

AP-08 Initiate Invoice Approvals

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to submit an Invoice for Approvals in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to initiate approval for single invoice and initiate approval for multiple invoices.

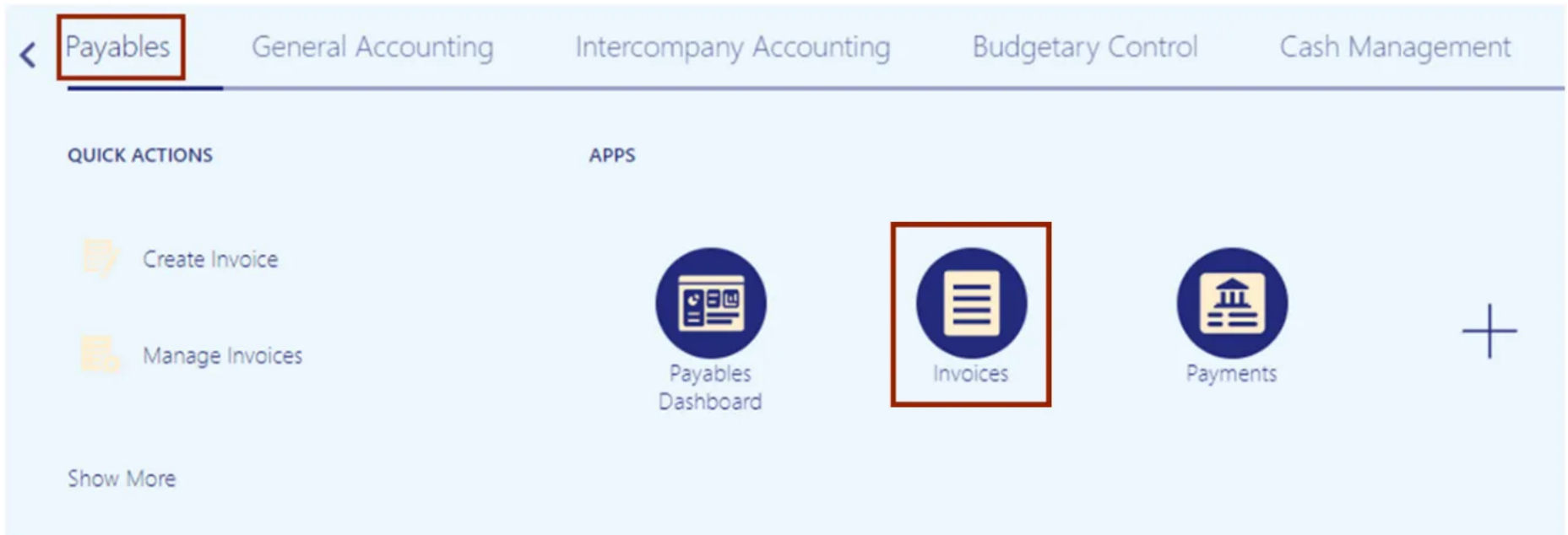
Initiate Approval for single Invoice

To Initiate Approval for single Invoice in NCFS, please follow the steps below. There are 7 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

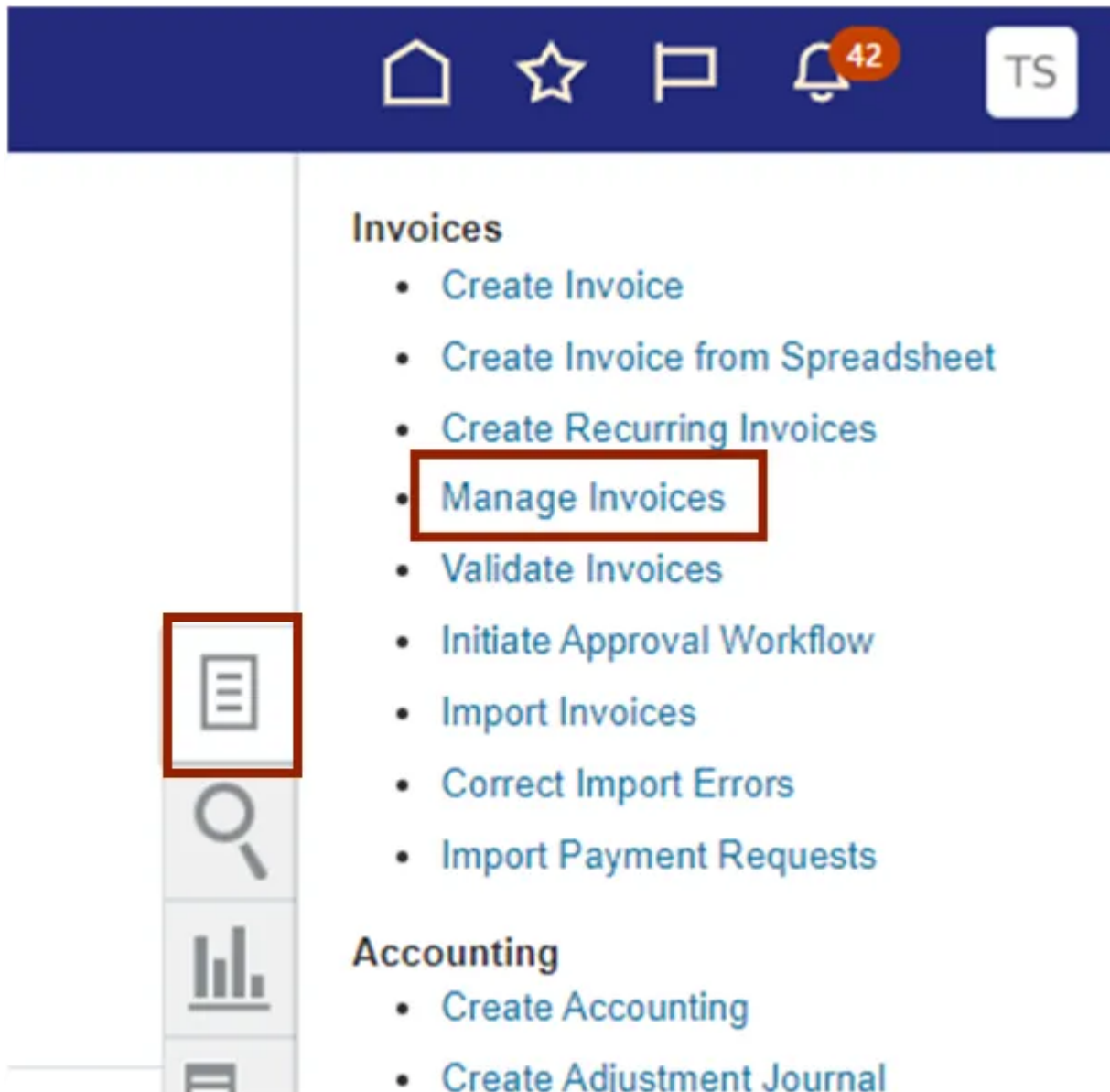
Step 2. Click the **Payables** tab. Click the **Invoices** app.

Image



Step 3. Click the **Tasks** icon. On the **Tasks** pane, click the **Manage** Invoices.

Image



Step 4. The **Manage Invoices** page opens. On the **Search: Invoice** section, enter the required fields. Click the **Search** button.

Image

Manage Invoices ?

Done

Search Results

Search: Invoice

Business Unit

** Invoice Number INV_NC489760

Invoice Amount

** Invoice Date m/d/yy

** Supplier or Party

Advanced

Saved Search

All Invoices

** At least one is required

** Supplier Number

Supplier Site

Taxpayer ID

** Invoice Group

Search

Reset

Save...

Actions

View

Validate

Pay in Full

Approval

Post

Detach

Invoice Number	Invoice Date	Creation Date	Supplier or Party	Supplier Site	Unpaid Amount	Invoice Amount	Applied Prepayments	Invoice Type	Notes	Validation Status	Approval Status	Holds	Details
No search conducted.													

Step 5. Click the **Actions** drop-down choice list button. Select **Approval** and the select **Initiate**.

Image

Manage Invoices ?

Search Results

► Search: Invoice

Actions ▼

View ▼











 Detach

Validate

Pay in Full

Approval ▼

Post ▼

	Creation Date	Supplier or Party	Supplier Site	Unpaid Amount	Invoice Amount
Initiate	5/8/23 10:07 AM	CENTRAL POLY BA...	R.19PT.01	200.00 USD	200.00 USD

Approval

Initiate

Withdraw

Force Approve

Resubmit

Edit

Validate

Release Holds

Apply or Unapply Prepayments

Cancel Invoice

Pay in Full

Post to Ledger

Account in Draft

Create Note

Add Attachment

Step 6. The selected Invoice number's **Approval Status** will change to **Initiated**.

Search

Reset

Save...

Actions

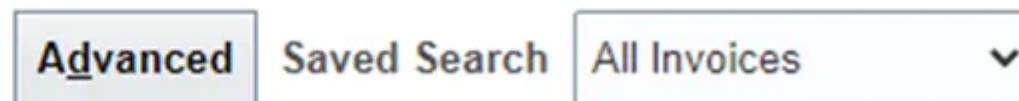
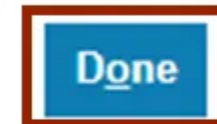
View

Validate

Approval

Post

Invoice Number	Inv Creation Date	Supplier or Party	Supplier Site	Unpaid Amount	Invoice Amount	Applied Prepayments	Invoice Type	Source	Notes	Validation Status	Approval Status	Ho Paid Status	Business Unit	A
INV_NC489760	5/8 5/8/23 10:...	CENTRAL POLY BA...	R.19PT.01	200.00 USD	200.00 USD	0.00 USD	Standard	Manual Invoice Entry		Validated	Initiated	0 Not paid	1900 DEPARTM...	U

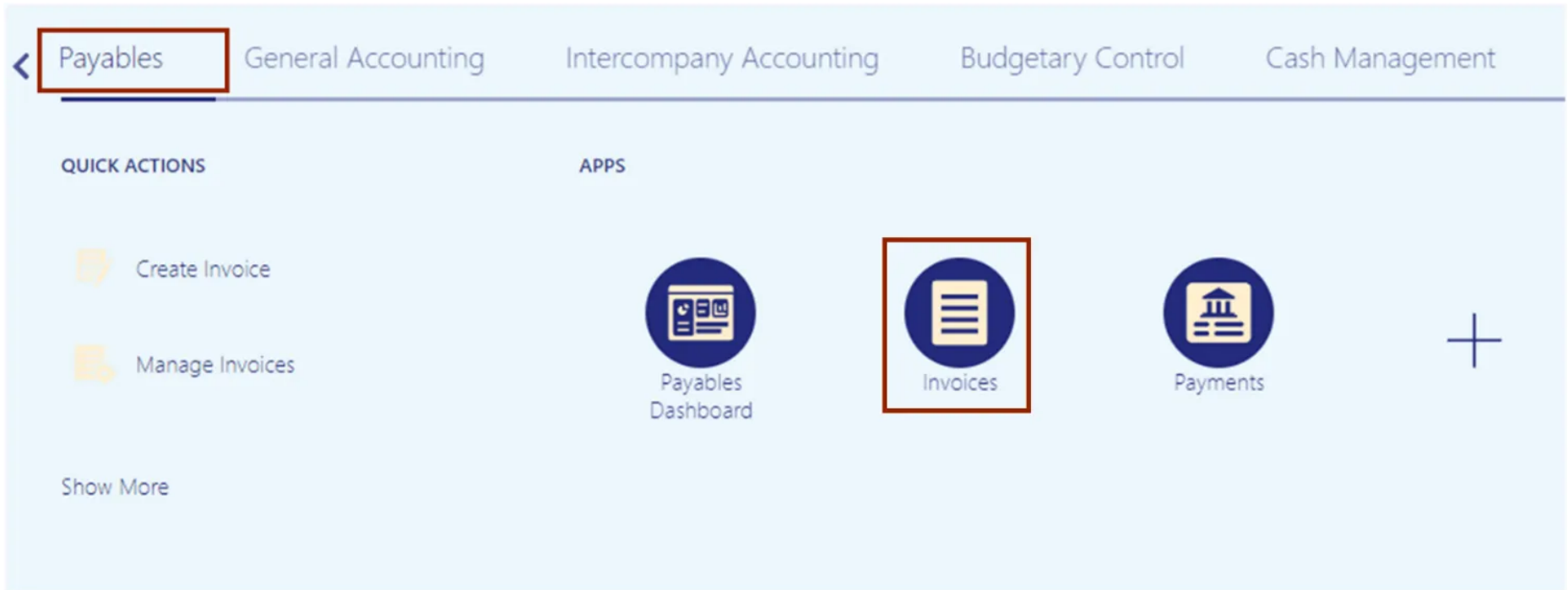


Initiate Approval for multiple Invoices

To Initiate Approval for multiple Invoices in NCFS, please follow the steps below. There are 11 steps to complete this process.

Step 1. Click the **Payables** tab. Click the **Invoices** app.

Image



Step 2. Click the **Tasks** icon. On the **Tasks** pane, under **Invoices**, click **Initiate Approval Workflow**.

Image

Image

Submit Request

 This process will be queued up for submission at position 1

Process Options

Name Initiate Invoice Approval Workflow
Description Initiates the approval process and routes invo...
Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

Basic Options

Parameters

* Business Unit 0000 DHHS MENTAL HEALTH ▼

Supplier or Party ▼

From Invoice Date m/d/yy 

To Invoice Date m/d/yy 

Invoice Number ▼

Source ▼

Approval Status ▼

Step 4. Click the **Submit** button.

Image

Submit Request

 This process will be queued up for submission at position 1

[Process Options](#) [Advanced](#) [Submit](#) [Cancel](#)

Name Initiate Invoice Approval Workflow

Description Initiates the approval process and routes invol...

Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

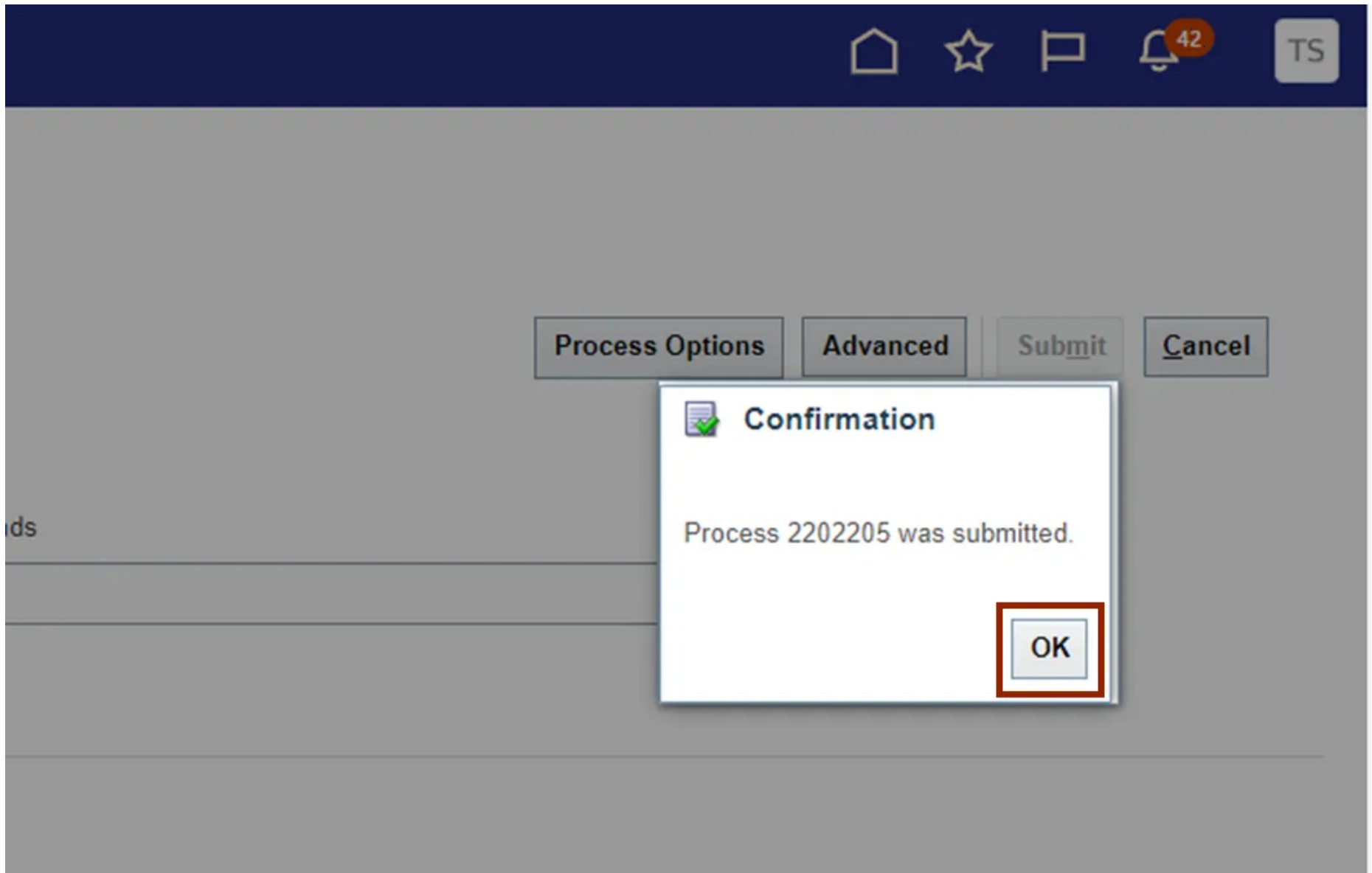
Basic Options

Parameters

* Business Unit	3000 DHHS MENTAL HEALTH	▼
Supplier or Party		▼
From Invoice Date	m/d/yy	
To Invoice Date	m/d/yy	
Invoice Number		▼
Source	▼	
Approval Status		▼

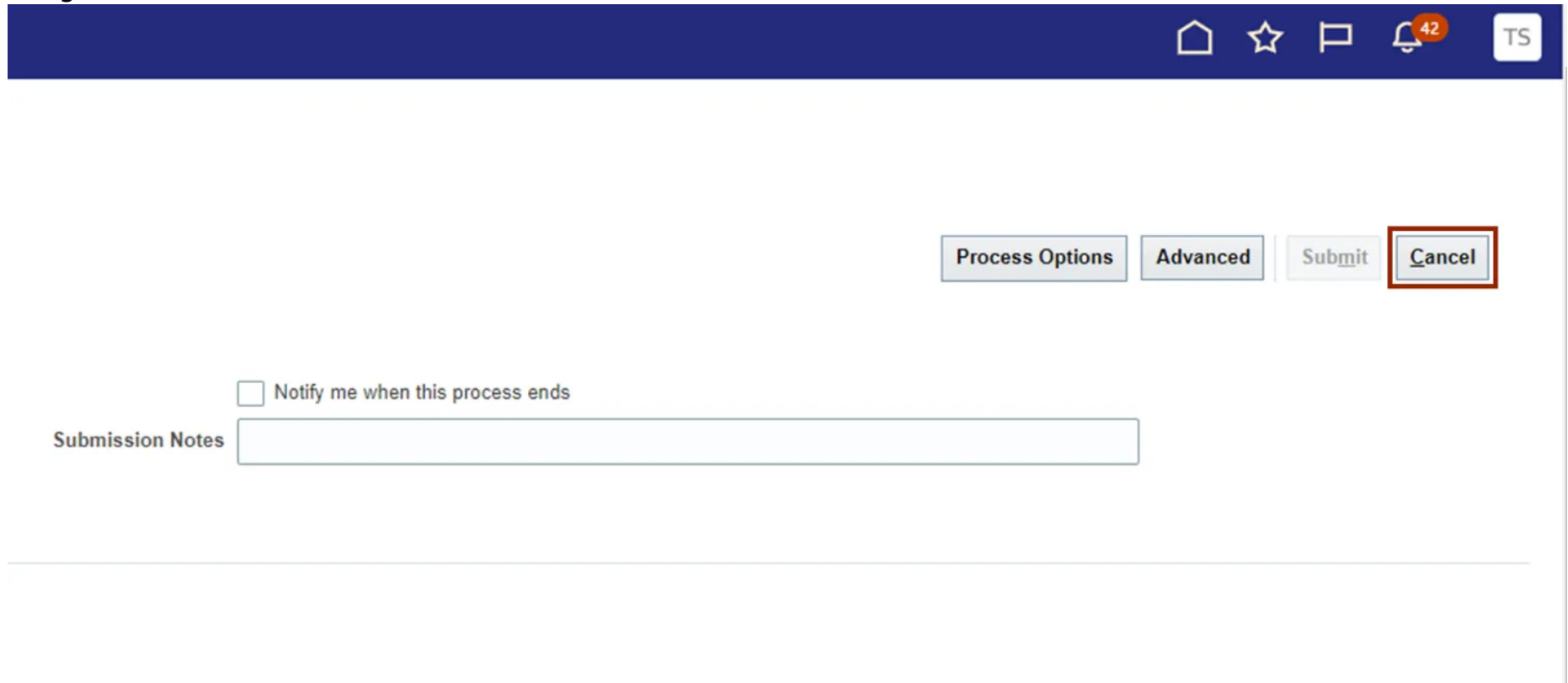
Step 5. The *Confirmation* pop-up appears. On the *Confirmation* pop-up, click the **OK** button.

Image



Step 6. On the **Submit Request** page, click the **Cancel** button. The Invoice Approval workflow is initiated and the Invoices are submitted.

Image



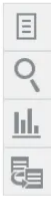
Process Options Advanced Submit **Cancel**

☐ Notify me when this process ends

Submission Notes

Step 7. You are now redirected to the **Invoices** page. Click on **Home** page.

Image



Step 8. Navigate to **Tools** application and click on **Scheduled Processes**. This is the step to find out the status of the Validate Invoice program.

Good afternoon, Training Super 1

< Expenses Procurement My Enterprise **Tools** Configuration Others

QUICK ACTIONS

- Manage Collaboration Messaging History
- AI Apps Administration

APPS



Set Preferences



Alerts Composer



Developer Connect



Worklist



Reports and Analytics



Scheduled Processes



Transaction Console



Collaboration Messaging



Step 9. The overview page is displayed and a list of all the processes are displayed. You can search for the process using the search criteria or scroll down and look for the process in the list.

Image

Overview ?

► Search

Search Results ?

View ☒ Flat List ☐ Hierarchy

Actions ▼ View ▼ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log ↻

Name	Process ID	Status
Rebuild Learning Item Stop Word Index	2796967	Wait
Rebuild Learning Item Stop Word Index	2796966	Succeeded
Rebuild Learning Item Stop Word Index	2796965	Succeeded
ESS process to check Search Cloud Service availability	2796964	Wait

Step 10. Click the **Search** arrow and enter the search criteria. You can use several criteria like Name, Process ID or the Submission Time to inquire for the process status. The process name to search for is - **Initiate Invoice Approval Workflow**, click on **Search** button.

Image

Overview ?

Search

Search

Name **Initiate Invoice Approval Work**

Process ID

Status

Submission Time After 12/20/23 10:22 AM (UTC 05:00) New York - Eastern Time (ET)

Submission Notes Contains

Submitted By

Saved Search Last hour

Search Reset Download Results

Step 11. A list of all the processes inquired on will be displayed with the status.

Image

Search Results ?

View ☒ Flat List ☐ Hierarchy

Actions ▾ View ▾

Schedule New Process

Resubmit

Put On Hold

Cancel Process

Release Process

View Log



Name	Process ID	Status
Initiate Invoice Approval Workflow	2810614	Succeeded
Initiate Invoice Approval Workflow	2810593	Succeeded

Wrap-Up

Submit a single Invoice and multiple Invoices for approval using the steps above.

Additional Resources

- Virtual Instructor-Led Training (vILT)
 - [AP101: Invoice Management](#)

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