



Accounts Payable Approvals

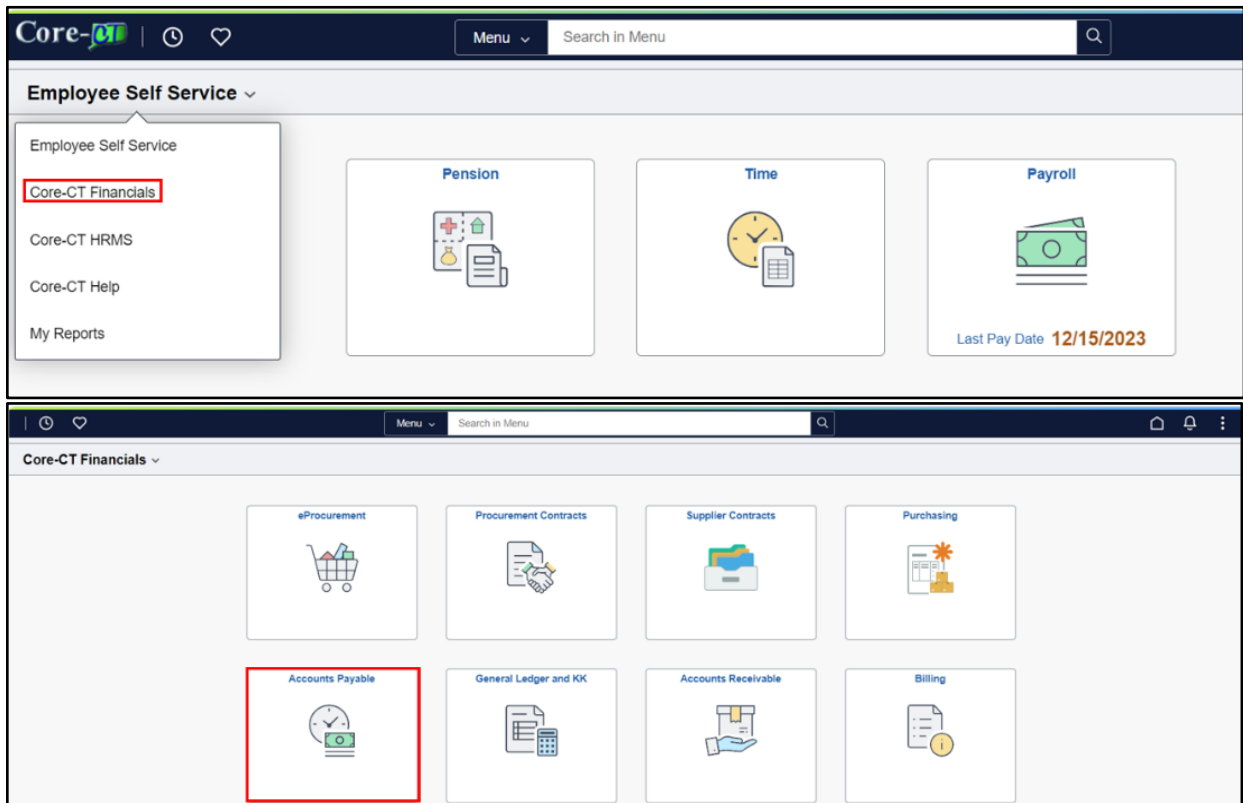
In Core-CT, Accounts Payable features a new process to approve vouchers. The Approvals Tab is one stop-shop for approvers to approve **Forms, Grants Proposals, Requisitions, and Vouchers**. Depending on roles and permissions, some approvals will differ between users. This activity guide walks users through the basic functionalities of these enhancements.

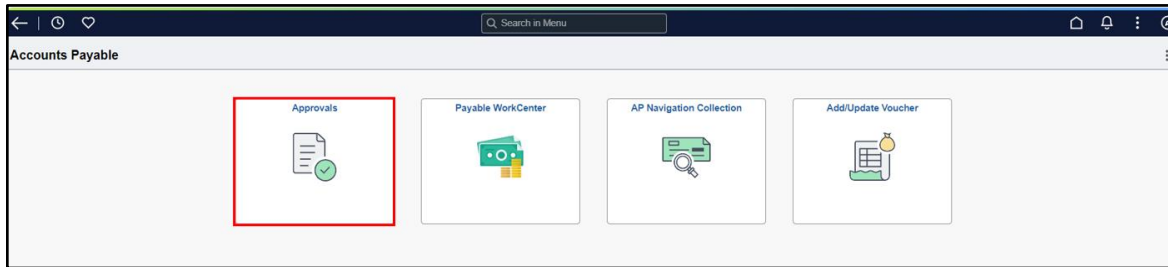
Important Note: All vouchers **MUST** be submitted before being sent for approval.

Accounts Payable Approvals

Navigation Components:

Core-CT Financials > Accounts Payable > Approvals





➤ **Filter Options**

There are two ways to navigate to Vouchers to approve.

- The left pane houses the different approvals by item pending approval.
- The right-hand side houses all components in descending order to when they were routed.

The screenshot displays the 'Pending Approvals' screen. On the left, there is a filter pane with 'All' selected (127 items), 'Purchase Order' (3), 'Requisition' (118), and 'Voucher' (8). The main area shows a table of requisitions with columns for Requisition, Amount, Vendor, and Routed status. The table is highlighted with a red border.

Requisition	Amount	Vendor	Routed
10,383.12 USD	MHAM1 / 0000038235 / CVH WFH CLOTHES BOB BARKER 2	BOB BARKER CO INC	Req Amount Approver 1 Routed 11/22/2023
5.06 USD	MHAM1 / 0000038299 / FINEPRO0136 FIX	SUBURBAN STATIONERS INC	Req Amount Approver 1 Routed 03/21/2024
1.00 USD	MHAM1 / 0000038300 / FINEPRO0149 FIX	SUBURBAN STATIONERS INC	Req Amount Approver 1 Routed 03/21/2024
1.00 USD	MHAM1 / 0000038301 / FINEPRO0149	SUBURBAN STATIONERS INC	Req Amount Approver 1 Routed 03/21/2024
5.00 USD	MHAM1 / 0000038302 / FINEPRO0149	SUBURBAN STATIONERS INC	Req Amount Approver 1 Routed 03/21/2024
17.60 USD	MHAM1 / 0000038304 / 43	SUBURBAN STATIONERS INC	Req Amount Approver 1 Routed 03/21/2024

1. Click the **View By** dropdown.

The screenshot shows the 'Pending Approvals' interface. On the left, there is a sidebar with a 'View By' dropdown menu set to 'Type'. Below it, there are four categories: 'All' (127), 'Purchase Order' (3), 'Requisition' (118), and 'Voucher' (6). The main area displays a list of requisitions. The first row is highlighted, showing a requisition for 10,383.12 USD from MHAM1 / 0000038235 / CVH WFH CLOTHES BOB BARKER 2, BOB BARKER CO INC, with a 'Req Amount Approver 1' and a 'Routed' date of 11/22/2023. The table has 127 rows in total.

Amount	Requester	Vendor	Approval	Date Routed
10,383.12 USD	MHAM1 / 0000038235 / CVH WFH CLOTHES BOB BARKER 2	BOB BARKER CO INC	Req Amount Approver 1	11/22/2023
5.06 USD	MHAM1 / 0000038299 / FINEPRO0136 FIX	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024
1.00 USD	MHAM1 / 0000038300 / FINEPRO0149 FIX	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024
1.00 USD	MHAM1 / 0000038301 / FINEPRO0149	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024
5.00 USD	MHAM1 / 0000038302 / FINEPRO0149	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024
17.60 USD	MHAM1 / 0000038304 / 43	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024

The **View By** dropdown allows filtering through vouchers depending by:

- **Date Routed**
- **From**
- **Priority**
- **Requester**

2. Click **Date Routed**.

Notice The left pane now displays vouchers based on the date routed.

The screenshot shows the 'Pending Approvals' interface with the 'View By' dropdown menu open. The 'Date Routed' option is selected, and the left sidebar now displays the same four categories as before: 'All' (127), 'Purchase Order' (3), 'Requisition' (118), and 'Voucher' (6). The main area displays the same list of requisitions as in the previous screenshot.

Amount	Requester	Vendor	Approval	Date Routed
10,383.12 USD	MHAM1 / 0000038235 / CVH WFH CLOTHES BOB BARKER 2	BOB BARKER CO INC	Req Amount Approver 1	11/22/2023
5.06 USD	MHAM1 / 0000038299 / FINEPRO0136 FIX	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024
1.00 USD	MHAM1 / 0000038300 / FINEPRO0149 FIX	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024
1.00 USD	MHAM1 / 0000038301 / FINEPRO0149	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024
5.00 USD	MHAM1 / 0000038302 / FINEPRO0149	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024
17.60 USD	MHAM1 / 0000038304 / 43	SUBURBAN STATIONERS INC	Req Amount Approver 1	03/21/2024

3. Select and open the **Voucher** that is ready for approval.

Pending Approvals

View By: Type

All 127 rows

Type	Amount	Business Unit	Invoice Number	Supplier Name	Status	Due Date
Voucher	15.00 USD	MHAM1 / 00868051	12356	GRAINGER INDUSTRIAL SUPPLY	Routed	08/27/2024
Voucher	100.00 USD	MHAM1 / 00868053	J / 524MSUATest02	NATIONSTART SPORT SPT INC	Routed	08/27/2024
Voucher	100.00 USD	MHAM1 / 00868075	/ 555555	SUBURBAN STATIONERS INC	Routed	08/27/2024
Voucher	1,000.00 USD	MHAM1 / 00868091	/ Int01.03 tetsing	SUBURBAN STATIONERS INC	Routed	08/27/2024
Requisition	158.75 USD	MHAM1 / 0000038519	/ 0000038519	C & C JANITORIAL SUPPLIES INC	Req Amount Approver 1	Routed 08/30/2024
Requisition	56.23 USD	MHAM1 / 0000038520	/ 29463	C & C JANITORIAL SUPPLIES INC	Req Amount Approver 1	Routed 09/02/2024

4. Click the **View Voucher** link.

Voucher

15.00 USD

In Process

Approve Deny Hold

Summary

Business Unit	MHAM1	Voucher ID	00868051
Invoice Number	12356	Created By	[User]
Supplier Name	GRAINGER INDUSTRIAL SUPPLY	Modified By	[User]
Due Date	05/17/24	Invoice Date	05/17/24
Voucher Source	Online	Voucher Style	Regular Voucher

[View Voucher](#)

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		TESTING RESERVED POS	1	EA	15.00 USD	15.00 USD

More Information

[View Printable Version](#)

- Users can look for the current state of approval the voucher is in by looking at the **Approval Status** on the left-hand side of the screen.

The screenshot shows the 'Regular Entry' page with the following details:

Business Unit	MHAM1	Invoice Date	05/17/2024
Voucher ID	00868051	Invoice No	12356
Voucher Style	Regular	Invoice Total	15.00 USD
		Receipt Date	05/20/2024
Supplier Name	GRAINGER INDUSTRIAL SUPPLY		
Entry Status	Postable	Pay Terms	Due Now
Match Status	No Match	Voucher Source	Online
Approval Status	Pending	Origin	G67
Post Status	Unposted	Created On	05/20/2024 8:03AM
		Created By	[User]
Doc Tol Status	Valid	Last Update	08/27/2024 11:19AM
Budget Status	Not Chk'd	Modified By	[User]
		ERS Type	Not Applicable
Budget Misc Status	Valid	Close Status	Open

*View Related: [Go](#) [Audit Logs](#)

Buttons: [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

Navigation: [Summary](#) | [Related Documents](#) | [Invoice Information](#) | [Payments](#) | [Voucher Attributes](#) | [Error Summary](#) | [Consumption](#)

- Click **Approval History** to see its previous routing.

The screenshot shows the 'Regular Entry' page with the following details:

Business Unit	MHAM1	Invoice Date	05/17/2024
Voucher ID	00868051	Invoice No	12356
Voucher Style	Regular	Invoice Total	15.00 USD
		Receipt Date	05/20/2024
Supplier Name	GRAINGER INDUSTRIAL SUPPLY		
Entry Status	Postable	Pay Terms	Due Now
Match Status	No Match	Voucher Source	Online
Approval Status	Pending	Origin	G67
Post Status	Unposted	Created On	05/20/2024 8:03AM
		Created By	[User]
Doc Tol Status	Valid	Last Update	08/27/2024 11:19AM
Budget Status	Not Chk'd	Modified By	[User]
		ERS Type	Not Applicable
Budget Misc Status	Valid	Close Status	Open

*View Related: [Go](#) [Audit Logs](#)

Buttons: [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

Navigation: [Summary](#) | [Related Documents](#) | [Invoice Information](#) | [Payments](#) | [Voucher Attributes](#) | [Error Summary](#) | [Consumption](#)

- Click the **Back** button.

Regular Entry

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary >

Business Unit MHAM1 Invoice Date 05/17/2024
 Voucher ID 00868051 Invoice No 12356
 Voucher Style Regular Invoice Total 15.00 USD
 Receipt Date 05/20/2024

Supplier Name GRAINGER INDUSTRIAL SUPPLY

Entry Status Postable Pay Terms Due Now
 Match Status No Match Approval History Voucher Source Online
 Approval Status Pending Origin G67
 Post Status Unposted Created On 05/20/2024 8:03AM
 Created By [User]
 Doc Tol Status Valid Last Update 08/27/2024 11:19AM
 Modified By [User]
 Budget Status Not Chk'd ERS Type Not Applicable
 Close Status Open

Budget Misc Status Valid
 *View Related Payment Inquiry Go

Audit Logs

Return to Search | Notify | Refresh | Add | Update/Display

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary | Consumption

8. Click **Approve** or **Deny**.

Voucher

15.00 USD

In Process

Approve | Deny | Hold

Summary

Business Unit MHAM1 Voucher ID 00868051
 Invoice Number 12356 Created By [User]
 Supplier Name GRAINGER INDUSTRIAL SUPPLY Modified By [User]
 Due Date 05/17/24 Invoice Date 05/17/24
 Voucher Source Online Voucher Style Regular Voucher
 View Voucher

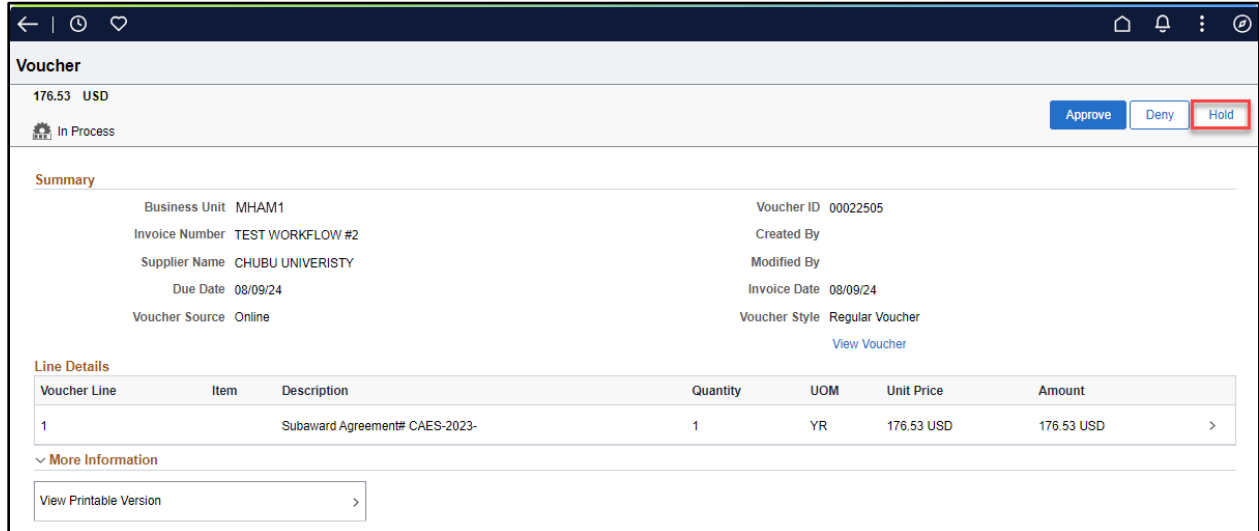
Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		TESTING RESERVED POS	1	EA	15.00 USD	15.00 USD

More Information


View Printable Version >

9. To put a voucher on hold, click **Hold**.



Voucher

176.53 USD

 In Progress

[Approve](#) [Deny](#) [Hold](#)

Summary

Business Unit	MHAM1	Voucher ID	00022505
Invoice Number	TEST WORKFLOW #2	Created By	
Supplier Name	CHUBU UNIVERISTY	Modified By	
Due Date	08/09/24	Invoice Date	08/09/24
Voucher Source	Online	Voucher Style	Regular Voucher

[View Voucher](#)

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount	
1		Subaward Agreement# CAES-2023-	1	YR	176.53 USD	176.53 USD	>

More Information

[View Printable Version](#) >