New World Refresher - How to Approve Items in New World

From the Home Screen, under my Tasks, there will be a list of items that need your attention.
1. Click on the "0 of 1 at 3" etc., under approval status
2. Review what comes up for accuracy, such as vendor name and description so you will know what you are looking at to approve.
3. Click on the word Items in the yellow bar - to see if a PO is linked to this invoice; important mostly if the purchase is for over $2,000. To minimize that back, click on the yellow bar that says item again
4. Click on the word Transactions in the next yellow bar down the page - to verify account number. DoubleClick the box with the plus sign to open the Journal Entry and then hover your mouse right beside the word Project and the icon changes shape, double click and it will expand the account code to show the description of what the code is. This is where you can make sure the account code the initiator chose is indeed what you desire and that it makes sense. To minimize that back, click on the yellow bar that says item again
5. Click on the word Documents in the yellow bar - To open the attachment, click the description, then when it prompts you to open or save the pdf, choose open. Verify that it matches the information in the above invoice entry:
    a. Invoice number
    b. Invoice date
    c. Invoice amount
    d. Due date- if a due date is not listed, look for a "net 30" etc., or use 30 days from the invoice date as your due date
    e.   G/L Date - this is a crucial date. It drives our financial records and tells the system what date this item should be reflected in our financials. It won't be on the invoice but needs to be verified in the system. The date should be the date the item was received. If it's a service, it should be the date the service was completed. If for a service period, you should use the last date of that time frame as the G/L date. If it's a conference, the G/L date should be the last date of the conference or the last date of the travel.
6. After all these things have been reviewed, you should check to see if additional invoices are paid in this invoice batch. You can do this by scrolling back up near the top on the right, where there is an invoice description. There is a drop-down box there. If you click that drop-down box, it will show if additional invoices need the same review.
7. After you have reviewed all the invoices to be paid with the batch you are reviewing, you then scroll back to the top and click approve. You select the next person in your approval chain, put in any comments you think the next person may need, and lastly, you click ok. This sends it to the next person in your approval chain. If you don't see the word approve, you may have to validate it first, by clicking the checkmark icon near the top of the page. Then you should see the word approve.

Updated Approval Chain:
Initiator - secretary
Principal or Assistant Principal (HS is C King and MS is K Barber only for time being)
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Supervisor of Business
Finance to process for payment

****Directors will be taken out of school level purchases as of July 1st, 2013. This puts more verification responsibility on the Principals.