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 <u>not</u> 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.

3. 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).

4. 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.

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

An invoice may have multiple line items awaiting approval. In some cases, only one line item may require your approval but you will see <u>all</u> 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 r**ecommended** 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 <u>only</u> 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.