

# DEPARTMENT OF TRANSPORTATION DELPHI eINVOICING SYSTEM REVIEWER /APPROVER QUICK REFERENCE GUIDE NOTIFICATION TYPES



## STEPS FOR REVIEWING NOTIFICATIONS

### 1. Log Into the Delphi eInvoicing System

- On the DOT Delphi eInvoicing System Login page, enter your user name and password
- Read the Rules of Behavior and check the box
- Select **Login**

### 2. Select the Responsibility

- Select the responsibility associated with the DOT OA for which you will review invoices to go to the Responsibility Home page

### 3. Select the Notifications Link

- Select the **Notifications** link to go to the Worklist page

For additional training resources, please visit the Delphi eInvoicing System website:

<http://www.dot.gov/cfo/delphi-einvoicing-system.html>

Available Training Materials:

- Reviewer/Approver Web-Based Training (WBT)
- Reviewer/Approver User Manual,
- Frequently Asked Questions (FAQs)

### 4. Select View Options

- Select view option from the View drop-down list:
  - All Notifications** will result in every notification in your worklist
  - Open Notifications** will return any notifications that you have not yet viewed
  - To Do Notifications** are invoices waiting to be reviewed
  - FYI Notifications** are informational in nature and do not require any action
  - Notifications From Me** will not return any results

### 5. Notification Types

- The Results in your returned worklist may show any of the following notification types:
  - FYI Approval Request E-mail** lets you know that an invoice is awaiting your approval. You will receive this notification as an e-mail and as a worklist item
  - Action: Approval Request** is sent after the grant recipient has submitted an invoice and requires you to take action. It will only be sent as a worklist item and will require an "approve" or "reject" response
  - FYI Threshold** is for your information only and is used within an auto-approved hierarchy when a preset threshold has been reached. This threshold will be a percentage of the total obligated amount on the Delphi PO. Any individual invoice that exceeds the threshold percentage generates this notification, but no action is required  
NOTE: This notification will only be sent on hierarchies that are auto-approved
  - Escalation FYI** is sent to a based on a predetermined number of calendar days. Please note that the user will continue to receive escalation notifications and you as the reviewer/approver will continue to receive reminder notifications until action is taken on the invoice  
NOTE: This notification will appear in the worklist and will also be sent through email
  - Rejection Previous Approvers** is an FYI only notification that is sent to any users who previously approved an invoice that is now being rejected  
NOTE: This notification is sent through email and will cannot be viewed through the worklist
- You will receive both an FYI notification and an Action notification when a grant recipient has submitted an invoice. However, you can only approve or reject an invoice from the Action notification. The FYI notification is for informational purposes only