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)

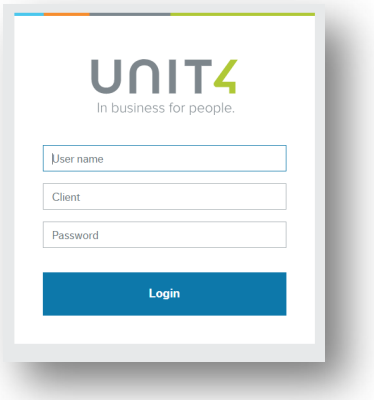
Email Notification

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

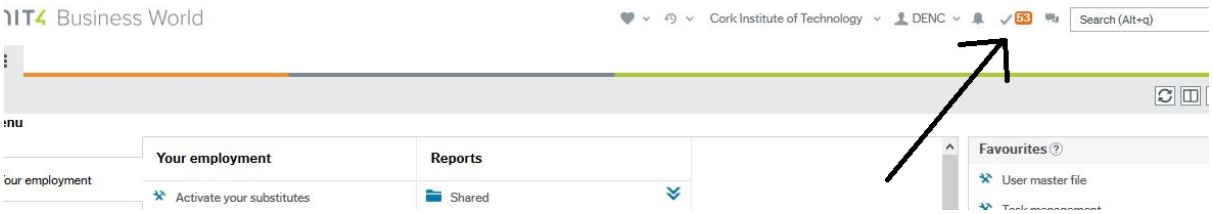


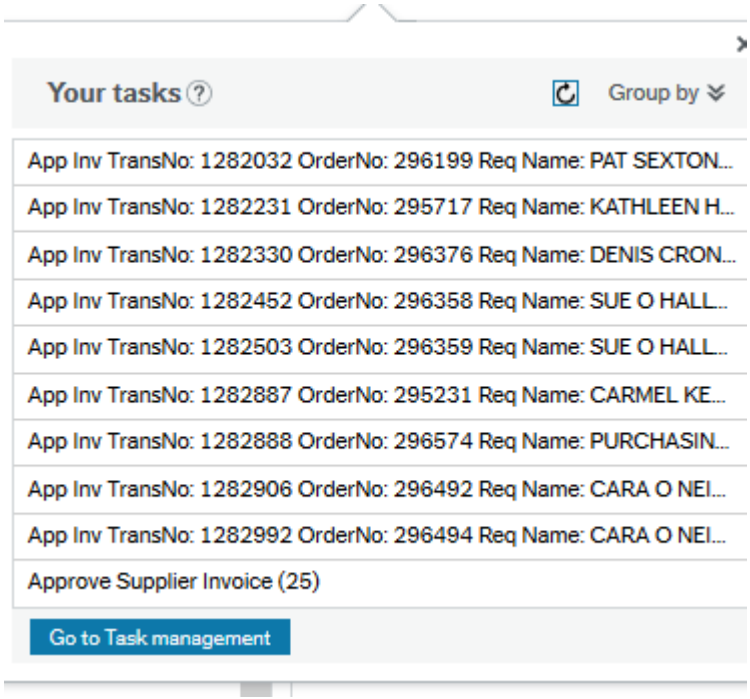
2. Enter your BWO! Credentials

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.

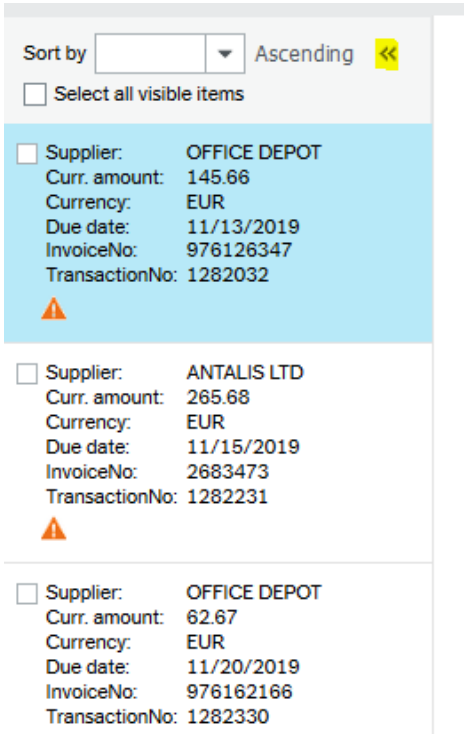




Purchase order invoices will display the requisition name and number as well as the transaction number and order number. If the full details are not viewable on the menu, hover over the task and the hidden text will be displayed. Full details are also viewable on the task management screen (see task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

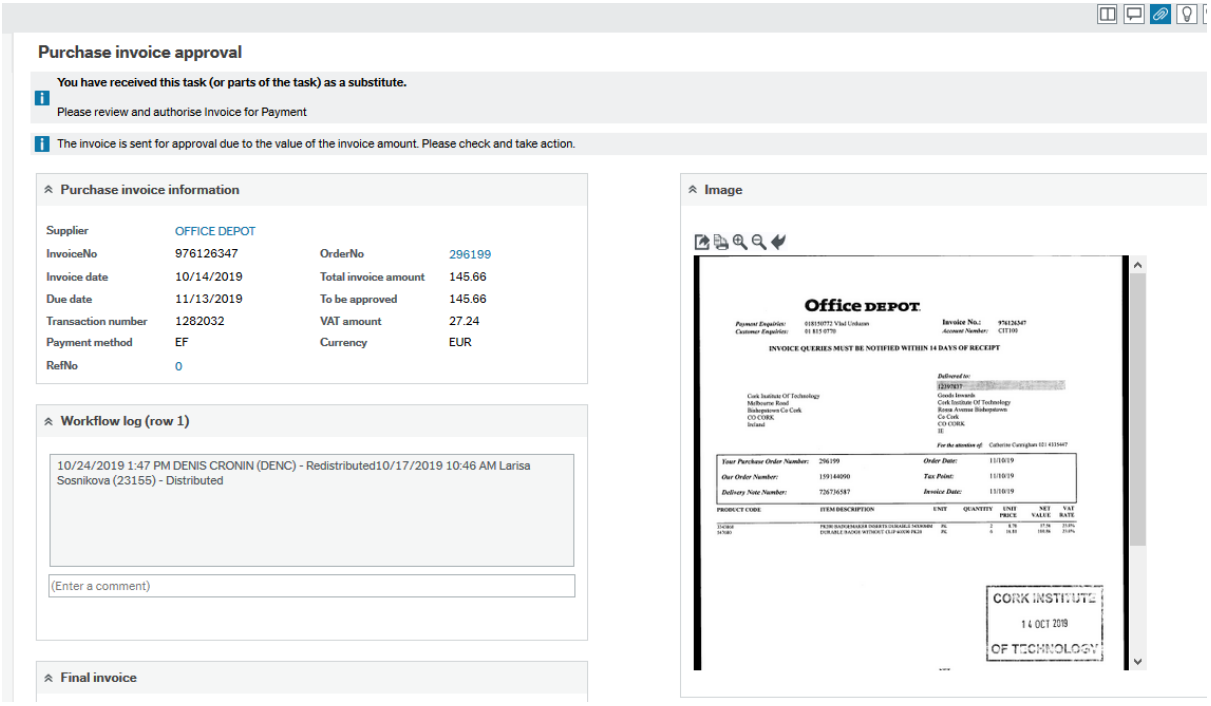
Invoice Approval view

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.



Reviewing Invoices

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



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

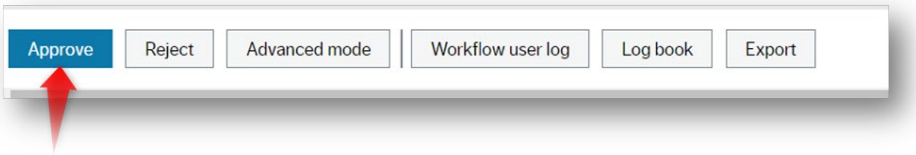
Shows the image of the invoice

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.

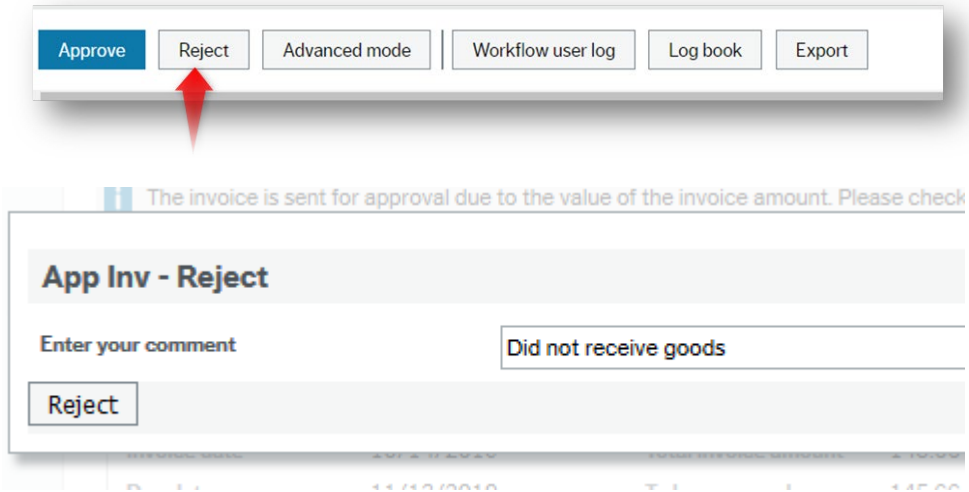
Approve

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.



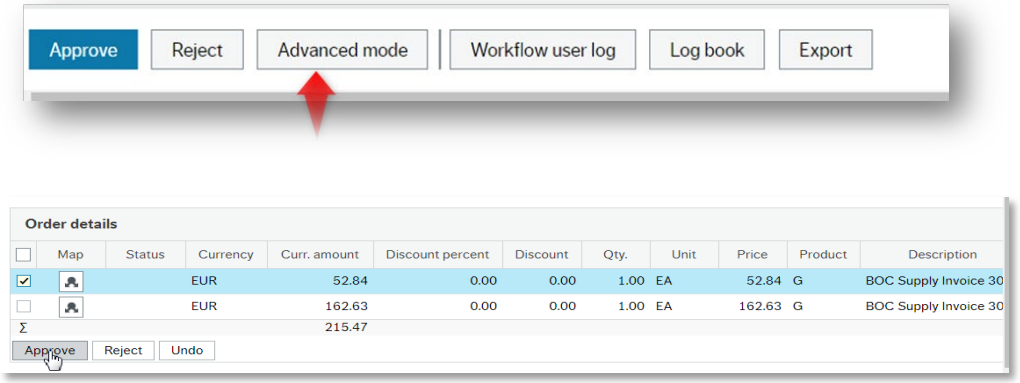
Reject

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



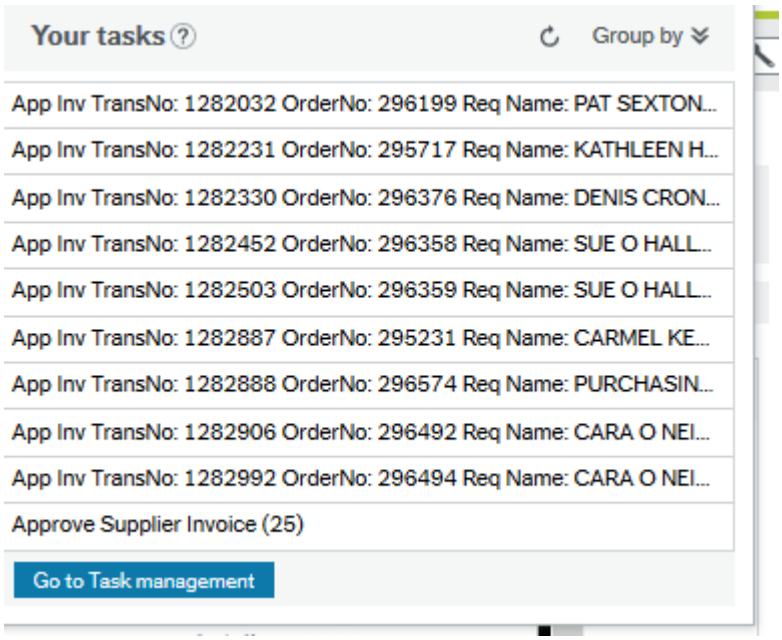
Advanced Mode

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

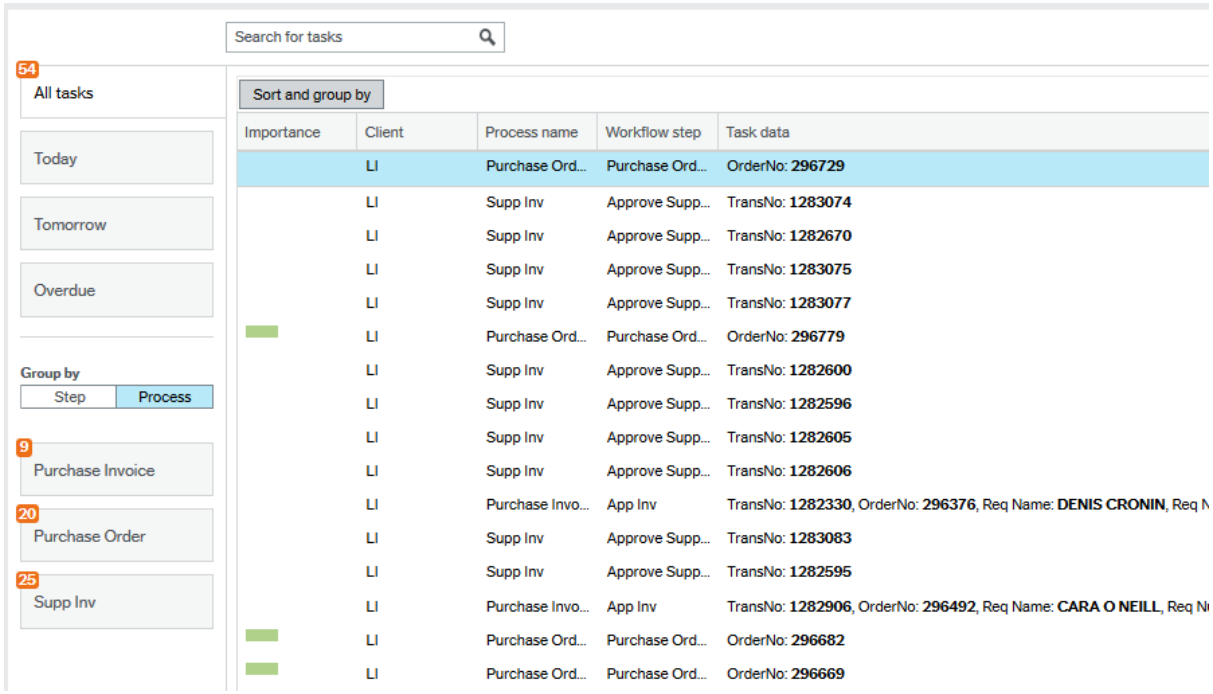


Task Management

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



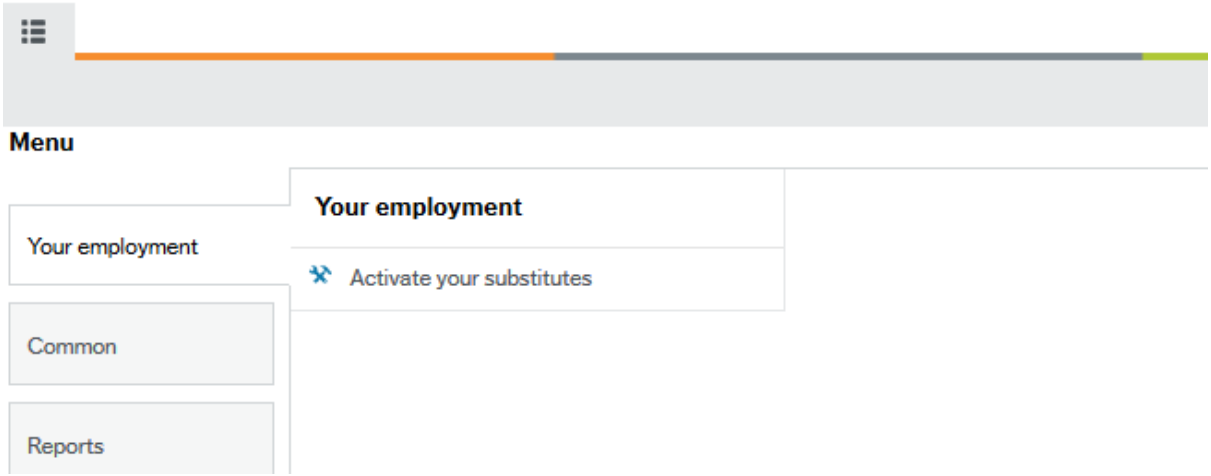
Here you can see all tasks assigned to you, and you can sort and group them by importance, type etc. Clicking on an individual task will bring you to the approval screen for that task.



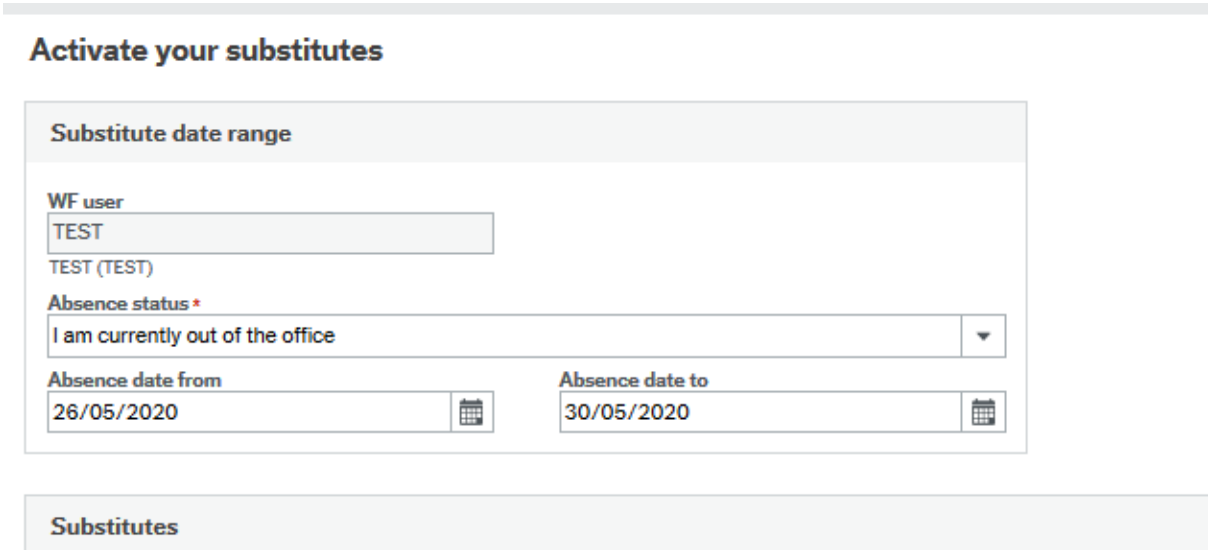
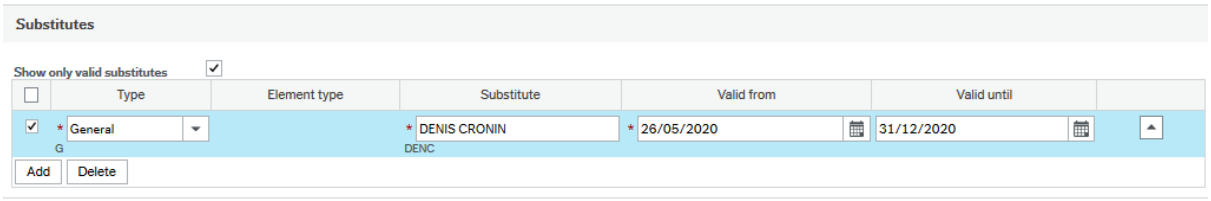
Setting up a substitute

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



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.



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