

# U4 ERP Workflow Tasks

Guide for Users

Version 1.0



[sirgar.llyw.cymru](http://sirgar.llyw.cymru)  
[carmarthenshire.gov.wales](http://carmarthenshire.gov.wales)

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# ACCESSING WORKFLOW TASKS

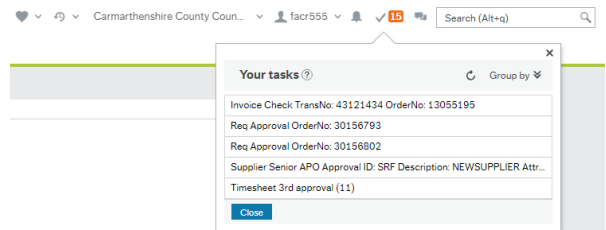
There are six types of workflow tasks:

- Invoice Checking
- Requisition Authorisation
- Supplier Invoice Authorisation/Purchase Invoice Authorisation (only when PO related invoices are over tolerance (2.5%))
- Debtor Invoice Authorisation
- New Supplier Form Authorisation
- Timesheet Approval (Engineering and Property design ONLY)

Other tasks you may also see are missing goods receipting tasks. Please see our goods receipting guide for assistance.

You should receive an email when there are tasks awaiting authorisation. There will be a link on the email that takes you to the log in screen of Unit4 ERP, but you may also log into Unit4 ERP your usual way if you wish.

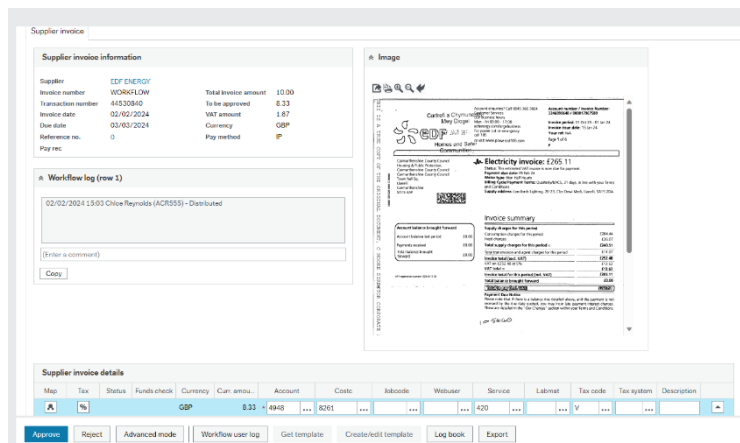
When you login into U4 ERP, the tasks are located on the top right-hand corner of the main menu screen, the tick icon (this is also visible when you are in any other part of the system). There will be an orange box with the number of tasks awaiting action next to the icon. Click on the icon to see all tasks. If you don't have any, the orange icon will not appear.



# ACTIONING A WORKFLOW TASK

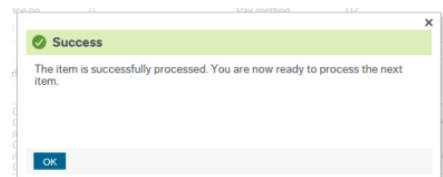
To open a Workflow Task simply click on the task you wish to view. If you have more than one of the same tasks waiting approval, they will appear on the right-hand side of the approval screen.

On this screen, you will find cost code details, and (if an invoice authorisation) the image of the invoice. You can click on the image making it bigger.



Once you have checked all the details on the authorisation screen, you can either press the Approve or Reject button found at the bottom of the screen.

Once you have approved the task the following confirmation box will appear, and the task will be removed from your outstanding task list.



If you need to reject the invoice for whatever reason, a comment box will appear, you must give a reason that the payment department can action. Please make sure your comment is useful, for example 'Not for me' or 'This is wrong' isn't informative.

If you have any workflow queries, please contact [CR Finance Systems](#)