Process Flow – Releasing Transactions from Hold

Please note: There is a holds tool located at http://yalebiz.yale.edu/invoice-holds-revised which will guide you in understanding what type of hold, who can work the hold, department or AP.

Best Practice Guide to Identifying & Releasing Holds

✔ Use the AP Worklist to view holds that can be released by the department approver

✔ Use Procurement Inquiry to identify if a specific transaction is on hold and not viewable on your worklist. Please contact Yale Shared Services Contact Center if you have any questions pertaining to the hold. Departments can also run Invoices on Hold Report (Formerly known as Bug 702a) located in the Data Warehouse Portal

✔ Use the Holds Tool (located on YaleBIZ, http://yalebiz.yale.edu/invoice-holds-revised in conjunction with your AP worklist to identify the reason for the hold, how to prevent the hold, and how to release the hold. (note: the Holds tool is searchable by holds name and/or action owner (i.e. department, AP, VCU, tax)