

# Tulane University SciQuest

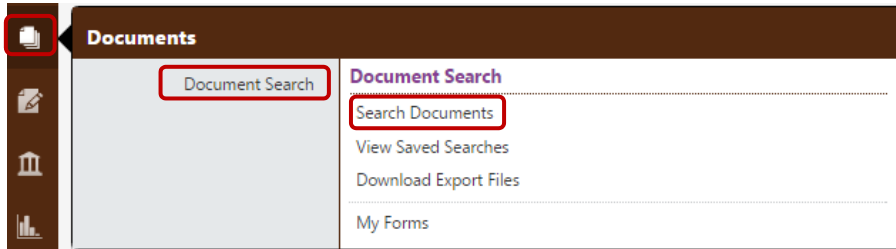
*Module 6: Invoice Approvals*

## 6.0 Creating an Invoice

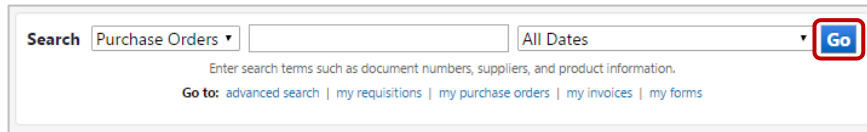
Target Audience: Invoice Approver

Users have the ability to create invoices for purchase orders.

1. Navigate to the Documents icon in the Navigation menu bar. Go to **Document Search** and **Search Documents**.



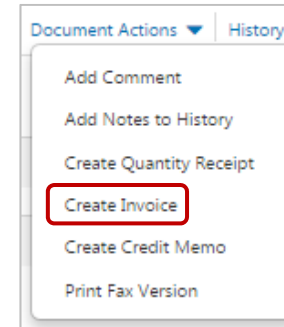
2. From the document search screen, search for purchase orders.



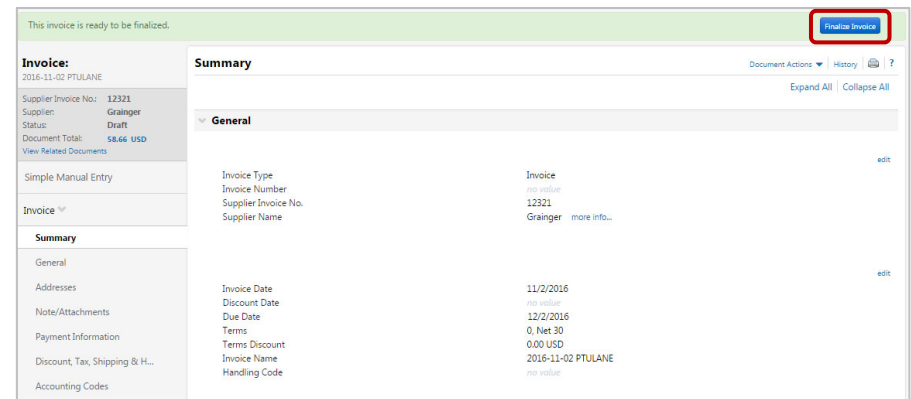
3. Select the purchase order that requires the creation of an invoice.

| PO No     | Supplier                                     | Creation Date/Time | Requisition No. | Requisitioner  | Supplier Status | Settlement Status            | PO Total     |
|-----------|----------------------------------------------|--------------------|-----------------|----------------|-----------------|------------------------------|--------------|
| ✓ 3000546 | Grainger                                     | 11/2/2016 2:26 PM  | 1695806         | Paul Tulane    | Sent            | No Matches                   | 58.66 USD    |
| ✓ 3000545 | GEO ADVISORS CONSULTING                      | 11/2/2016 2:14 PM  | 1699105         | Paul Tulane    | Sent            | Fully Received<br>No Matches | 1,000.00 USD |
| 3000544   | BD Biosciences                               | 11/2/2016 2:13 PM  | 1698854         | Paul Tulane    | Sent            | No Matches                   | 679.00 USD   |
| ✓ 3000543 | CEDARLANE USA                                | 11/2/2016 1:44 PM  | 1691980         | Rebecca Derbes | Sent            | No Matches                   | 20.00 USD    |
| ✓ 3000542 | CEDARLANE USA                                | 11/2/2016 1:44 PM  | 1692000         | Geryl Diodene  | Sent            | No Matches                   | 56.00 USD    |
| ✓ 3000541 | LAWRENCE LIVERMORE NATIONAL LABORATORY L-397 | 11/2/2016 1:44 PM  | 1688134         | Timothy Meaut  | Sent            | No Matches                   | 45.00 USD    |

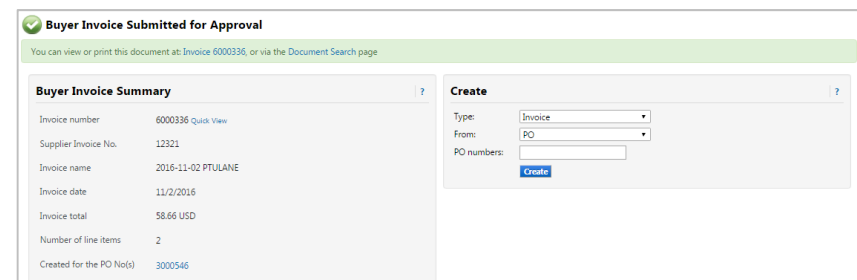
3. In the Document Actions drop down menu, select **Create Invoice**.



4. Complete all of the required fields and select **Finalize Invoice**.



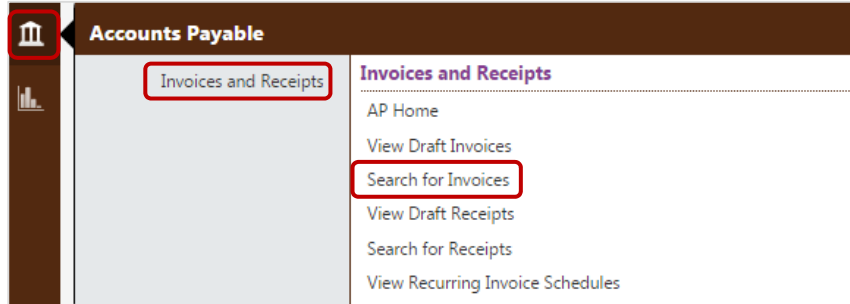
5. A confirmation of the buyer invoice will be displayed.



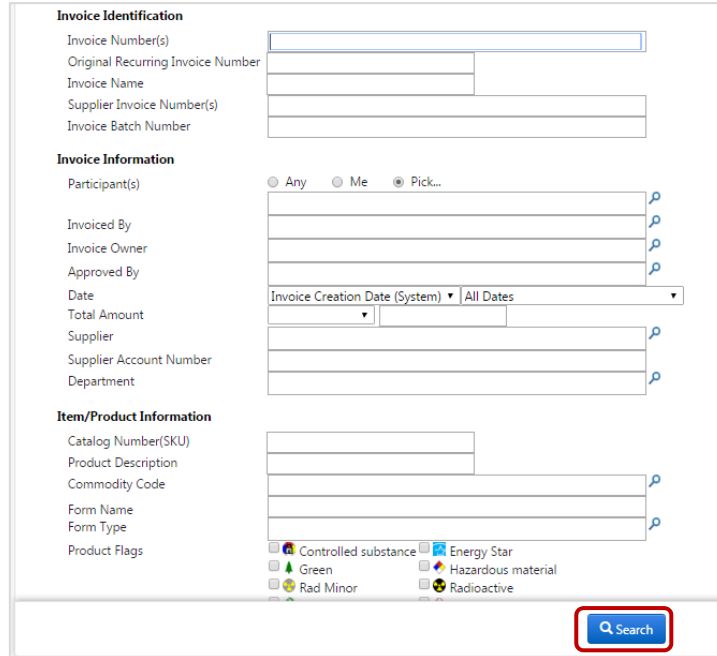
## 6.1 Editing an Invoice

Target Audience: Invoice Approver

- From the navigation menu, click the **Accounts Payable** icon and **Search for Invoices**.



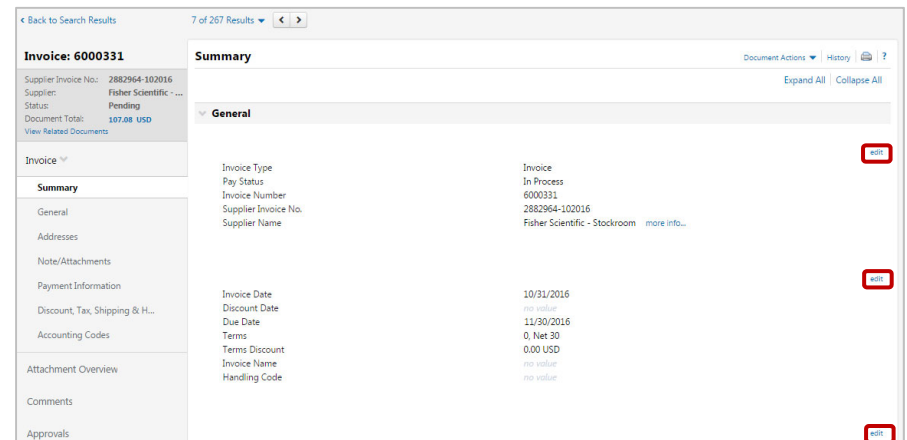
- Enter applicable information in the Invoice Search fields and select **Search**.



- From the search results, select the invoice that requires review and approval.

| Invoice No. | Supplier Invoice No. | Supplier Name                 | PO No.  | Invoice Date/Time                                           | Other Detail                                                         | Invoice Total |
|-------------|----------------------|-------------------------------|---------|-------------------------------------------------------------|----------------------------------------------------------------------|---------------|
| 6000336     | 12321                | Grainger                      | 3000546 | Created: 11/2/2016 2:56 PM<br>Due: 12/2/2016<br>Discount:   | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 58.66 USD     |
| 6000331     | 2882964-102016       | Fisher Scientific - Storeroom | 3000351 | Created: 10/31/2016 1:46 PM<br>Due: 11/30/2016<br>Discount: | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 107.08 USD    |
| 6000330     | 2882965-102016       | Fisher Scientific             | 3000458 | Created: 10/31/2016 1:46 PM<br>Due: 11/30/2016<br>Discount: | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 102.07 USD    |
| 6000323     | 67890                | SECURENATION                  | 3000504 | Created: 10/26/2016 9:56 AM<br>Due: 11/25/2016<br>Discount: | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 500.00 USD    |
| 6000283     | 9037943404           | Airgas, Inc.                  | 3000431 | Created: 10/6/2016 5:08 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 127.80 USD    |
| 6000279     | 9037944172           | Airgas, Inc.                  | 3000429 | Created: 10/6/2016 4:15 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 165.53 USD    |

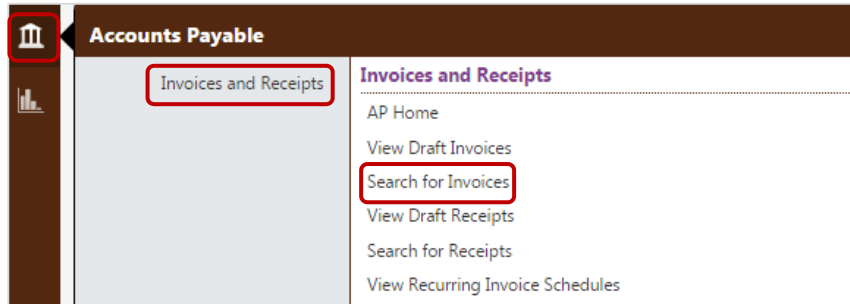
- Once the invoice is open, edits can be made in any of the invoice sections by selecting the **Edit** links.



## 6.2 Rejecting an Invoice

Target Audience: Invoice Approver

- From the navigation menu, click the **Accounts Payable** icon and **Search for Invoices**.



- Enter applicable information in the Invoice Search fields and select **Search**.

**Invoice Identification**

Invoice Number(s)

Original Recurring Invoice Number

Invoice Name

Supplier Invoice Number(s)

Invoice Batch Number

**Invoice Information**

Participant(s)  Any  Me  Pick...

Invoiced By

Invoice Owner

Approved By

Date  Invoice Creation Date (System) | All Dates

Total Amount

Supplier

Supplier Account Number

Department

**Item/Product Information**

Catalog Number(SKU)

Product Description

Commodity Code

Form Name

Form Type

Product Flags

Controlled substance  Energy Star  Hazardous material  Radioactive

Green  Rad Minor

- Using the invoice filters, filter invoices based on **Workflow Status**. The invoice must be pending in order to reject it.

**Search Details**

Filtered by

Date Type: Invoice Creation Date (System)

Date Range: All Dates

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**Refine Search Results**

Date Range

All Dates

**Workflow Status**

Complete (222)

**Rejected (1)**

**Supplier**

Staples (32)

Test Supplier - Margot (22)

CEDARLANE USA (12)

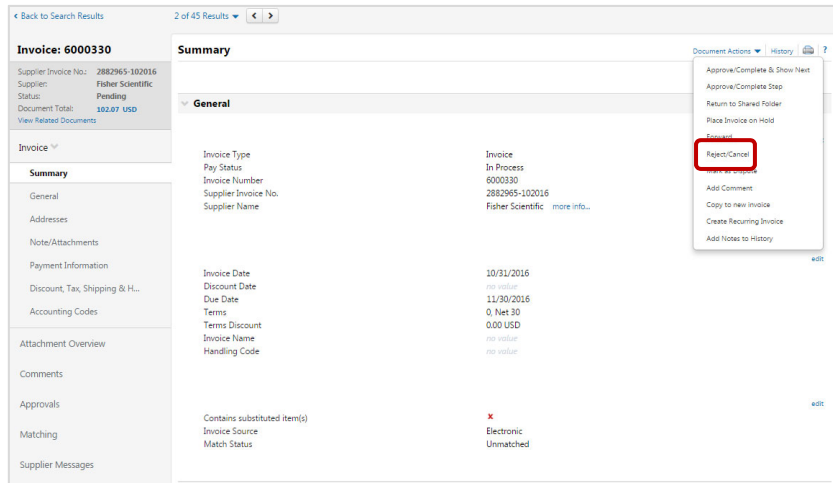
CDW GOVERNMENT INCORPORATED (10) [more]

- Select the invoice number that should be rejected.

Showing 1 - 20 of 45 Results All Dates

| Invoice No.                    | Supplier Invoice No. | Supplier Name                 | PO No.  | Invoice Date/Time                                           | Other Detail                                                         | Invoice Total |
|--------------------------------|----------------------|-------------------------------|---------|-------------------------------------------------------------|----------------------------------------------------------------------|---------------|
| <a href="#">6000331</a>        | 2882964-102016       | Fisher Scientific - Storeroom | 3000351 | Created: 10/31/2016 1:46 PM<br>Due: 11/30/2016<br>Discount: | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 107.08 USD    |
| <b><a href="#">6000330</a></b> | 2882965-102016       | Fisher Scientific             | 3000458 | Created: 10/31/2016 1:46 PM<br>Due: 11/30/2016<br>Discount: | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 102.07 USD    |
| <a href="#">6000323</a>        | 67890                | SECURENATION                  | 3000504 | Created: 10/26/2016 9:56 AM<br>Due: 11/25/2016<br>Discount: | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 500.00 USD    |
| <a href="#">6000283</a>        | 9037943404           | Airgas, Inc.                  | 3000431 | Created: 10/6/2016 5:08 PM<br>Due: 11/9/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 127.80 USD    |
| <a href="#">6000279</a>        | 9037944172           | Airgas, Inc.                  | 3000429 | Created: 10/6/2016 4:15 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 165.53 USD    |
| <a href="#">6000268</a>        | DRH6100              | CDW GOVERNMENT INCORPORATED   | 3000420 | Created: 9/30/2016 7:15 AM<br>Due: 10/26/2016<br>Discount:  | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 62.46 USD     |

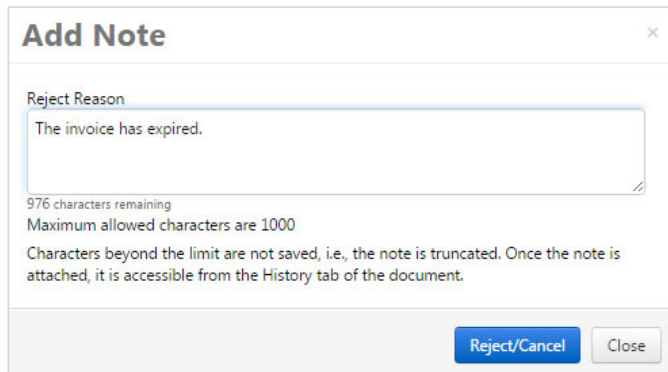
5. From the **Document Actions** drop down menu, select **Reject/Cancel**.



The screenshot shows the 'Invoice: 6000330' summary page. The 'Document Actions' dropdown menu is open, and the 'Reject/Cancel' option is highlighted with a red box. The menu options include: Approve/Complete & Show Next, Approve/Complete Step, Return to Shared Folder, Place Invoice on Hold, Cancel, **Reject/Cancel**, Add Comment, Copy to New Invoice, Create Recurring Invoice, and Add Notes to History.

| General                      |                                                |
|------------------------------|------------------------------------------------|
| Invoice Type                 | Invoice                                        |
| Pay Status                   | In Process                                     |
| Invoice Number               | 6000330                                        |
| Supplier Invoice No.         | 2882965-102016                                 |
| Supplier Name                | Fisher Scientific <a href="#">more info...</a> |
| Invoice Date                 | 10/31/2016                                     |
| Discount Date                | no value                                       |
| Due Date                     | 11/30/2016                                     |
| Terms                        | 0, Net 30                                      |
| Terms Discount               | 0.00 USD                                       |
| Invoice Name                 | no value                                       |
| Handling Code                | no value                                       |
| Contains substituted item(s) | <span style="color: red;">x</span>             |
| Invoice Source               | Electronic                                     |
| Match Status                 | Unmatched                                      |

6. Add a note including the reason for rejecting the invoice.

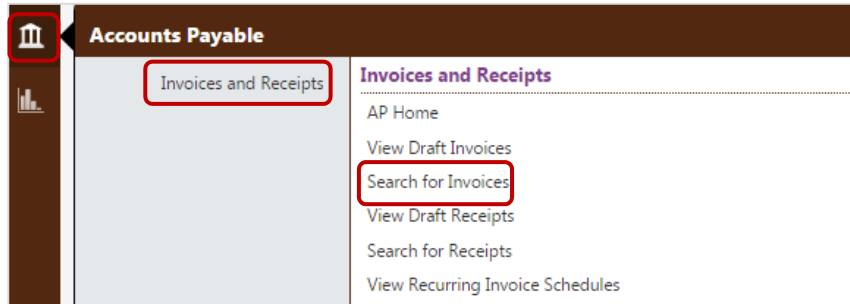


The 'Add Note' dialog box is shown with a text area containing the text 'The invoice has expired.' Below the text area, it indicates '976 characters remaining' and 'Maximum allowed characters are 1000'. A warning message states: 'Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.' At the bottom, there are two buttons: 'Reject/Cancel' and 'Close'.

## 6.3 Forwarding an Invoice

Target Audience: Requester/Invoice Approver

- From the navigation menu, click the **Accounts Payable** icon and **Search for Invoices**.



- Enter applicable information in the Invoice Search fields and select **Search**.

**Invoice Identification**

Invoice Number(s)

Original Recurring Invoice Number

Invoice Name

Supplier Invoice Number(s)

Invoice Batch Number

**Invoice Information**

Participant(s)  Any  Me  Pick...

Invoiced By

Invoice Owner

Approved By

Date  Invoice Creation Date (System)  All Dates

Total Amount

Supplier

Supplier Account Number

Department

**Item/Product Information**

Catalog Number(SKU)

Product Description

Commodity Code

Form Name

Form Type

Product Flags

Controlled substance  Energy Star  Hazardous material  Radioactive

Green  Rad Minor

- Using the invoice filters, filter invoices based on **Workflow Status**. The invoice must be pending to forward it to another approver.

**Search Details**

Filtered by

Date Type: Invoice Creation Date (System)

Date Range: All Dates

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**Refine Search Results**

Date Range

All Dates

**Workflow Status**

Pending (45)

**Supplier**

Staples (32)

Test Supplier - Margot (22)

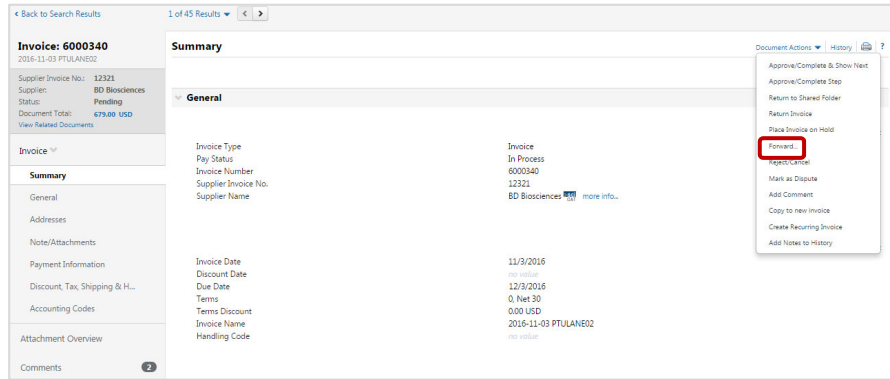
CEDARLANE USA (12)

CDW GOVERNMENT INCORPORATED (10) [more]

- Select the invoice number that should be forwarded.

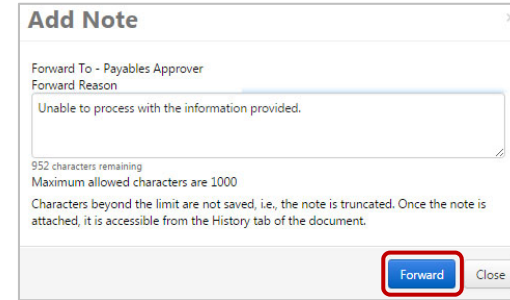
| Invoice No.                                                       | Supplier Invoice No. | Supplier Name                 | PO No.  | Invoice Date/Time                                           | Other Detail                                                         | Invoice Total |
|-------------------------------------------------------------------|----------------------|-------------------------------|---------|-------------------------------------------------------------|----------------------------------------------------------------------|---------------|
| <span style="border: 1px solid red; padding: 2px;">6000340</span> | 12321                | BD Biosciences                | 3000544 | Created: 11/3/2016 10:37 AM<br>Due: 12/3/2016<br>Discount:  | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 679.00 USD    |
| 6000331                                                           | 2882964-102016       | Fisher Scientific - Storeroom | 3000351 | Created: 10/31/2016 1:46 PM<br>Due: 11/30/2016<br>Discount: | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 107.08 USD    |
| 6000323                                                           | 67890                | SECURENATION                  | 3000504 | Created: 10/26/2016 9:56 AM<br>Due: 11/25/2016<br>Discount: | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 500.00 USD    |
| 6000283                                                           | 9037943404           | Airgas, Inc.                  | 3000431 | Created: 10/6/2016 5:08 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 127.80 USD    |
| 6000279                                                           | 9037944172           | Airgas, Inc.                  | 3000429 | Created: 10/6/2016 4:15 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 165.53 USD    |
| 6000268                                                           | DRH6100              | CDW GOVERNMENT INCORPORATED   | 3000420 | Created: 9/30/2016 7:15 AM<br>Due: 10/26/2016<br>Discount:  | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 62.46 USD     |

5. From the **Document Actions** drop down menu, select **Forward**.



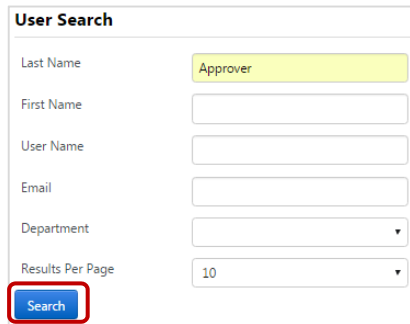
The screenshot shows an invoice summary page for invoice 6000340. The 'Document Actions' dropdown menu is open, and the 'Forward...' option is highlighted with a red box. Other options in the menu include 'Approve/Complete & Show Next', 'Approve/Complete Step', 'Return to Shared Folder', 'Return Invoice', 'Place Invoice on Hold', 'Reprint Invoice', 'Mark as Dispute', 'Add Comment', 'Copy to new invoice', 'Create Recurring Invoice', and 'Add Notes to History'.

8. Add a note that will be attached to the invoice. Select **Forward**.



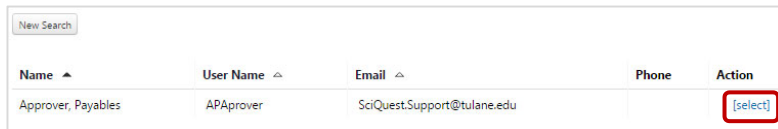
The screenshot shows the 'Add Note' dialog box. The 'Forward Reason' field contains the text: 'Unable to process with the information provided.' The 'Forward' button at the bottom right is highlighted with a red box. The dialog also shows character limits: '952 characters remaining' and 'Maximum allowed characters are 1000'.

6. Search the appropriate user that should receive the invoice.



The screenshot shows the 'User Search' form. The 'Last Name' field contains the text 'Approver'. The 'Search' button at the bottom left is highlighted with a red box. Other fields include 'First Name', 'User Name', 'Email', 'Department', and 'Results Per Page' (set to 10).

7. Select the user.

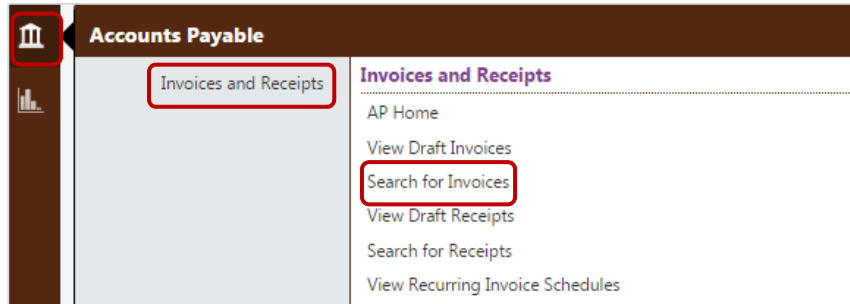


| Name               | User Name  | Email                       | Phone | Action   |
|--------------------|------------|-----------------------------|-------|----------|
| Approver, Payables | APApprover | SciQuest.Support@tulane.edu |       | [select] |

## 6.4 Placing an Invoice on Hold

Target Audience: Invoice Approver

- From the navigation menu, click the **Accounts Payable** icon and **Search for Invoices**.



- Enter applicable information in the Invoice Search fields and select **Search**.

**Invoice Identification**

Invoice Number(s)

Original Recurring Invoice Number

Invoice Name

Supplier Invoice Number(s)

Invoice Batch Number

**Invoice Information**

Participant(s)  Any  Me  Pick...

Invoiced By

Invoice Owner

Approved By

Date  Invoice Creation Date (System)  All Dates

Total Amount

Supplier

Supplier Account Number

Department

**Item/Product Information**

Catalog Number(SKU)

Product Description

Commodity Code

Form Name

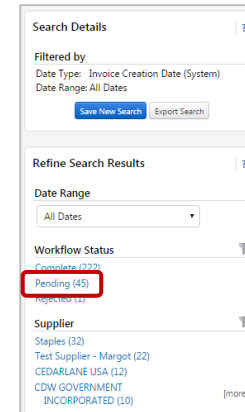
Form Type

Product Flags

Controlled substance  Energy Star  Hazardous material  Radioactive

Green  Rad Minor

- Using the invoice filters, filter invoices based on **Workflow Status**. The invoice must be pending put a hold on the invoice.

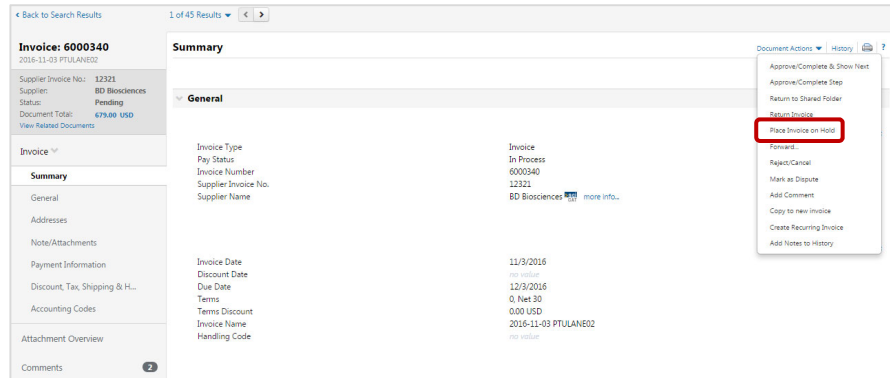


- Select the invoice number that should be placed on hold.

| Invoice No.    | Supplier Invoice No. | Supplier Name                 | PO No.  | Invoice Date/Time                                           | Other Detail                                                         | Invoice Total |
|----------------|----------------------|-------------------------------|---------|-------------------------------------------------------------|----------------------------------------------------------------------|---------------|
| <b>6000340</b> | 12321                | BD Biosciences                | 3000544 | Created: 11/3/2016 10:37 AM<br>Due: 12/3/2016<br>Discount:  | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 679.00 USD    |
| 6000331        | 2882964-102016       | Fisher Scientific - Storeroom | 3000351 | Created: 10/31/2016 1:46 PM<br>Due: 11/30/2016<br>Discount: | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 107.08 USD    |
| 6000323        | 67890                | SECURENATION                  | 3000504 | Created: 10/26/2016 9:56 AM<br>Due: 11/29/2016<br>Discount: | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 500.00 USD    |
| 6000283        | 9037943404           | Airgas, Inc.                  | 3000431 | Created: 10/6/2016 5:08 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 127.80 USD    |
| 6000279        | 9037944172           | Airgas, Inc.                  | 3000429 | Created: 10/6/2016 4:15 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 165.53 USD    |
| 6000268        | DRH6100              | CDW GOVERNMENT INCORPORATED   | 3000420 | Created: 9/30/2016 7:15 AM<br>Due: 10/26/2016<br>Discount:  | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 62.46 USD     |



5. From the **Document Actions** drop down menu, select **Place Invoice on Hold**.



Back to Search Results 1 of 45 Results

**Invoice: 6000340**  
2016-11-03 PTULANE02

Supplier Invoice No.: 12321  
Supplier: BD Biosciences  
Status: Pending  
Document Total: 679.00 USD  
View Related Documents

**Summary**

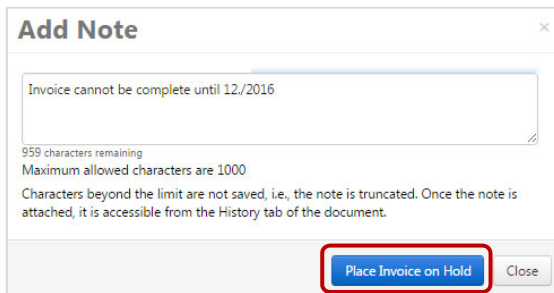
**General**

|                      |                                             |
|----------------------|---------------------------------------------|
| Invoice Type         | Invoice                                     |
| Pay Status           | In Process                                  |
| Invoice Number       | 6000340                                     |
| Supplier Invoice No. | 12321                                       |
| Supplier Name        | BD Biosciences <a href="#">more info...</a> |
| Invoice Date         | 11/3/2016                                   |
| Discount Date        | no value                                    |
| Due Date             | 12/9/2016                                   |
| Terms                | 0 Net 30                                    |
| Terms Discount       | 0.00 USD                                    |
| Invoice Name         | 2016-11-03 PTULANE02                        |
| Handling Code        | no value                                    |

**Document Actions** | History

- Approve/Complete & Show Next
- Approve/Complete Step
- Return to Shared Folder
- Return Invoice
- Place Invoice on Hold**
- Forward...
- Reject/Cancel
- Mark as Dispute
- Add Comment
- Copy to new invoice
- Create Recurring Invoice
- Add Notes to History

6. Add a note to the invoice.



**Add Note**

Invoice cannot be complete until 12/2016

959 characters remaining  
Maximum allowed characters are 1000

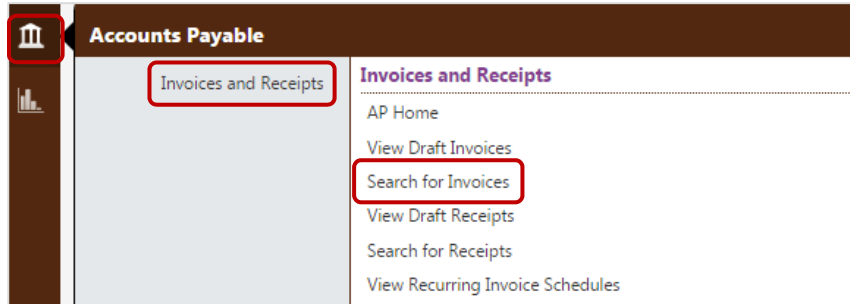
Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

**Place Invoice on Hold** Close

## 6.5 Reviewing and Approving Invoices

Target Audience: Invoice Approver

- From the navigation menu, click the **Accounts Payable** icon and **Search for Invoices**.



- Enter applicable information in the Invoice Search fields and select **Search**.

- From the search results, select the invoice that requires review and approval.

| Invoice No.    | Supplier Invoice No. | Supplier Name                 | PO No.  | Invoice Date/Time                                           | Other Detail                                                         | Invoice Total |
|----------------|----------------------|-------------------------------|---------|-------------------------------------------------------------|----------------------------------------------------------------------|---------------|
| <b>6000336</b> | 12321                | Grainger                      | 3000546 | Created: 11/2/2016 2:56 PM<br>Due: 12/2/2016<br>Discount:   | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 58.66 USD     |
| 6000331        | 2882964-102016       | Fisher Scientific - Storeroom | 3000351 | Created: 10/31/2016 1:46 PM<br>Due: 11/30/2016<br>Discount: | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 107.08 USD    |
| 6000330        | 2882965-102016       | Fisher Scientific             | 3000458 | Created: 10/31/2016 1:46 PM<br>Due: 11/30/2016<br>Discount: | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 102.07 USD    |
| 6000323        | 67890                | SECURENATION                  | 3000504 | Created: 10/26/2016 9:56 AM<br>Due: 11/25/2016<br>Discount: | Source: Manual<br>Type: PO Invoice<br>Pay: In Process<br>Status:     | 500.00 USD    |
| 6000283        | 9037943404           | Airgas, Inc.                  | 3000431 | Created: 10/6/2016 5:08 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 127.80 USD    |
| 6000279        | 9037944172           | Airgas, Inc.                  | 3000429 | Created: 10/6/2016 4:15 PM<br>Due: 11/5/2016<br>Discount:   | Source: Electronic<br>Type: PO Invoice<br>Pay: In Process<br>Status: | 165.53 USD    |

- Review the invoice and make edits as necessary.

- Select **Approve/Complete** stop from the Document Actions drop down menu.