

Business Process	Navigation
<ol style="list-style-type: none"> <li>1. Submit vouchers for workflow using online voucher page (one at a time).</li> <li>2. Submit vouchers for workflow using batch process</li> </ol>	<ol style="list-style-type: none"> <li>1. Main Menu &gt; Finance Navigation &gt; <b>Accounts Payable &gt; Vouchers &gt; Add/Update &gt; Regular Entry</b></li> <li>2. Main Menu &gt; Finance Navigation &gt; <b>Accounts Payable &gt; Vouchers &gt; Approve &gt; Request Voucher Batch</b></li> </ol>

Process 1: Use the following navigation to submit vouchers one at a time for voucher workflow approval.

1. Before a voucher can be submitted for workflow approval it has to be ready for approval. Depending on the voucher style – PO related or non-PO vouchers – there might be different processes required. But the processes that occur prior to voucher workflow submission include Budget Checking, and Matching.
2. From the Main Menu page, select **Accounts Payable > Vouchers > Add/Update > Regular Entry**.

3. Click on the Find an Existing Value tab, and enter search criteria in order to find the voucher you want to submit.

**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: = 62500

Voucher ID: begins with

Invoice Number: begins with

Invoice Date: =

Short Vendor Name: begins with

Vendor ID: begins with

Name 1: begins with

Voucher Style: =

Related Voucher: begins with

Entry Status: =

Voucher Source: =

Case Sensitive

Search    Clear    Basic Search    Save Search Criteria

- Use criteria such as **Business Unit, Invoice Number, Invoice Date, Voucher ID, Short Vendor Name, Vendor ID** to narrow your search.
- Once you obtain the desired voucher, from the **Summary** page review the data. **Budget Status** must be **Valid**. **Match Status** should either be **No Match** or **Matched**. **Approval Status** should be **Pending**.
- Click on the **Invoice Information** tab.

**Summary    Related Documents    Invoice Information    Payments    Voucher Attributes    Error Summary**

Business Unit: 62500    Invoice No: HGJ554545D    Action: [Dropdown]

Voucher ID: 00002153    Invoice Date: 05/02/2013

Voucher Style: Regular Voucher    Accounting Date: 06/12/2013    Run

Vendor ID: 0000017158    INDRYTEC    [Session Defaults](#)

ShortName: INDRYTEC-001    17 WASHINGTON AVE N, STE 500    [Attachments \(0\)](#)

Location: DEFAULT    MINNEAPOLIS, MN 55401    [Comments\(0\)](#)

\*Address: 1    [Preview Approval](#)

[Advanced Vendor Search](#)

Control Group: 0000000132    \*Pay Terms: 00    0 Days

Invoice Lines: 4361.76    Basis Date Type: User Date

\*Currency: USD    [Non Merchandise Summary](#)

Miscellaneous:    [Print Invoice](#)

Freight:    [Submit For Approval](#)

Total: 4,361.76

Difference: 0.00    [Calculate](#)

**Copy From Source Document**

PO Unit:    [Copy PO](#)

PO Number:    [Go](#)

Copy From: None

**Invoice Lines**    Find | View All | First | 1 of 1 | Last

Line: 1    Item:    UOM:    Quantity:

\*Distribute by: Amount    Unit Price:    Line Amount: 4,361.76

Ship To: 200121    Description: TEMP WORKERS

- Click on the **Submit for Approval** button.

**Approval Comments**

Business Unit: 62500  
 Voucher ID: 00002153  
 Additional Details: [Empty text box]

OK Cancel Refresh

8. Enter any additional comments you would desire the approver to see in the **Additional Details** box.
9. Click **OK**.

**Approval Summary**

Business Unit: 62500  
 Voucher ID: 00002153

**Approve vouchers without PO\_ID**

**BUSINESS\_UNIT=62500, VOUCHER\_ID=00002153:Pending**

Approve vouchers without PO\_ID

```

    graph LR
      A[Skipped  
No approvers found  
Accountant Approver] --> B[Pending  
Mary Engel  
Payables Staff Approvers]
      B --> C[Not Routed  
Sun Wisneski  
Payables Supervisor Approval]
    
```

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

[Summary](#) | [Related Documents](#) | [Invoice Information](#) | [Payments](#) | [Voucher Attributes](#) | [Error Summary](#) | [Approval Summary](#)

10. The approval routing will display and this voucher will be added to the appropriate person(s) worklist ready for the approver(s) to take action.
11. Note: You can also navigate to Main Menu > Finance Navigation > **Accounts Payable > Vouchers > Approve > Approval Framework – Vouchers** to submit a voucher to workflow. Accomplishes same submission as shown above just using a different source page.

Process 2: Use the following navigation to submit vouchers through a batch process that will submit multiple vouchers at one time.

12. Navigate to: Main Menu > Finance Navigation > **Accounts Payable > Vouchers > Approve > Request Voucher Batch**.

13. If this is the first time you are running the process you may need to create a run control id. If you have already created one then you can search or type in the name previously used. You do not have to create a run control id for each separate process you run; however, if you will run the same process repeatedly it is a good idea to have a dedicated run control for that process with the settings already set up.
14. You will access the page with the **Find an Existing Value** tab displayed. Click on the **Add a New Value** tab if you are adding a new run control id; otherwise, stay on the **Find an Existing Value** tab to use one previously created.
15. Enter a **Run Control ID** = VOUCHER\_APPROVAL (id cannot have any spaces in it so use the underscore instead of a space).
16. Click **Add** or **Search**. If click Search you do not have to enter the run control id first as you can select it from the search list that will appear at the bottom of the page.

17. You are on the **Voucher Approval Workflow** run control page now. No parameters are required for this process. Any vouchers that are ready to be submitted (have Budget Status = Valid, Match Status = No Match or Matched) will get submitted.
18. Click **RUN**.

Favorites Main Menu > Accounts Payable > Vouchers > Approve > Request Voucher Batch

### Process Scheduler Request

User ID: VP1 Run Control ID: VOUCHER\_APPROVE

Server Name: PSUNX Run Date: 06/17/2013  
 Recurrence: Recurrence Run Time: 11:21:44AM  
 Time Zone: Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	APVCHAPR	APVCHAPR	PSJob	(None)	(None)	<a href="#">Distribution</a>
<input checked="" type="checkbox"/>	Voucher Approval Framework	VCHR_APRV_AF	Application Engine	Web	TXT	<a href="#">Distribution</a>
<input type="checkbox"/>	Voucher Approval Workflow	VCHR_APRV_WF	Application Engine	Web	TXT	<a href="#">Distribution</a>

OK Cancel

19. Select the **Voucher Approval Framework** process by clicking in the **Select** column for that process (VCHR\_APRV\_AF).
20. Then click **OK** to execute the process.
21. You will return to the **Voucher Approval Workflow** page and you can click on the **Process Monitor** hyperlink to check the status of the process. For help with **Process Monitor**, see separate Quick Reference Guide for **Process Monitor**.
22. After the job successfully completes, the vouchers included in the process will have been added to the appropriate approver(s) worklist.