

Activity Review Report Invoice Image Access Quick Guide

April 1, 2011

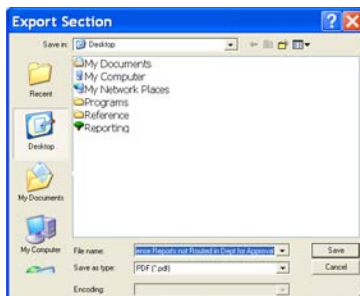
As of April 1, 2011, Financial Reviewers will be able to access available invoice images from the Activity Review Report located in the Review Tool Folder in the Portal. In order to access this functionality, you must first Export the Pivot Reports on which you want to view images.

Step 1: Click the check boxes beneath the pivot reports that you want to download to PDF format. PDF format is required for viewing invoice images.

Step 2: Click on the Export Pivot Report(s) to PDF Button on the lower left corner of the screen.

The screenshot shows the 'Activity Review Report' interface for September 2011. It features a 'Summary Report' tab and 'Detail Views' for Expenses, Interfund Transfers, and Revenue. Under 'Expenses', there are several report categories with checkboxes: 'Expense Reports' (checked), 'SciQuest Purchases' (checked), 'OK to Pay Invoices', 'Sub-Award Invoice Payments', and 'Shipping Transactions'. Below these are 'Journal Entries' and 'High-Risk' sections with their respective report categories. A red oval highlights the 'Expense Reports' and 'SciQuest Purchases' checkboxes. Another red oval highlights a button at the bottom left that says 'Click here to Export Pivot Report(s) to PDF'.

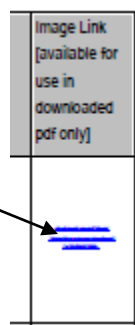
Step 3: You will be prompted to save the PDF file for each pivot you exported. Continue to click **Save**.



Step 4: Open the file that you just saved.

Step 5: Drill on the link provided in the PDF report.

Step 6: As with AHR Invoice Images you will need to sign into the CAS login screen. Remember, once signed in, do not close the sign-in screen window. This will allow you to continue to drill on images without having to sign-in again.



Reminders: If you should have any questions or need any help contact ga.usersupport@yale.edu for further information.