Workflow Actions

Overview
This tip & technique is designed to explain some of the workflow actions and also some of the restrictions and consequences that arise when using them.

Scanned Invoice Workflow

Navigation
Accounts Payable > Vouchers > Scanned Invoices > Scanned Invoice Workflow

Pushback

The pushback function will push the scanned invoice back to the previous step. Comments are mandatory when performing the pushback. The thing to keep in mind when performing a pushback is that the invoice will always come back to you. A step that has a status of ‘Pushed Back’ is locked. In the example below, the Financial Delegate (Step 3) has pushed the invoice back to the Business Contact (Step 2). Even if the Business Contact selects a different Financial Delegate from the lookup box, the invoice will always go back to the one who pushed it back.

In a situation like this, if you want to select a different Business Contact or Financial Delegate to the one who has pushed back, you will need to ‘Restart’ the workflow to clear the status of the ‘Pushed Back’ step to ‘Not Routed’.

Restart

The restart function will terminate the current approval process and create a brand new approval thread starting from step 1 again. You are always able to see the previous approval thread by looking at the ‘Comment History’

Here you can see that this scanned invoice workflow has been restarted twice. Clicking on the ‘View History’ link will show you the previous approval thread and comments that were entered there (see over page).
Some reasons why you should restart the workflow:

- Any time that you want to start again from step 1 and have all steps approved again.
- If the previous approval steps were done in error you can restart the workflow over from step 1.
- If you have added any Purchase Order lines and want the matching/tolerance check to run over the invoice.
- If you ever see a ‘Skipped’ step. This means the workflow could not find any approvers for this step. This should not happen, but if you see this you should consciously select a Business Contact (step 2) or Financial Delegate (Step 3) and restart the workflow.

Deny

A scanned invoice should only be denied in a few circumstances.

- If you never intend on paying the invoice it should be denied with appropriate comments entered to enable F&BS staff to ascertain if the scanned invoice should be cancelled from the system.
- The invoice has already been paid (e.g. on Purchase Card)
- If the invoice is not for your Business Unit you can deny the invoice with appropriate comments entered to enable F&BS staff to try and redirect the invoice to the correct Business Unit.
- If the scanned invoice is not for you or your team, instead of denying you could try to reassign or change the team. If you have no idea who the invoice is for, then you should deny the invoice with appropriate comments. F&BS staff will then attempt to find the correct area and re-route the invoice to them.

Reassign

The reassign function transfers your approval of the pending step to another user. You are able to reassign to any users that are in any of the teams associated with the Business Unit of the Scanned Invoice. Reassign is usually only used when there are not ‘Multiple Approvers’ for a particular step.

A common use of reassign would be if you are the Financial Delegate and you realise that the invoice is actually above your delegation threshold – you can reassign the Financial Delegate step to a different Delegate.

Another use for the reassign function is if a user has gone on leave without setting an alternate user for the period of leave, then any team member can go into the scanned invoice and reassign the pending approval step to another staff member.
Insert an Additional Approver or Reviewer

After any step in the workflow you can insert an ad-hoc approver or reviewer. This is done by clicking on any of the green symbols between each of the steps. Inserting an additional approver means that this person must approve the inserted step for the invoice to continue through workflow (either by logging on or via a Collaborative Email).

Inserting an additional reviewer on the other hand does not stop the workflow at the review step awaiting any user actions. A reviewer will receive a notification email that an invoice has been flagged for their review and it will include a link to the workflow but the reviewer does not need to perform any actions for the workflow to continue. It can be seen as a way of notifying users that approval steps have been performed. You can insert any employee in the University that has access to the AP scanned invoice Workflow. In this way approvals can be sought from other areas/Business Units/Colleges in the University.

After inserting an ad-hoc approver or reviewer make sure that you save the page using the save button below the workflow diagram. Failing to do this will result in your inserted approvers/reviews disappearing.

The submit button is usually greyed out for the entire workflow. The button will become active if an invoice is ‘denied’. In this way, if an invoice is accidentally denied, you can hit the submit button which will resubmit the invoice into the workflow at step 1. Another time the submit button becomes active is when the invoice is in a ‘Completed’ state. An invoice will enter a Completed state when all approval steps have been approved but a voucher has not yet been created.

Essentially, the approve button pushes the scanned invoice to the next step in the workflow. Make sure you have entered all the information you need to before approving and routing the invoice to the next step.
Starting a new path allows another separate stream of approval to be initiated while the other approval path is still in workflow. The two paths can be approved simultaneously but act exclusively. To enable a voucher to be created all approval paths must be complete.

This allows approval paths to go to completion without having to wait for approvals in the other path to move forward. Common uses are when an invoice has charges for multiple areas on the same invoice and therefore needs approval from many users. In the example above, the first Business Contact was selected the normal way for the initial path. Additional users were inserted as new paths.

For further information on AP Scanned Invoice Workflow please use the following link:

https://services.anu.edu.au/financial-management/transactional-services/reimbursements