



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)

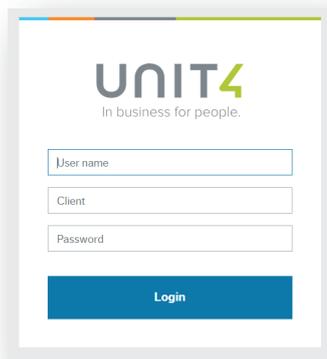
Email Notification

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

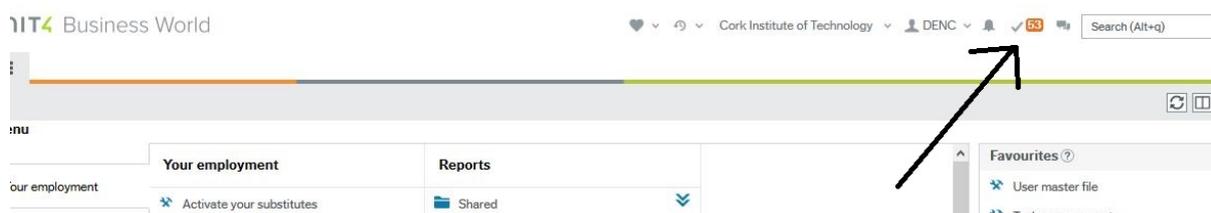


2. Enter your BWO! Credentials

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.



Your tasks ? Group by ⌵

App Inv TransNo: 1282032 OrderNo: 296199 Req Name: PAT SEXTON...
App Inv TransNo: 1282231 OrderNo: 295717 Req Name: KATHLEEN H...
App Inv TransNo: 1282330 OrderNo: 296376 Req Name: DENIS CRON...
App Inv TransNo: 1282452 OrderNo: 296358 Req Name: SUE O HALL...
App Inv TransNo: 1282503 OrderNo: 296359 Req Name: SUE O HALL...
App Inv TransNo: 1282887 OrderNo: 295231 Req Name: CARMEL KE...
App Inv TransNo: 1282888 OrderNo: 296574 Req Name: PURCHASIN...
App Inv TransNo: 1282906 OrderNo: 296492 Req Name: CARA O NEI...
App Inv TransNo: 1282992 OrderNo: 296494 Req Name: CARA O NEI...
Approve Supplier Invoice (25)

[Go to Task management](#)

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

<input type="checkbox"/>	Supplier: OFFICE DEPOT Curr. amount: 145.66 Currency: EUR Due date: 11/13/2019 InvoiceNo: 976126347 TransactionNo: 1282032
<input type="checkbox"/>	Supplier: ANTALIS LTD Curr. amount: 265.68 Currency: EUR Due date: 11/15/2019 InvoiceNo: 2683473 TransactionNo: 1282231
<input type="checkbox"/>	Supplier: OFFICE DEPOT Curr. amount: 62.67 Currency: EUR Due date: 11/20/2019 InvoiceNo: 976162166 TransactionNo: 1282330

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	OFFICE DEPOT	OrderNo	296199
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	1282032	Currency	EUR
Payment method	EF	RefNo	0

Workflow log (row 1)

10/24/2019 1:47 PM DENIS CRONIN (DENC) - Redistributed 10/17/2019 10:46 AM Larisa Sosnikova (23155) - Distributed

(Enter a comment)

Final invoice

Image

Office DEPOT

Payment Supplier: 01810772 Vial Union Invoice No.: 976126347
Customer Supplier: 01 811 8776 Account Number: CT100

INVOICE QUERIES MUST BE NOTIFIED WITHIN 14 DAYS OF RECEIPT

Delivered to: CORK INSTITUTE OF TECHNOLOGY
Cork Institute of Technology
Malvern Road
Ballinacorney Co Cork
CO CORK
Ireland

For the attention of: Catherine Carrigan 011 4310407

Your Purchase Order Number:	296199	Order Date:	11/10/19
Our Order Number:	159148090	Tax Point:	11/10/19
Delivery Note Number:	726756587	Invoice Date:	11/10/19

PRODUCT CODE	ITEM DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	NET SALES	VAT RATE
1282032	FROM THE PAPERLESS OFFICE SOLUTIONS PROGRAM	PL	2	6.28	12.56	20%
1282032	DURABLE BOOK WITHOUT CLIP WITH PAPER	PL	2	69.90	139.80	20%

CORK INSTITUTE OF TECHNOLOGY
14 OCT 2019
OF TECHNOLOGY

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

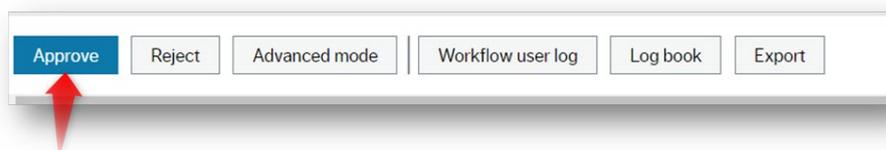
Shows the image of the invoice

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.

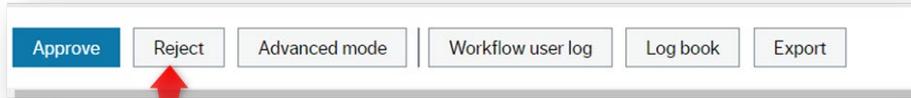
Approve

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

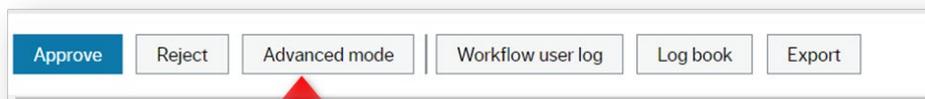


App Inv - Reject

Enter your comment

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											
<input type="checkbox"/>	Map	Status	Currency	Curr. amount	Discount percent	Discount	Qty.	Unit	Price	Product	Description
<input checked="" type="checkbox"/>			EUR	52.84	0.00	0.00	1.00	EA	52.84	G	BOC Supply Invoice 30
<input type="checkbox"/>			EUR	162.63	0.00	0.00	1.00	EA	162.63	G	BOC Supply Invoice 30
				Σ							
				215.47							

Task Management

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

Your tasks Group by ▼

App Inv TransNo: 1282032 OrderNo: 296199 Req Name: PAT SEXTON...

App Inv TransNo: 1282231 OrderNo: 295717 Req Name: KATHLEEN H...

App Inv TransNo: 1282330 OrderNo: 296376 Req Name: DENIS CRON...

App Inv TransNo: 1282452 OrderNo: 296358 Req Name: SUE O HALL...

App Inv TransNo: 1282503 OrderNo: 296359 Req Name: SUE O HALL...

App Inv TransNo: 1282887 OrderNo: 295231 Req Name: CARMEL KE...

App Inv TransNo: 1282888 OrderNo: 296574 Req Name: PURCHASIN...

App Inv TransNo: 1282906 OrderNo: 296492 Req Name: CARA O NEI...

App Inv TransNo: 1282992 OrderNo: 296494 Req Name: CARA O NEI...

Approve Supplier Invoice (25)

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.

54 All tasks

Today

Tomorrow

Overdue

Group by

9 Purchase Invoice

20 Purchase Order

25 Supp Inv

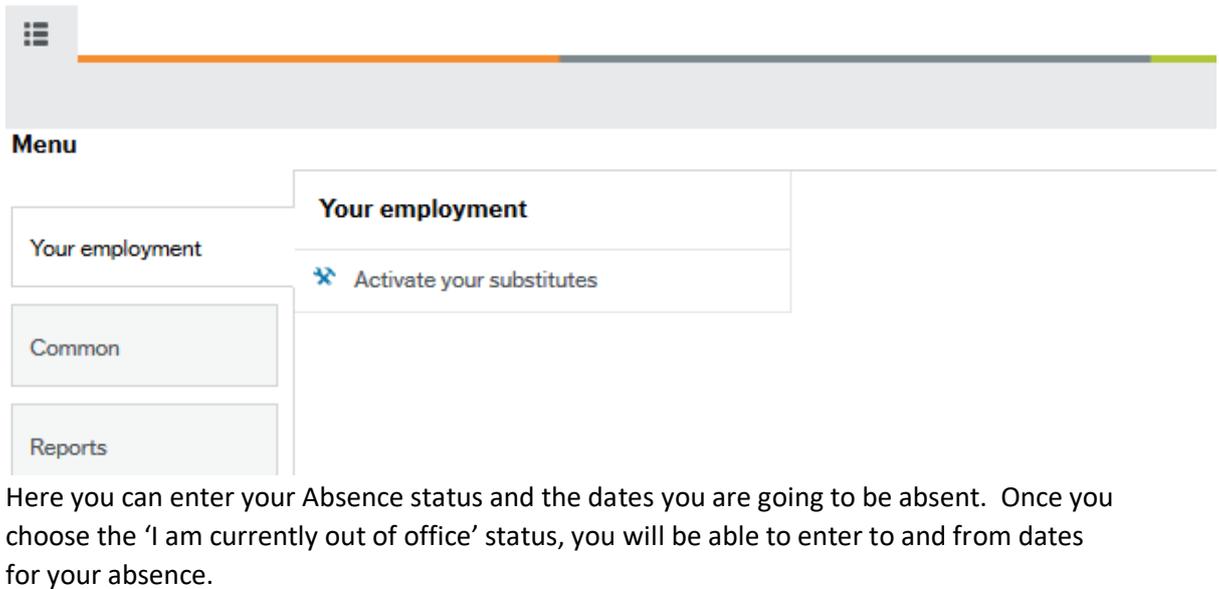
Sort and group by

Importance	Client	Process name	Workflow step	Task data
	LI	Purchase Ord...	Purchase Ord...	OrderNo: 296729
	LI	Supp Inv	Approve Supp...	TransNo: 1283074
	LI	Supp Inv	Approve Supp...	TransNo: 1282670
	LI	Supp Inv	Approve Supp...	TransNo: 1283075
	LI	Supp Inv	Approve Supp...	TransNo: 1283077
	LI	Purchase Ord...	Purchase Ord...	OrderNo: 296779
	LI	Supp Inv	Approve Supp...	TransNo: 1282600
	LI	Supp Inv	Approve Supp...	TransNo: 1282596
	LI	Supp Inv	Approve Supp...	TransNo: 1282605
	LI	Supp Inv	Approve Supp...	TransNo: 1282606
	LI	Purchase Invo...	App Inv	TransNo: 1282330 , OrderNo: 296376 , Req Name: DENIS CRONIN , Req N
	LI	Supp Inv	Approve Supp...	TransNo: 1283083
	LI	Supp Inv	Approve Supp...	TransNo: 1282595
	LI	Purchase Invo...	App Inv	TransNo: 1282906 , OrderNo: 296492 , Req Name: CARA O NEILL , Req N
	LI	Purchase Ord...	Purchase Ord...	OrderNo: 296682
	LI	Purchase Ord...	Purchase Ord...	OrderNo: 296669

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:

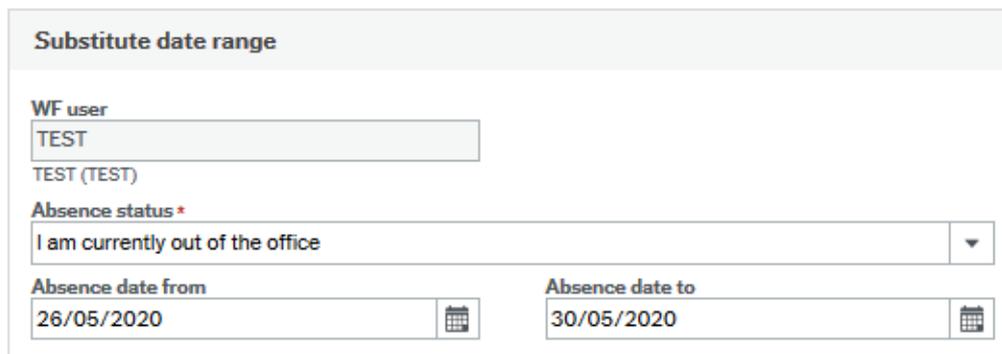
1. If it is the first time this individual is going to be your substitute, you will first have to email denis.cronin@cit.ie and request this user be added to your substitute options
2. Once the user has been added, on your main screen, you should see, under 'Your Employment', an option 'Activate your substitutes'. Click here



The screenshot shows a web interface with a 'Menu' section. Under the 'Your employment' category, the 'Activate your substitutes' option is highlighted with a blue cursor. Other menu items include 'Your employment', 'Common', and 'Reports'.

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.

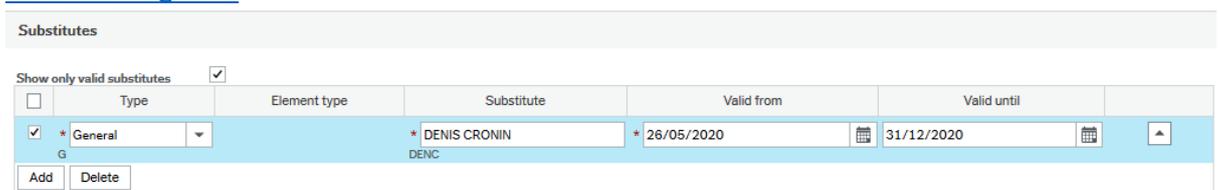
Activate your substitutes



The form is titled 'Substitute date range'. It contains the following fields:

- WF user:** A text input field containing 'TEST'.
- Absence status *:** A dropdown menu with 'I am currently out of the office' selected.
- Absence date from:** A date input field containing '26/05/2020'.
- Absence date to:** A date input field containing '30/05/2020'.

4. On the lower part of the screen, your substitute(s) will be listed. If they are not, contact denis.cronin@cit.ie.



The screenshot shows a table titled 'Substitutes'. The table has columns for 'Type', 'Element type', 'Substitute', 'Valid from', and 'Valid until'. A single row is visible with the following data:

Type	Element type	Substitute	Valid from	Valid until
* General	G	* DENIS CRONIN DENC	* 26/05/2020	31/12/2020

Buttons for 'Add' and 'Delete' are located below the table.