



INITIATE INVOICE APPROVALS

QUICK REFERENCE GUIDE AP-08

AP

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**).

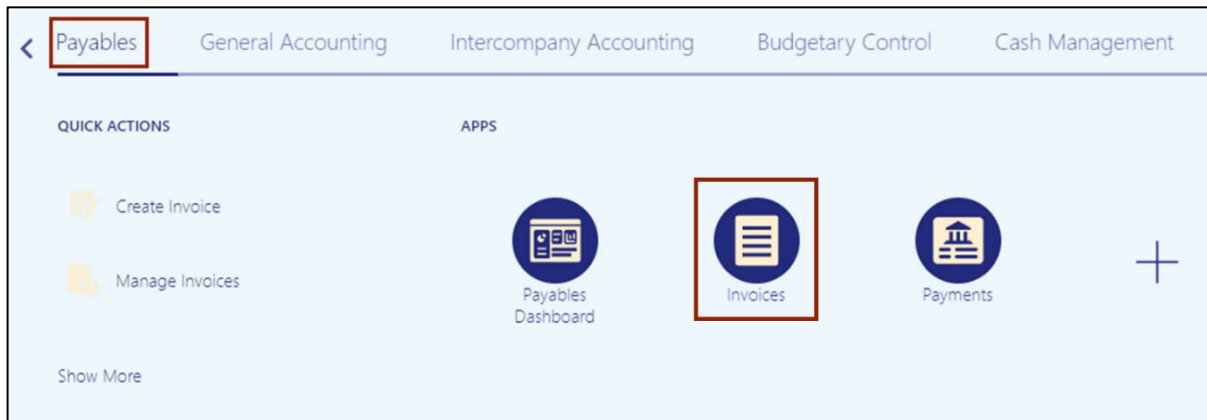
Introduction and Overview

This QRG covers the steps to initiate approval for single invoice and initiate approval for multiple invoices.

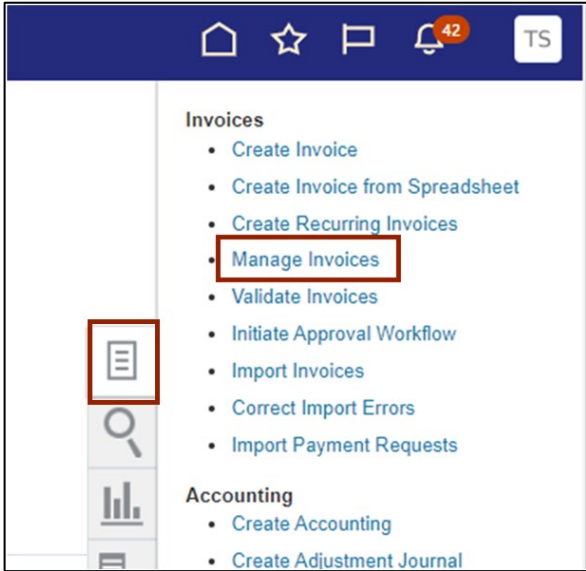
Initiate Approval for single Invoice

To Initiate Approval for single Invoice in NCFS, please follow the steps below:

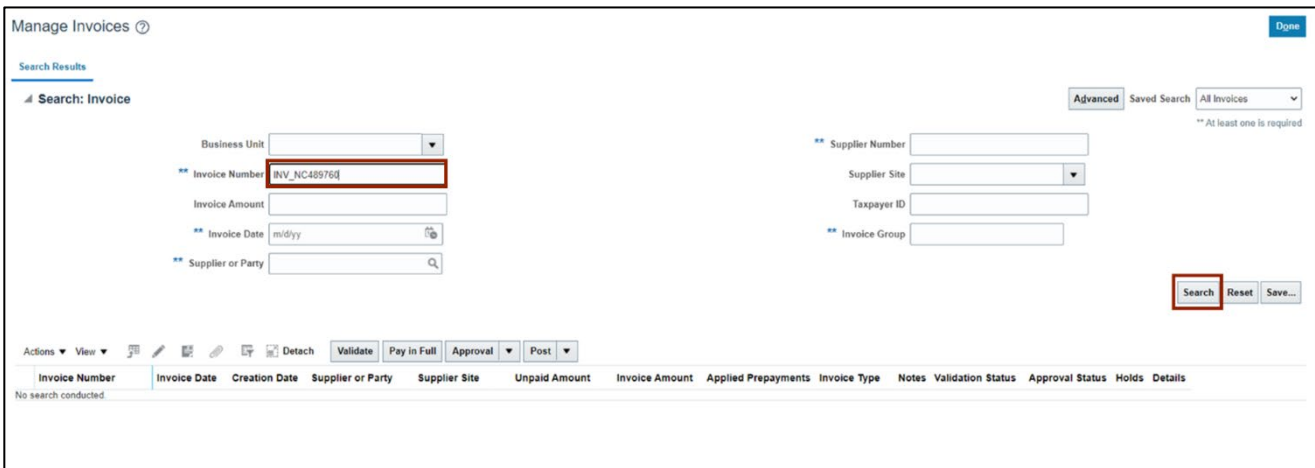
1. Log in to the NCFS portal with your credentials to access the system.
2. Click the **Payables** tab. Click the **Invoices** app.



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



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



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

The screenshot shows the 'Manage Invoices' page with a search filter for 'Invoice'. The 'Actions' dropdown menu is open, and the 'Approval' option is selected, which has opened a sub-menu where 'Initiate' is highlighted. The background table shows invoice details for 'CENTRAL POLY BA...' with an unpaid amount of 200.00 USD.

Invoice Number	Creation Date	Supplier or Party	Supplier Site	Unpaid Amount	Invoice Amount
INV_NC489760	5/8/23 10:07 AM	CENTRAL POLY BA...	R.19PT.01	200.00 USD	200.00 USD

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

This screenshot shows the same invoice table as above, but the 'Approval Status' column for the invoice 'INV_NC489760' is now 'Initiated', which is highlighted with a red box. The 'Validation Status' is 'Validated'.

Invoice Number	Inv Creation Date	Supplier or Party	Supplier Site	Unpaid Amount	Invoice Amount	Applied Prepayments	Invoice Type	Source	Notes	Validation Status	Approval Status	Ho Paid Status	Business Unit
INV_NC489760	5/8 5/8/23 10:...	CENTRAL POLY BA...	R.19PT.01	200.00 USD	200.00 USD	0.00 USD	Standard	Manual Invoice Entry		Validated	Initiated	0 Not paid	1900 DEPARTM... U

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

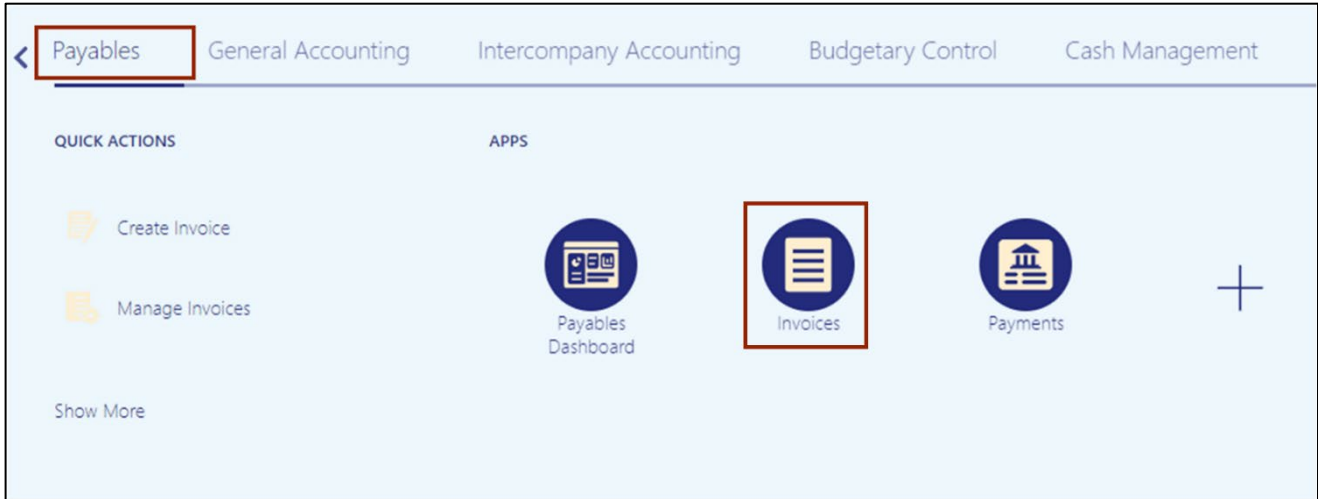
7. Scroll to the top of the **Manage Invoices** page and click the **Done** button.


The screenshot shows the mobile app interface with a dark blue top navigation bar containing icons for home, star, flag, notifications (42), and a user profile icon (TS). A 'Done' button is highlighted with a red box in the top right corner of the main content area.

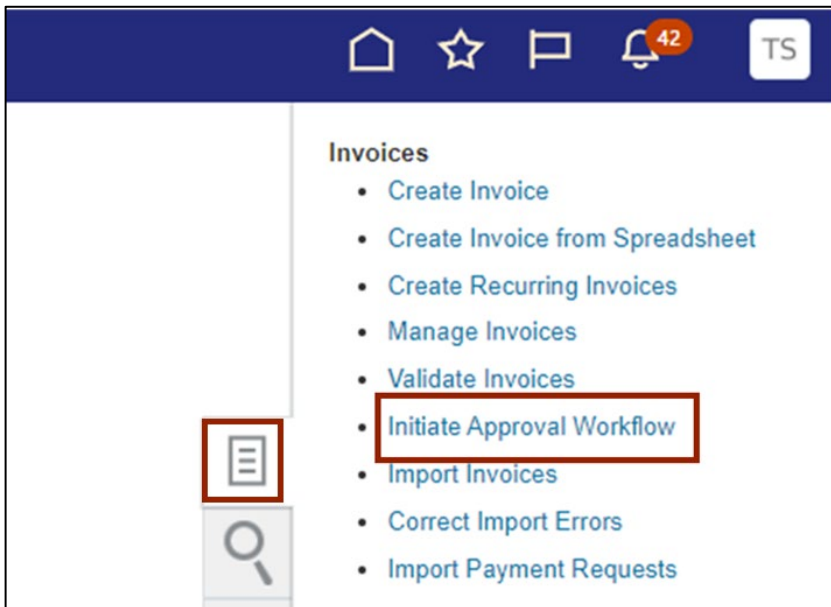
Initiate Approval for multiple Invoices

To Initiate Approval for multiple Invoices in NCFS, please follow the steps below:

1. Click the **Payables** tab. Click the **Invoices** app.



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



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

Submit Request

i This process will be queued up for submission at position 1

Name Initiate Invoice Approval Workflow
Description Initiates the approval process and routes invo...
Schedule As soon as possible

Basic Options

Parameters

* Business Unit 3000 DHHS MENTAL HEALTH ▼

Supplier or Party ▼

From Invoice Date

To Invoice Date

Invoice Number ▼

Source ▼

Approval Status ▼

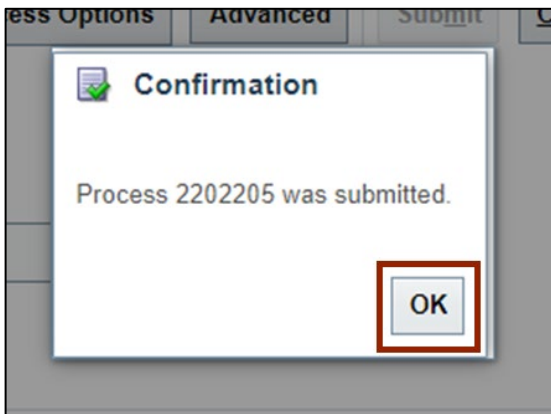
- Click the **Submit** button.

Process Options Advanced Submit Cancel

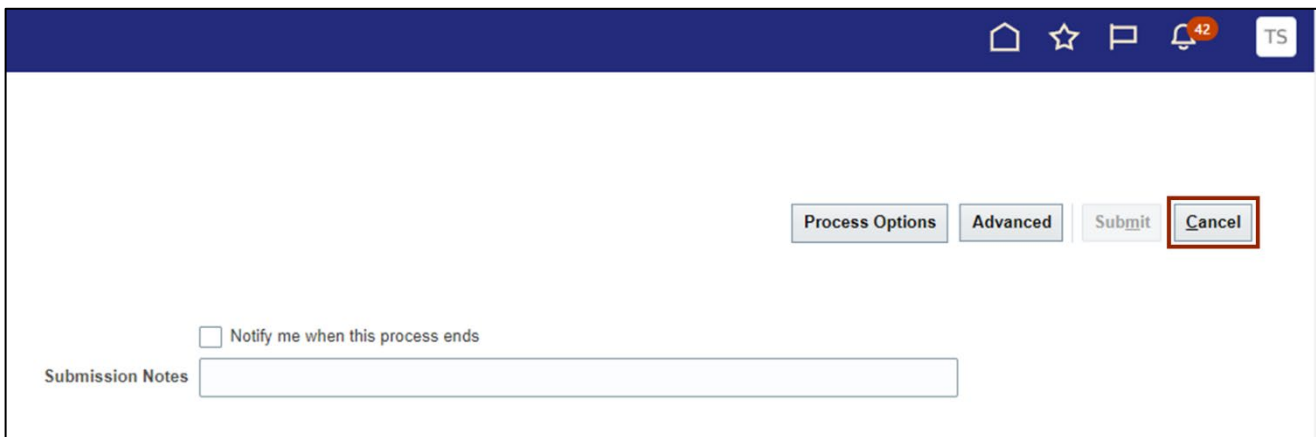
Notify me when this process ends

Submission Notes

5. The *Confirmation* pop-up appears. On the *Confirmation* pop-up, click the **OK** button.



6. On the **Submit Request** page, click the **Cancel** button. The Invoice Approval workflow is initiated and the Invoices are submitted.

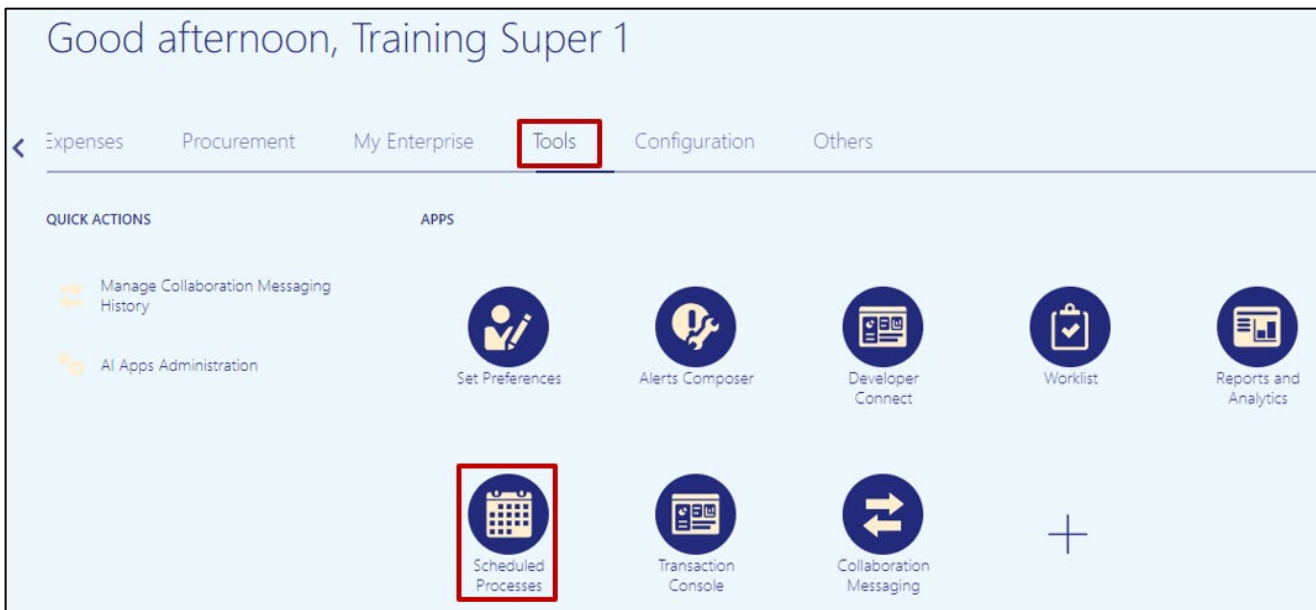


7. You are now redirected to the **Invoices** page. Click on **Home** page.

The screenshot shows the 'Invoices' page with a summary dashboard and a table of invoice items. The dashboard includes a 'Recent' donut chart showing 101 invoices, and four summary boxes for 'Holds', 'Approval', and 'Prepaid'.

Invoice Number	Amount	Supplier	Supplier Site	Validation Status	Accounting Status	Paid Status	Creation Date	Last Updated Date	Business Unit	Source
20230214NASH	55,935.00 USD	NASH COUNTY	R.2BPC.02	Needs revalidation	Unaccounted	Not paid	2/15/23 12:45 AM	5/23/23 12:24 PM	2800 DHHS PUBLIC H...	Dept of HHS-DPH Ai
20230214GREE	14,201.00 USD	COUNTY OF GREENE	R.2DPC.02	Needs revalidation	Unaccounted	Not paid	2/15/23 12:46 AM	5/23/23 12:24 PM	2000 DHHS CHILD AN...	Dept of HHS-DCF
20230214WAYN	96,133.00 USD	COUNTY OF WAYNE-002	R.2DPC.B	Needs revalidation	Unaccounted	Not paid	2/15/23 12:47 AM	5/23/23 12:24 PM	2000 DHHS CHILD AN...	Dept of HHS-DCF
20230214HAYW	37,427.00 USD	HAYWOOD COUNTY FINAN...	R.2DPC.01	Needs revalidation	Unaccounted	Not paid	2/15/23 12:46 AM	5/23/23 12:24 PM	2000 DHHS CHILD AN...	Dept of HHS-DCF
20230214GRAH	38,270.00 USD	COUNTY OF GRAHAM	R.2BPC.A	Needs revalidation	Unaccounted	Not paid	2/15/23 12:43 AM	5/23/23 12:24 PM	2800 DHHS PUBLIC H...	Dept of HHS-DPH Ai
20230214YADK	49,207.00 USD	YADKIN COUNTY	R.2BPC.D	Needs revalidation	Unaccounted	Not paid	2/15/23 12:45 AM	5/23/23 12:24 PM	2800 DHHS PUBLIC H...	Dept of HHS-DPH Ai
20230214NEW	364,977.00 USD	NEW HANOVER COUNTY	R.2BPC.02	Needs revalidation	Unaccounted	Not paid	2/15/23 12:45 AM	5/23/23 12:24 PM	2800 DHHS PUBLIC H...	Dept of HHS-DPH Ai
20230214ALEX	21,928.00 USD	ALEXANDER COUNTY FINAN...	R.2BPC.01	Needs revalidation	Unaccounted	Not paid	2/15/23 12:44 AM	5/23/23 12:24 PM	2800 DHHS PUBLIC H...	Dept of HHS-DPH Ai
20230214MART	144,974.00 USD	MARTIN TYBELL WASHINGT...	R.2BPC.01	Needs revalidation	Unaccounted	Not paid	2/15/23 12:45 AM	5/23/23 12:24 PM	2800 DHHS PUBLIC H...	Dept of HHS-DPH Ai

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



- 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.

Overview ?

Search

Search Results ?

View Flat List Hierarchy

Actions View **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log ↻

Name	Process ID	Status
Rebuild Learning Item Stop Word Index	2796967	Wait
Rebuild Learning Item Stop Word Index	2796966	Succeeded
Rebuild Learning Item Stop Word Index	2796965	Succeeded
ESS process to check Search Cloud Service availability	2796964	Wait

- 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.

Overview ?

Search

Name **Initiate Invoice Approval Work**

Submission Time After 12/20/23 10:22 AM (UTC-05:00) New York - Eastern Time (ET)

Submission Notes Contains

Submitted By

Saved Search Last hour

Search Reset Download Results

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

Search Results ?

View Flat List Hierarchy

Actions View **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log ↻

Name	Process ID	Status
Initiate Invoice Approval Workflow	2810614	Succeeded
Initiate Invoice Approval Workflow	2810593	Succeeded

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