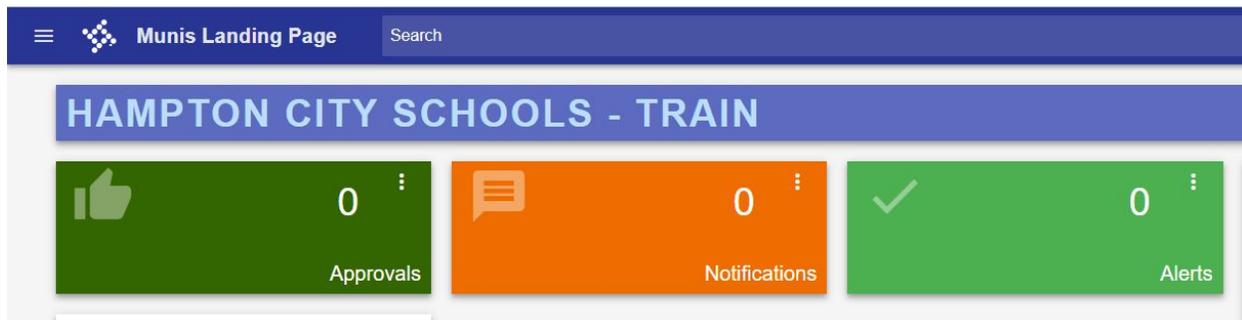


USE CHROME WEB BROWSER ONLY

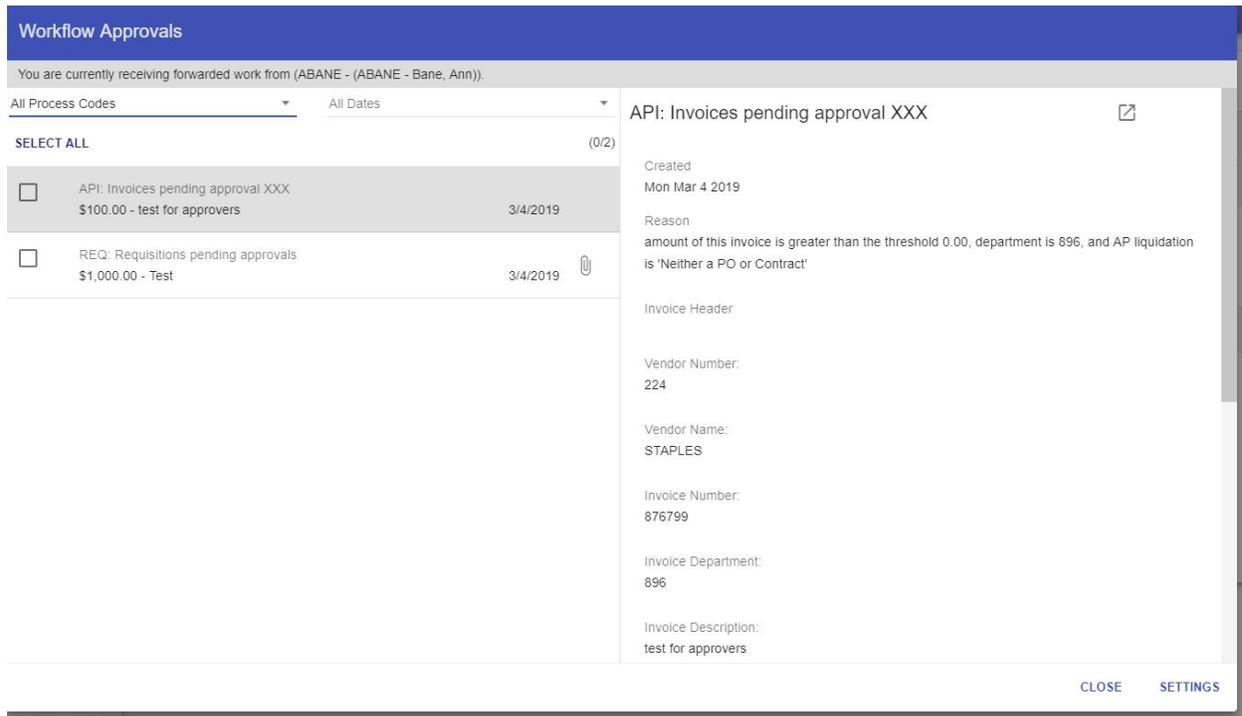
To Approve any items

Complete this procedure to approve or reject any function approval sent to you for action.

1. Click the **Approvals** tile on the Dashboard.



2. There may be multiple items for your approval and the codes will identify what type of approvals is needed



The codes you may see are as follows:

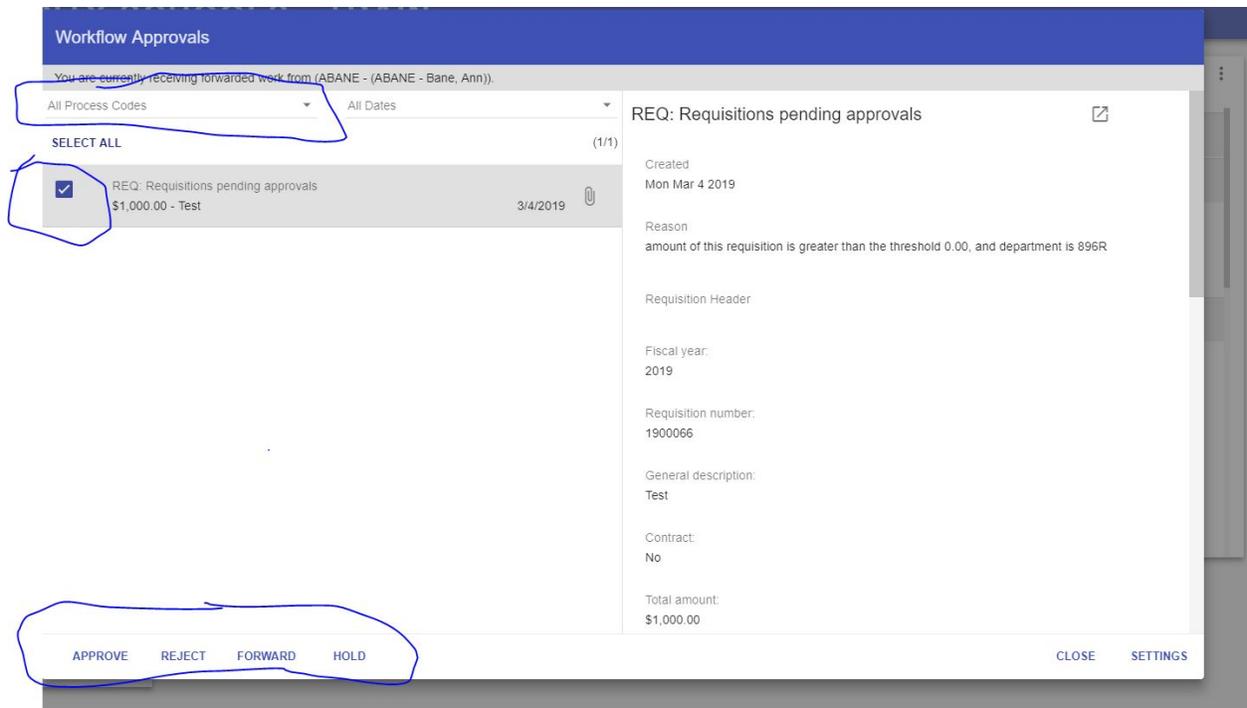
API = AP invoice that is not linked to a Purchase Order.

POM = Change order to a Purchase Order.

REQ = Requisition that will convert to a Purchase Order.

BGT = Budget transfer request

From the approvals tile on your dashboard you can filter the type of approvals by selecting the pull down box next to **ALL PROCESS CODES**.



3. You can see some of the details about the document by scrolling on the right side of the screen. However, to open the document that you are approving, click in the check box next to the document, then click the box with the arrow on the right side of the window.

Workflow Approvals

You are currently receiving forwarded work from (ABANE - (ABANE - Bane, Ann)).

All Process Codes ▼ All Dates ▼

SELECT ALL (0/2)

| | | |
|--------------------------|---|--|
| <input type="checkbox"/> | API: Invoices pending approval XXX \$100.00 - test for approvers | 3/4/2019 |
| <input type="checkbox"/> | REQ: Requisitions pending approvals \$1,000.00 - Test | 3/4/2019  |

API: Invoices pending approval XXX 

Created
Mon Mar 4 2019

Reason
amount of this invoice is greater than the threshold 0.00, department is 896, and AP liquidation is 'Neither a PO or Contract'

Invoice Header

Vendor Number:
224

Vendor Name:
STAPLES

Invoice Number:
876799

Invoice Department:
896

Invoice Description:
test for approvers

CLOSE SETTINGS

Before approving, you are looking at the following:

API - The correct GL account is being charged and you approve of the expense. Documentation is attached.

POM - A change order to a purchase order. The correct GL account is being charged and you approve of the expense. Click **Audits** to view the History of Changes.

REQ - The correct GL account is being charged and you approve of the expense. Documentation is attached.

BGT - A budget transfer request approving both the GL and the budget changes.

Sample API

Invoice Entry [TRAIN DATABASE Feb 25 2019]

Back Search Browse Update Delete Email Schedule Attach Change Lines PO Inquiry View Address Journal Info Subc Payments Print Label Additional Info Notes Invoice Audits Duplicate Void

Invoice

Year * 2019
 PO * ...
 Contract ...
 Vendor * 224 ... STAPLES
 Address 0 ...
 Terms net 30 days

Document * 30
 Invoice * 876799
 Gross * 100.00

Discount date
 Discount % .000
 Net amount 100.00
 Payment method Normal
 Check/Wire

DBA STAPLES
 BUSINESS ADVANTAGE
 DEPT DC
 BOSTON MA 02241-5256

Description test for approvers
 Status Pending Approval
 Department 896
 Work order
 Work order task 0
 Allocation 0
 Requisition
 Liq method
 Account

Separate check
 Include documentation
 PA applied
 Comments
 Withholding (.00)

ACCOUNTS LINE ITEMS

| Line | T | Account | PO | Inv amount | 1099 | A | Description | Bud | Work order |
|------|---|--|----|------------|------|---|--------------------|-----|------------|
| 1 | E | 50-5802-9-896-000-62120-00074-00000000 | | 100.00 | | N | test for approvers | | 1 |

Sample REQ

Requisition: 2019/1900066

Released, munis, 03/04/2019

Requisition

Vendor Quotes (0) General Notes (0)

Fiscal Year* 2019 Requisition Number* 1900066 Created Date* 03/04/2019 Type (N) NORMAL Project Accounts Applied

Department* (896R) COMM & LEGISLATIV RELATION REQ Purchase order

Description Test

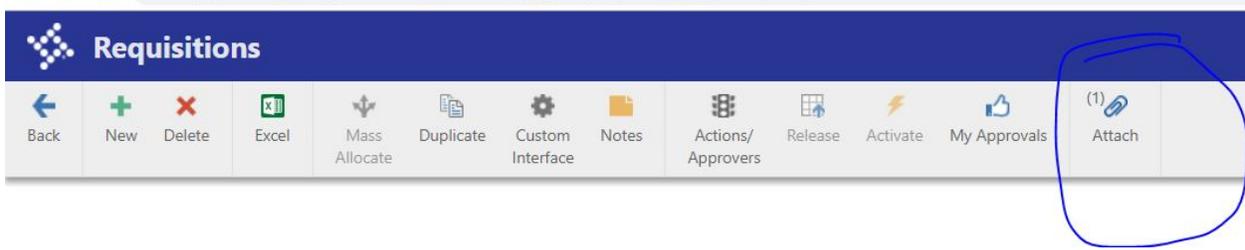
Items (1)

Add Item

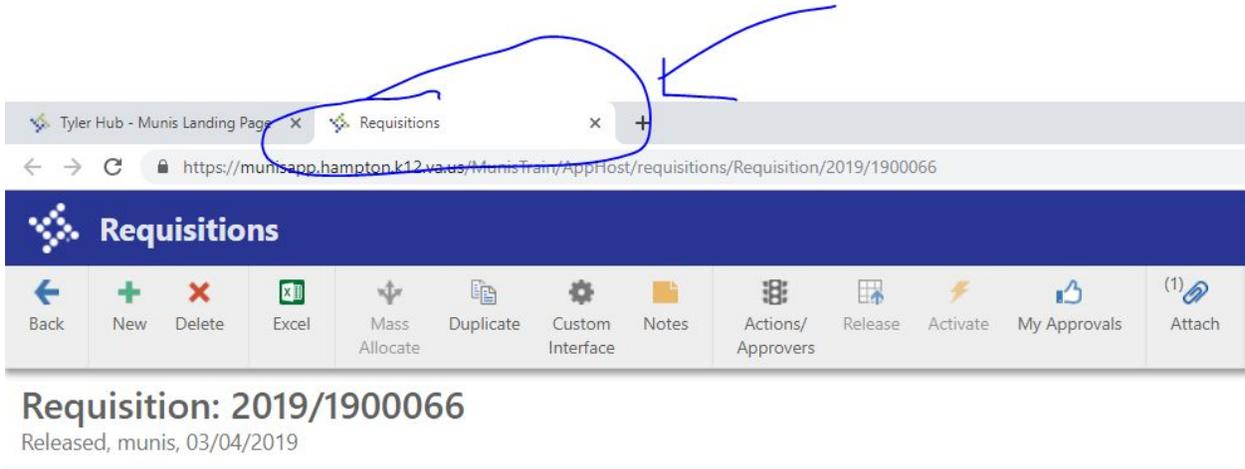
| Line | Description | Qty | UOM | Unit Price | Line Total | GL Account |
|------|--------------------|------|------|---------------|------------|--|
| 1 | test for approvers | 1.00 | EACH | \$1,000.00000 | \$1,000.00 | E (50-6050-9-896-000-61100-10003-00000000 -) Other Expenses |

If you want the vendor information double click on the item line.

From ANY item viewed, there will be an ATTACH button on the top ribbon. Click on this to view the attachments to the transaction.



When done reviewing the item, CLOSE THE TAB THAT WAS OPENED FOR THE REVIEW.



Make sure the box is checked next to the item you are about to approve or reject.

4. Click one of the buttons at the bottom to either Approve, Reject or Forward.
 - a. **Approve** if ok
 - b. **Reject** to deny - A comment is required for a rejection.
 - c. **Forward** to send to another approver for review.
 - d. **Hold** to keep in your Approvals tile

There is an entry box that appears which must be completed if you are rejecting or forwarding. Enter the reason you are rejecting or forwarding.

The screenshot displays a 'Workflow Approvals' interface. At the top, a blue header reads 'Workflow Approvals'. Below it, a grey bar states 'You are currently receiving forwarded work from (ABANE - (ABANE - Bane. Ann))'. The main area features a list of approval items. One item is selected, showing 'REQ: Requisitions pending approvals' with a value of '\$1,000.00 - Test' and a date of '3/4/2019'. A modal dialog is open over this item, titled 'Reject 1 Item(s)'. The dialog contains a text input field for a 'Comment *' with a red error message 'Comment is required.' and a character count '0 / 50'. At the bottom right of the dialog are 'CANCEL' and 'SUBMIT' buttons. The background details panel shows 'Created: Mon Mar 4 2019', 'Reason: ...00, and department is 896R', 'General description: Test', 'Contract: No', and 'Total amount: \$1,000.00'.

FORWARDING APPROVALS

If you will be out on extended leave you can forward your approvals.

Open your Approvals Box.

The following box will appear:

Workflow Approvals

All Process Codes ▼ All Dates ▼ **No Items to Display**

SELECT ALL (0/0)

CLOSE **SETTINGS**

Select **Settings**.

Select the Approver and the Start and End Date.

Save

Approvals Settings

TBLEEKER - Bleeker, Tracey is not currently forwarding any work.

Process Code Restriction ▼ Workflow Card Title
Approvals

Forwarding

Forward all Workflow to user **Approver** ▼

Selective Forwarding

API AP Invoice approvals Approver ▼

POM PO Change Order approvals Approver ▼

Schedule Forwarding

Start Date ▼ Hour ▼ Minute ▼ AM/PM ▼ **End Date** ▼ Hour ▼ Minute ▼ AM/PM ▼

RESET FORWARDING CANCEL **SAVE**