

Hello and welcome to our Oracle Procurement Video Guide series. This video on approving invoices will cover approval email notifications, notifications and worklists in Oracle and potential actions when reviewing an invoice.

Getting started, there are three ways in which you can interact with the invoices pending your approval. We're going to walk through each option and their best uses.

The first and most immediate way in which you may interact with your approvals is through your Outlook email. One of the first things you may notice are the three options to approve, reject or request info. Before we review these options, it's important to note that if you are using a custom email other than your official, UC Path email, you will not be able to use the approve, reject or request info options in Outlook. Instead, you may refer to our [knowledge base article](#) on setting up approval through your Gmail.

- Approve lets the invoice continue in its workflow to be paid.
- Reject routes the invoice through accounts payable for review. Their action will depend on the comment you leave when rejecting the invoice, and they will reach out to follow up.
- The third option, request info, should not be used as it will not direct your questions to the appropriate party. Instead, you should contact the supplier directly if you have any questions about the invoice.

Other information on the email includes:

- A hyperlink which will allow you to view the invoice in Oracle,
- The invoice total and line item breakdown,
- The due date and payment method,
- And a history of comments, attachments and actions that have been taken over the course of the invoice's approval workflow

The second way to access your approval queue is through any bell icon in the Oracle environment. You can use the search bar at the top to search for a particular invoice. Once you find what you're looking for, you can open any of the notifications by clicking on the blue hyperlink.

Although this is a convenient way to access your invoice approvals, the bell icon displays all notifications sorted from newest to oldest, complete or not, which have been sent to you. As such, you may use the menu to quickly find an approval notification, but the notifications appearing will not be up to date.

The third and final way to access your approval queue is through the worklist. This can be found under the tools section of the Oracle homepage. As with the bell icon, you can search for particular invoices and click on the blue hyperlinks to open them up. This view also allows you to sort by any of the headings by clicking on the arrows next to their titles. You can expand the notifications appearing by opening the servers menu in the view dropdown and increasing the maximum tasks up to 30. To easily access this module in the future, you can add it is a favorite using the star icon at the top of your screen.

Once you click on a notification, an approval window will open for the invoice you've selected.

- Click on the View Invoice button to open the invoice in a new tab in Oracle,
- View the line item details as well as the charge account used,

- And review the history of attachments, comments and actions taken during the course of the approval workflow.

If based on this information you decide that you should be the one reviewing this invoice, claim the document. This will allow you in the new Actions menu to approve or reject the invoice. You can also release the invoice to allow someone else to take action on the approval, or view the approval history.

Thank you for taking the time to watch our video guide – we hope this information has been helpful. If you have any further questions, please reach out to us by submitting a case through [Services & Support](#) or by calling us at 858.534.9494.