



APPROVAL OVERVIEW

Refer to the eSHOP Approvers Quick Guide for basic information.

Non PO Invoices do not require review by requesters. The invoice is electronically uploaded into eSHOP to the Non PO Funding Approval folder. An email is then generated to advise the approvers assigned to the cost object used to process the invoice.

EMAILS

All approvers must go into eSHOP to approve Non PO invoices. Approval by email will not be possible but a hyper link within the email will take you directly to the invoice requiring approval in eSHOP.

The email notification for Non PO approvals is separate from those of the requisition approvals. If you do not want to receive the emails, you need only to change your profile as follows:

1. Click on your Profile
2. Go to Email Preferences Tab
3. In the Area titled "Settlement" you will want to override the following default email preferences under the Settlement header:

Invoice Workflow Notification available	✓	<input type="checkbox"/>
Invoice pending Workflow approval	✓	<input type="checkbox"/>

4. Check the Override Role box
5. De-select the Values box
6. Click **Save**.

APPROVALS FOLDERS

Under Filter My Approvals (Type), select Invoice from the drop down list.

Filtered By

Type: Invoice

Date Range: All Dates

View Approvals For: Nicole McCoid

Filter My Approvals ?

Type

Invoice

Date Range

All Dates

APPROVING A NON PO INVOICE

1. Click on the Invoice Number (ie: **V000001344**)
2. Review the **Buyer Invoice Summary** tab for accuracy.
3. In the upper-right hand corner **Available Actions** select **Approve/complete step & show next**.

Non Purchase Order Invoice

4. This will approve the invoice for payment and take you to the next invoice. Repeat process of approving beginning with step 2 above.

CHANGE COST OBJECT ON NON PO INVOICE

NOTE: Do not use this option unless you approve the information on the invoice EXCEPT for the cost object.

You will not be able to edit any information contained in the invoice. You will need to forward the invoice to Jim Vogel to make the cost object change. If the cost object should be changed permanently, you must also contact Matheson to update your future invoices.

1. In the **Available Actions** select **Forward...**
2. Click **Go**
3. A search box will appear, enter VOGEL in the last name field.
4. Click **Search**
5. Click **[select]** on the line for James Vogel (Username JVOGEL1)
6. A pop-up box will appear for **Add Note**, enter the change needed on the invoice.

PLACE NON PO INVOICE ON HOLD

NOTE: This does nothing more than mark the invoice as "on hold" in the Approvals tab and add a comment as a reminder for you

1. In the upper-right hand corner **Available Actions** select **Place Invoice on Hold**
2. Click **Go**.

A pop-up box will appear for **Add Note**, enter the reason you are placing the invoice on hold.

REJECTING A NON PO INVOICE

NOTE: Rejecting cancels the invoice and no notice is sent to anyone for re-entry. Be sure to follow the steps listed below.

1. In the upper-right hand corner **Available Actions** select **Assign**
2. Click **Go**. You will then need to assign the invoice to yourself.
3. Then from the Available Actions, select **Forward...** and forward to Jim Vogel with a comment that the invoice should be cancelled/rejected.

Rejecting an invoice will not activate notification. The supplier may need to be contacted to let them know why the invoice is being rejected and to determine what will need to be resubmitted.