Invoice Approvals – via E-mail

APPROVAL OVERVIEW

The first approval step for an Invoice (Non PO and Blanket-related) is the financial approval step. Each cost object (cost center or WBS element) has one or more financial approvers assigned to it. Each approver will be notified via email when an invoice has been submitted for their approval.

You can approve the document directly from your email. If you need to place the invoice on hold or forward the invoice to another approver, you need to log into eSHOP to view and process it.

The email you receive includes details of the invoice such as the lines included and the cost information.

After reviewing the details of the document, click the Take Action button to view the approval options.

Note: If you receive multiple email approval requests for the same document, most likely it has been split funded and you are assigned as an approver to two or more of the cost objects that have been used. Do not delete the additional emails. Since each email is specific to the portion of the document assigned to each cost object, you will need to process each emailed approval in order for the document to proceed.

APPROVAL OPTIONS

The Invoice Approval page appears with several action option shown.

Click on Assign to myself to view additional approval options and to assign the document to yourself for future action such as to place invoice on hold.

Return to Owner – Choose this option to return the invoice.

Approve – You approve of the item(s) being purchased and the amount that is being charged to the cost object you are responsible for.

Forward to… – Forward the invoice to another approver. Note: this option only appears once you have assigned the invoice to yourself.

Return to Shared Folder – Choose this option to return the invoice to allow other approvers to take action.

If you select Approve, a confirmation message will appear:

Invoice has been Approved successfully!