



MTU

Ollscoil Teicneolaíochta na Mumhan
Munster Technological University

INVOICE APPROVAL MANUAL

Business World (M7)

This manual will allow you to approve and reject invoices on Business World (M7)

Email Notification

When an invoice is ready for your approval, you will receive an email alerting you that there is a new item in your task list for approval. This email will also contain a link to Agresso Web.

Opening BWO M7 on the Web

1. Open your internet browser and go to

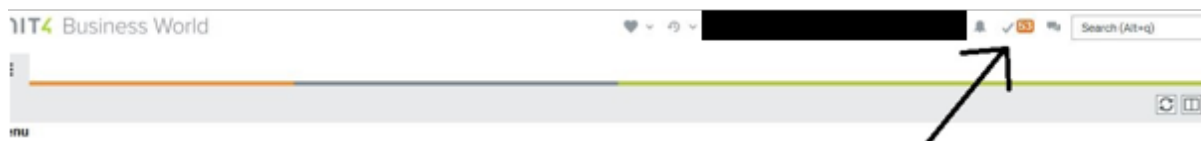
https://ubw.unit4cloud.com/ie_mtu_prod_web

Sign in will be via SSO and Microsoft Authentication.

Tasks Area

When there are invoices awaiting approval, they will appear in the 'Your tasks' area on the BWO Web portal.

In the top right corner of the screen, look for a tick mark with a number highlighted in orange. Click into this and use the drop down to select an invoice. Purchase order invoices will be listed individually, supplier invoices will be grouped into one task.



Purchase order invoices will display the requisition name and number as well as the transaction number and order number. If the full details are not viewable on the menu, hover over the task and the hidden text will be displayed. Full details are also viewable on the task management screen (see task management at the end of this document)

Invoice Approval view

The list of tasks is displayed on the left-hand side of the screen. These can be sorted either Ascending or Descending by supplier, amount, currency, due date, invoice number etc. Selecting the two arrows at the top minimises the task list and gives you a full view of the invoice details.

Sort by Ascending <<

☐ Select all visible items

☐ Supplier: [REDACTED]
 Curr. amount: 145.66
 Currency: EUR
 Due date: 11/13/2019
 InvoiceNo: [REDACTED]
 TransactionNo: [REDACTED]


☐ Supplier: [REDACTED]
 Curr. amount: 265.68
 Currency: EUR
 Due date: 11/15/2019
 InvoiceNo: [REDACTED]
 TransactionNo: [REDACTED]


☐ Supplier: [REDACTED]
 Curr. amount: 62.67
 Currency: EUR
 Due date: 11/20/2019
 InvoiceNo: [REDACTED]
 TransactionNo: [REDACTED]

Reviewing Invoices

Click onto the relevant invoice to open the details of the invoice

Purchase invoice approval

You have received this task (or parts of the task) as a substitute.
Please review and authorise invoice for Payment

The invoice is sent for approval due to the value of the invoice amount. Please check and take action.

Purchase invoice information

Supplier	[REDACTED]	OrderNo	[REDACTED]
InvoiceNo	976126347	Total invoice amount	145.66
Invoice date	10/14/2019	To be approved	145.66
Due date	11/13/2019	VAT amount	27.24
Transaction number	[REDACTED]	Currency	EUR
Payment method	EF		
RefNo	0		

Workflow log (row 1)

[REDACTED]

(Enter a comment)

Final invoice

Image



INVOICE QUOTES MUST BE RECEIVED WITHIN 14 DAYS OF RECEIPT

Supplier: [REDACTED]

Order No: [REDACTED]

From Purchase Order Number:	276109	Order Date:	01/08/19
Buy Order Number:	10010000	Buy Date:	01/08/19
Delivery Note Number:	10010000	Delivery Date:	01/08/19

Product Code	Product Description	Units	Quantity	Unit Price	Total Price
10000	10000	1	1	145.66	145.66
TOTAL			1	145.66	145.66

Invoice information section

Shows Header information such as Supplier name, Invoice Number, Amount.

Workflow log section

Shows the user that distributed the invoice and any workflow comments entered on the invoice

Image

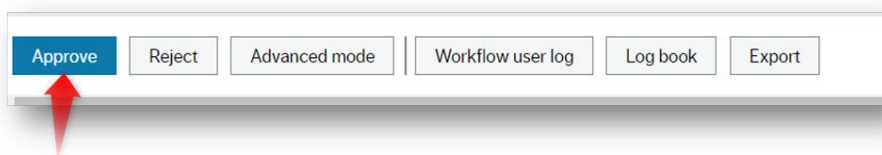
Shows the image of the invoice

Invoice control

If you scroll down, this shows the transaction details, and if it is a purchase order invoice, details of the order it is matched to.

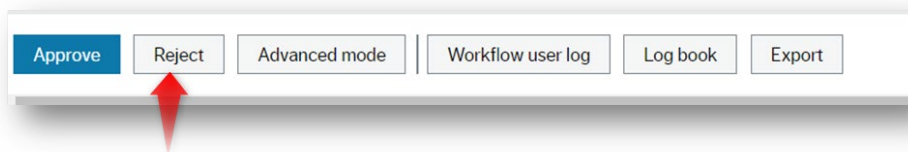
Approve

The approver can approve the full invoice by using the below buttons i.e. all lines on the invoice are routed to the next approver if relevant. It will then disappear from the approver's task list.



Reject

The approver can reject an invoice but must enter a comment. The invoice will then route back to the requestor. The requestor receives an email in their inbox advising them of a task that requires action



 The invoice is sent for approval due to the value of the invoice amount. Please check

App Inv - Reject

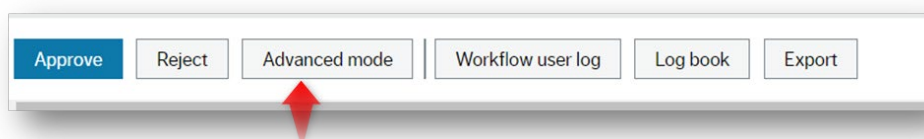
Enter your comment

Did not receive goods

Reject

Advanced Mode

The approver can select a specific row and approve or reject on a line basis rather than an overall invoice basis.



Order details											
☐	Map	Status	Currency	Curr. amount	Discount percent	Discount	Qty.	Unit	Price	Product	Description
☒			EUR	52.84	0.00	0.00	1.00	EA	52.84	G	BOC Supply Invoice 30
☐			EUR	162.63	0.00	0.00	1.00	EA	162.63	G	BOC Supply Invoice 30
Σ				215.47							
Approve		Reject	Undo								

Task Management

Under 'Your Tasks' there is a button for 'Go to Task management'

Here you can see all tasks assigned to you, and you can sort and group them by importance, type etc. Clicking on an individual task will bring you to the approval screen for that task.

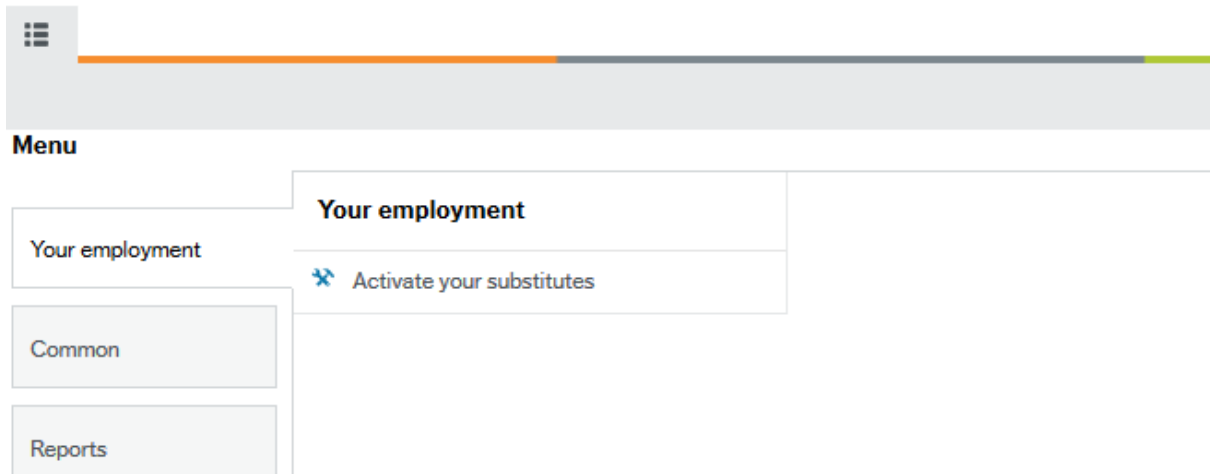
Search for tasks				
54 All tasks Today Tomorrow Overdue Group by Step Process 9 Purchase Invoice 20 Purchase Order 25 Supp Inv				
Sort and group by				
Importance	Client	Process name	Workflow step	Task data
	LI	Purchase Ord...	Purchase Ord...	OrderNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Purchase Ord...	Purchase Ord...	OrderNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Purchase Invo...	App Inv	TransNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Supp Inv	Approve Supp...	TransNo:
	LI	Purchase Invo...	App Inv	TransNo:
	LI	Purchase Ord...	Purchase Ord...	OrderNo:
	LI	Purchase Ord...	Purchase Ord...	OrderNo:

Setting up a substitute

If you are going to be absent and need to nominate another staff member as substitute for your tasks, you will need to do the following steps:

1. If it is the first time this individual is going to be your substitute, you will first have to email denis.cronin@mtu.ie and request this user be added to your substitute options

2. Once the user has been added, on your main screen, you should see, under 'Your Employment', an option 'Activate your substitutes'. Click here



Menu

Your employment

Your employment

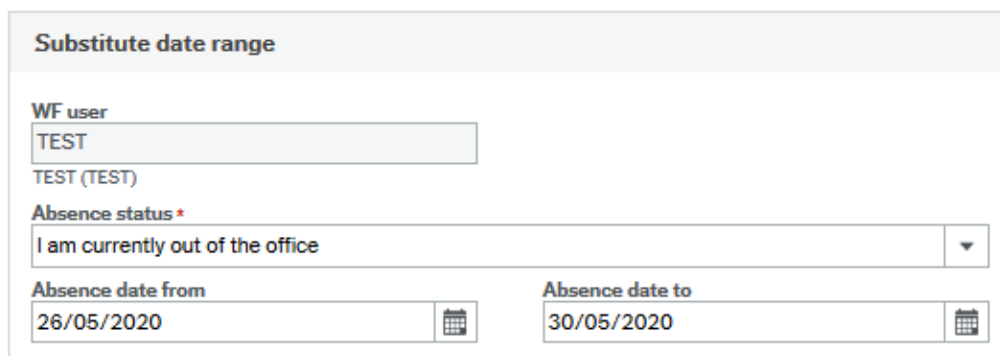
Common

Reports

✕ Activate your substitutes

3. Here you can enter your Absence status and the dates you are going to be absent. Once you choose the 'I am currently out of office' status, you will be able to enter to and from dates for your absence.

Activate your substitutes



Substitute date range

WF user
TEST
TEST (TEST)

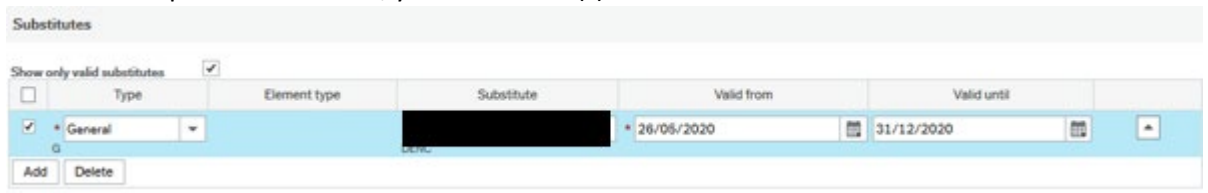
Absence status *
I am currently out of the office

Absence date from
26/05/2020

Absence date to
30/05/2020

Substitutes

4. On the lower part of the screen, your substitute(s) will be listed.



Substitutes

Show only valid substitutes ☒

Type	Element type	Substitute	Valid from	Valid until
General	G	...	26/05/2020	31/12/2020

Add Delete