Collaborative Email Approvals

Infrequent users of ES Financials will be able to approve/update Scanned Invoices directly from an email, without needing to log onto ES Financials. There are some restrictions in functionality when using Collaborative Email which are detailed below. As there are a wide variety of operating systems, email clients and browsers in use, the different configuration of these can also affect the operation of the collaborative email.

The collaborative email has form elements which you may be able to view and update directly in your email client, or you may need to view using a browser directly.

Restrictions that should be considered when using Collaborative Email

There are a number of issues and restrictions that come with using the collaborative email functionality compared to logging into the system. If any of the restrictions below will cause problems it is advised that you should change to logging into the system to take advantage of the increased functionality.

- You need a default email client installed and set as the default (e.g. Outlook, Thunderbird, AppleMail etc). If you use WebMail and do not have a default email client set or your browser configuration is not set to send mail with the incoming/outgoing mail servers then the collaborative email approvals will not work.

- You cannot upload any attachments against the invoice or view any of the attachments that may have previously been uploaded.

- You cannot insert any additional ad-hoc approvers

- When using the ApprovalForm.html you cannot use any special characters (&, #, @ etc) also double space can cause issues. The workflow views these special characters as an escape character and the encrypted string that is formed in the email can be truncated and fail to complete the approval

- Some users have had issues where the email is created in HTML format and some characters are converted to their corresponding HTML code (e.g. “ = &quot; or double space can convert one of them to &nbsp;) This causes the approval to fail. Creating or converting the email which is sent to plain text can help stop this problem.

- Some combinations and configurations of Operating System/Email Client/Web Browsers just do not work. It depends on the configuration of each of the components as to how they interact together.

- Prior comments that are shown at the top of the collaborative email are limited to 254 characters, so longer/multiple comments can be truncated.
Email Content

A collaborative email will have the following content in the form of attachments:

- PDF copy of the scanned invoice
- HTML version of the email response form

The collaborative email will contain some text which cannot be updated and some fields which can be updated, along with some drop down list choices and a submit push button.

Scanned Invoice Completion/Workflow

Workflow Step 3 Financial Delegate. You are the only user eligible to approve this workflow step.

Prior Comments: Some/more of the items on this invoice have been received. Please approve if goods have been delivered. SJF, Clements, R.

Please open the PDF attachment to review the scanned invoice details, then if it belongs to you review the coding, and update the appropriate fields and submit the changes.

(1) Prior Comments – Any comments entered by previous approvers in the workflow will appear here. It is critical to look for these comments as there may be important information here from previous approvers in the workflow.

(2) Description – This is the description that will show in the ledger and any associated reports.

(3) Chartfields – This is where the general ledger code (charge code) information is entered. These include Fund Code (i.e. R,Q,S,T), Department (i.e. 42510, 54300) and Project ID (i.e. 01,PM).

(4) OK to Process – Select the appropriate option for whether to process this invoice or not. It is intended to provide a reason code for processing this transaction (OK – Goods/Services Received, Dispute Invoice, Hold – do not process, Not OK to Pay).

(5) Financial Delegate – Should contain a list of user names who have been nominated as possible financial delegates for the Scanned Invoice Team. The correct Financial delegate for the invoice should be chosen.

(6) Action – What action do you want to take for this scanned invoice (Approve, Deny, Pushback, Update/Comment). Note that if you select update/comment then the invoice will still be pending your approval and will need to be actioned again to move it along in the workflow.

(7) Comments – Add comments that can be seen by future workflow approvers. Comments will always be viewable to those that log on and can also be seen at the top of the future collaborative emails.

(8) Submit – When you are ready to submit your approval press the submit button.

Once you have updated the appropriate fields then press the **Submit** push button.

The system will take on average 15 minutes to reflect your changes in the ES Financials system. You will only receive a response email if your actions could not be processed. Reasons for this can be that your approval has already been received or the approval was actioned online.

**Accessing the Email Form**

Email Clients may display the email content in different ways. You may need to view the email differently in order to get the Form in a state where you can enter data and have the Submit button enabled. These should be attempted with the following preferences.

1. **Directly in Email** - If the email client supports viewing the email directly in the email then the input fields/drop down lists/pushbuttons are enabled. This means you can interact directly with the email and respond. Works in the following email clients: Thunderbird, Microsoft Office 2003 (not 2007 or 2010), iPhone Mail, Apple Mail

2. **View message in browser/unblock content** - If the email client has a message about the content not being able to display properly then can use the option to display in a browser or show hidden content and update from there – usually works with Outlook but you may need ActiveX controls enabled in your browser.

**Microsoft Office 2010**

3. **Using the HTML form.** If their client does not allow any of these options or is having issues submitting using the other options then you will need to Open the ‘ApprovalForm.html’ attachment, edit it in the browser and submit from there.  

   Please note that when using this HTML form option then **please do not use special characters such as & # and * in the comments or other input fields.** Doing so will cause an error.

**Responding to the Email Form**

After entering the relevant information, click **Submit**

Depending on your email client you may need press ‘send’ for the drafted email, which will contain an encrypted string of characters as below:

Otherwise if using the ‘View in Browser’ option you will need to accept messages about allowing mail to be sent on your behalf. This will send from your default email client.
If you can not update the approval in the collaborative email

There are certain things that the collaborative email form will NOT be able to do.

- Add or view additional attachments
- Search for Purchase Order/Receipt information
- Provide ability to split the invoice to further lines than is available in the email
- Validation of data entered - it does not allow you to search for valid values for GL codes, so please take care to enter appropriate values
- Reassign the current workflow step to a different user.
- Insert an adhoc approver.

In this circumstance you have the following options

- Update/Approve the transaction online.
- Push back to the previous approver and provide comments providing the details of what you want changed. Please note that pushing a transaction back will mean that once they fix the data it will come back to you directly (not to the group of approvers) – you will then need to approve the changes made.
- Update the comments with what you need changed and approve the step – allowing the future approver/administrator to update the data for you.
- Or use the hyperlink provided in the email to log onto the system and update the transaction yourself. You will need to log onto ES Financials using your ES password.

Where can I find more information?

A Video Demonstration of Approving a Non-PO Invoice via collaborative email approvals can be found on the following page, as well as more in depth documentation on the AP Workflow Module: