Placing a Voucher on Approval Hold

Core-

All vouchers (except those created by the one-time voucher interface process) require approval. Only vouchers with a match status of õMatchedö or "No Match Requiredö and a Budget Check status of õNot Checkedö are routed for approval. Only one level of approval is required.

Vouchers requiring approval display on an approverøs worklist. Though a single voucher is routed to multiple approvers, only one approver is required to approve a voucher. Once a voucher has been approved, it no longer displays on the approvers' worklists. Approvers do not receive email notifications that vouchers are waiting their approval.

Approvers must add a comment when placing a voucher On Hold. The voucher will remain on the approversø worklists until the voucher is approved.

In this example an approver reviews and places a voucher On Hold. The voucher processer reviews the approval status of the voucher. Then the approver approves the voucher.

Procedure

Navigation: Worklist > Worklist

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Step	Action
1.	The Worklist displays vouchers that require approval. Use the links in the Links column to navigate to the voucher Approval page.
	Once a voucher has been approved, it will no longer display on the Worklist.
	Vouchers that are placed on Hold or Denied remain on the Worklist until they have been approved,
	Click the VoucherApproval, 593, STATE, 2012-01-03, N, 0, BUSINESS_UNIT:DEPM link.

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Step	Action
2.	Click the Line Information tab to review line information for the voucher.
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Step	Action
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Step	Action
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Step	Action
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Step	Action
7.	Vouchers require only a single level of approval. In this example the voucher will be placed on hold.
	Comments must be added when a voucher is placed on hold.
	Enter Not ready to approve in the VOUCHER APPROVAL Comments field.
8.	Click the Hold button.
	Hold

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Step	Action
9.	Click the View/Hide Comments link to review the comments.
	View/Hide Comments

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Step	Action
10.	The comments display in the Comments section. They are stamped with the
	Approver's name and the time/date entered.

Step	Action
11.	Click the Sign out link.
	Sign out

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Step	Action
12.	The Voucher Processor has signed into Core-CT.
	Navigation: Accounts Payable > Vouchers > Add/Update > Regular Entry
	Click the Find an Existing Value tab to locate the submitted voucher. Find an Existing Value
13.	Enter 00121834 in the Voucher ID field.
14.	Click the Search button.

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Step	Action
15.	The Approval Status of this voucher is Pending. The voucher has been placed on approval hold. Approval hold is not a status Click the Approval History link to review the details.
	Approval History

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Step	Action
16.	The voucher has been placed On Approval Hold.
	Click the Expand button.

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Step	Action
17.	The Comments section displays the name of the Approver who placed the voucher On Approval Hold along with the date, time, and comments.
18.	Click the Sign out link.

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DEP-Griffin Andrea	01/14/2013	Approval Routing	Approval Workflow	3-Low 🗸	VoucherApproval. 593, STATE, 2012-01-03, N. 0, BUSINESS UNIT:DEPM1 VOUCHER ID:00121834 RDC:RA.0.A	Mark Worked Reassign
DEP-Griffin Andrea	01/14/2013	Approval Routing	Approval Workflow	3-Low 🗸	VoucherApproval. 594, STATE, 2012-01-03, N. 0, BUSINESS UNIT:DEPM1 VOUCHER ID:00121835 RDC:RA.0.A	Mark Worked Reassign
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Step	Action
19.	The approver has signed into Core-CT.
	Navigation: Worklist > Worklist
	The voucher previously placed on hold still displays on the Worklist.
	Click the VoucherApproval, 593, STATE, 2012-01-03, N, 0, BUSINESS_UNIT:DEPM link.

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Step	Action
20.	Click the Line Information tab to review line information for the voucher.

OR/	ACLE.								Home	Worklist	Add to Favorites	Sian out
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Approval	rn to Search) (¥ Notify on <u>Charαe Inform</u>	nation									

Step	Action
21.	Click the Charge Information tab to review distribution information for the
	voucher.
	Charge Information

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Return to Search	Notify									
Approval Line Inform	ation Charge Information									

Step	Action
22.	Click the scrollbar to move to the right of the GL Chart section.

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Step	Action
23.	Click the Approval tab.

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Step	Action
24.	Click the scrollbar to move to the bottom of the page.

OR/	ACLE.							Sign out
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Step	Action
25.	Comments are not required when a voucher is approved.
	Click the Approve button.

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Favorites	Main Menu >	Worklist > Work	list							
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Misc Am	ıt:	0.00								
Freight:		0.00		Added By:		GriffinA				
Sales Ta	IX:	0.00				DEP-Griffin Andrea				
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Return	n to Search	Notify								
Approval]	ine Informatio	n Charge Information	n							_
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Step	Action
26.	The Voucher Approval section indicates that the voucher has been approved.
	Click the Sign out link.

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worrtes Main Menu > Acco	unts Payable > Vouchers > Add/update > Regular Entry	
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short Vendor Name:		
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endor Location:		
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nvoice Date:	21	
iross Invoice Amount:	0.00	
reight Amount:	0.00	
lisc Charge Amount:	0.00	
stimated No. of Invoice Lines:	1	
Add		
nd an Existing Value Add a N	ew Value	

Step	Action
27.	The Voucher Processor has signed into Core-CT to view the status of the voucher.
	Navigation: Accounts Payable > Vouchers > Add/Update > Regular Entry
	Click the Find an Existing Value tab to locate the voucher.
	Find an Existing Value

ORACLE	
avorites : Main Menu > Accounts Pavable > Vouchers > Add/Update > Regular Entry	Home Worklist Add to Pavorites S
	🛛 New Window 🕜 Help 📼
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nter any information you have and click Search Leave fields blank for a list of all values	
Find an Existing Value Add a New Value	
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Search Clear Basic Search	
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ind an Existing value <u>Add a New Value</u>	

Step	Action
28.	Enter 00121834 into the Voucher ID field.
29.	Click the Search button.

ORACLE				Home	Worklist	Add to Favorites	Sign out		
Favorites Main Menu > Acc	counts Payable > Vouchers > Add/Up	date > Regular Entry		inomo	TOTAL		1 Olgin out		
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Business Unit:	DEPM1	Invoice Date:	01/14/2013						
Voucher ID:	00121834	Invoice No:	123556						
Voucner Style:	Regular	Invoice Lotal:	20.00 US	SD					
Contract ID:		Receipt Date:	01/03/2013						
Vendor Name:	ELECTRICAL WHOLESALERS INC	Pay Terms:	Due Now						
	IST WALNUT ST	Voucher Source:	Online						
Entry Status	HARTFORD, CT 06120	Origin							
Entry Status.	Postable	Origin.	H41						
Approval Status:	No Match Approval History	Created Pro	01/14/2013						
Approval Status:	Approved	Created By:	GriffinA						
Post status:	Unposted	Modified:	01/29/2013						
		Modified By:	CoteK						
		ERS Type:	Not Applicable						
Budget Status:	Not Chk'd	Close Status:	Open						
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Step	Action
30.	The Approval Status field displays Approved.
	Click the Approval History link to review details.

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ORACLE					Add to Favorites	Sign out
Favorites Main Menu	> Accounts Payable >	Vouchers > Add/Update > Regular Entry				
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Approved						
DEP-C	Cote Kathleen					
01/29/1	3 - 9:36 AM					
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Return						

Step	Action
31.	The Approval History page displays that the voucher is now approved. The history of the approval of this voucher remains in the Comments section.

ORACLE								
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Step	Action
32.	Click on the Expand Comments button to view the comments for this voucher.

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Step	Action
33.	
	End of Procedure.