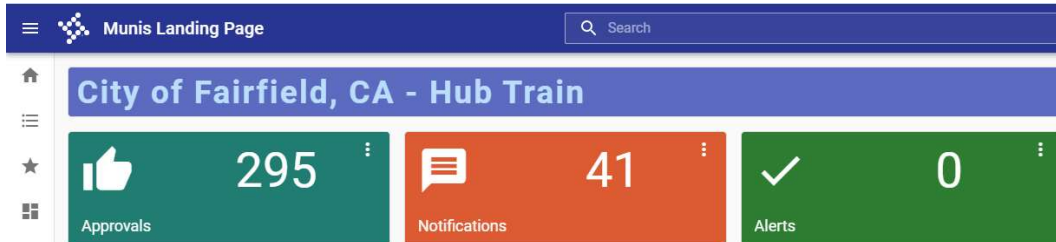
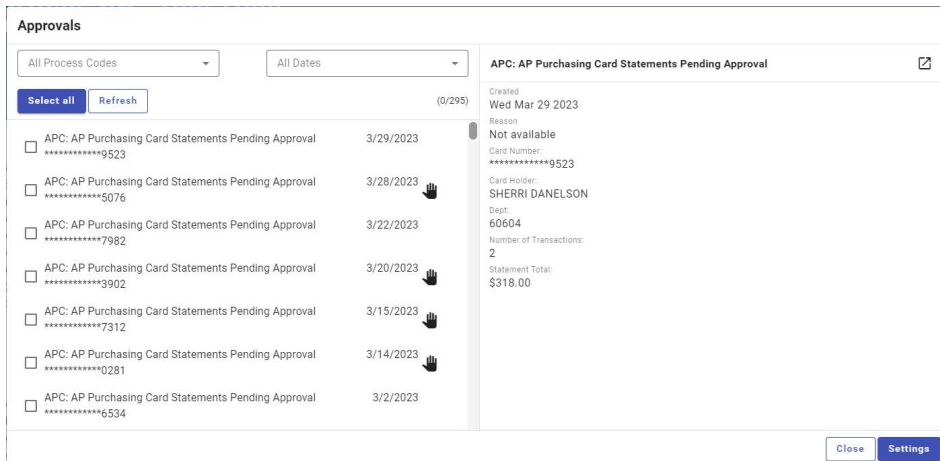


Tyler Topic: Workflow Approvals

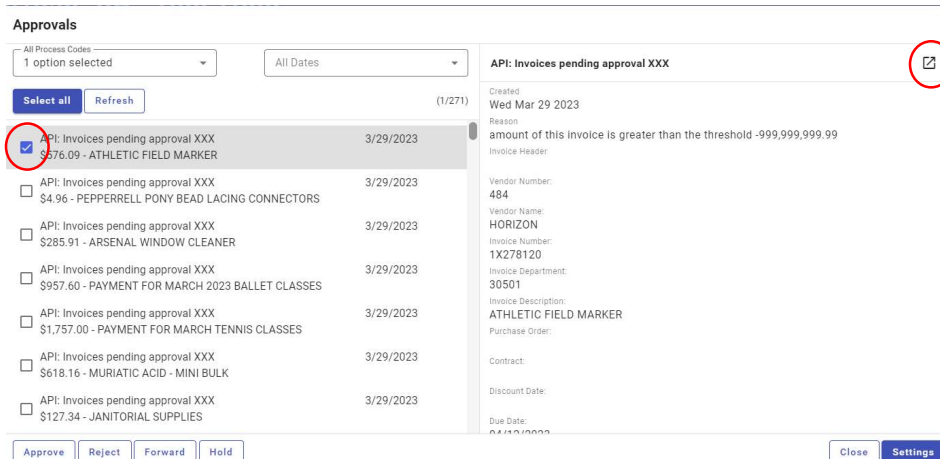
Any items waiting for approval (like Purchase Cards, Invoices, Purchase Requisitions, etc.) that are available for your approval will all be included under the Approvals tile on the Munis Landing Page. The below shows 295 items for approval.



1) Click on the Approvals tile and the below screen will come up showing the individual items for approval. The dropdown options at the top allow sorting by Process Codes or Dates. Otherwise, Approvals will be sorted alphabetically by Process Code, then by date from most recent to least recent.



2). Click on an item and hit the square in the upper right corner to go to the detail screen. In this example, the Process Codes were sorted for API (Accounts Payable Invoice) so it will take us to the Invoice Entry screen to review the entry (including the attachments in TCM).



3) Click on the Attach Paperclip icon to review the attachment in TCM. Based on if the invoice was entered correctly, the actions can be taken from the buttons at the bottom of the screen.

Invoice Entry [City of Fairfield ~CA | TRAIN | 03/29]

Close Search Browse Update Delete Email Schedule **Attach** Discrepancies Change Lines PO Inquiry View Address Journal Info Sub Payments Credit Contract Additional Info Notes Invoice Audit Duplicate Void Release Invoice Update 1099 Box Code Suspend Invoice

Invoice Entry [City of Fairfield ~CA | TRAIN | 03/29]

Address: [] Terms: [] CITY OF INDUSTRY CA 91716-8248

Document #: 31565 Invoice #: 1X278120 Gross #: 576.09 Description: ATHLETIC FIELD MARKER Status: Pending Approval Department: 30501

Discount date: [] Disc basis: .00 CHECK RUN: [] Work order: [] Separate check: []
 Discount %: .000 Disc amt: .00 Invoice date: 03/13/2023 Received date: 03/13/2023 Work order task: 0 Include documentation: []
 Net amount: 576.09 Due date: 04/12/2023 Allocation: 0 PA applied: []
 Payment method: EFT Liq method: Line Released: [x]
 Check/Wire: [] Special handling: []

Accounts Line Items

Line	Org	Object	Proj	PO	Inv amount	1099	A	Description	Bud	Work order
1	10130501	8319			576.09		N	ATHLETIC FIELD MARKER		1

Total Amount: 576.09 Payment Amount: 576.09

Last Change
 McCookran-Lester, Ladaija RELEASED this invoice on 03/29/2023 at 19:23:45

Workflow
 My Approvals **Approve** Reject Forward Hold Approvers

Approve: No changes needed, Approve Invoice so it moves to next step in Workflow. When hitting Approve, the below screen will appear. A comment is Optional for this. Hit Accept.

Enter Optional Comment

Back Accept Cancel

Invoice Entry [City of Fairfield ~CA | TRAIN | 03/29] > Enter Optional Comment >

Comment entry
 Comment for this action (Optional) []

Reject: Invoice has a problem and needs to be updated, this will Reject it back to the Originator. When hitting Reject, a Comment is required to explain why this invoice is being rejected. Hit Accept.

Enter Rejection Information

Back Accept Cancel

Invoice Entry [City of Fairfield ~CA | TRAIN | 03/29] > Enter Rejection Information >

Comment entry
 Comment for this action (Required) [WRONG AMOUNT]

Forward: Forward to a different Workflow Approver for review. This will no longer show in your Approvals if it is forwarded. Select another user to forward this to from the drop down, and enter a Comment as to the reason (required).

Enter Forward Information

Back | Accept | Cancel

Invoice Entry [City of Fairfield ~CA | TRAIN | 03/29] > Enter Forward Information > /

Comment entry

Forward item to user: *

Comment for this action (Required)

Hold: Place the invoice on Hold for further review. A comment will be required for this action as well.

Enter Hold Information

Back | Accept | Cancel

Invoice Entry [City of Fairfield ~CA | TRAIN | 03/29] > Enter Hold Information > /

Comment entry

Comment for this action (Required)

To remove this Hold, Click on **Release Hold**. Do this before Approving an Invoice that had been previously placed on Hold.

Workflow

My Approvals | Approve | Reject | Forward | **Release Hold** | Approvers

Approvers: Hitting this button will show all the Workflow Steps, including who has already approved the invoice and who will be approving at the next steps, as well as any comments entered by previous Approvers.

Workflow

My Approvals | Approve | Reject | Forward | Hold | **Approvers**

Work Flow Status

Back | Search

Invoice Entry [City of Fairfield ~CA | TRAIN | 03/29] > Work Flow Status

Originator

Name Comment

Approvers' comments

Name	Action taken date	Action taken	Action	Comment
Weihe, Kristan	04/03/2023	16:43	Held	NEED MORE INFO ON CHARGE

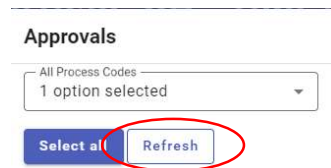
Steps

Step	Status	Activated Date	Activated TI
35	Complete (Approved)		
By source business rule - Any Group Complete			
Phillips, Stacy	Complete	03/29/2023	16:25
60	In Progress		
By source business rule - Any Group Current			
de Guzman, Julie		03/29/2023	16:25
Weihe, Kristan		03/29/2023	16:25
Dixon, Myles		03/29/2023	16:25
Rendon, Ruth		03/29/2023	16:25
Gangnay, Tenzin		03/29/2023	16:25

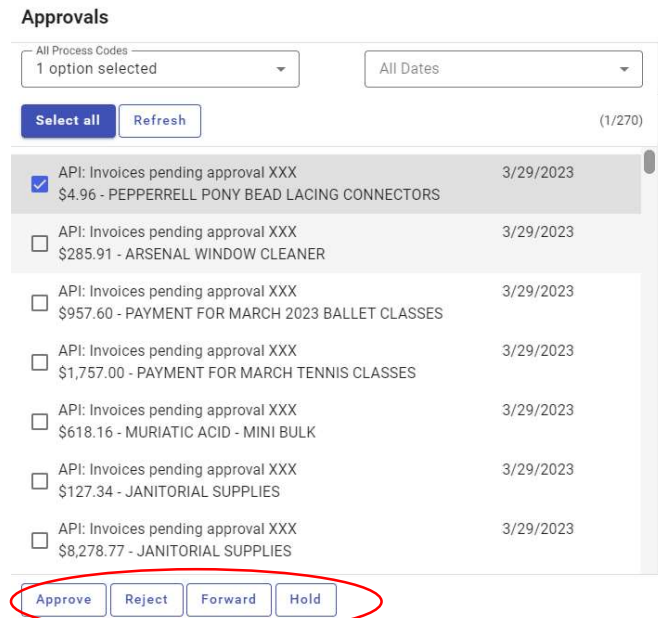
4) After Approving the invoice, the Close X button can either be clicked in the top left corner to go back to the Approvals tile, or more invoices for approval can be viewed using the arrows at the bottom of the screen to move to the next record. This shows there are 271 total invoices currently waiting for approval for this approver.



5) If the Close X button is used, the main Approvals screen will come back up. Click Refresh in the top left corner to see that record disappeared from the available Approvals. This will also wipe out any Sorting that was done by Process Codes or Dates.

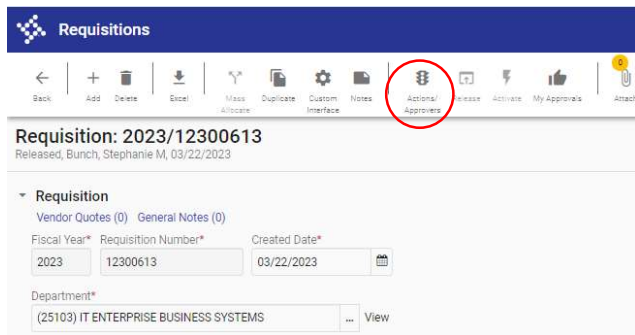


6) Items can also be Approved/Rejected/Held/Forwarded from the main Approvals tile using the button below (not recommended as it does not show a lot of detail on the item).

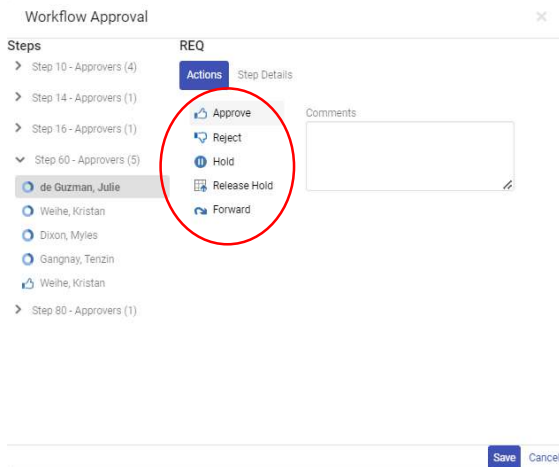


7) Go through all the items in the Approvals tile periodically to keep things moving in Workflow. Below are examples of the other common Approval items and how to Approve them from the detail screens (see Step 2).

Requisitions: After reviewing the Requisition, click on the Actions/Approvers Stoplight Icon.



Select the from the options listed, enter any Comments in the Comments box, and hit Save. This screen will also show you the approvers at all the other steps in the workflow.



Purchase Cards: This looks very similar to the Invoice Approval, with the Available options at the bottom of the screen.

