



eBuilder User Guide

70.00 – Invoice Approval (INV) Process

Revision History			
Rev #	Reason	Date	Revised By
0	Initial Release	7/13/2024	Bill Copeland



Process Overview |

The 70.00 – Invoice Approval (INV) Process allows consultants and contractors to submit invoices via the project they are engaged in through eBuilder. During the creation of the commitment (agreement/contract) in eBuilder, the integration step with PeopleSoft (PS) encumbers the money and creates a PO. When an invoice is submitted and approved, it also integrates with PS to pay the invoice and update the purchase order. Once completed, the integration process will apply the PS journal and voucher information to the invoice in eBuilder. The integration process has been enhanced to accommodate multiple MoCodes, but only one MoCode per line item. In addition, the Invoice Approval process has several conditional steps and routes based on the information available within the process, project, and commitment.

INV - Workflow Details

Description: The process can be initiated by the Consultant or Contractor to request payment. The process is routed to specific internal roles or actors to review and approve the invoice.

Actors: PM, Contract Admin, CPM Accounting, Director of PDC, Campus Contracting Officer, UM System (FPD Review / Director), Consultant and Contractor



Initiation/Start Step |

This process is typically initiated by the Consultant or Contractor. In eBuilder, they will navigate to the Project and

Conditionals |

Conditionals are used to automate routing of workflow based on policy, project status, process data, roles, missing information, etc. Following are conditionals for the invoice process:

1. Is Null? –This is checking to ensure there is a value in column (Ehis Period) of the Invoice Items Section. If there is no value, the process will route back to the vendor (initiator) providing an error message. The vendor will need to update and resubmit. If there is a value it will move to the next step.

2. Is Invoice Unique? –This is checking to see if the Vendor Invoice # the Start Process Section has been used in prior invoices. If it is a duplicate, it routes back to the vendor (initiator) providing an error message. The vendor will need to update and resubmit. If the Vendor Invoice # is unique, it will move to the next step.

3. Construction Contract ? –This is checking to determine if the project is a construction contract. If it is, it routes to the Construction Contract process. If it is not, it routes to the next step.

9. If MU? (conditional)

“Yes” go to 10. Project Status Construction?

“No” go to Accounting/BSS Review (data entry step for S&T, UMKC & UMSL)

10. Project Status Construction? –Checking the project status to see if the project is in Construction or Construction Close.

“Yes” go to MU CPM Review (data entry step)

“No” go to MU PM Review (data entry step)

Payment Hold: Contract Review |

If the invoice is in this step that means the insurance is out of date. The Contract or Agreement Admin will contact the consultant or contractor and request an updated Certificate of Insurance documentation. Once received they will update the dates below in the Insurance Check section of the invoice process instance and attach the new Certificate of Insurance file to the commitment in the project.

Details Comments (0) Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0)

Please verify the Builder's Risk Insurance Expiration date has not passed on the original commitment. This can be updated in the custom fields questions, please contact an e-Builder admin.

Actions to be taken:

Revise - this will send the process back to the initiator to update.

Commitment Builder's Risk Insurance Expiration Date: 03.29.2024

Commitment Professional Liability Insurance Expiration Date: 03.29.2024

Commitment Automobile Insurance Expiration Date: 03.29.2024

Commitment General Liability Insurance Expiration Date: 03.29.2024

Once completed, Take Action “Verified ” to move the invoice forward which will also update the insurance date fields on the commitment; or “Revise” to send back to the Initiator, or Save Draft to complete later.

MU PM/CPM Review |

The invoice process will route to either the PM or CPM based on the project status. If the project status is either Construction or Construction Close, it will route to the CPM first. All other Tf 11.04 6rleeM f-9 (u n Tc4(/)-3.6 (CP)4 0 0 11.04 703.2 22. Td [(P)it(CP)42 (ot)1 0)

MU Accounting/BSS Review |

Accounting will review invoice any relevant information, comments, attachments, project MoCodes on the individual Invoice Items and update as necessary. The integration with People Soft supports the use of multiple MoCodes one per line

Assoc. Director of Construction Review | (MU)

Review all relevant information in the

Integration Hold | (automated step)

In this step, the Invoice Approval process will integrate with PS to queue the invoice payment and update the purchase order.