

Once an invoice has entered Basware and the coding has been completed, each invoice needs to be approved for payment by an approver with financial delegation.

As the approver, it is your responsibility to review the expenses and coding of each invoice in your task list. You can either approve the invoice for payment, or if for any reason an invoice is deemed not ready for payment by you, there are a couple of options to manage this.

You can select 'return task' which will return the invoice to the user who sent it to you, please ensure you include a meaningful comment advising the user why you are returning the invoice back to them. Or, you can 'reject' the invoice, which returns the invoice to Accounts Payable admin, who will manage the invoice as per the meaningful description you have provided.

Note: Once the approval has been completed, the invoice will be cleared for payment. No further approvals will occur for the invoice.

1. Check coding and approval

1.1 Open Basware. From your homepage select the **Tasks** tab or *Click here to view task list* options.

The screenshot displays the Basware user interface. At the top, there is a navigation bar with 'Home', 'Tasks' (highlighted with a red box), 'Documents', a notification bell, a user profile icon, and 'Flinders University'. Below the navigation bar is a large banner image of a hand writing in a notebook. On the left side of the banner, there is a 'HELLO' greeting box with the text 'You have 4 tasks. Check them out below.' and a list of three tasks, each with a due date and 'Invoice | Approval' status. A red box highlights a 'Click here to view task list >' link. Below the banner is a 'DO YOU WANT TO LEARN MORE?' section with the text 'Tutorials, practical hints, and the latest features in Basware Purchase-to-Pay (P2P)'. This section contains four image-based links: 'GETTING STARTED', 'USER INTERFACE RENEWAL', 'WHAT'S NEW?', and 'KNOWLEDGE BASE'.

1.2 Open the invoice from the list. Note: **Do not** click on Approve at this stage as the invoice will then go directly for payment.

Navigation	Invoice ID	Supplier	Date	Status	Amount	Action
>	[Redacted]	Flinders University	09/02/2021	Approval	110.00 AUD GROSS	Approve
>	[Redacted]	Flinders University	22/02/2021	Approval	110.00 AUD GROSS	Approve
>	[Redacted]	Flinders University	01/03/2021	Approval	110.00 AUD GROSS	Approve
>	[Redacted]	Flinders University	17/03/2021	Header review	110.00 AUD GROSS	Review

1.3 Review the invoice image and the coding information to determine the expense is relevant and correct.

Invoice details: 61.14 GROSS | 61.14 NET | Approve

Images: 1 | Open image

Header data		Related documents		Workflow		Attachments		Invoice lines		History	
Organisation	Flinders University	Invoice type	Expense Invoice	Scan Report Code		Supplier code *					
Supplier ABN	[Redacted]	Captured ABN (Invoice Image)	[Redacted]	Supplier bank BBAN	[Redacted]	Supplier bank name	[Redacted]	Invoice number *	IN00	Reference person	[Redacted]
Currency code *	AUD	Exchange rate base date *	06/03/2021	Exchange rate (company) *	1	Tax sum	0.00	Gross total (company)	61.14	Purchase order numbers	[Redacted]
Invoice date *	21/09/2020	Group Code	Select	Description		Plan reference		Net total *	61.14		
Payment term code *	30, Thirty Days	Gross total *	61.14	Tax sum	0.00	Net total (company) *	61.14	Due date	21/10/2020	Scan Date	22/02/2021
		Net total *	61.14	Scan Report ID	20210222_061033_FLINDERSAU...						

Coding 1

Filter coding | Tax sum difference: 0.00 | Net sum difference: 0.00 | Gross sum difference: 0.00 | Add coding

#	Ledger Code	Entity	Cost Center Code *	Project Code *	Account Code	EAM Project Code	EAM Task Number	EAM Resource Group	Actions
1									[Copy] [Delete]

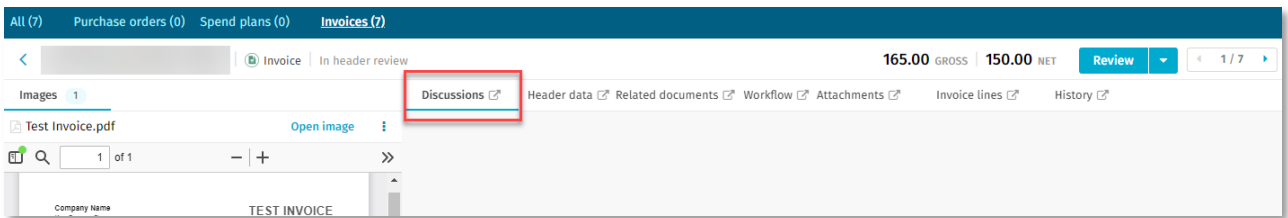
1.4 Once your review is complete and you are ready to approve, click **Approve**.



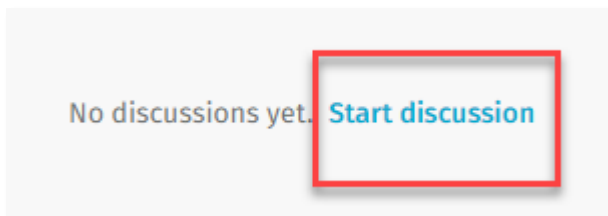
2. Discussions on an invoice

The option to hold a discussion on an individual invoice is available. Anyone with Basware access involved in the invoice process can participate in a discussion. Discussions are held on the invoice, and message notifications will be shown through the bell icon on the top of the screen. Note: a notification email will also be sent to the message recipient. Open the invoice as you would for approval (see steps 1.1 – 1.2). For example: If the invoice relates to multiple areas, you may need to seek confirmation it is ok to proceed with approval from the other interested parties.

2.1 Open the **Discussions** tab on the invoice.



2.2 Select **Start discussion**.




2.3 Enter the name of the person you wish to discuss the invoice with.

The screenshot shows a web interface for 'Discussions'. At the top, there are navigation tabs: 'Discussions', 'Header data', 'Related documents', 'Workflow', 'Attachments', 'Invoice lines', and 'History'. Below these is a form with a dropdown menu labeled 'Select recipients' and a text area labeled 'Type your discussion message here'. The 'Select recipients' dropdown is highlighted with a red rectangular box. At the bottom right of the form are 'Cancel' and 'Post' buttons.

2.4 Enter your message in *New message*.

This screenshot is similar to the previous one, showing the 'Discussions' form. In this view, the text area labeled 'Type your discussion message here' is highlighted with a red rectangular box. The 'Select recipients' dropdown is visible above it. The 'Cancel' and 'Post' buttons are at the bottom right.

2.5 Click **Post**. Your message will then be sent via system notification  to the person selected who will also receive an email notification of the message.

A close-up of the 'Cancel' and 'Post' buttons. The 'Post' button is highlighted with a red rectangular box.

2.6 While waiting for the response notification, you may wish to move on to the next invoice by selecting the right or left arrow next to the approve button, or go back to the task list.

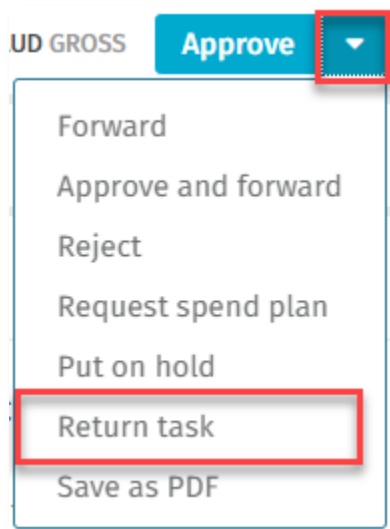
The screenshot shows a navigation bar with tabs: 'Home', 'Tasks', 'Documents', a notification bell, a user icon, and 'Flinders University'. The 'Tasks' tab is highlighted with a red box. Below the navigation bar is a dark blue bar. At the bottom, there is an 'Approve' button with a dropdown arrow, and next to it are left and right navigation arrows with '2 / 3' in between. The 'Approve' button and the navigation arrows are both highlighted with red boxes.

3. Return/Reject task

As per the introduction, **As an approver**, you can select **'return task'** which will return the invoice to the user who sent it to you, please ensure you include a meaningful reason advising the user why you are returning the invoice. Or, you can **'reject'** the invoice, which returns the invoice to Accounts Payable team, who will manage the invoice as per the meaningful description you have provided.

3.1 Return

3.1.1 If during your approval stage you have discovered an error, or the invoice needs to be returned to a previous user, select the **Down arrow** next to **Approve**.



3.1.2 The Return task pop up window will appear with the previous user's name prepopulated. Enter a meaningful **Comment** for the previous user.

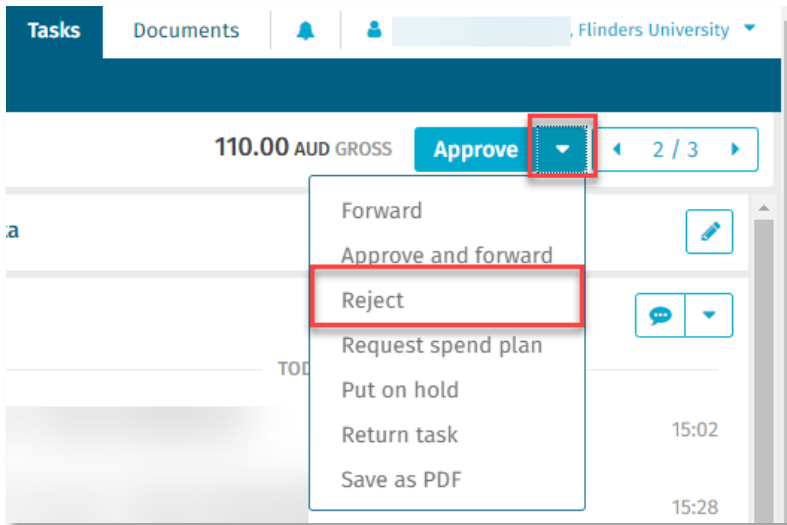
The image shows a 'Return task' pop-up window. At the top, it says 'Return task' with a close button (X). Below that, there is a 'Task' section with a radio button selected for 'HEADER REVIEW'. Underneath, there is a greyed-out text field containing a name. The main part of the window is a large text area labeled 'Comment *' which is currently empty. A character count '1000' is visible in the bottom right corner of the text area. At the bottom of the window, there are two buttons: 'Cancel' and 'Return'.

3.1.3 Select the **Return** icon once your comment has been entered.

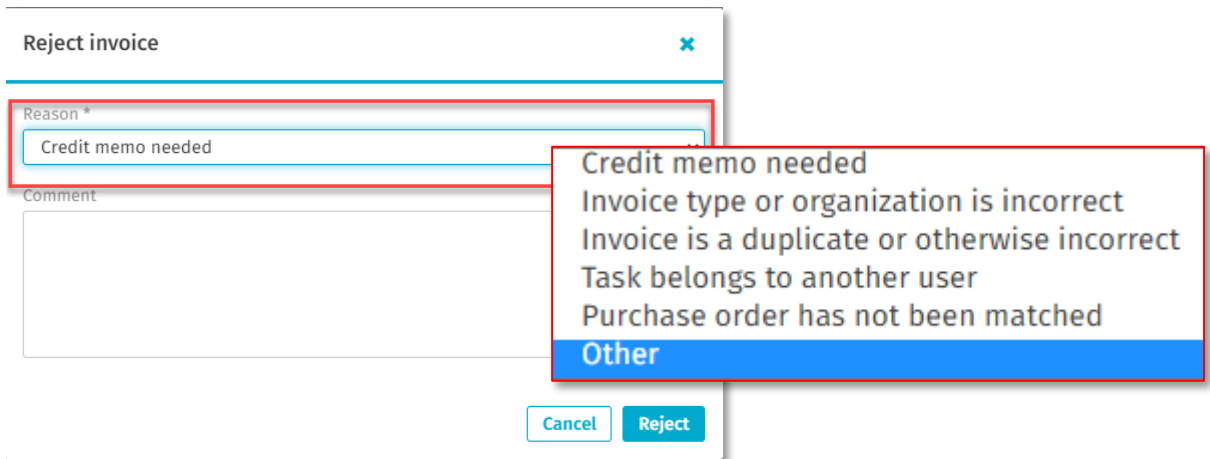
The image shows the same 'Return task' pop-up window as in the previous step. The 'Comment *' text area now contains the text 'Test Comment|'. The character count in the bottom right corner of the text area is now '988'. The 'Return' button at the bottom right is highlighted with a red box, indicating it should be selected.

3.2 Reject

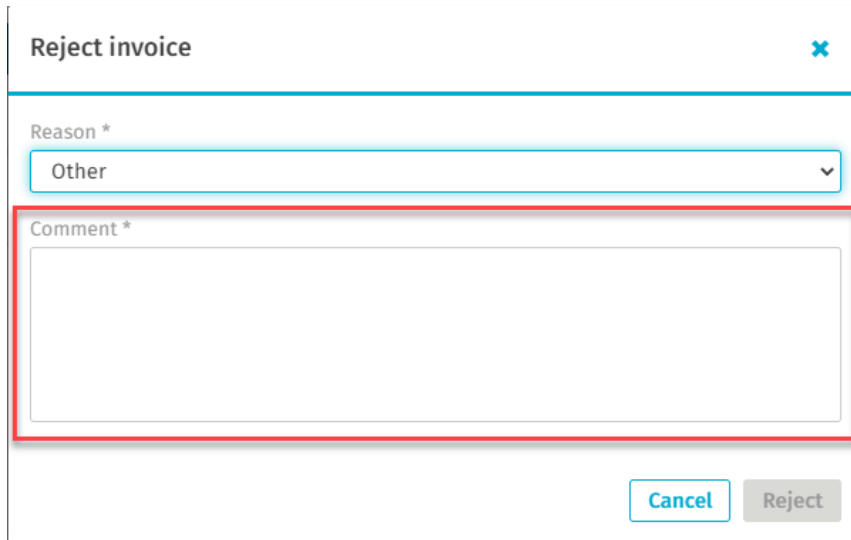
3.2.1 If during your approval stage you have discovered an error in the coding or any other issue and you need to direct the invoice to another user who isn't the user who sent the invoice to you, please select the **Down arrow** next to **Approve** and select **Reject**. **Note:** The 'reject' process does not cancel the invoice, it will send it back to Accounts Payable team to manage.



3.2.2 The **Reject invoice** pop up window will appear, select the reject **Reason**.



3.2.3 Provide a meaningful **Comment** for the rejection, as the invoice will go into the Accounts Payable team workflow where they will action your request as per the comment you have provided.



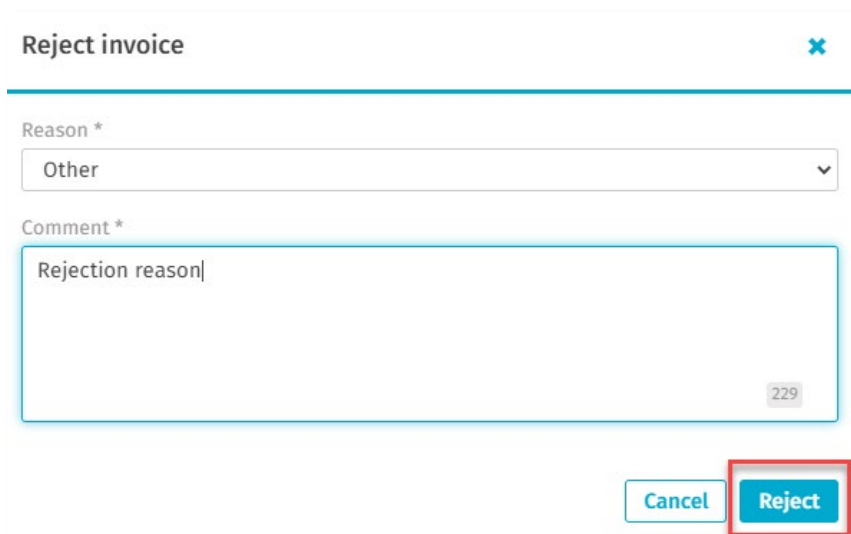
Reject invoice ✕

Reason *
Other

Comment *

Cancel Reject

3.2.4 Once a comment is entered, click **Reject**.



Reject invoice ✕

Reason *
Other

Comment *
Rejection reason|

Cancel **Reject**

Note: if/when the invoice reappears in your tasks list, comments previously added in the process will be visible to you.

This ends the guide.