Service Invoice Approval Process

Form or Screen: Infor Lawson: Inbasket Process Flow - Invoice/Req Approval

Business Use: A purchase order is designated as either for goods or services. When an order for services is fulfilled, the invoice from the vendor is routed to the designated “Approver” with budget oversight responsibilities for the accounting location. The Approver is responsible to review the invoice for accuracy and allowable expenditure and choose to either Approve, or Reject the invoice for payment. Only Approved invoices can progress forward for processing of payment to a vendor.

Tips and Best Practices:
- When set up as a new approver, ensure e-mails are not being sent to your spam file.
- Some approvers set up rules in Outlook to have approval e-mails sent to a special folder that they can monitor daily.
- Best practice is to review the Inbasket at least weekly.

1. Designated Approver for a school or department accounting location will receive an e-mail notification that an invoice is waiting for approval.

2. If an invoice is not approved within 3 days, a reminder is sent to the Approver.

3. The approver can access the Inbasket Process Flow Integrator directly by logging into Lawson, or through the link within the notification e-mail.
4. Log into Infor Lawson using your normal DPS login and password.

5. Click the globe icon. The icon will turn blue when successfully entered into Infor Lawson.

6. Expand the Bookmarks by clicking the down arrow. Click the lawprod next to the Inbasket.

7. Work tasks can be accessed by clicking either the My Tasks or My Work.

   Recommendation is to click the My Tasks link.
8. The number of tasks or work items pending review will be displayed for each role assigned to the individual approver. Most approvers will either have the role of Principal or Department Head. There may be multiple roles within Facilities. To view the tasks, double click either the role name or the work items next to the name.

9. All Invoices awaiting approval will be with Invoice in the description and include the invoice number followed by the vendor number.
10. Placing the cursor on the invoice number line to be reviewed will display basic invoice information below.

11. Double click the invoice/vendor number in order to display action options and review additional invoice details.

12. Additional information is available for review by clicking any item that is underscored.

13. An invoice image can be viewed by clicking the Invoice number from the Invoice Information screen.
14. Click the Invoice Image icon on the resulting screen.

15. Click the Open hyperlink once the URL address is populated.

16. Click the “FileNexus” pane displayed.

17. The Username and Password as noted below are typed in lower case and are the same for all users.

   **UserName:** scan
   **Password:** scanner
18. If an error message is received, make sure pop-up blockers are turned off.

19. Click the PDF icon (middle Action button.)

20. Click the “Cancel” button on the next dialogue screen.

21. The scanned invoice image will be displayed for review along with any other supporting documents provided with the invoice.
22. Click the X in the red exit boxes to back out of the invoice image and FileNexus screens.

23. Following are actions specific to: Approve an Invoice or Reject an Invoice.

Approve An Invoice

24. To approve an invoice, click Approve button on the action bar above the invoice details.

No further dialogue boxes will appear.
25. Click **My Tasks** to return to work unit tasks and continue to review invoices.

26. Continue reviewing remaining invoices following steps 8 through 23.

27. It is important to **FIRST** enter a message related to the action taken.

Before taking any action, select the “Messages” option above the invoice details.

---

**Reject An Invoice**

When the Approver determines that an invoice should not be paid, the action selected would be “Reject”. An invoice should be rejected if, the amount invoiced by the vendor is incorrect; the vendor did not complete the services per their contract; or the invoice is paying against the wrong purchase order.
<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>28.</td>
<td>Select <strong>Create</strong> under the Actions pull down menu, or click the <strong>Create icon button</strong>.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>29.</td>
<td>Complete the following steps to create a message.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.</td>
<td>Enter information in the <strong>Subject</strong> box.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.</td>
<td><strong>Message</strong> field is free form so message entered is at the discretion of the approver.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C.</td>
<td>Once message is entered, click <strong>SAVE</strong> icon. A message of “Create Completed Successfully” will appear briefly.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D.</td>
<td>Click <strong>the back button</strong> to return to the invoice.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
30. To reject an invoice, click **Reject** button on the action bar above the invoice details.

No further dialogue boxes will appear.

31. Click **My Tasks** to return to work unit tasks and continue to review invoices.

32. Continue reviewing remaining invoices following steps 8 through 23.