Module - Gifts and entertainment - superusers

*This module allows a user to manage the declaration, analysis and management of gifts and entertainment. This guide covers the module functionalities available to superusers.*

## Configuration of the gifts and entertainment module

The module consists mainly of the Gifts and entertainment control, which must always be active . In addition to the control, the module requires the following settings in the configuration menu:

- **Limit type :** Gift and entertainment amount limit.
  - General: General amount limit.
  - Company: Amount limit per company.
  - User: Amount limit per user.
  - User and company: Amount limit per user and company.
- **Limit:** Limit amount.
- **Period:** The period covered by the limit.

These parameters must be configured in order to have the module running smoothly .

### STEP 1

Navigate to Controls configuration, under **Configuration** → **Controls** from the platform menu.

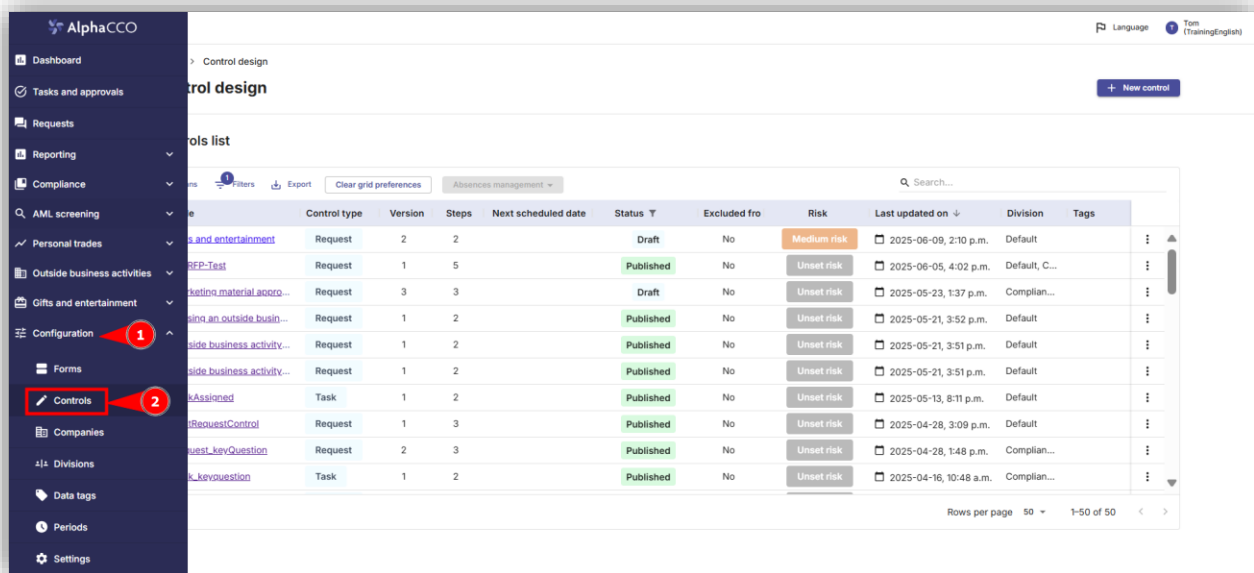


Figure 1: Controls list

STEP 2

Search with the keywords "gifts and entertainemnt" in the search field and view the status of controls.

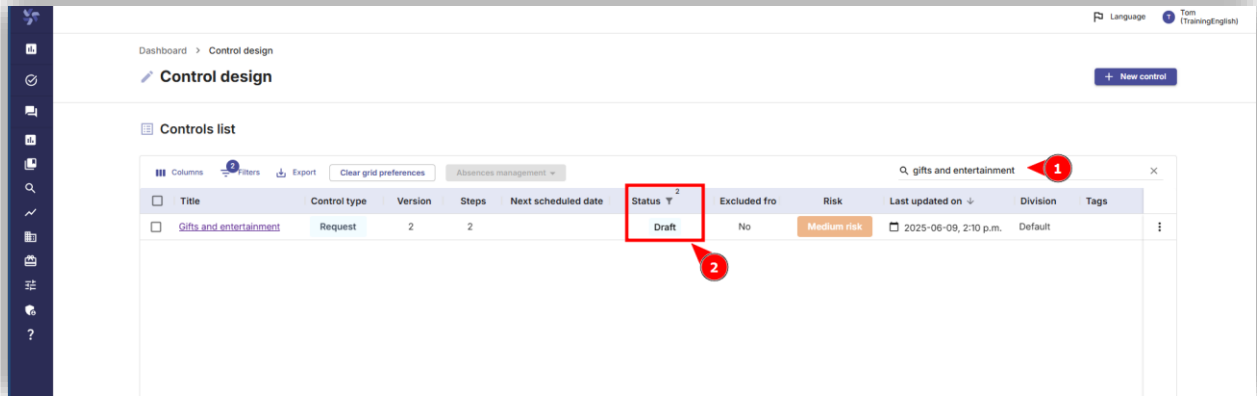


Figure 2: Filtered list of controls to show the gifts and entertainment module control.

STEP 3

Verify assignments, make any changes to the form according to your needs, and validate the decision step settings (approval) for each control. The default approver is the user's designated manager. You may select a specific user as approver for each control.

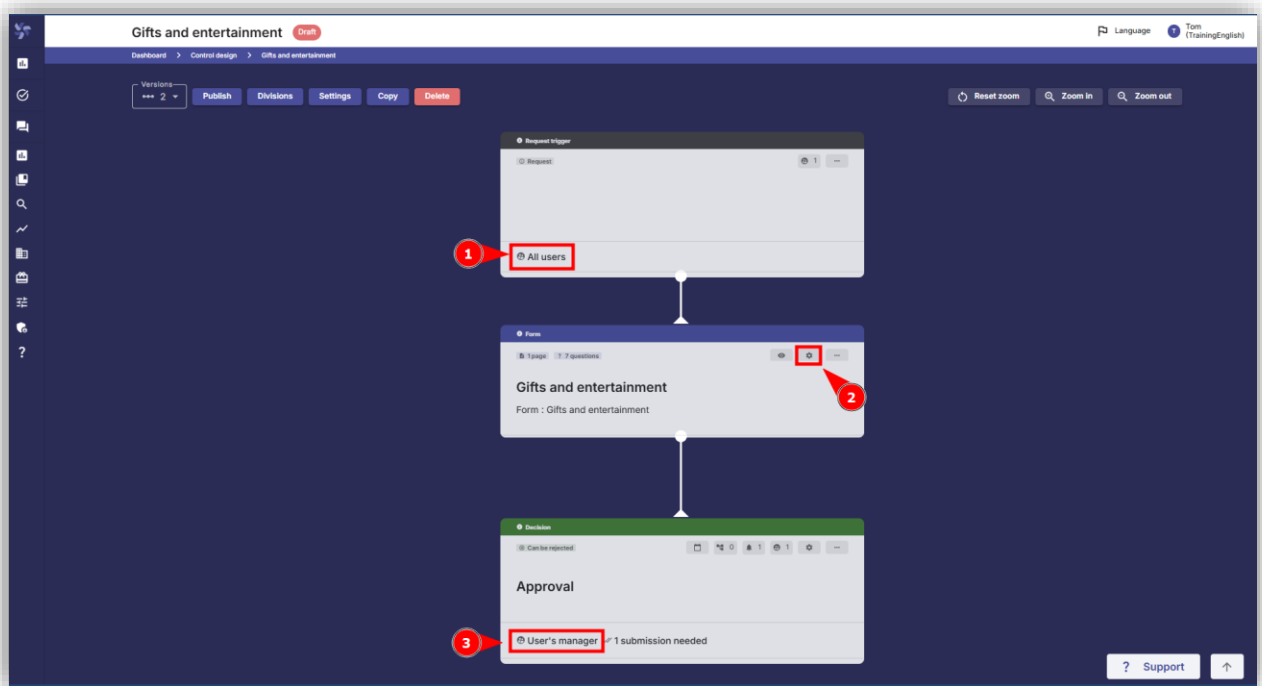


Figure 3: View of the control workflow, including request assignment, form settings, and decision step user manager assignment.

STEP 4

Once the checks have been made, if the control is in draft mode , click on **Publish** to activate it. Repeat the above checks for the other two controls before publishing them.

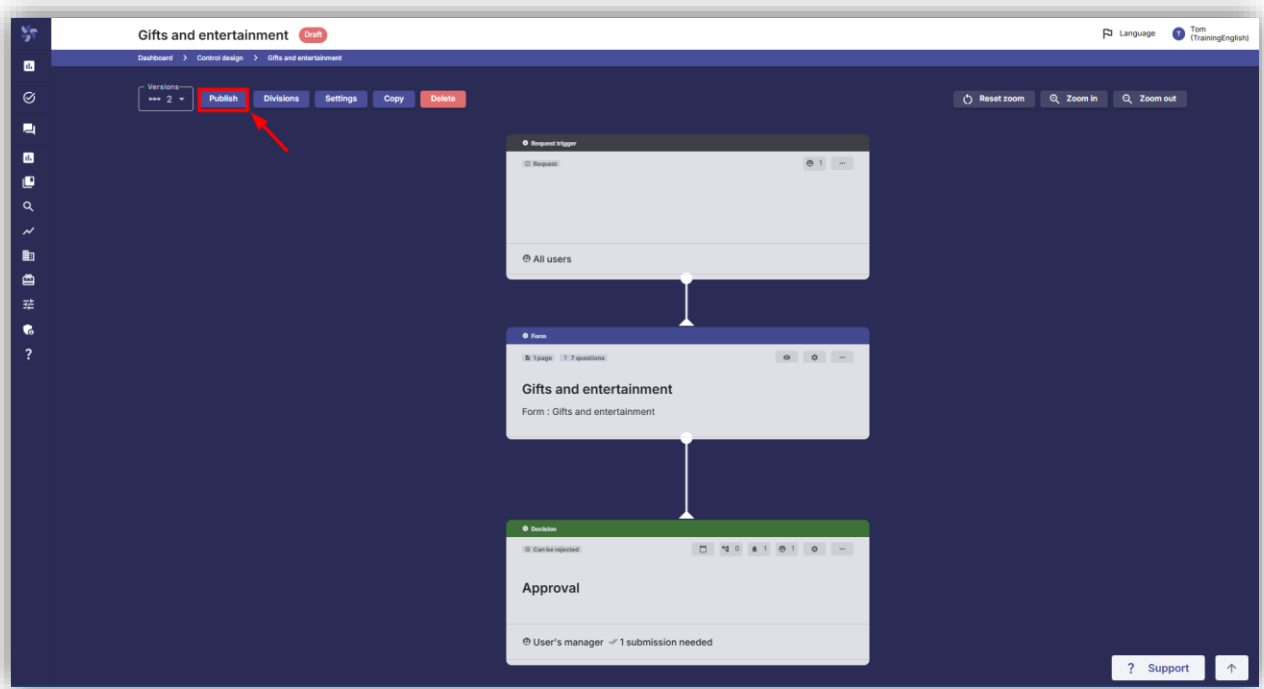


Figure 4: Activate control with Publish button

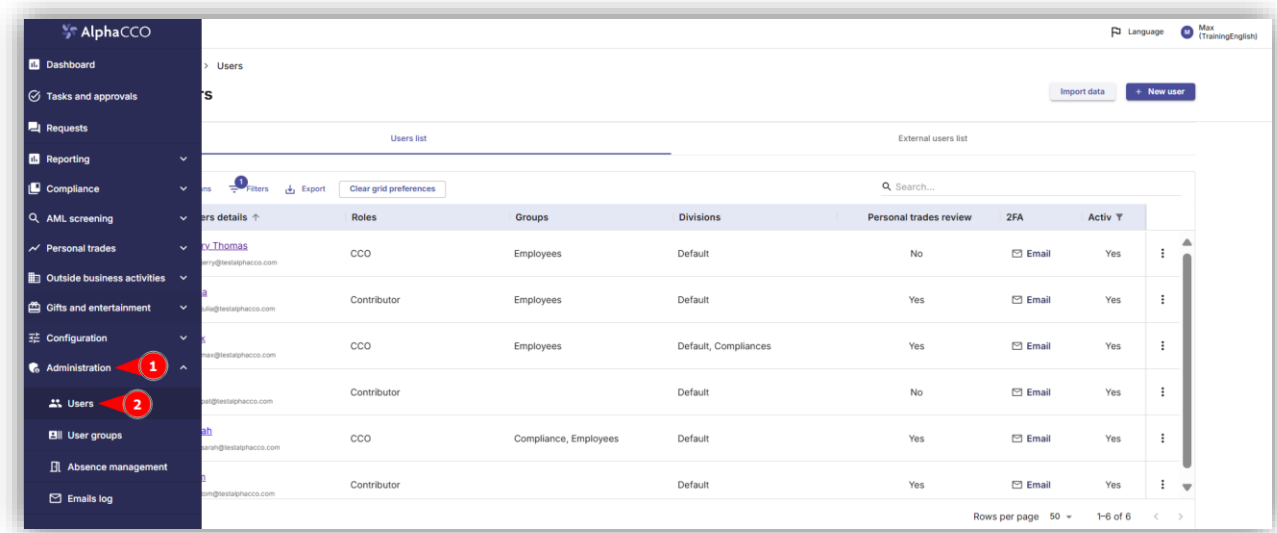
**Note:** If the user's manager is the designated approver in all three controls, it must be specified in the **User management** section (under Administration, Users from the menu).

However, if a separate user is configured as approver in the controls, the approval task will be assigned to that user, thus specifying the user's manager is not required.

**Designating a manager for each user**

**STEP 1**

To designate a user's manager, navigate to user management under **Administration** → **Users** from the menu.



*Figure 5: User management*

STEP 2

In the user profile, select the manager and click **Save changes** to finish.

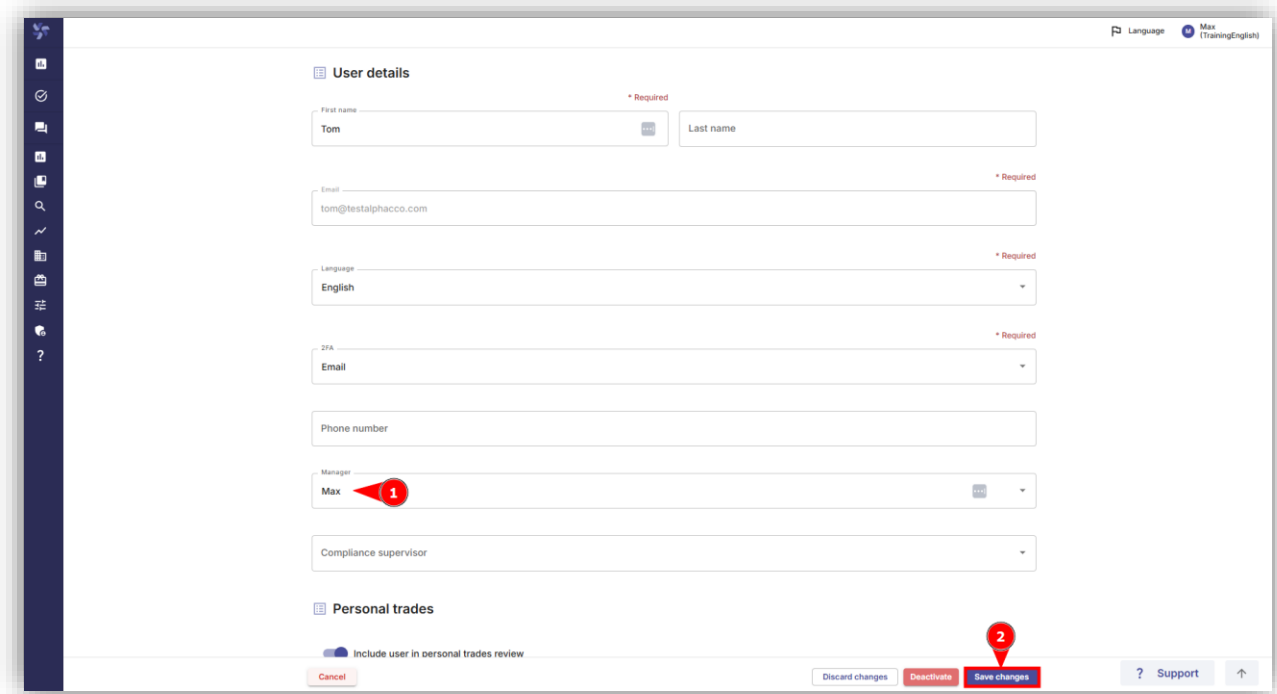


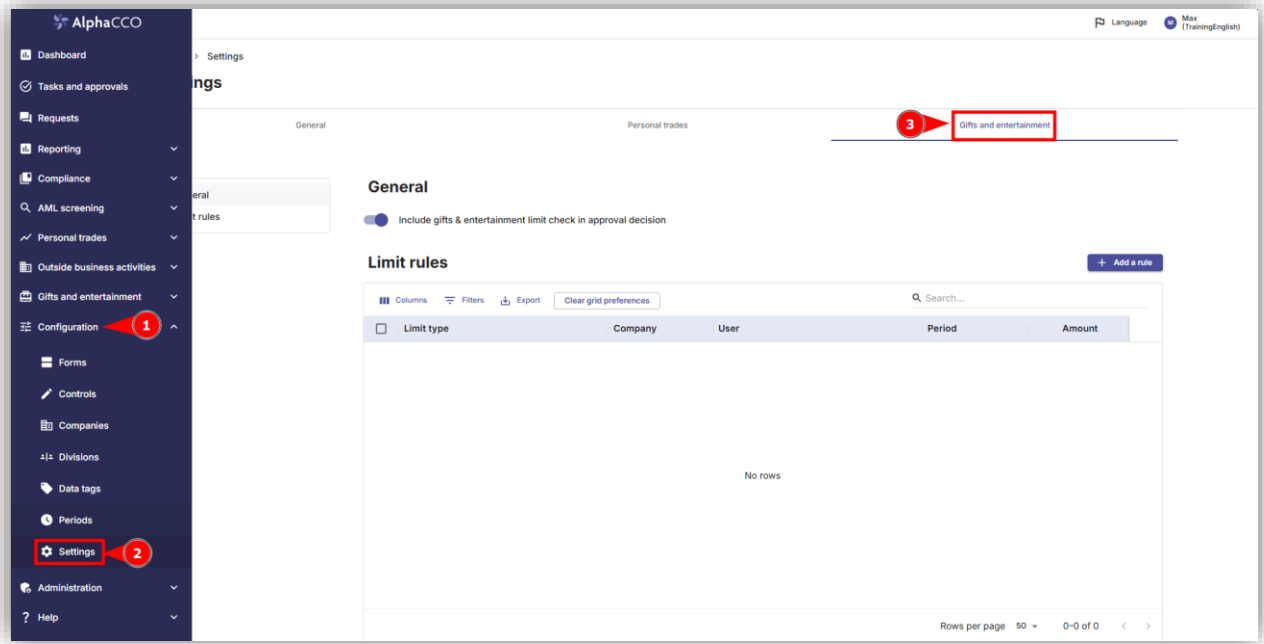
Figure 6: User profile displaying a designated manager

**Configuring module parameters**

The **Gifts and entertainment** section of the settings menu is used to configure the various limits allowed.

**STEP 1**

Navigate to external activities management, under **Configuration** → **Settings** → **Gifts and entertainment**



*Figure 7: Gifts and entertainment limits settings*

STEP 2

To include the limits of gift and entertainment in the approval decision, use the button toggle to activate the parameter and then click on **Add rule** to define the rule associated with the limit:

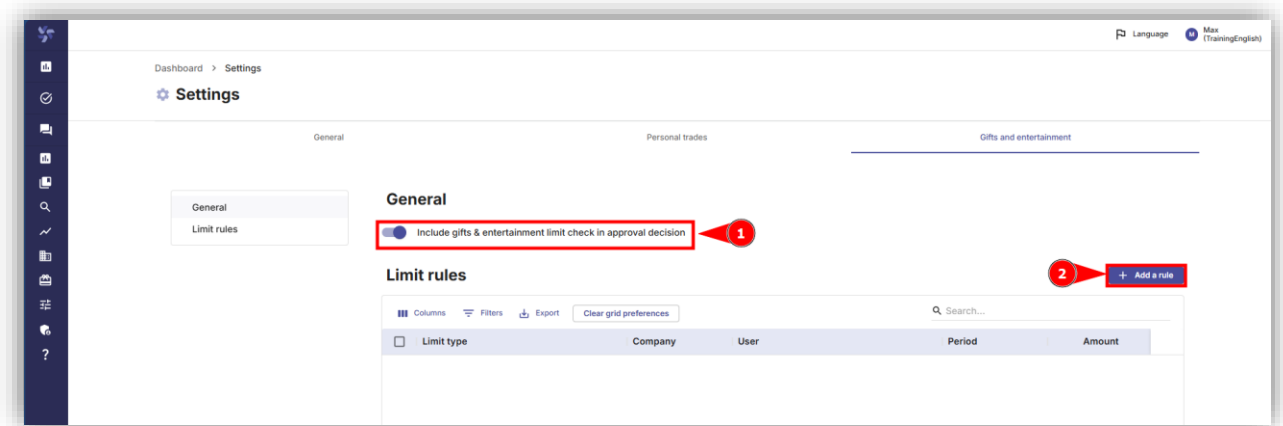


Figure 8: Limit activation button

## STEP 3

In the window that appears, choose the following parameters:

- **Limit type :**
  - General: General amount limit.
  - Company: Amount limit per company.
  - User: Amount limit per user.
  - User and company: Amount limit per user and company.
- **Limit:** The amount of the limit.
- **Period:** The period covered by the limit. Namely annually, monthly or quarterly.

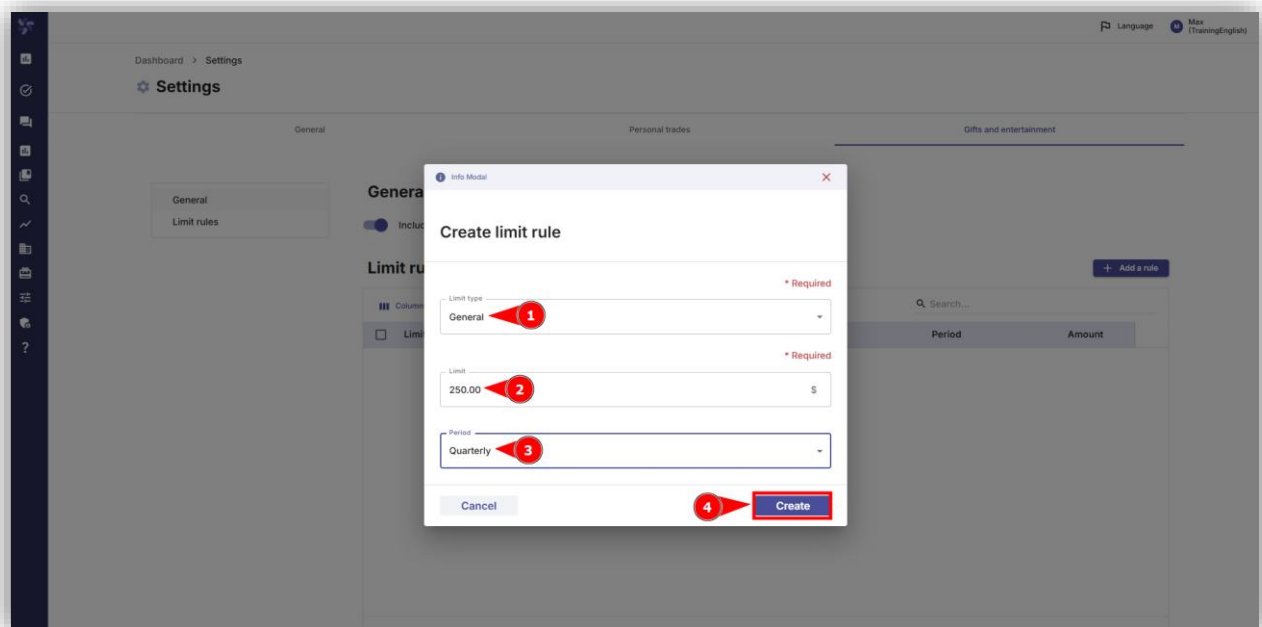


Figure 9: information window for creating a limit.

STEP 4

The configured limit type and amount are displayed in table the limit rules.

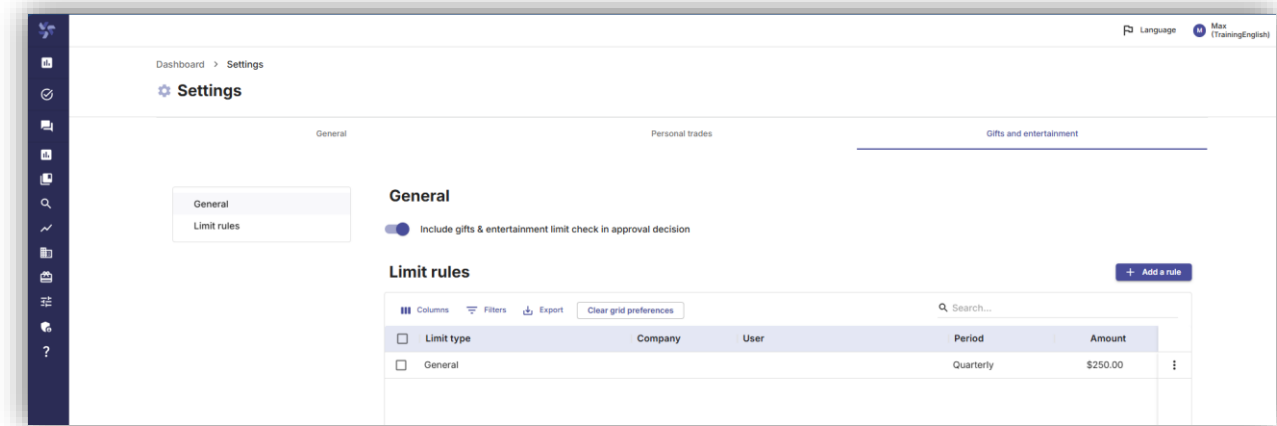


Figure 10: Settings page with a created limit rule.

Several rules can be configured, however the rule with the smallest configured amount limit is the one used for the approval or rejection decision.

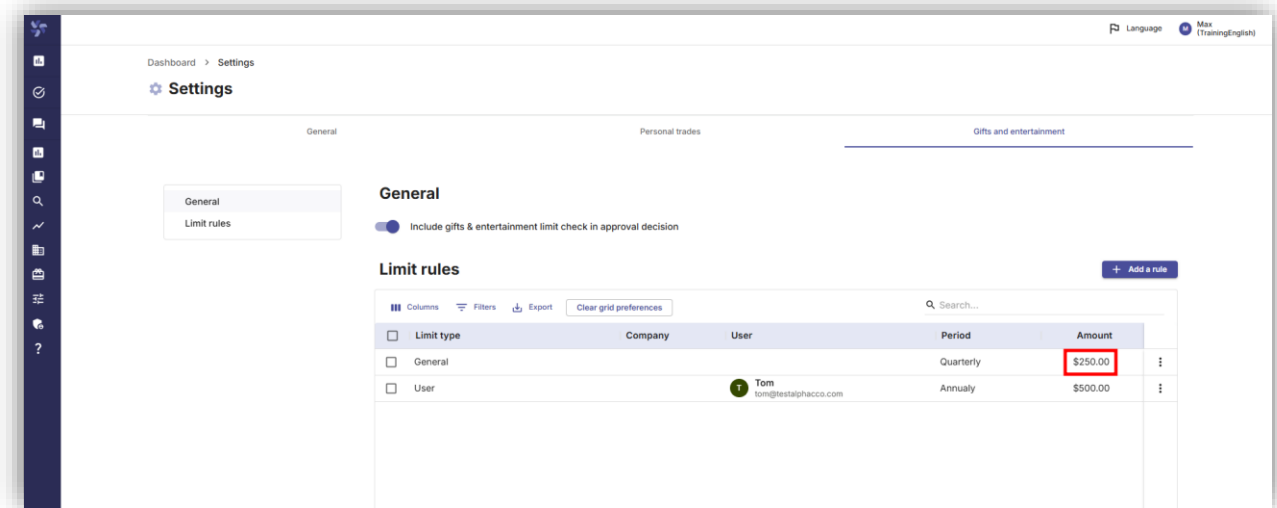


Figure 11: Settings page with two limit rules configured.

### Viewing all gift and entertainment declarations

All approved and gift and entertainment declarations rejected can be viewed on the platform.

**STEP 1**

To view gift and entertainment declarations, navigate to **Gift and Entertainment Management**, under **Gifts and Entertainment** → **Gift and Entertainment Management**.

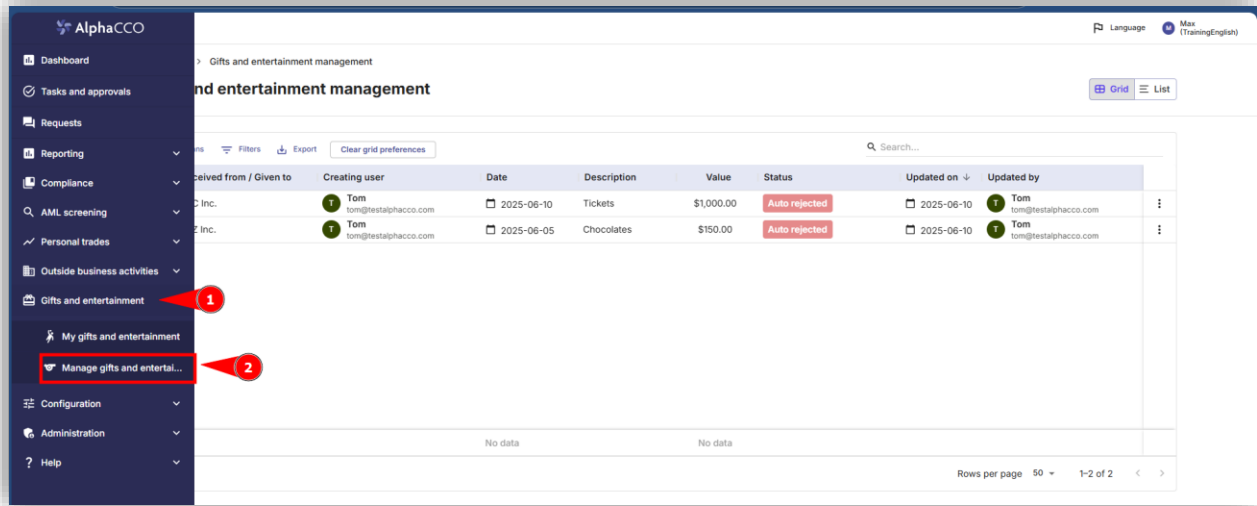


Figure 12: Gifts and entertainment management page.

**STEP 2**

All your declarations are displayed. Use the **Columns**, **Filters** and **Export** buttons to show or hide columns, filter the results to be displayed or export the list of external activities in Excel format.

You can search for a gift and entertainment declaration using the keyword search field.

Click on the options button to view the details of a gift and entertainment declaration.

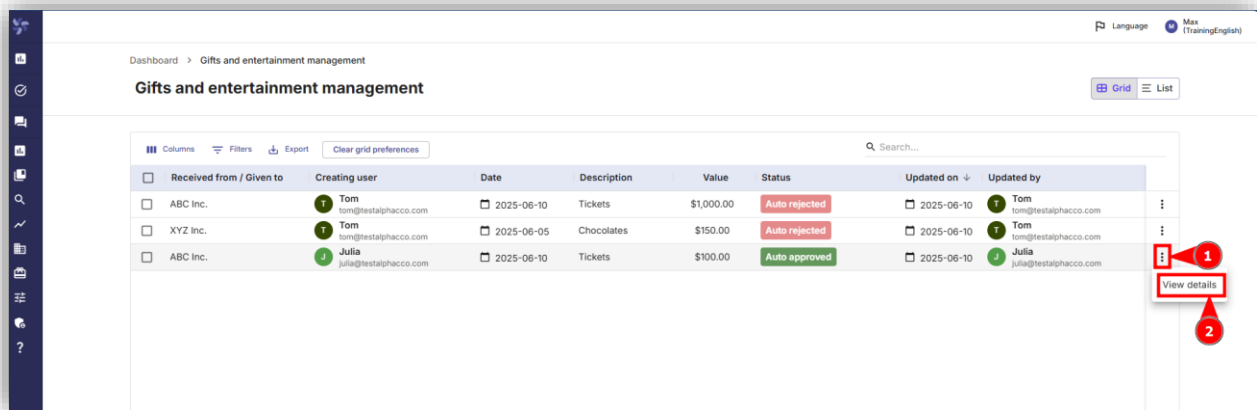


Figure 13: Gifts and entertainment history page with the options button to view the details

STEP 3

The declaration details are displayed. Use the **Sort by status** button to sort declarations chronologically (**oldest to most recent**) or by **status**. In the window, you'll find additional information such as the value of the gift, the various authorized limits, and the total value of completed declarations.

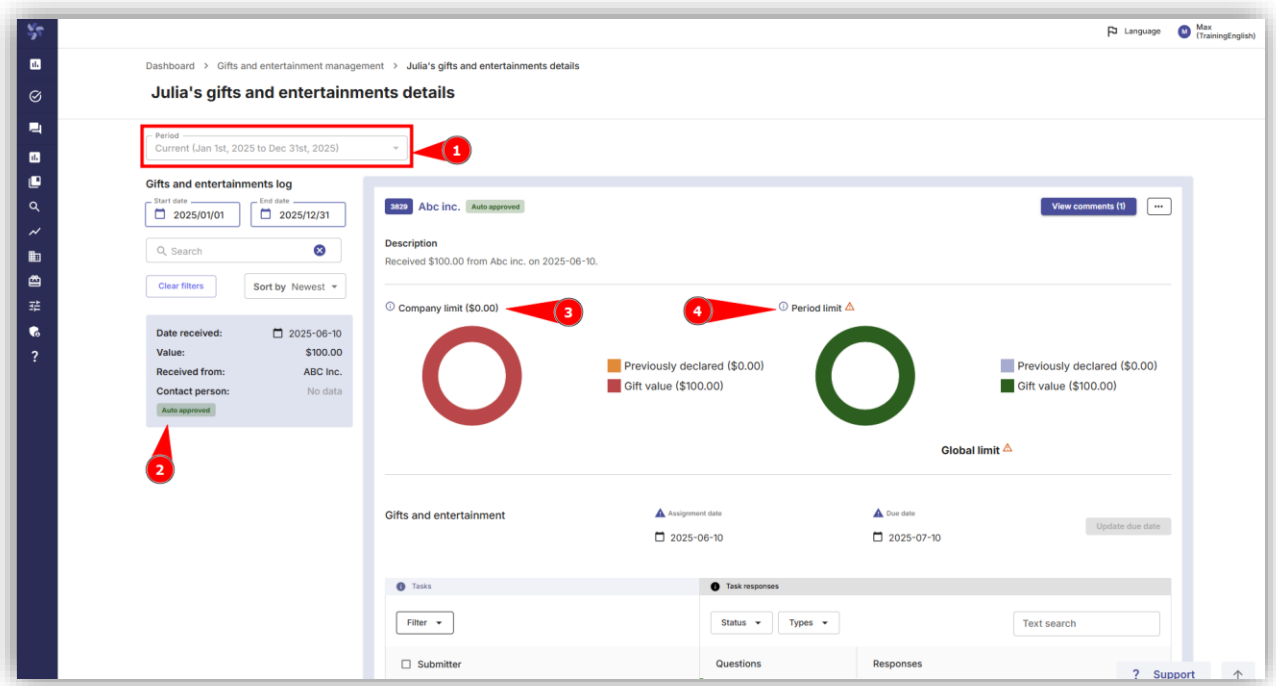


Figure 14: details of a Gift and entertainment declaration

NOTES

Please note that this document is only a brief guide. The AlphaCCO support team will be happy to assist you if you require further guidance. Please do not hesitate to contact us at [support@alphacco.com](mailto:support@alphacco.com)