

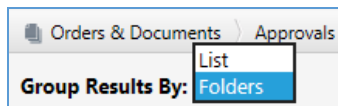
APPROVAL OVERVIEW

The approvals necessary for an invoice depends on your campus policies. Multiple approvers may be assigned to a particular folder. It is important to review and take action on the invoices assigned to you since payment will not be sent to the vendor until all the approvals have been completed.

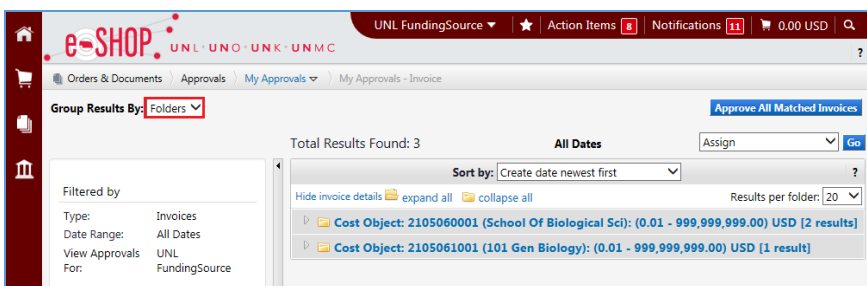
From within eSHOP, click on My Approvals from Orders & Documents to see what is currently in your approval folders waiting to be reviewed.



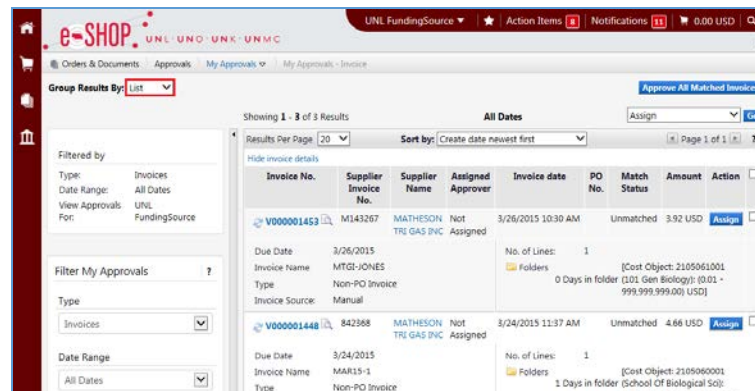
There are two views available on the Approvals tab. You can choose to view your approvals by Folders or by List.



Folder view allows you to see which approval folders you are an approver for and how many documents are awaiting approval in each. You can tell which ones are available because they are not assigned to an approver and therefore have no name by them. You can Expand or Collapse all folders by clicking the links. If you are an Approver for multiple folders, this would probably be the best view for you to use.



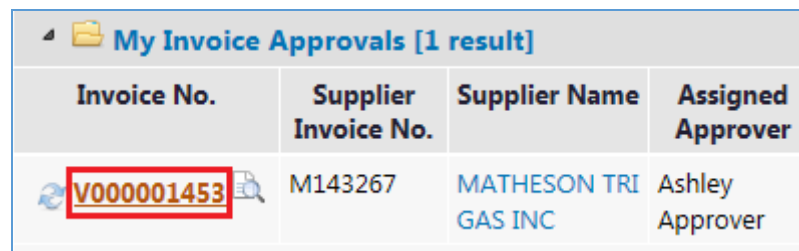
The List view shows all documents without being grouped into folders. If you only approve a few folders, this view might be better for you.



In order to more easily see which documents require your attention, choose from the sort options in the drop-down box at the top or use the filters on the left-side.

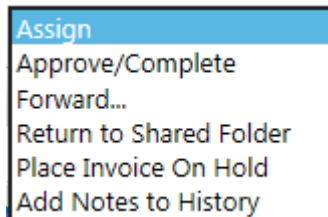
To avoid a duplication of reviewing invoices, select “assign” from the dropdown menu. This way other approvers will not be working on/reviewing the same document and will be prevented from acting on it.

Once in my folder, click on the document number to drill into the details of the invoice to check it for accuracy.



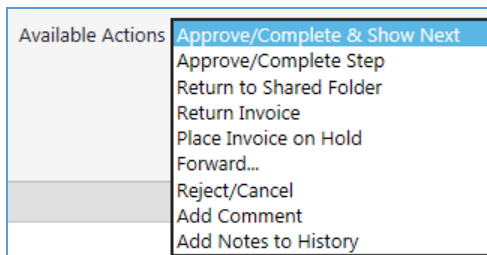
APPROVAL OPTIONS

From within a Shared folder, Approval Options include:



- **Assign** moves the invoice into your My Invoice Approvals folder where only you can take action on it.
- **Approve/Complete** will send the invoice onto the next step.
- **Forward...** allows approver to forward the invoice to another approver.
- **Return to Shared Folder** moves the invoice out of your My Invoice Approvals folder and back to the shared approval folder.
- **Place Invoice On Hold** is an invoice placed on hold that will remain in an approver's folder.
- **Add Notes to History** allows notes to be added prior to approval.

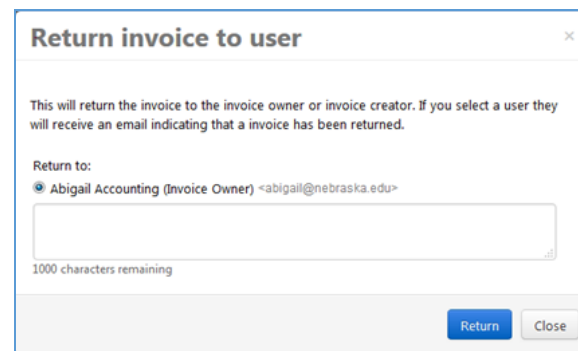
From within the My Approvals folder, additional actions are available:



- **Approve/Complete & Show Next** will send the invoice onto the next step in the process and show the next item that needs approval.
- **Return Invoice** will send the invoice back to the invoice owner, where it is accessible from within the View Draft Invoices screen. The invoice owner receives an email notification of return, can edit the returned invoice and re-submit it to workflow.
- **Reject/Cancel** allows the approver to reject the invoice and include a note that is visible from the History tab of the invoice.

Invoice Approvals – via eSHOP

When **Return Invoice** is selected, a pop-up is presented to allow an explanation to be included:



When **Reject/Cancel** is selected, a pop-up is presented to allow approver to include a note and reason:

