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.

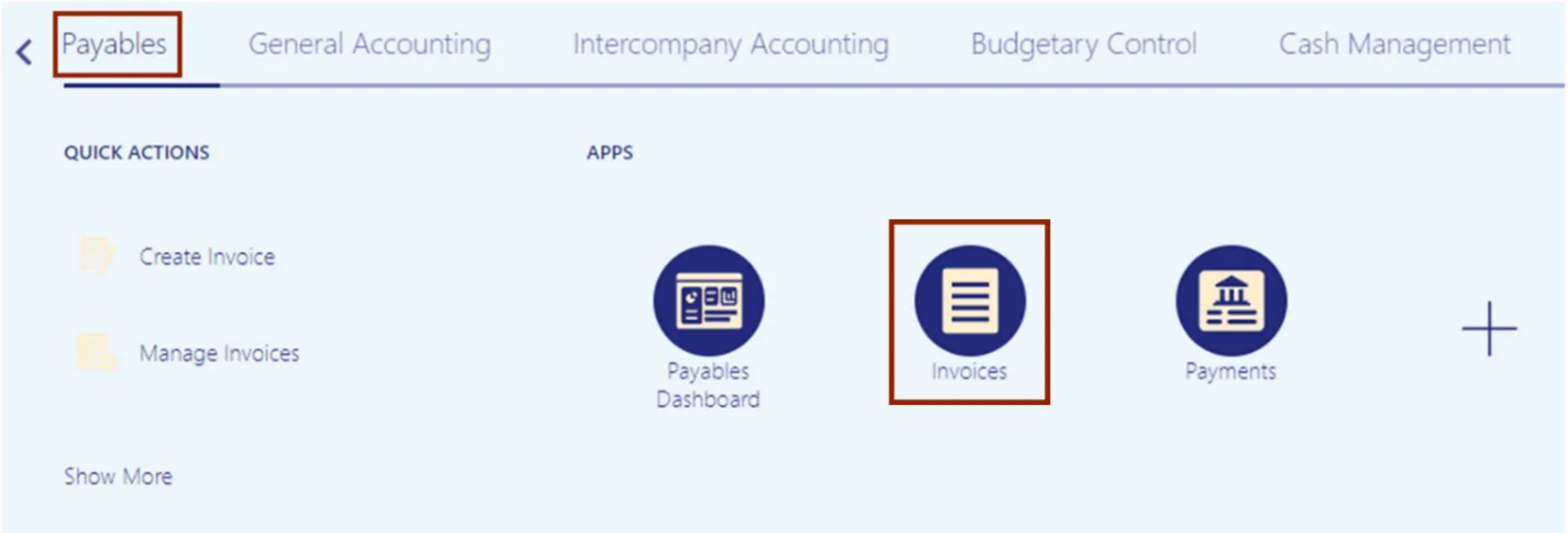
Initiate Approval for single Invoice

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.

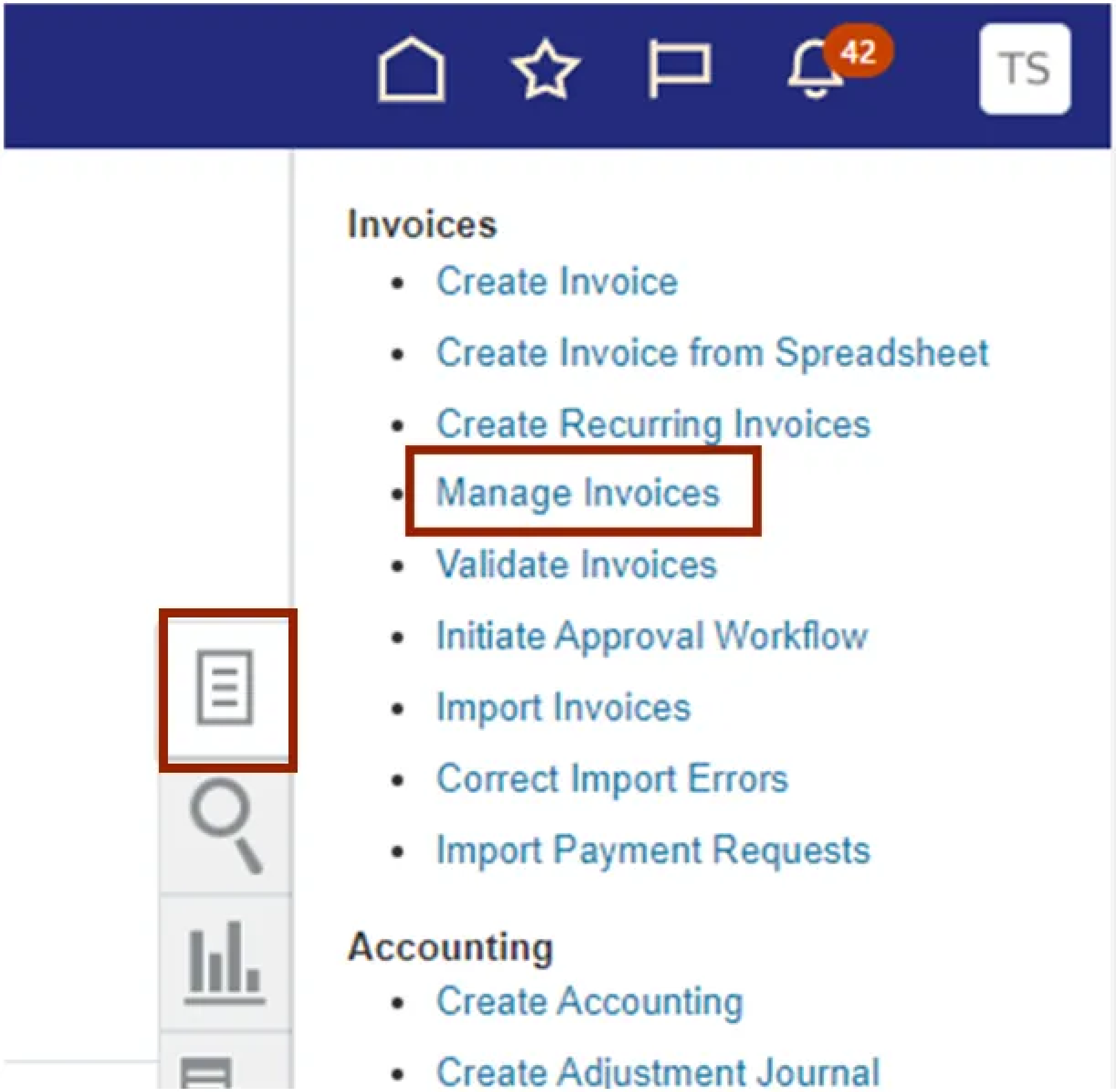
Step 2. Click the **Payables** tab. Click the **Invoices** app.

Image



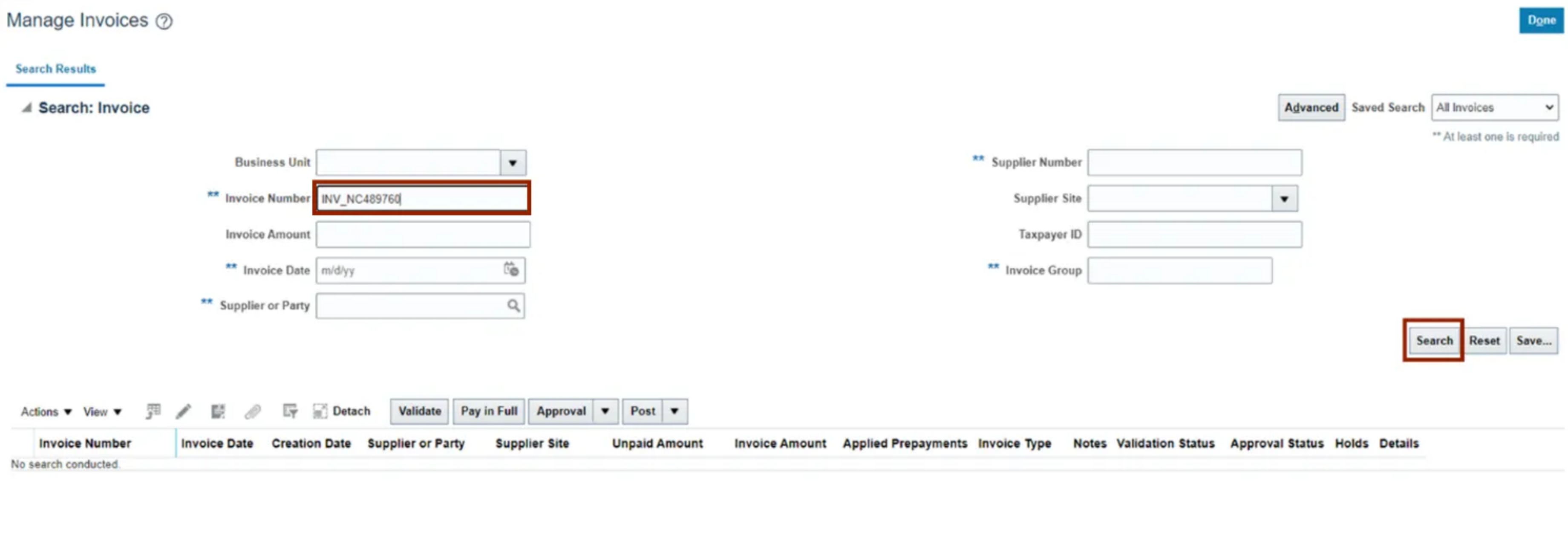
Step 3. Click the **Tasks** icon. On the **Tasks** pane, click the **Manage** Invoices.

Image



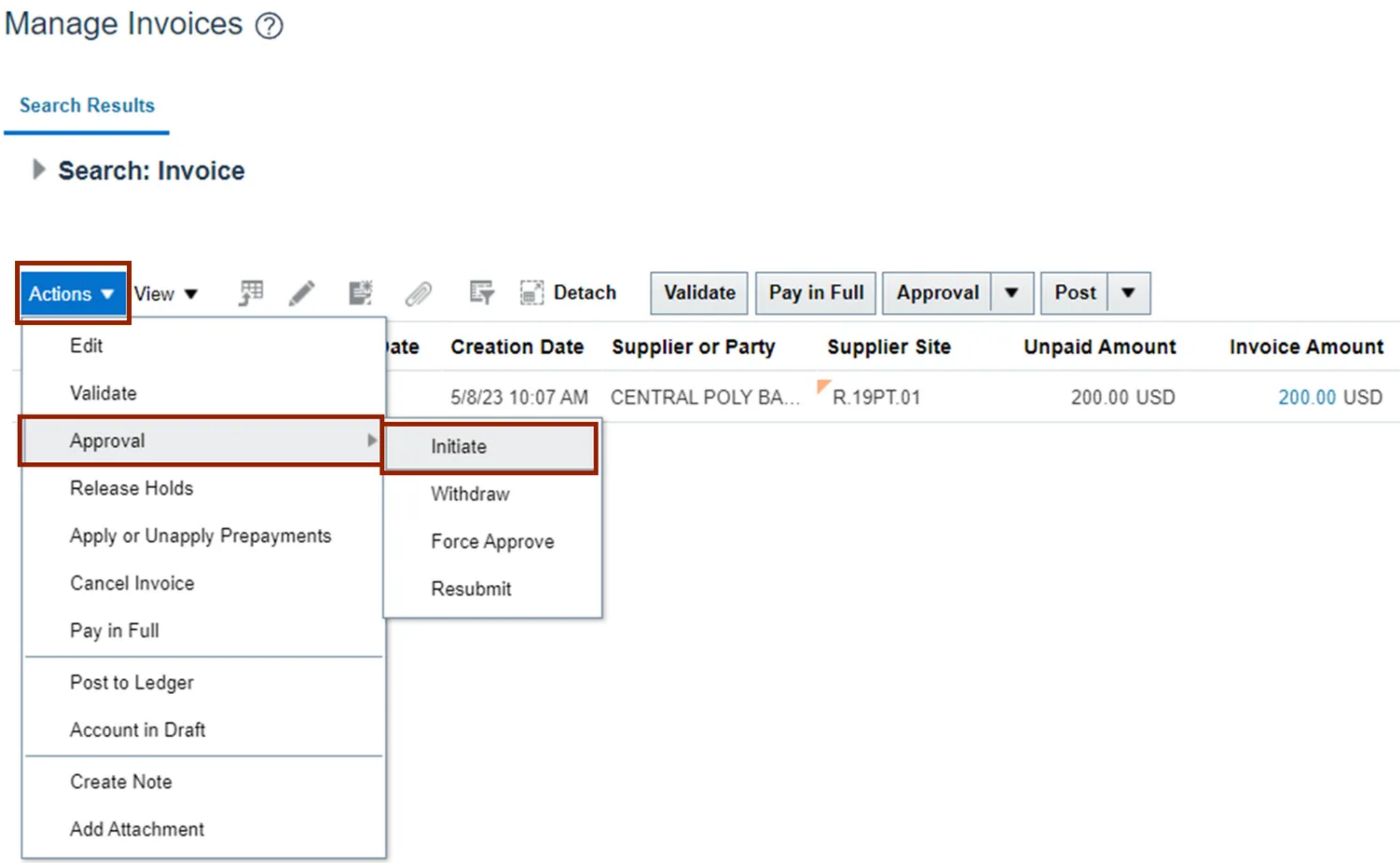
Step 4. The **Manage Invoices** page opens. On the ***Search: Invoice*** section, enter the required fields. Click the **Search** button.

Image



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

Image



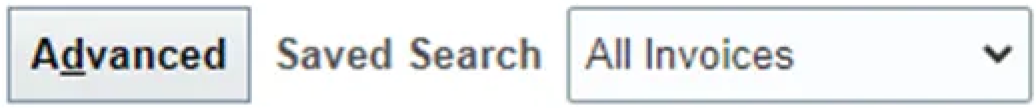
Step 6. The selected Invoice number's **Approval Status** will change to ***Initiated***.

Image

Note: Depending on the workflow configuration for the specific BU, it might go directly to the status of workflow approved

Step 7. Scroll to the top of the **Manage Invoices** page and click the **Done** button.

Image



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.

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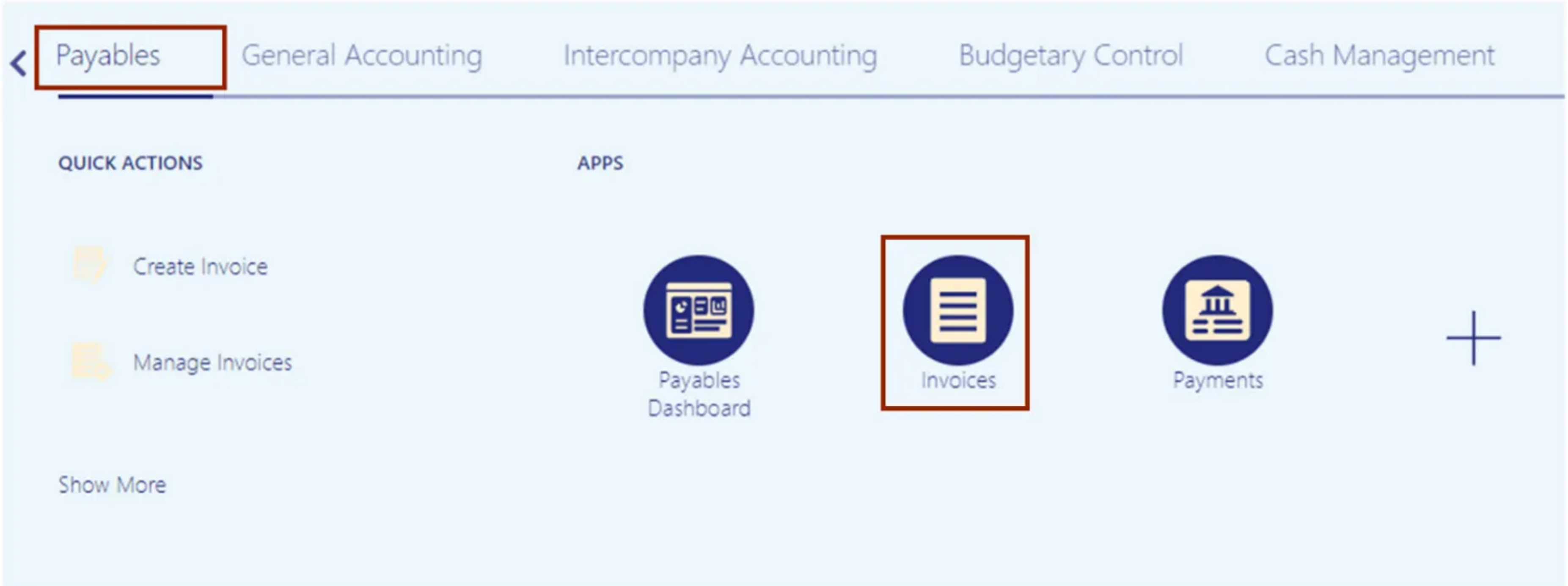
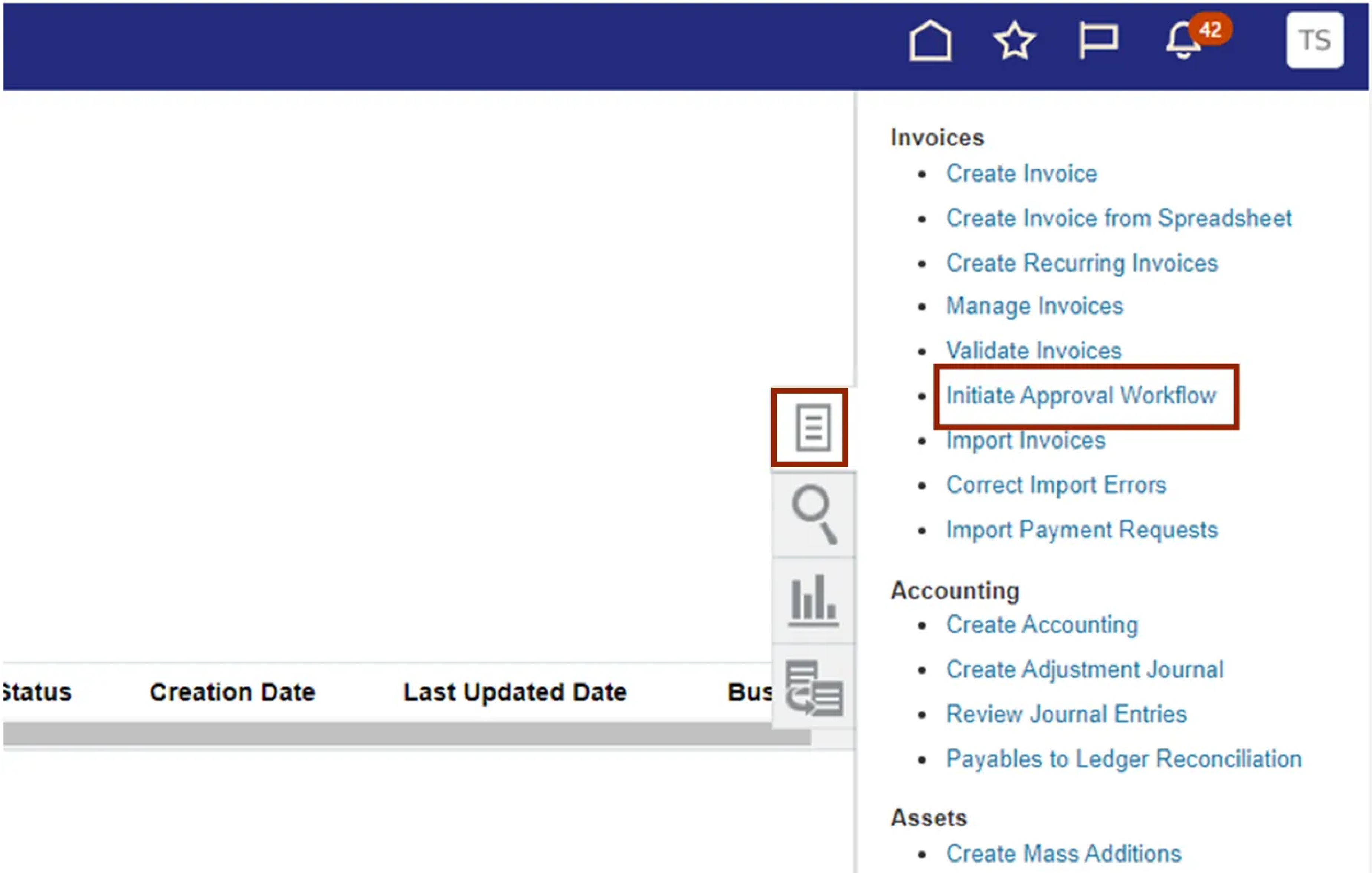


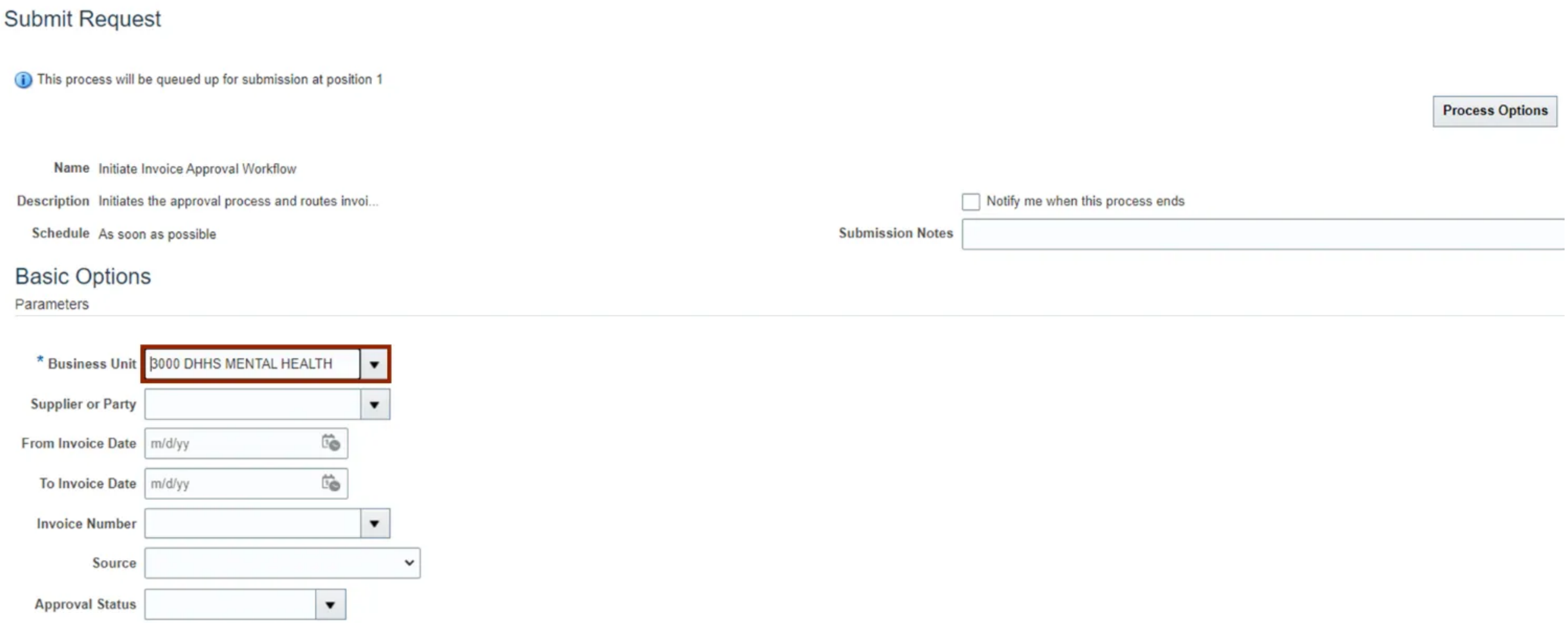
Step 2. Click the **Tasks** icon. On the **Tasks** pane, under ***Invoices***, click **Initiate Approval Workflow**.

Image



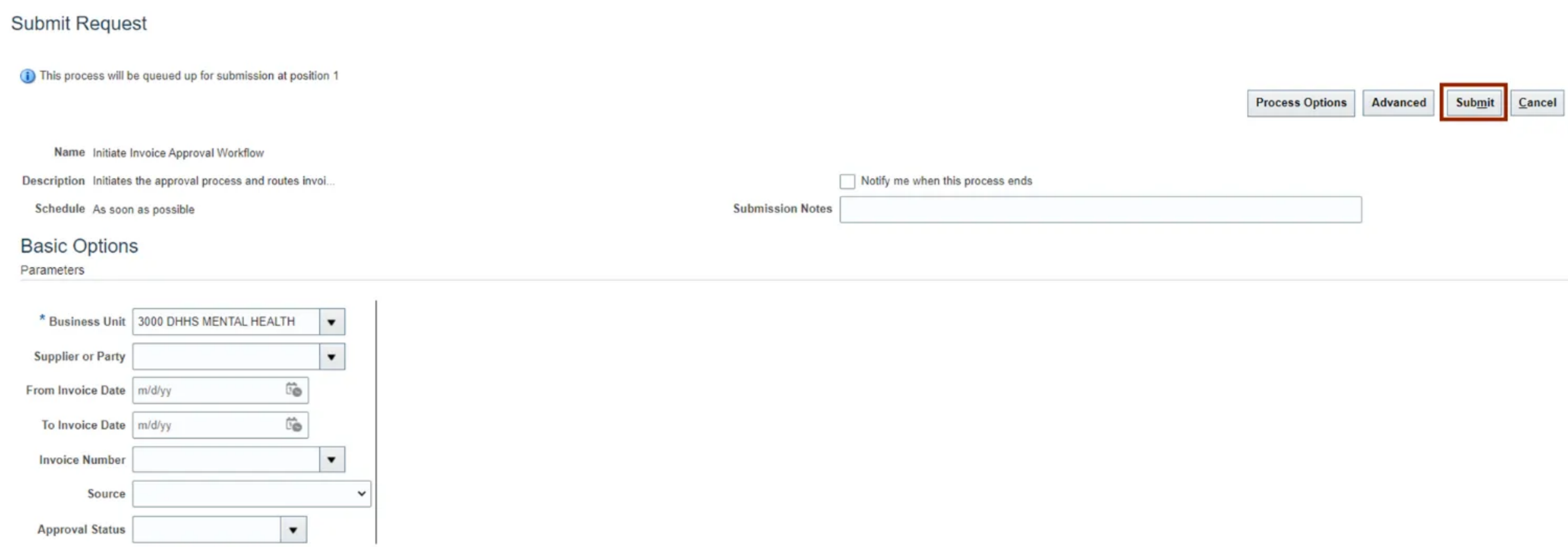
Step 3. The **Submit Request** page opens. On the ***Basic Options*** section, enter the required fields ***Business Unit***.

Image



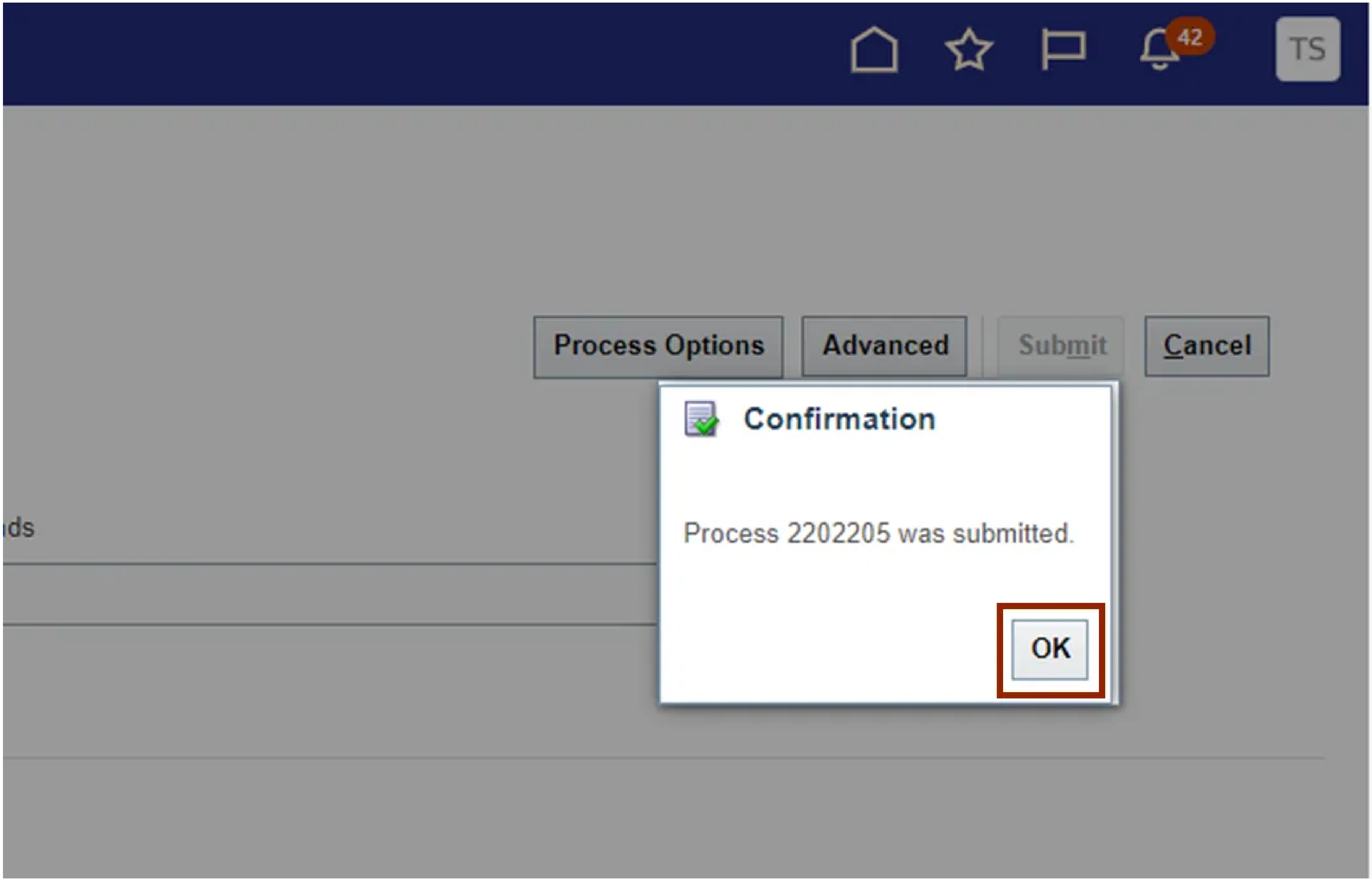
Step 4. Click the **Submit** button.

Image



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.

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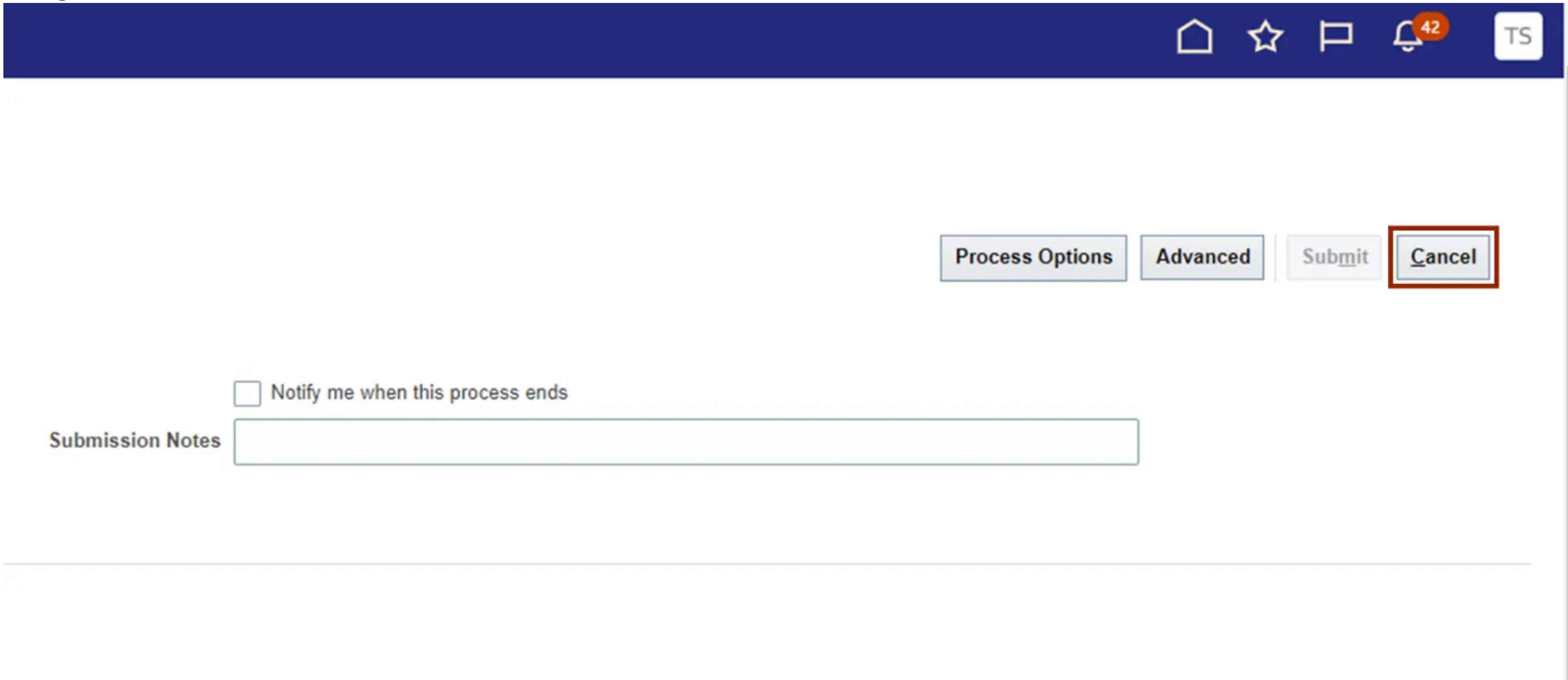
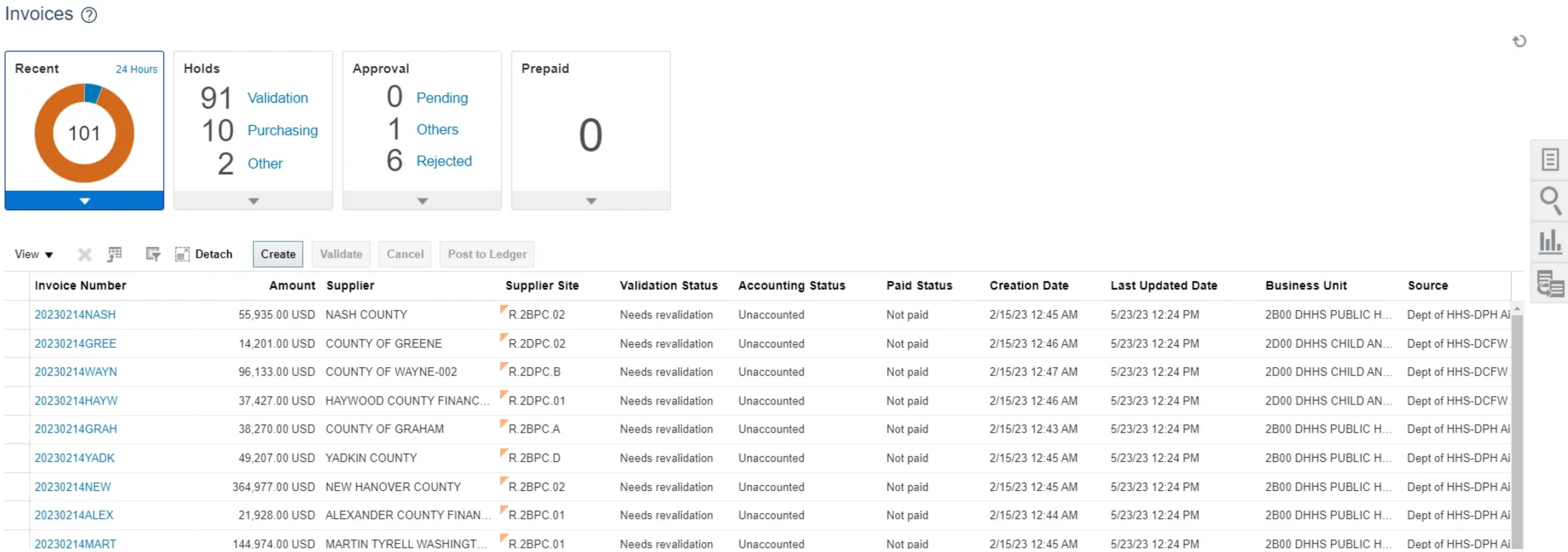


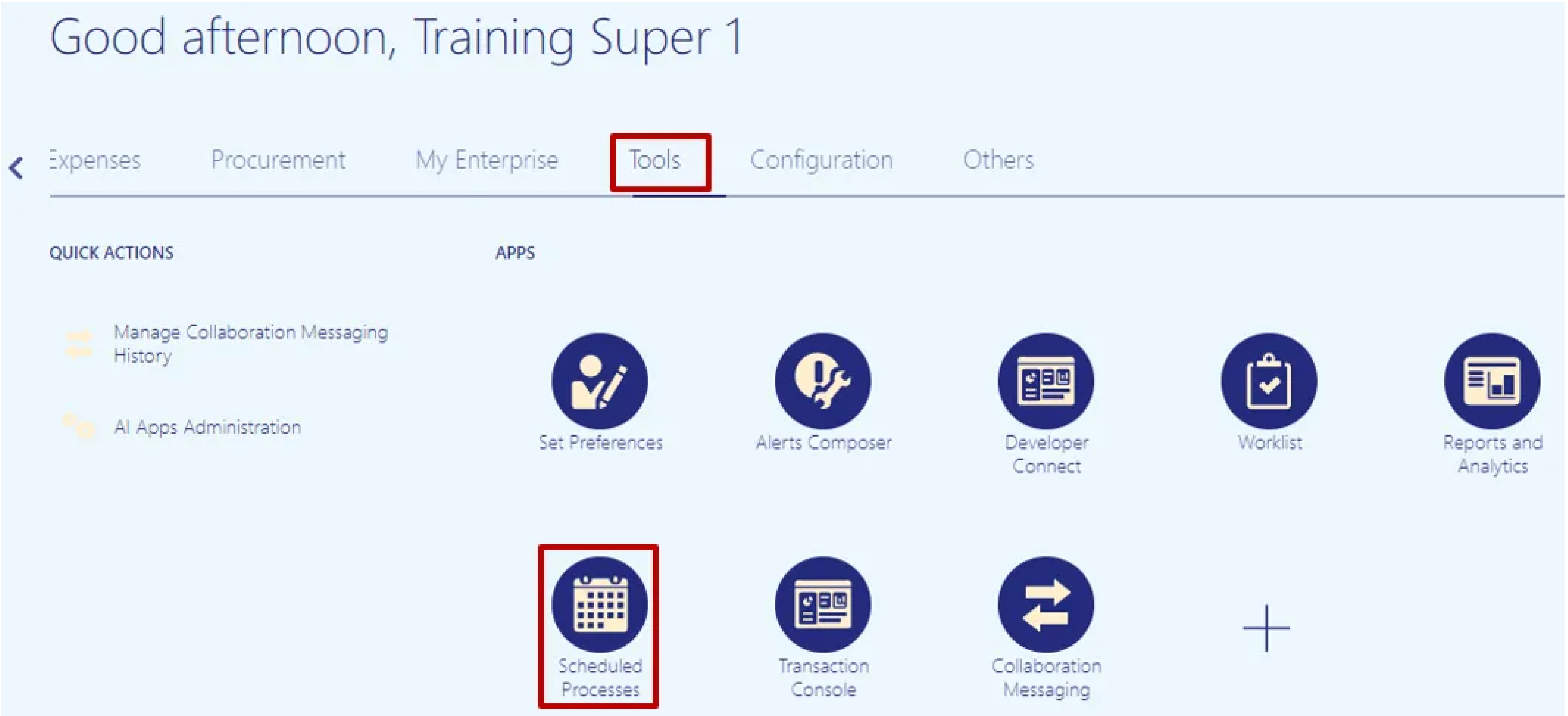
Step 7. You are now redirected to the **Invoices** page. Click on **Home** page.

Image



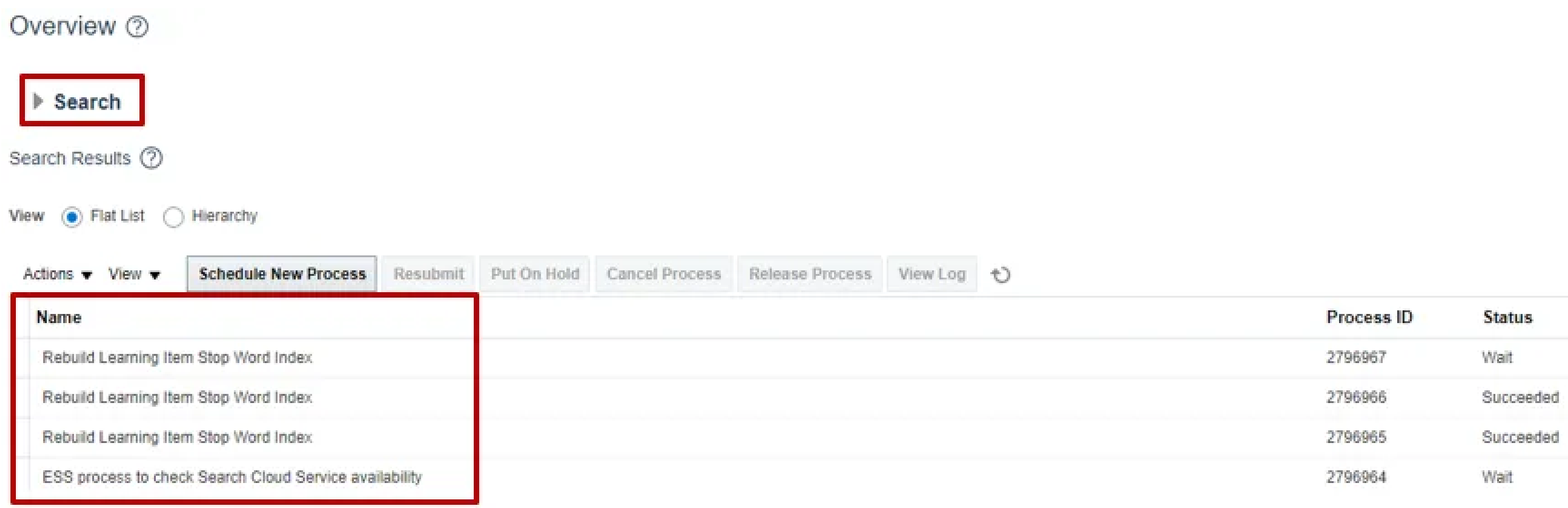
Step 8. Navigate to **Tools** application and click on **Scheduled Processes**. This is the step to find out the status of the Validate Invoice program.

Image



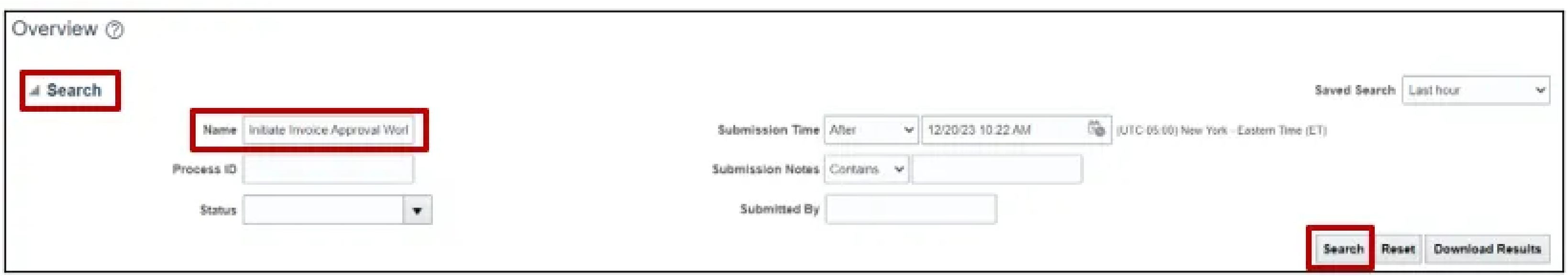
Step 9. The overview page is displayed and a list of all the processes are displayed. You can search for the process using the search criteria or scroll down and look for the process in the list.

Image



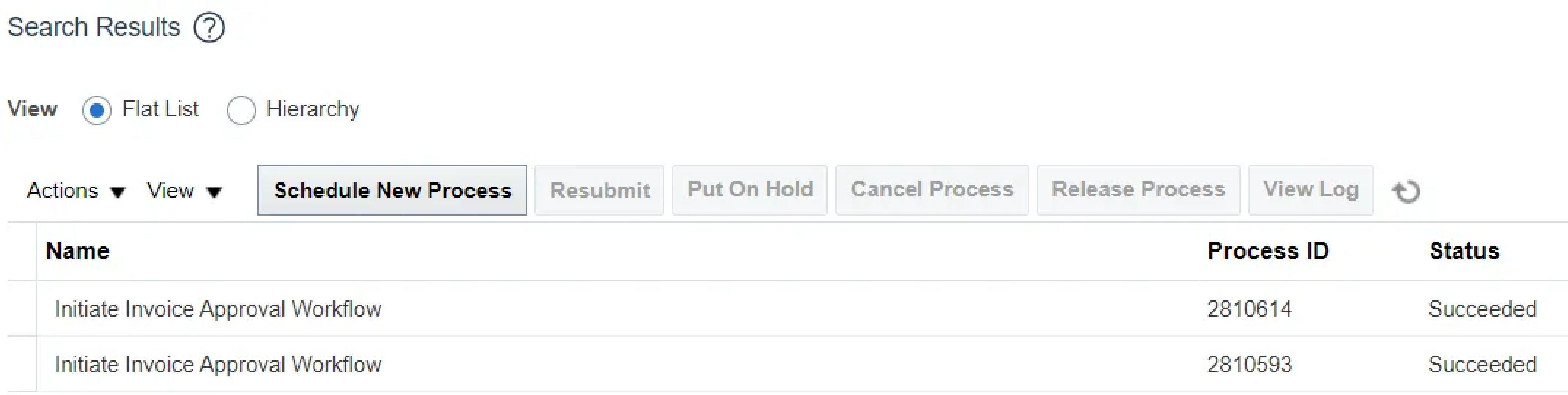
Step 10. Click the **Search** arrow and enter the search criteria. You can use several criteria like Name, Process ID or the Submission Time to inquire for the process status. The process name to search for is – **Initiate Invoice Approval Workflow**, click on **Search** button.

Image



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

Image



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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