

Step-by-Step Guide

Navigating Invoice Approval Folders



In This Guide

- ✓ Reviewing My Invoice Approvals
- ✓ Assigning invoices for approval
- ✓ Reviewing shared approval folders

This guide demonstrates how to navigate your invoice approval workflow folders.

Procedure

1. As an Approver, if you are assigned to:
 - only **one** workflow rule - you will have one approval folder.
 - **multiple** workflow rules - you will have more than one approval folder.
2. Shared approval invoices can be easily identified due to the fact that they do not appear in your **My Invoice Approvals** folder, but in a separate folder indicating the workflow rule.

Also, the invoices in the shared approval folder will display the **Assign** link under the **Action** column.

Adam Approver profile | logout

2011-12-21 adamaapprove 01 | 1 item(s), 250.00 USD

Approvals - Invoice

Search for Catalog No. (SKU) Go

home/shop | favorites | forms | carts | **approvals** | history | document search | more >> | AA

requisition | purchase order | **invoice** | requisition outbox | purchase order outbox | invoice outbox

My Approvals

Select another approver My Approvals Go

Assign substitute to all folders... End substitution for all folders

Click to filter Invoice Approvals ?

Hide invoice details

Please note: The **Approve** action on the **Invoice Approvals** page will not perform match actions. In order to mark invoices as Matched or Forced Match, the invoice must be approved from the document.

Assign substitute to this folder... Apply Action to Selected Invoice(s) Approve/Complete Go

My Invoice Approvals ?

Results per page 10 BuyerInvoices Found: 0 Page of 0

Invoice No.	State	Match Status	Supplier Invoice No.	Supplier Name	Invoice date	Type	Amount	Due Date	Discount Date	Action	
Assign substitute to this folder... Apply Action to Selected Invoice(s) Assign Go											
<input type="checkbox"/> Stillwater A/P ?											
Results per page 10 BuyerInvoices Found: 5 Page 1 of 1											
Invoice No.	Approver	State	Match Status	Supplier Invoice No.	Supplier Name	Invoice date	Type	Amount	Due Date	Discount Date	Action
88746		Not Assigned	Matched	MyTestInvo	FORD AUDIO -VIDEO	12/14/2011	Invoice	8,000.00 USD	12/14/2011		Assign
PO No.	E000287										
Invoice Name	2011-12-14_sq_jdiana 01										
Invoice Source:	Manual										
No. of Lines:	1										
This invoice has attachments											
This invoice has Notes											

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- An invoice in the shared approval folder that does not contain the **Assign** link under the **Action** column indicates that you or another approver has already assigned it to him/herself (as shown in the example below).
- For shared approvals, it is recommended that you **Assign** an invoice to yourself if you plan to approve the invoice so that another approver does not begin to simultaneously work on it.

After you have assigned an invoice to yourself it will appear in your **My Invoice Approvals** folder.

The screenshot displays the 'Approvals - Invoice' page for user 'Adam Approver'. It shows two folders: 'My Invoice Approvals' and 'Stillwater A/P'. Both folders contain one invoice with ID 88746. In the 'My Invoice Approvals' folder, the invoice is in an 'Active' state and has an 'Approve' link in the 'Action' column. In the 'Stillwater A/P' folder, the invoice is in an 'Assigned' state and has an 'Assign' link in the 'Action' column. A red arrow points from the 'Approve' link in the first folder to the 'Assign' link in the second folder, illustrating the transition of the invoice's status.

Invoice No.	State	Match Status	Supplier Invoice No.	Supplier Name	Invoice date	Type	Amount	Due Date	Discount Date	Action
88746	Active	Matched	MyTestInvo	FORD AUDIO-VIDEO	12/14/2011	Invoice	8,000.00 USD	12/14/2011		Approve
88746	Assigned	Matched	MyTestInvo	FORD AUDIO-VIDEO	12/14/2011	Invoice	8,000.00 USD	12/14/2011		Assign

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5. You can view the invoice details by clicking on the invoice number.

Adam Approver profile | logout | 2011-12-21 adamaapprove 01 | 1 item(s), 250.00 USD

Approvals - Invoice

Search for Catalog No. (SKU) Go

home/shop | favorites | forms | carts | **approvals** | history | document search | more >> | Font Size: A | A | A

requisition | purchase order | **invoice** | requisition outbox | purchase order outbox | invoice outbox

My Approvals Select another approver My Approvals Go

Assign substitute to all folders... End substitution for all folders

Click to filter Invoice Approvals ?

Hide invoice details

Please note: The **Approve** action on the **Invoice Approvals** page will not perform match actions. In order to mark invoices as Matched or Forced Match, the invoice must be approved from the document.

Assign substitute to this folder... Apply Action to Selected Invoice(s) Approve/Complete Go

My Invoice Approvals ?

Results per page 10 BuyerInvoices Found: 1 Page 1 of 1

Invoice No.	State	Match Status	Supplier Invoice No.	Supplier Name	Invoice date	Type	Amount	Due Date	Discount Date	Action
88746	Active	Matched	MyTestInvo	FORD AUDIO-VIDEO	12/14/2011	Invoice	8,000.00 USD	12/14/2011		Approve

PO No. E000287
Invoice Name 2011-12-14 _sq_jdiana 01
Invoice Source: Manual
No. of Lines: 1

This invoice has attachments
This invoice has Notes

An invoice may have multiple line items awaiting approval. In some cases, only one line item may require your approval but you will see all the line items on the invoice. Throughout workflow an invoice will always contain all the line items associated with the invoice. There is no direct indicator showing which line items you must approve.

▲ It is **recommended** that you review all line items and focus on the line items that fall into your workflow rules (i.e. fiscal, administrative or accounting).

You will not be able to approve only the line items that fall into your workflow rules. Line items requiring the approval of others will continue to await their approval.

The entire invoice will stay in workflow until all the appropriate approvals are completed.

You have successfully navigated your invoice approval folders.



When an Invoice Number exists in Multiple Approver Folders

- ▲ An invoice *may* display more than once if you are assigned to *multiple* workflow rules.
- ▲ When you assign an invoice which exists in multiple folders to yourself, the following message displays:

The following invoice(s) is currently in an additional approval folder. Would you like to perform this action against additional folders as well?

- Click **Yes** to assign the invoice to yourself across all approval folders. It is recommended to select Yes, otherwise you may need to approve the same invoice more than once.
- Click **No** to assign the invoice to yourself for only this approval folder.