

New BEN Pays/MarkView Functionality – Request Comment

There is new MarkView functionality which gives the Buyer (or user as below) the ability to send invoices on hold to any active PO Manager requesting review and/or comment. The person to whom the invoice has been sent responds back to the Buyer with their comments using the 'Return To' Action in MarkView. From here, the Buyer should know their 'next steps' to request that the holds be released or invoice cancelled based on their MarkView training and/or documentation.

Please Note - This new functionality does not allow the user, receiving the invoice for comment, the ability to use the 'Resolve Holds' or 'Route to Accounts Payable' Actions in MarkView. Only the 'Return To' Action can be selected.

Summary of the Functionality by Person Responsible or Summary by Function

Step	Function	Person Responsible	BEN Pays/MarkView Action
I.	Send the invoice on hold to a PO Manager for review and comment	PO Buyer or Buyer's Alternate	Select Request Comment
II.	Respond to invoices that have been sent	PO Manager to whom comment was requested	Select Return To
III.	Recall or Re-Route invoices that were sent for comment and have not been returned	PO Buyer or Buyer's Alternate	Select Recall or Re-Route

Detailed Procedures on Functions

I. Send the invoice on hold to someone else for review and comment.



- A. From the MarkView Web Inbox select the invoice on hold to view. The image is opened and the Request Comment Action is available.



- B. Click on 'Request Comment'. Enter or select from the list of values the PO Manager's Contact name and enter Comments for her/him to review. Click OK to send the invoice with comment.

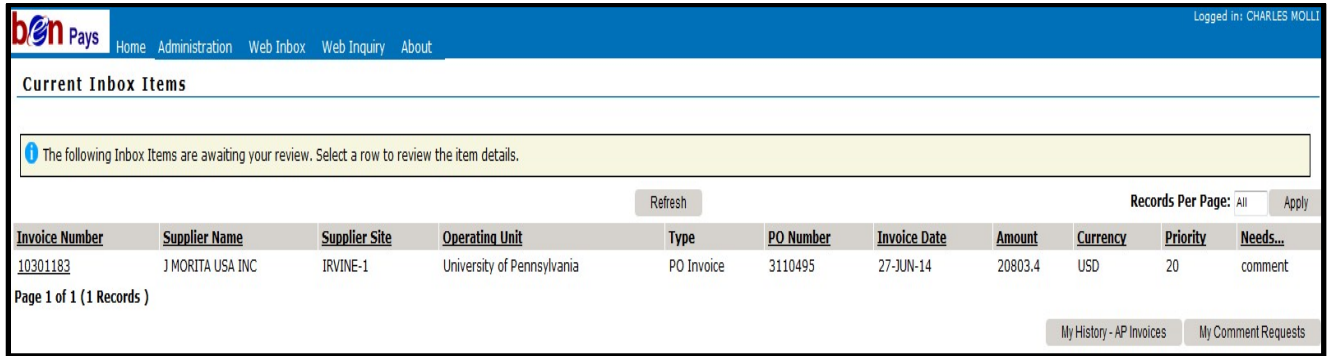


The screenshot shows a software interface with three buttons in the top bar: 'Resolve Holds', 'Route To Accounts Payable', and 'Request Comment'. Below these is a tabbed menu with 'Holds', 'PO Line Details', 'Payments', and 'Related D'. The 'Request Comment' dialog box is open, featuring a yellow background and a question mark icon. It contains the following fields: 'Contact: *' with a dropdown menu showing 'MOLLI, CHARLES (CMOLLI)'; 'Email:' with the text 'ryanb@upenn.edu'; and 'Comments: *' with a text box containing 'Is this okay to pay?'. At the bottom are 'OK' and 'Cancel' buttons.

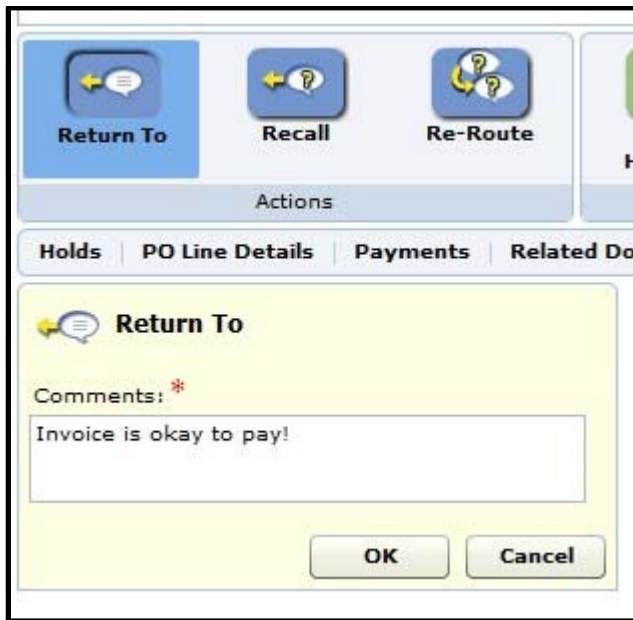
 You have successfully sent PO Invoice 10301183 to CHARLES MOLLI (CMOLLI) for comment.
 The viewer is now showing the next document.

II. Respond to invoices that have been sent.

A. Invoice is now in the selected PO Manager's BEN Pays/MarkView Web Inbox.



B. After opening the image the PO Manager can respond by selecting the 'Return To' Action and entering the appropriate comments. Click [OK].



Please Note – The 'Recall' and 'Re-Route' actions are visible but are not to be used by the PO Manager. The PO Manager can only use the 'Return To' Action.

III. Recall or Re-route invoices that were sent for comment and have not been returned.

- A. The Buyer can view all invoices sent to 'Request Comment' from the Web Inbox by clicking on the 'My Comment Requests' link.

The following Inbox Items are awaiting your review. Select a row to review the item details.

Refresh Records Per Page: All Apply

Invoice Number	Supplier Name	Supplier Site	Operating Unit	Type	PO Number	Invoice Date	Amount	Currency	Priority	Needs...
25	UNION LEAGUE OF PHILADELPHIA	PHILADELPHIA-1	University of Pennsylvania	PO Invoice	3199286	19-JUN-14	16090.54	USD	25	purchasing resolution
06271401	PYRAMID CLUB	PHILADELPHIA-1	University of Pennsylvania	PO Invoice	3189093	30-JUN-14	12445.96	USD	20	purchasing resolution
26	UNION LEAGUE OF PHILADELPHIA	PHILADELPHIA-1	University of Pennsylvania	PO Invoice	3194680	07-JUL-14	20136.68	USD	20	purchasing resolution

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My History - AP Invoice **My Comment Requests**

- B. The Buyer Recall or Re-route an invoice sent for comment.

a. Re-Routing an Invoice

- i. Click on the link under 'Description' to open the invoice.

You requested comments on the following Items.

Refresh Records Per Page

Description	Type	Current Owner	Days with Owner	Previous Queue	Priority	Comment Request Reason
J MORITA USA INC (10301183)	PO Invoice	CHARLES MOLLI (CMOLLI)	0	Comment Request	20	JOSEPH NACE (JNACE) requested comments on: "Is this okay to pay?."

Recall Selected

Page 1 of 1 (1 Records)

- ii. Click the Re-Route Action.

bon Pays Invoice 10301183

JOSEPH NACE Help Return to List

PO Invoice J MORITA USA INC Comment Request

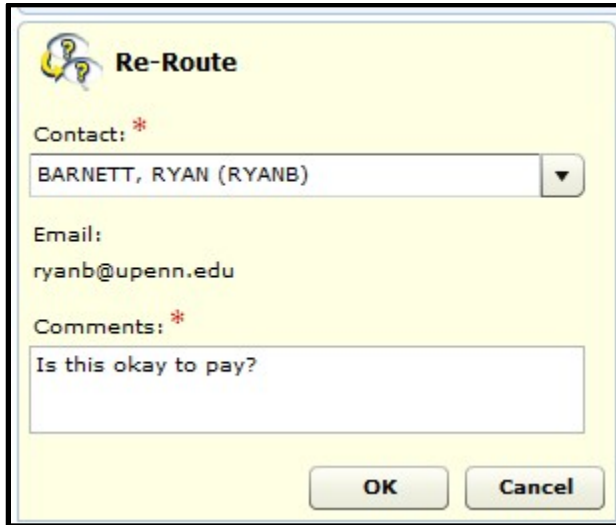
Organization: University of Pennsylvania Supplier Site: IRVINE-1 Invoice Number: 10301183
Date: 27-JUN-2014 Amount: 20,803.40 USD

CHARLES MOLLI (CMOLLI) is responsible for adding comments to this PO Invoice. However, you can Recall this PO Invoice back to yourself for additional processing, or you can Re-Route it to a different user.

Return To Recall **Re-Route** Yellow Highlight Blue Sticky Note Red Arrow Delete

Action Thumbnails Page 1 / 1 Zoom 96% Zoom Rotate Rotate Page Options Fax E-mail Print History Overview Output

iii. Enter another PO Manager's contact information and comments. Click [OK].



Re-Route

Contact: *
BARNETT, RYAN (RYANB)

Email:
ryanb@upenn.edu

Comments: *
Is this okay to pay?

OK Cancel

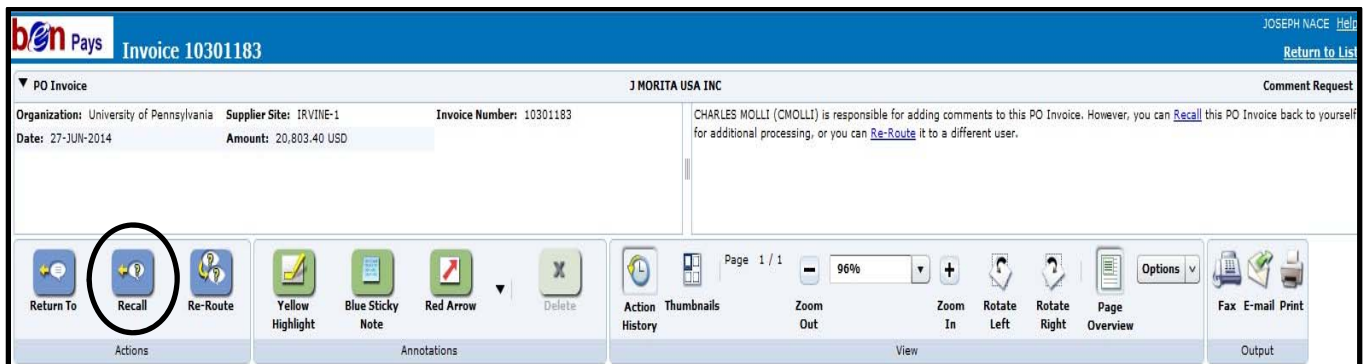
b. Recall an Invoice

i. Click on the link under 'Description' to open the invoice or check the box next to the invoice and then select the 'Recall Selected' box.

Items Sent for Comment							
You requested comments on the following Items.							
Refresh							
Records Per Page							
<input type="checkbox"/>	Description	Type	Current Owner	Days with Owner	Previous Queue	Priority	Comment Request Reason
<input type="checkbox"/>	J MORITA USA INC (10301183)	PO Invoice	CHARLES MOLLI (CMOLLI)	0	Comment Request	20	JOSEPH NACE (JNACE) requested comments on: "Is this okay to pay?."
<input type="checkbox"/>	Recall Selected						

Page 1 of 1 (1 Records)

OR



bon Pays Invoice 10301183

Organization: University of Pennsylvania Supplier Site: IRVINE-1 Invoice Number: 10301183
Date: 27-JUN-2014 Amount: 20,803.40 USD

CHARLES MOLLI (CMOLLI) is responsible for adding comments to this PO Invoice. However, you can [Recall](#) this PO Invoice back to yourself for additional processing, or you can [Re-Route](#) it to a different user.

Actions: Return To, Recall, Re-Route

Annotations: Yellow Highlight, Blue Sticky Note, Red Arrow, Delete

View: Action History, Thumbnails, Zoom Out (96%), Zoom In, Rotate Left, Rotate Right, Page Overview

Output: Fax, E-mail, Print

<input checked="" type="checkbox"/>	Description
<input checked="" type="checkbox"/>	<u>1 MORITA USA INC (10301183)</u>
<input checked="" type="checkbox"/>	Recall Selected

ii. You will receive a message that you recalled the item from Comment Request.

Items Sent for Comment		
<input checked="" type="checkbox"/> You Recalled 1 item(s) from Comment Request.		
<u>Description</u>	<u>Type</u>	<u>Current</u>
You have no records out for comment.		