

# Kofax – View or Amend Workflow

## Introduction

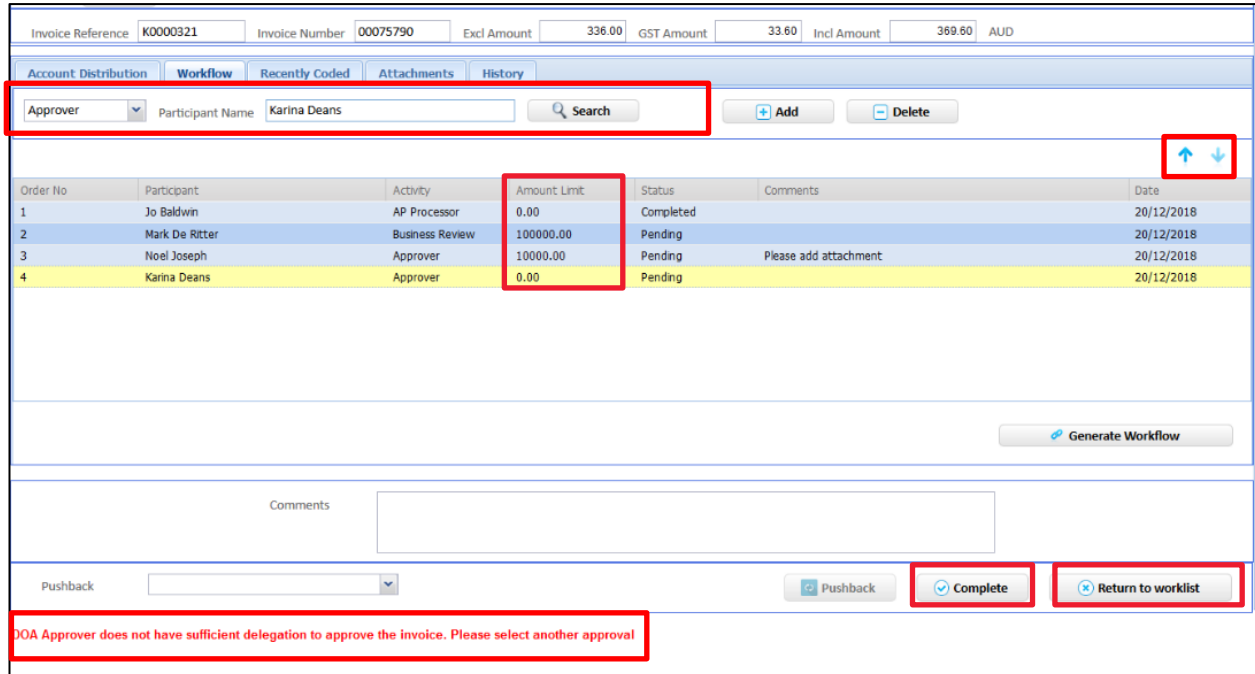
This document demonstrates how to view and/or amend the workflow approval path.

## Procedure

To view and/or amend the workflow path -

1. Click on the **Workflow** tab to view the workflow path for this transaction
2. To add an Approver or Business Reviewer, select from drop down list and use the search functionality to find the name (you can enter by name or staff ID) then press **Add**
3. To change the order of the workflow path, highlight the line and use the arrow keys to move the person up or down
4. To remove someone from the workflow path, highlight the name and press **Delete**
5. Once this is done, click on **Complete**.

**NOTE:** the last person in the workflow path must be an **Approver** with the right level of financial delegation to approve the value of the invoice (see Amount Lmt column for limits). An error message will alert you to select another approver.



Invoice Reference: K0000321 Invoice Number: 00075790 Excl Amount: 336.00 GST Amount: 33.60 Incl Amount: 369.60 AUD

Account Distribution Workflow Recently Coded Attachments History

Approver Participant Name Karina Deans Search Add Delete

Order No	Participant	Activity	Amount Limit	Status	Comments	Date
1	Jo Baldwin	AP Processor	0.00	Completed		20/12/2018
2	Mark De Ritter	Business Review	100000.00	Pending		20/12/2018
3	Noel Joseph	Approver	10000.00	Pending	Please add attachment	20/12/2018
4	Karina Deans	Approver	0.00	Pending		20/12/2018

Generate Workflow

Comments

Pushback Complete Return to Work Queue

JOA Approver does not have sufficient delegation to approve the invoice. Please select another approval

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

## Contact Us

For further support or questions, contact Finance & Procurement Services on +61 8 8313 3414 or [finprosupport@adelaide.edu.au](mailto:finprosupport@adelaide.edu.au)