

## Approving Invoices

This page describes how to approve invoices in Alma, including how to access the **Waiting for Approval Invoices** page and approve invoices to proceed to the payment stage, or mark them as Need Additional Review to return them to e review stage of the workflow. It also describes the actions that can be performed on this page such as changing or releasing an invoice assignment, deleting invoices or setting invoices back to the Review stage.

To approve invoices, you must have the following role:

- Invoice Manager

You can approve only invoices associated with the scope assigned to your role. You can delete an invoice only if you have been assigned the **Invoice Operator Extended** role.

If the approval rules pre-configured by an administrator determine that manual approval for invoices is required under certain circumstances, the invoice is sent for manual approval when the specified criteria are met. This approval set is skipped if an invoice approval rule indicates to do so; see [Configuring Invoice Approval Rules](#).

### Note

For an overview of the end to end invoice workflow with links to relevant sections for details see [Invoicing Workflow](#).

Invoices are approved on the Waiting for Approval Invoices page (**Acquisitions > Receiving and Invoicing > Approve**). You can also view this page starting on a specific tab by selecting one of the following tasks in the Tasks List in the persistent menu (see [Tasks in the Task List](#)):

- **Invoices - approval - assigned to you**
- **Invoices - approval - without assignment**

Invoice #	Vendor	Owner	Creation from	Creation Date	Last Updated Date	# of Lines	Total Price
1 4821	1 Wiley-Blackwell	Clean Training	Manually	2014/03/04	2016/12/12	5	22.00 USD
2 1516	3 Baker & Taylor	Clean Training	Manually	2014/03/04	2016/09/09	5	14.00 USD

### Waiting for Approval Invoices Page

#### To manually approve invoices:

1. On the Waiting for Approval Invoices page, locate the invoices that you want to approve.
2. Select **Actions > Edit** for the invoice you want to approve. The Invoice Details page appears.
3. Modify the information in each tab as required. For information on the fields in each of these tabs, see [Creating an Invoice From a PO or Manually](#).
4. Select one of the following:

- **Approve** – The invoice is waiting to be paid and proceeds to the payment stage of the workflow. For details, see [Invoicing Workflow](#).
- **Need Additional Review** – If the invoice needs additional review, it is returned to the review stage of the workflow. When you select this, a dialog box appears, allowing you to select a reason for the action. To configure the reasons, see [Configuring Invoice Disapproval Reasons](#). See [Sending Invoices Back to Review](#).

You can also perform invoice management tasks on the Waiting for Approval Invoices page (**Acquisitions > Receiving and Invoicing > Approve**), as described in the referenced procedures:

- Change an invoice assignment - Select **Assign to** in the row actions list for an invoice. The reassignment dialog box opens. See [Assigned to Me, Unassigned, Assigned to Others Tabs](#).
- Release an invoice assignment - Select **Release assignment** in the row actions list for an invoice. The invoice is unassigned and moved to the **Unassigned** tab.
- Delete an invoice - Select **Delete** in the row actions list for an invoice and select **Confirm** in the confirmation dialog box. The associated expenditures are deleted and the encumbrances for the related POs are recalculated.
- Set invoices back to the Review stage (see [Sending Invoices Back to Review](#))

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#### Note

- You can delete an invoice only if you have been assigned the **Invoice Operator Extended** role.
  - If your institution does not enforce approval rules, when a user with a role other than Invoice Manager selects **Save and Continue** on an invoice in review, the approval status is set to **Not Required** and the **Approved By** field is empty.
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