

Kofax – Financial Approver

Introduction

This guide is intended for Financial Delegates who approve supplier invoices that don't have a Purchase Order (PO).

As an Approver, you will be asked to review the invoice to ensure the type of goods/service is in line with University policy, and the expenditure supports business operations.

Access to Kofax

You can access Kofax in the following ways;

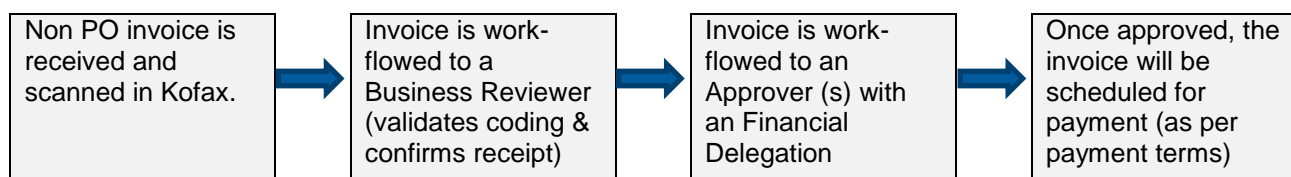
- Click the link in the system generated email sent to you when an invoice has been sent to you to action, or
- Click on the Kofax button on the Finance & Procurement Services [homepage](#) or
- Click on the Kofax tile in the Finance System.

However if you are travelling or not on the University network:

- Please visit ITDS website to set up the [ADAPT](#) and/or [VPN](#) to access Kofax
- Alternatively, please nominate an alternative user in advance to action on your behalf ([link](#))

Procedure

Non-PO supplier invoice process



From your **Work Queue**, click the link you would like to action

1. Review the invoice image and the information provided to determine to the best of your knowledge that the type of goods/service being purchased is for University business
2. To view or add attachments click on the **Attachments Tab**

3. If you approve the payment, click the **Approve** button.

Additional steps

Click through the “tabs” for additional information on the invoice or to upload attachments, if required.

Account Distribution	Workflow	Attachments	History
Review invoice details and coding (as above)	View the work-flow approval path. To amend use “Push back”	Open any attachments and/or upload your own	Any comments will be noted here

Push Back

If you need more information, amend the coding or workflow, “push back” to the Business Reviewer. For any other amendments, including changing the Business Reviewer, select Accounts Payable (AP Processor) from the drop down list. Please use the comment box to add your instructions.

Clicking on the **Return to Work Queue** button takes you back to your Work Queue landing page.

Need help?

For further support or questions, contact Finance & Procurement Services on +61 8 8313 3414 or finprosupport@adelaide.edu.au