

# Placing a Voucher on Approval Hold



All vouchers (except those created by the one-time voucher interface process) require approval. Only vouchers with a match status of "Matched" or "No Match Required" and a Budget Check status of "Not Checked" are routed for approval. Only one level of approval is required.

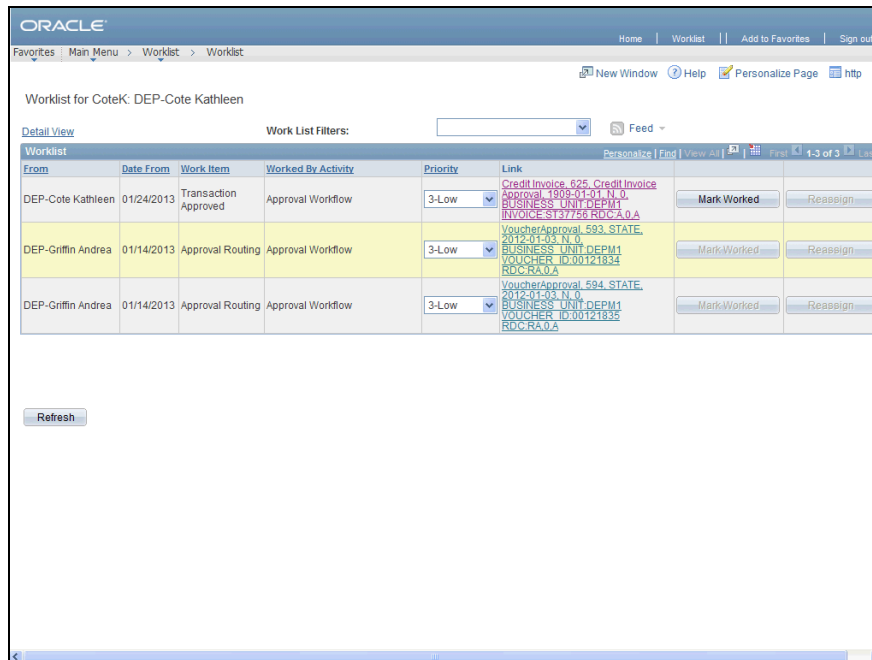
Vouchers requiring approval display on an approver's worklist. Though a single voucher is routed to multiple approvers, only one approver is required to approve a voucher. Once a voucher has been approved, it no longer displays on the approvers' worklists. Approvers do not receive email notifications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

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

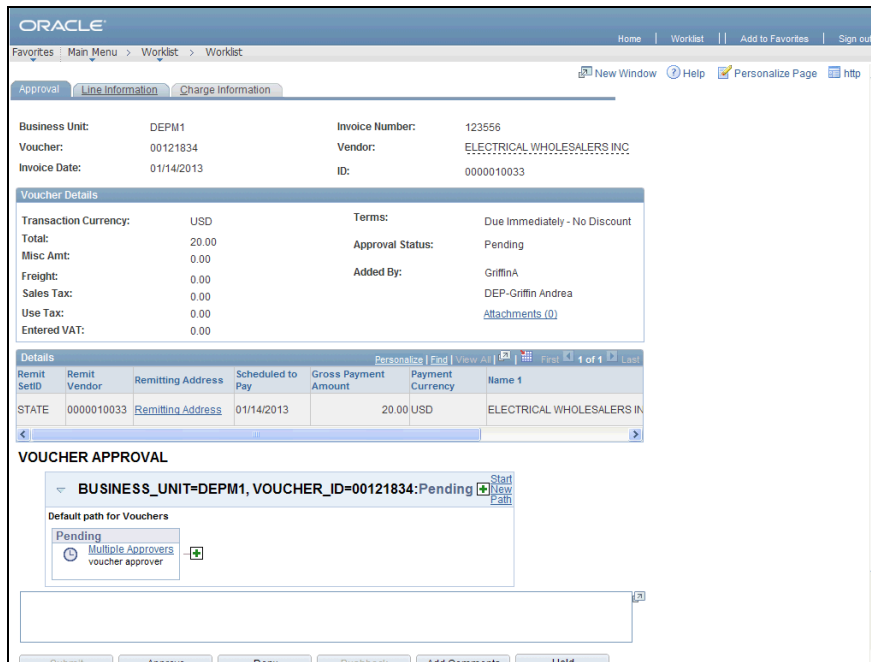
In this example an approver reviews and places a voucher On Hold. The voucher processor reviews the approval status of the voucher. Then the approver approves the voucher.

## Procedure

Navigation: Worklist > Worklist



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



Step	Action
2.	<p>Click the <b>Line Information</b> tab to review line information for the voucher.</p> <p><b>Line Information</b></p>

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

Approval | **Line Information** | Charge Information

New Window | Help | Personalize Page | http

Business Unit: DEPM1 Invoice Number: 123556  
 Voucher: 00121834 Vendor: ELECTRICAL WHOLESALERS INC  
 Invoice Date: 01/14/2013 ID: 0000010033

Line Number From  To  Of 1

Line Detail

Line	Description	Quantity	Merchandise Amt
1		0.0000	20.00

[Approval](#) | [Line Information](#) | [Charge Information](#)

Step	Action
3.	Click the <b>Charge Information</b> tab to review distribution information for the voucher.

**Charge Information**

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

Approval | Line Information | **Charge Information**

New Window | Help | Personalize Page | http

Business Unit: DEPM1 Invoice Number: 123556  
 Voucher: 00121834 Vendor: ELECTRICAL WHOLESALERS INC  
 Invoice Date: 01/14/2013 ID: 0000010033

Line Number From  To  Of 1

Details

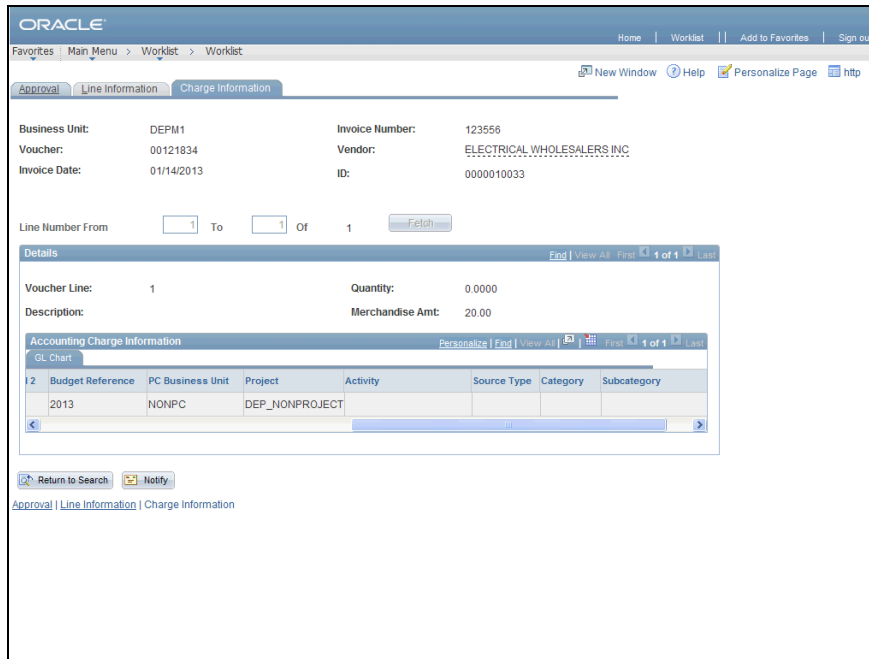
Voucher Line: 1 Quantity: 0.0000  
 Description: Merchandise Amt: 20.00

Accounting Charge Information

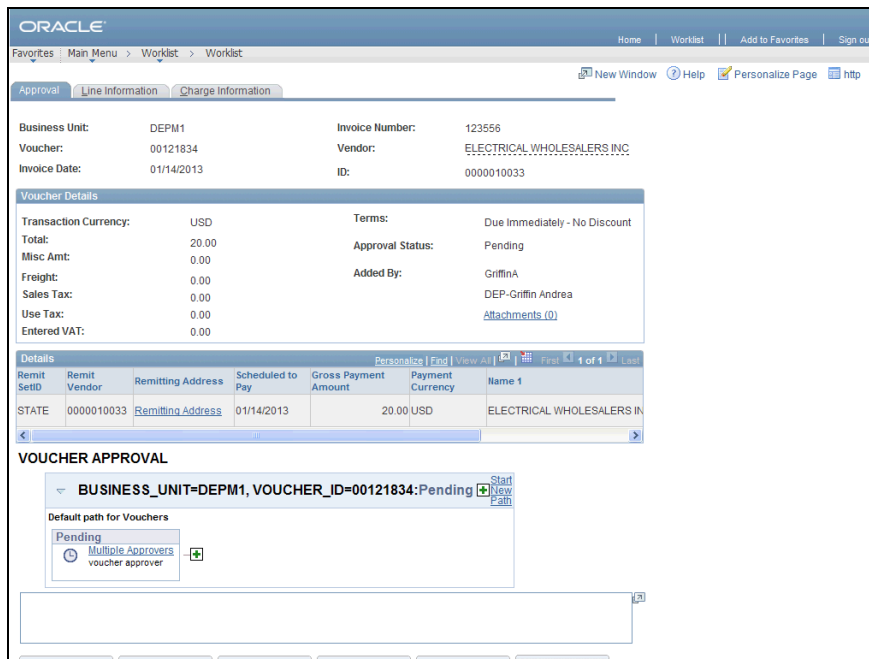
Merchandise Amt	GL Unit	Fund Code	Department	Special ID	Program Code	Account	ChartField 1	ChartField 2
20.00	STATE	11000	DEP39165	10020	00000	54050		

[Approval](#) | [Line Information](#) | [Charge Information](#)

Step	Action
4.	Click the scrollbar to move to the right of the <b>GL Chart</b> section.



Step	Action
5.	Click the <b>Approval</b> tab.



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

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

Invoice Date: 01/14/2013 ID: 0000010033

**Voucher Details**

Transaction Currency:	USD	Terms:	Due Immediately - No Discount
Total:	20.00	Approval Status:	Pending
Misc Amt:	0.00	Added By:	GriffinA
Freight:	0.00		DEP-Griffin Andrea
Sales Tax:	0.00		<a href="#">Attachments (0)</a>
Use Tax:	0.00		
Entered VAT:	0.00		

**Details**

Remit SetID	Remit Vendor	Remitting Address	Scheduled to Pay	Gross Payment Amount	Payment Currency	Name 1
STATE	0000010033	<a href="#">Remitting Address</a>	01/14/2013	20.00	USD	ELECTRICAL WHOLESALERS IN

**VOUCHER APPROVAL**

BUSINESS\_UNIT=DEPM1, VOUCHER\_ID=00121834:Pending [Start New Path](#)

Default path for Vouchers

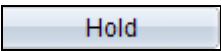
Pending

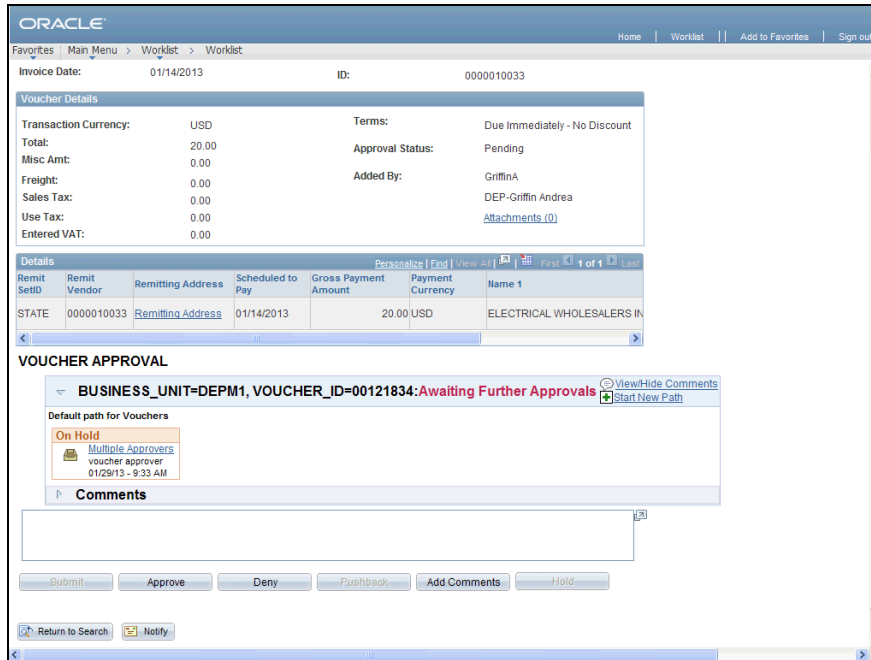
Multiple Approvers  
voucher approver

Submit Approve Deny Pushback Add Comments Hold

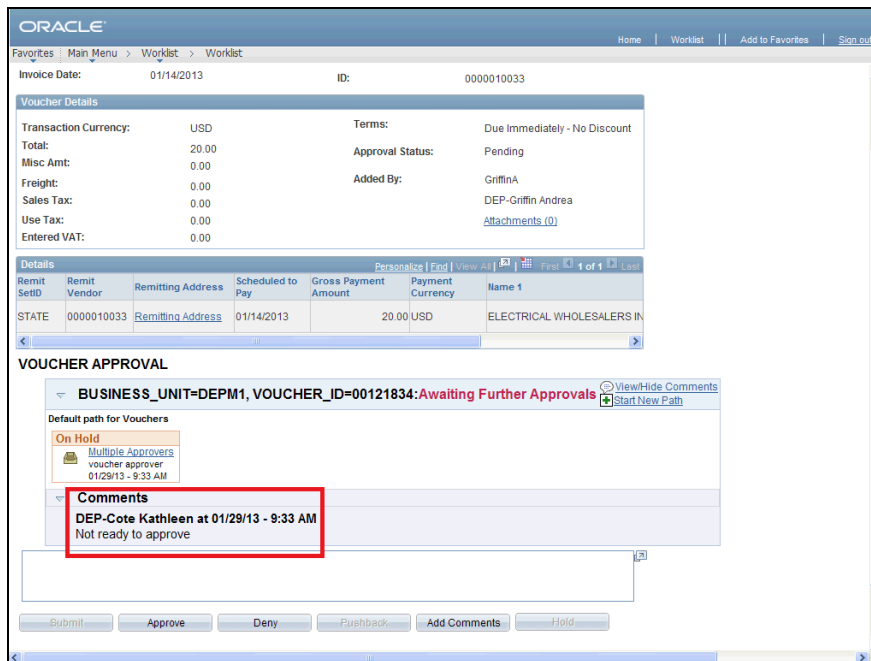
[Return to Search](#) [Notify](#)

[Approval](#) | [Line Information](#) | [Charge Information](#)


Step	Action
7.	<p>Vouchers require only a single level of approval. In this example the voucher will be placed on hold.</p> <p>Comments must be added when a voucher is placed on hold.</p> <p>Enter <b>Not ready to approve</b> in the <b>VOUCHER APPROVAL Comments</b> field.</p>
8.	<p>Click the <b>Hold</b> button.</p> <p></p>

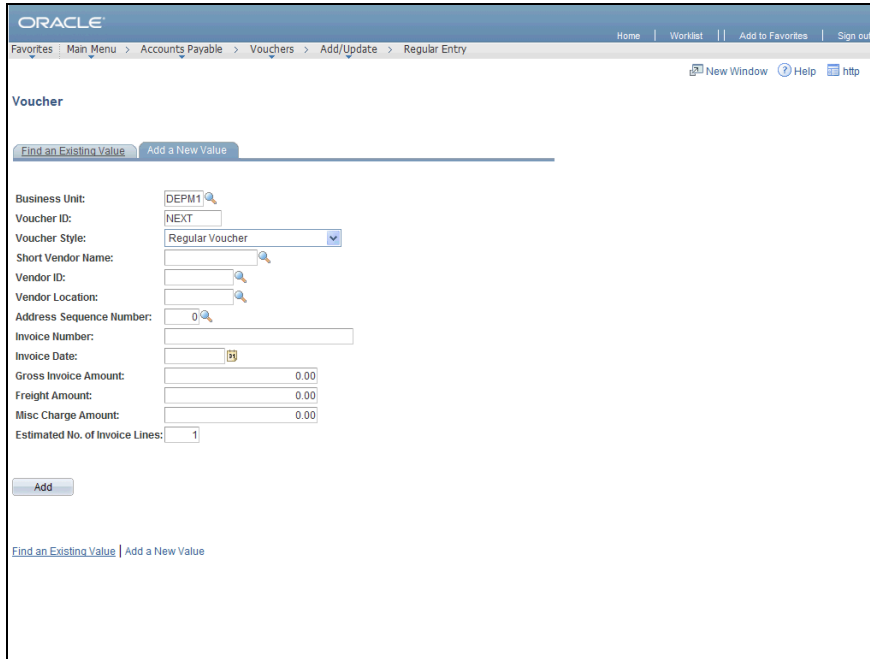


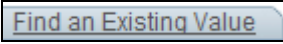
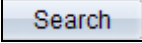
Step	Action
9.	Click the <b>View/Hide Comments</b> link to review the comments. <a href="#">View/Hide Comments</a>



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

Step	Action
11.	Click the <b>Sign out</b> link. 



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

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

New Window | Help | Personalize Page | http

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary | Consumption

Business Unit: DEPM1 Invoice Date: 01/14/2013  
 Voucher ID: 00121834 Invoice No: 123556  
 Voucher Style: Regular Invoice Total: 20.00 USD  
 Contract ID: Receipt Date: 01/03/2013  
 Vendor Name: ELECTRICAL WHOLESALERS INC Pay Terms: Due Now  
 151 WALNUT ST Voucher Source: Online  
 HARTFORD, CT 06120  
 Entry Status: Postable Origin: H41  
 Match Status: No Match [Approval History](#) Created: 01/14/2013  
 Approval Status: Pending Created By: GriffinA  
 Post Status: Unposted Modified: 01/14/2013  
 Modified By: CoteK  
 ERS Type: Not Applicable  
 Budget Status: Not Chkd Close Status: Open  
 Budget Misc Status: Valid [Audit Log](#)  
 \*View Related: Payment Inquiry  [Go](#)

Save | Return to Search | Notify | Refresh | Add | Update/Display

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary | Consumption

Step	Action
15.	<p>The <b>Approval Status</b> of this voucher is Pending. The voucher has been placed on approval hold. Approval hold is not a status</p> <p>Click the <b>Approval History</b> link to review the details.</p> <p><a href="#">Approval History</a></p>

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

New Window | Help | Personalize Page | http

Approval History

Business Unit: DEPM1 Total: 20.00  
 Voucher ID: 00121834  
 Approval Status: Pending

**VOUCHER APPROVAL**

BUSINESS\_UNIT=DEPM1, VOUCHER\_ID=00121834:Awaiting Further Approvals [View/Hide Comments](#)


Default path for Vouchers

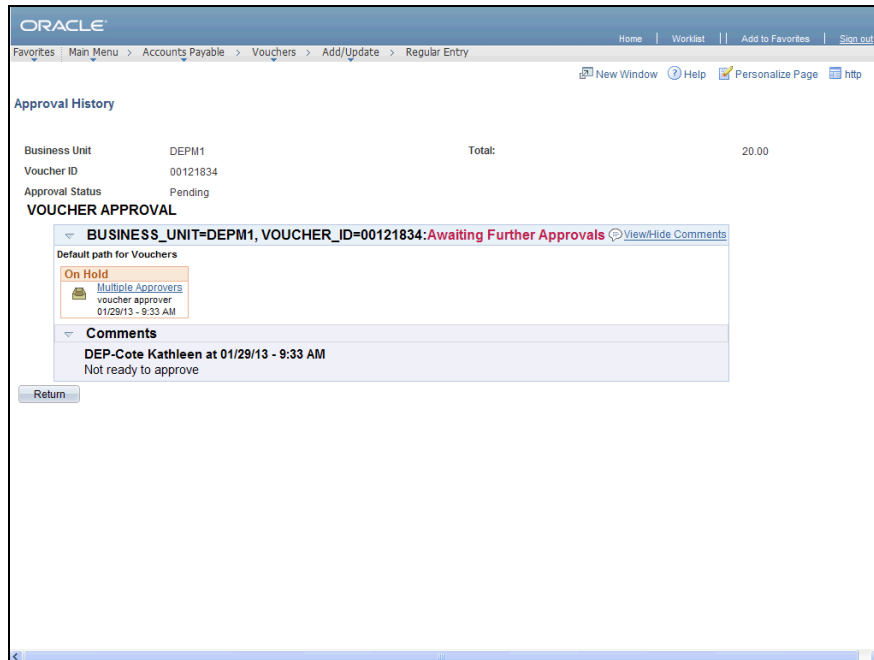
On Hold  
 Multiple Approvals  
 voucher approver  
 01/29/13 - 9:33 AM


Comments

Return



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



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 <b>Sign out</b> link. 

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

New Window | Help | Personalize Page | http

Worklist for CoteK: DEP-Cote Kathleen

Detail View | Work List Filters: [ ] | Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
DEP-Cote Kathleen	01/24/2013	Transaction Approved	Approval Workflow	3-Low	<a href="#">Credit Invoice 625, Credit Invoice Approval 1908-01-01, N, 0, BUSINESS_UNIT:DEPM1, INVOICE:SI77756, ROCR:0,0</a>	Mark Worked	Reassign
DEP-Griffin Andrea	01/14/2013	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval 593, STATE, 2012-01-03, N, 0, BUSINESS_UNIT:DEPM1, VOUCHER_ID:00121834, ROCR:0,0</a>	Mark Worked	Reassign
DEP-Griffin Andrea	01/14/2013	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval 594, STATE, 2012-01-03, N, 0, BUSINESS_UNIT:DEPM1, VOUCHER_ID:00121835, ROCR:0,0</a>	Mark Worked	Reassign

Refresh

Step	Action
19.	<p>The approver has signed into Core-CT.</p> <p>Navigation: Worklist &gt; Worklist</p> <p>The voucher previously placed on hold still displays on the <b>Worklist</b>.</p> <p>Click the <b>VoucherApproval, 593, STATE, 2012-01-03, N, 0, BUSINESS_UNIT:DEPM1</b> link.</p>

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

Approval | **Line Information** | Charge Information

Business Unit: DEPM1 Invoice Number: 123556  
 Voucher: 00121834 Vendor: ELECTRICAL WHOLESALERS INC  
 Invoice Date: 01/14/2013 ID: 0000010033

**Voucher Details**

Transaction Currency: USD Terms: Due Immediately - No Discount  
 Total: 20.00 Approval Status: Pending  
 Misc Amt: 0.00 Added By: GriffinA  
 Freight: 0.00 Sales Tax: DEP-Griffin Andrea  
 Use Tax: 0.00 Attachments (0)  
 Entered VAT: 0.00

**Details**

Remit SetID	Remit Vendor	Remitting Address	Scheduled to Pay	Gross Payment Amount	Payment Currency	Name 1
STATE	0000010033	Remitting Address	01/14/2013	20.00	USD	ELECTRICAL WHOLESALERS IN

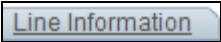
**VOUCHER APPROVAL**

BUSINESS\_UNIT=DEPM1, VOUCHER\_ID=00121834: Awaiting Further Approvals

Default path for Vouchers

On Hold  
 Multiple Approvers  
 voucher approver  
 01/29/13 - 9:33 AM

Comments

Step	Action
20.	Click the <b>Line Information</b> tab to review line information for the voucher. 

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

Approval | **Line Information** | Charge Information

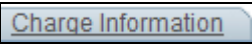
Business Unit: DEPM1 Invoice Number: 123556  
 Voucher: 00121834 Vendor: ELECTRICAL WHOLESALERS INC  
 Invoice Date: 01/14/2013 ID: 0000010033

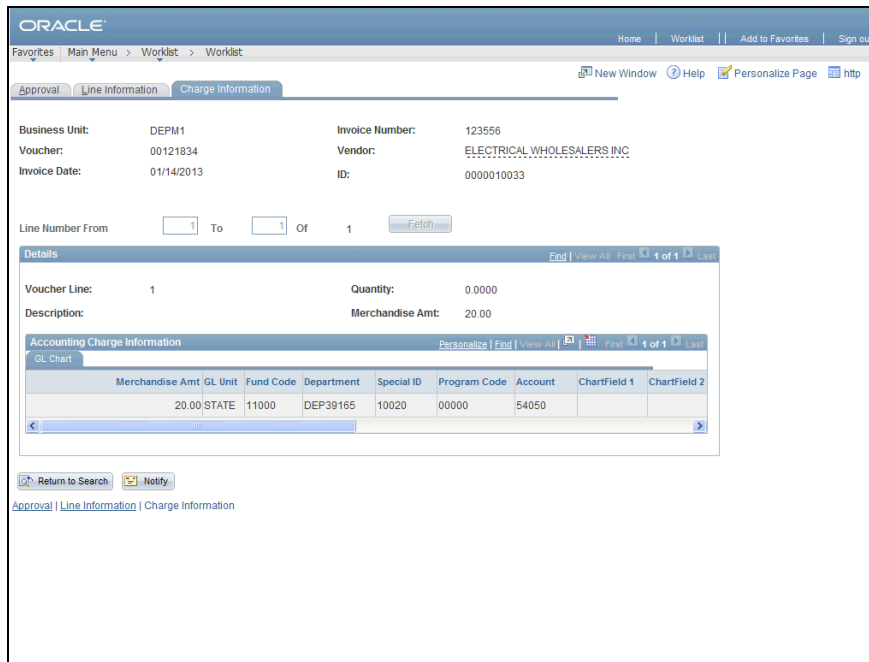
Line Number From  To  Of 1

**Line Detail**

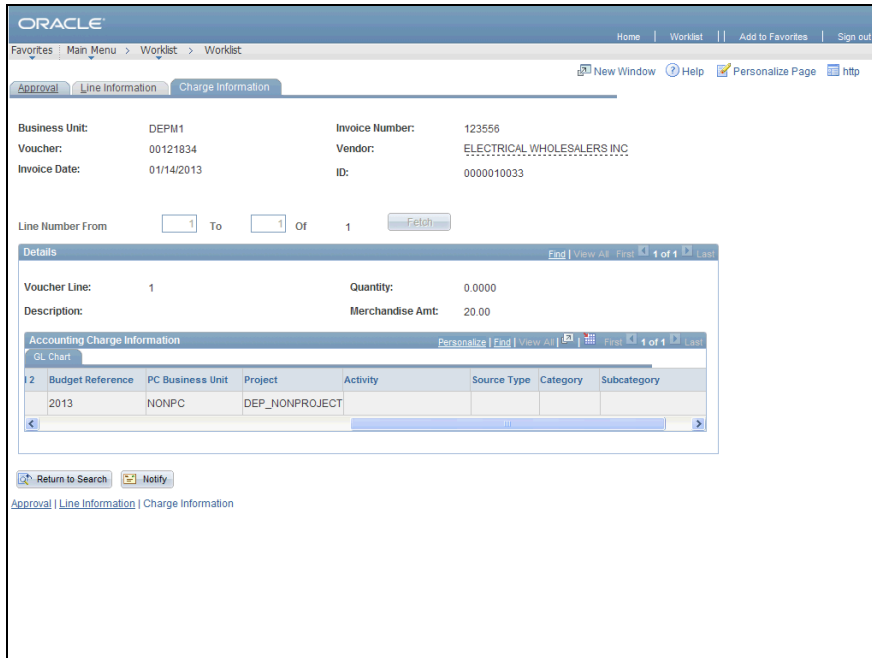
Line	Description	Quantity	Merchandise Amt
1		0.0000	20.00

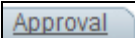
Approval | Line Information | Charge Information

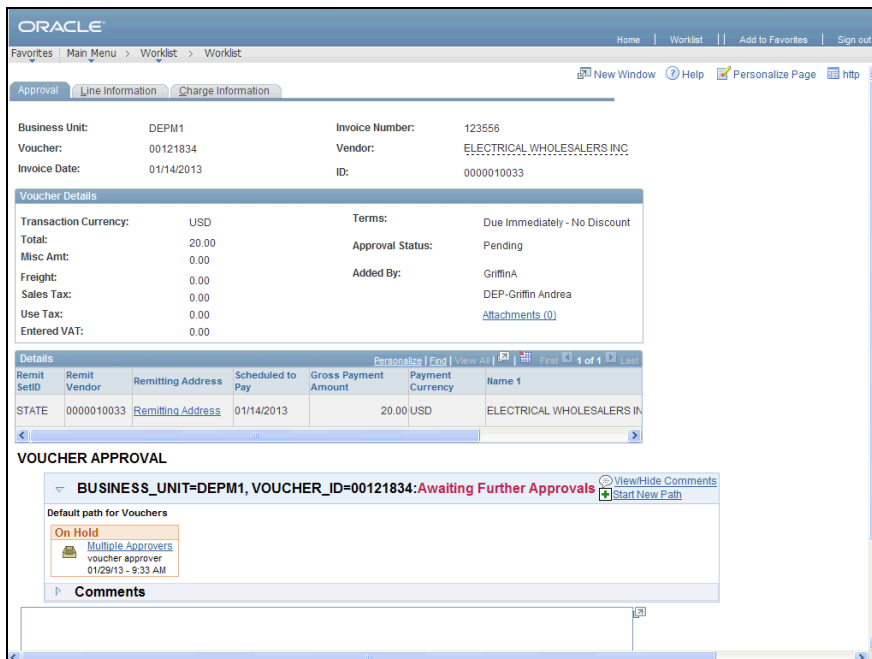
Step	Action
21.	Click the <b>Charge Information</b> tab to review distribution information for the voucher. 



Step	Action
22.	Click the scrollbar to move to the right of the <b>GL Chart</b> section.



Step	Action
23.	Click the <b>Approval</b> tab. 



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

ORACLE

Favorites | Main Menu > Worklist > Worklist

Home | Worklist | Add to Favorites | Sign out

**Voucher Details**

Transaction Currency: USD      Terms: Due Immediately - No Discount  
 Total: 20.00      Approval Status: Pending  
 Misc Amt: 0.00  
 Freight: 0.00      Added By: GriffinA  
 Sales Tax: 0.00      DEP-Griffin Andrea  
 Use Tax: 0.00      Attachments (0)  
 Entered VAT: 0.00

**Details**

Remit SetID	Remit Vendor	Remitting Address	Scheduled to Pay	Gross Payment Amount	Payment Currency	Name 1
STATE	0000010033	Remitting Address	01/14/2013	20.00	USD	ELECTRICAL WHOLESALERS IN

**VOUCHER APPROVAL**

**BUSINESS\_UNIT=DEPM1, VOUCHER\_ID=00121834:Awaiting Further Approvals** [View/Hide Comments](#) [Start New Path](#)

Default path for Vouchers

**On Hold**

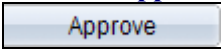
Multiple Approvers  
 voucher approver  
 01/29/13 - 9:33 AM

**Comments**

Submit   Approve   Deny   Pushback   Add Comments   Hold

[Return to Search](#)   [Notify](#)

[Approval](#) | [Line Information](#) | [Charge Information](#)

Step	Action
25.	<p>Comments are not required when a voucher is approved.</p> <p>Click the <b>Approve</b> button.</p> <p></p>

ORACLE

Favorites | Main Menu > Worklist > Worklist

Home | Worklist | Add to Favorites | Sign out

[Approval](#) | [Line Information](#) | [Charge Information](#)

Business Unit: DEPM1      Invoice Number: 123556  
 Voucher: 00121834      Vendor: ELECTRICAL WHOLESALERS INC  
 Invoice Date: 01/14/2013      ID: 0000010033

**Voucher Details**

Transaction Currency: USD      Terms: Due Immediately - No Discount  
 Total: 20.00      Approval Status: Approved  
 Misc Amt: 0.00  
 Freight: 0.00      Added By: GriffinA  
 Sales Tax: 0.00      DEP-Griffin Andrea  
 Use Tax: 0.00      Attachments (0)  
 Entered VAT: 0.00

**Details**

Remit SetID	Remit Vendor	Remitting Address	Scheduled to Pay	Gross Payment Amount	Payment Currency	Name 1
STATE	0000010033	Remitting Address	01/14/2013	20.00	USD	ELECTRICAL WHOLESALERS IN

**VOUCHER APPROVAL**

**BUSINESS\_UNIT=DEPM1, VOUCHER\_ID=00121834:Approved** [View/Hide Comments](#)

Submit   Approve   Deny   Pushback   Add Comments   Hold

[Return to Search](#)   [Notify](#)

[Approval](#) | [Line Information](#) | [Charge Information](#)

Step	Action
26.	<p>The <b>Voucher Approval</b> section indicates that the voucher has been approved.</p> <p>Click the <b>Sign out</b> link.</p> <p><a href="#">Sign out</a></p>

The screenshot shows the Oracle Voucher Processor interface. The breadcrumb navigation is: Home | Worklist | Add to Favorites | Sign out. The main navigation path is: Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry. The page title is "Voucher". There are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is active. The form contains the following fields:

- Business Unit: DEPM1
- Voucher ID: NEXT
- Voucher Style: Regular Voucher
- Short Vendor Name: (empty)
- Vendor ID: (empty)
- Vendor Location: (empty)
- Address Sequence Number: 0
- Invoice Number: (empty)
- Invoice Date: (empty)
- Gross Invoice Amount: 0.00
- Freight Amount: 0.00
- Misc Charge Amount: 0.00
- Estimated No. of Invoice Lines: 1

There is an "Add" button at the bottom left of the form area. Below the form, there are links for "Find an Existing Value" and "Add a New Value".

Step	Action
27.	<p>The Voucher Processor has signed into Core-CT to view the status of the voucher.</p> <p>Navigation: Accounts Payable &gt; Vouchers &gt; Add/Update &gt; Regular Entry</p> <p>Click the <b>Find an Existing Value</b> tab to locate the voucher.</p> <p><a href="#">Find an Existing Value</a></p>

ORACLE

Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

Home | Worklist | Add to Favorites | Sign out

New Window | Help | http

### Voucher

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: = DEP1

Voucher ID: begins with

Invoice Number: begins with

Short Vendor Name: begins with

Vendor ID: begins with

Name 1: begins with

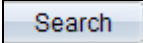
Voucher Style: =

Related Voucher: begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

Step	Action
28.	Enter <b>00121834</b> into the <b>Voucher ID</b> field.
29.	Click the <b>Search</b> button. 

ORACLE

Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Personalize Page | http

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary | Consumption

Business Unit: DEP1 Invoice Date: 01/14/2013

Voucher ID: 00121834 Invoice No: 123556

Voucher Style: Regular Invoice Total: 20.00 USD

Contract ID: Receipt Date: 01/03/2013

Vendor Name: ELECTRICAL WHOLESALERS INC Pay Terms: Due Now

151 WALNUT ST Voucher Source: Online

HARTFORD, CT 06120

Entry Status: Postable Origin: H41

Match Status: No Match [Approval History](#) Created: 01/14/2013

Approval Status: **Approved** Created By: GriffinA

Post Status: Unposted Modified: 01/29/2013

Budget Status: Not Chk'd Modified By: CoteK

Budget Misc Status: Valid ERS Type: Not Applicable

\*View Related: Payment Inquiry [Audit Logs](#) Close Status: Open

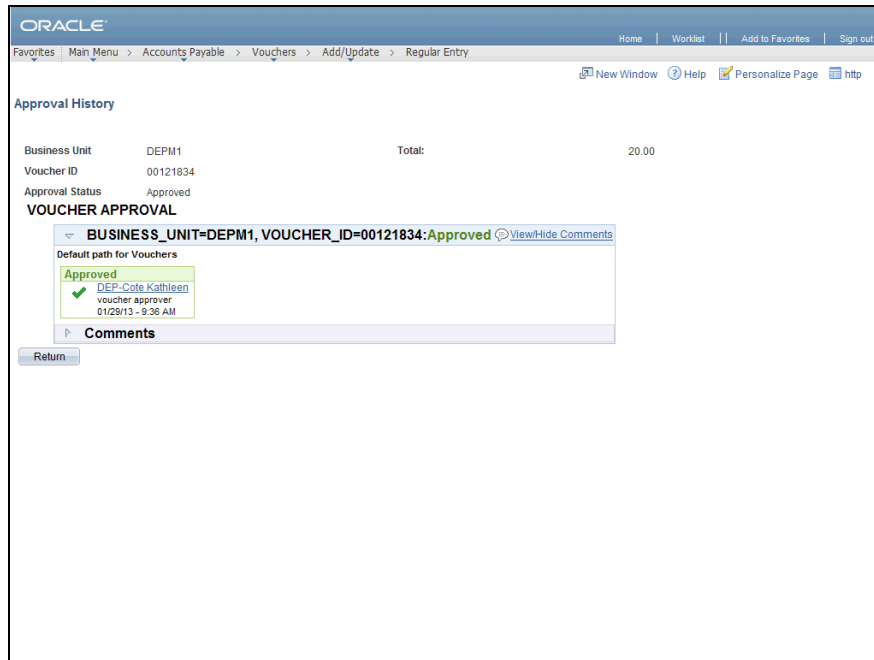
Go

Save | Return to Search | Notify | Refresh | Add | Update/Display

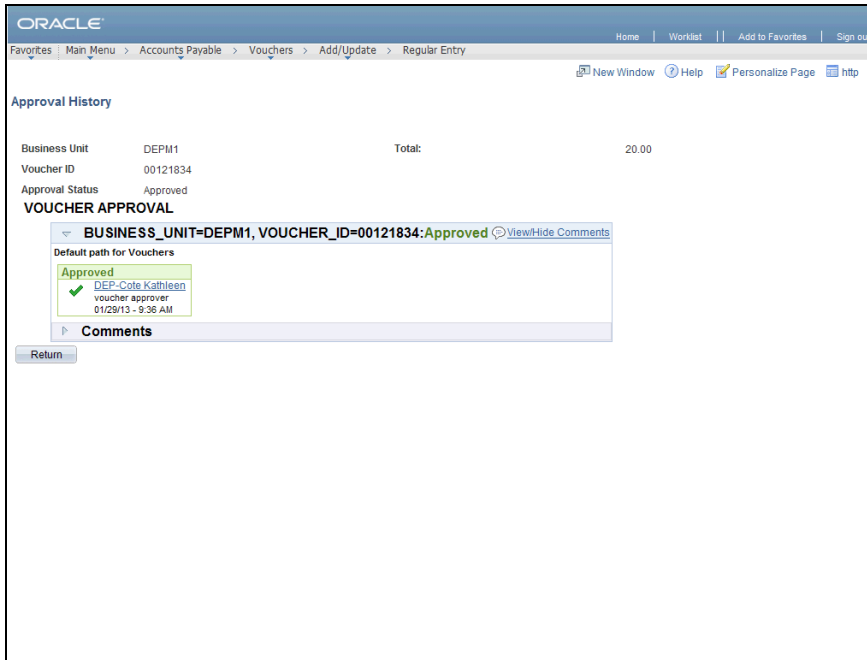
Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary | Consumption




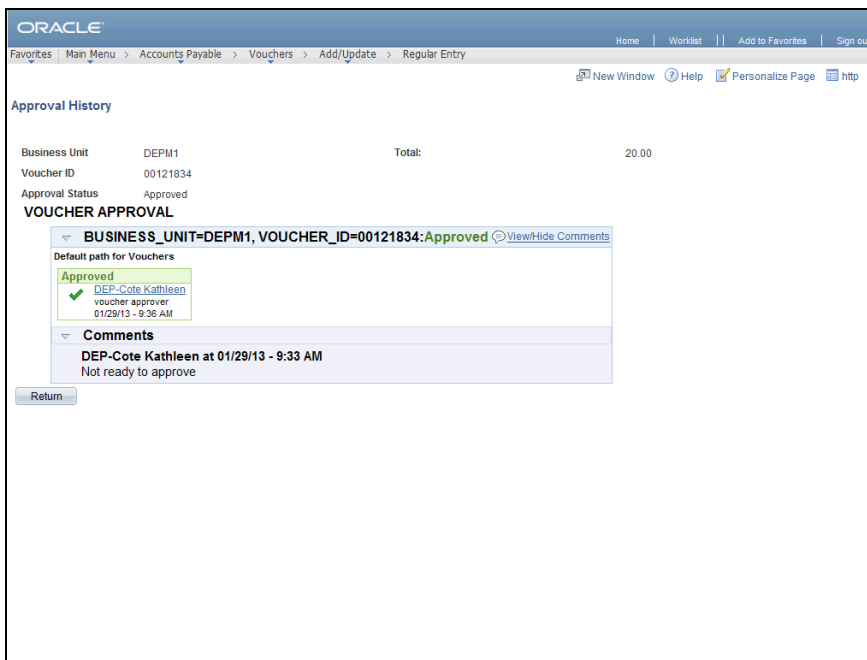
Step	Action
30.	<p>The <b>Approval Status</b> field displays Approved.</p> <p>Click the <b>Approval History</b> link to review details.</p> <p><a href="#">Approval History</a></p>



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



Step	Action
32.	Click on the <b>Expand Comments</b> button to view the comments for this voucher. 



Step	Action
33.	<b>End of Procedure.</b>