## Accounts Payable – Submit Voucher for Workflow

### Business Process

1. Submit vouchers for workflow using online voucher page (one at a time).
2. Submit vouchers for workflow using batch process

### Navigation

1. Main Menu > Finance Navigation > Accounts Payable > Vouchers > Add/Update > Regular Entry
2. Main Menu > Finance Navigation > Accounts Payable > Vouchers > Approve > Request Voucher Batch

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**Process 1:** Use the following navigation to submit vouchers one at a time for voucher workflow approval.

1. Before a voucher can be submitted for workflow approval it has to be ready for approval. Depending on the voucher style – PO related or non-PO vouchers – there might be different processes required. But the processes that occur prior to voucher workflow submission include Budget Checking, and Matching.

2. From the Main Menu page, select Accounts Payable > Vouchers > Add/Update > Regular Entry.

   ![Voucher Screen](image.png)

3. Click on the Find an Existing Value tab, and enter search criteria in order to find the voucher you want to submit.

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4. Use criteria such as Business Unit, Invoice Number, Invoice Date, Voucher ID, Short Vendor Name, Vendor ID to narrow your search.

5. Once you obtain the desired voucher, from the Summary page review the data. Budget Status must be Valid. Match Status should either be No Match or Matched. Approval Status should be Pending.

6. Click on the Invoice Information tab.

7. Click on the Submit for Approval button.
8. Enter any additional comments you would desire the approver to see in the Additional Details box.

9. Click OK.

10. The approval routing will display and this voucher will be added to the appropriate person(s) worklist ready for the approver(s) to take action.

11. Note: You can also navigate to Main Menu > Finance Navigation > Accounts Payable > Vouchers > Approve > Approval Framework – Vouchers to submit a voucher to workflow. Accomplishes same submission as shown above just using a different source page.

Process 2: Use the following navigation to submit vouchers through a batch process that will submit multiple vouchers at one time.

13. If this is the first time you are running the process you may need to create a run control id. If you have already created one then you can search or type in the name previously used. You do not have to create a run control id for each separate process you run; however, if you will run the same process repeatedly it is a good idea to have a dedicated run control for that process with the settings already set up.

14. You will access the page with the Find an Existing Value tab displayed. Click on the Add a New Value tab if you are adding a new run control id; otherwise, stay on the Find an Existing Value tab to use one previously created.

15. Enter a Run Control ID = VOUCHER_APPROVAL (id cannot have any spaces in it so use the underscore instead of a space).

16. Click Add or Search. If click Search you do not have to enter the run control id first as you can select it from the search list that will appear at the bottom of the page.

17. You are on the Voucher Approval Workflow run control page now. No parameters are required for this process. Any vouchers that are ready to be submitted (have Budget Status = Valid, Match Status = No Match or Matched) will get submitted.

18. Click RUN.
19. Select the Voucher Approval Framework process by clicking in the Select column for that process (VCHR_APRV_AF).

20. Then click OK to execute the process.

21. You will return to the Voucher Approval Workflow page and you can click on the Process Monitor hyperlink to check the status of the process. For help with Process Monitor, see separate Quick Reference Guide for Process Monitor.

22. After the job successfully completes, the vouchers included in the process will have been added to the appropriate approver(s) worklist.