Rochester Institute of Technology

Oracle Training: Approving Requisitions in the Oracle Applications

Introduction

Employees who have been delegated the authority to approve requisitions are able to approve requisitions on-line in the Oracle Purchasing Requestor application. In addition, employees may view their department requisitions.

Objectives:

At the end of this course, you will understand how to approve requisitions on-line in the Oracle system. You will also be able to use the Purchasing Requestor system to:

- View a copy of the Requisition
- Forward a Requisition to the next higher approval authority
- Reject a Requisition

Advantages of the Oracle Purchasing Approval Application

Some of the advantages of the on-line system include:

- Efficient no need to sign manual forms and mail them to Purchasing
- Timely your approved requisition will be available immediately for Purchasing to process.

Purchasing Approval Procedures

In the daily course of business, it is often necessary to secure outside goods and services. As an employee with Approval authority, it will become necessary for you to approve requisitions for outside expenditures.

Note: While it is not necessary to have access to the RIT-Requestor responsibility to approve requisitions, it is strongly suggested. To receive access, you must fill out an access form and submit to Purchasing for processing. The forms may be obtained on-line on the Purchasing Web site under "Forms".

If, after reviewing this manual, you have further questions about approving requisitions, please contact Purchasing at ext. 5-2107.

When a requisitioner forwards a requisition to you for approval, you will receive an email notification from Oracle Workflow.

You are able to approve an Oracle requisition directly from your e-mail notification. An example of a notification in Outlook is shown below.

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ΞĒ	James Fisher	RE: P-card	Thu 1/17/02 11:49 PM	
! 🖓 🗅	Chris Rodgers	Meeting Change	Fri 1/18/02 10:29 AM	
ãъ	Ø Oracle Workflow	Purchase Requisition 18798 forwarded from Kiely, Rebecca L for USD 19.35 requires your approv	Fri 1/18/02 11:01 AM	
🛆 🗅	Ø Oracle Workflow	Purchase Requisition 18799 forwarded from Kiely, Rebecca L for USD 5,500.00 requires your app	Fri 1/18/02 11:06 AM	
🛆 B	🖉 Andrea Napoli	US630355A-11720-2002-01-18-092429.x/s	Fri 1/18/02 11:26 AM	
👰 🗅	0 Lee Jennejohn	credit card purchases	Fri 1/18/02 1:51 PM	

Click on the e-mail and a summary of the requisition to be approved appears.

You are able to review what is being requested, the dollar amount, the account number being charged and the person making the request.

From: R12 TRIT1I - Oracle Workflow [mailto:wftrit1i@AtOracle.com] Sent: Monday, May 05, 2008 9:20 AM To: Becky L Kiely Subject: Action Required: Purchase Requisition 43036 for Barilla, Marcia (9,988.00 USD)									
From Barilla, Marcia Requisition Total 9,988.00 USD To Kiely, Rebecca Non-Recoverable Tax 0.00 USD Sent 0.5-May-2008 09:19:05 Justification To be rejected Due 07-May-2008 09:19:05 Justification To be rejected ID 911291									
Req	uisition Lines								
Line	# Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)		
1	1 testing-doc to be rejected	AAA AUTOMOBILE CLUB	01.15500.73150.35.00000.00000	Each	11	908	9,988.00		
App	roval Sequence								
]⊣	Kiely, Rebecca L	ess							
Num	Name	Action	Action Date		Not	e			
1	Barilla, Marcia	Submitted	05-May-2008 09:19:05		To b	oe rejected			
2	Kiely, Rebecca L	Pending							
Rela	ted Applications								
Please	pen Document								

Click on "Please click here to respond" and you will be prompted to log into Oracle.

You can also log into Oracle by directing your browser to <u>https://mybiz.rit.edu</u>.



When you log in, Oracle will automatically take you to your personal home page.

From your personal home page, click on either RIT Purchasing Requestor or the RIT Workflow User responsibility



The following screen will appear if you have open notifications:



Click on OK and the following screen will appear:



Click on "Notifications"

Your Work Flow Worklist will appear.

Privacy Statement

Selec	elect Notifications: Open Reassign										
Select	Select All Select None										
Select	From	Туре	Subject	Sent 🔻	Due						
	Barilla, Marcia	@Requisition	Purchase Requisition 43035 for Barilla, Marcia (8,745.00 USD)	02-May-2008	04-May-2						
	Barilla, Marcia	@Requisition	Purchase Requisition 43034 for Barilla, Marcia (1,100.00 USD)	02-May-2008	04-May-2						
	Barilla, Marcia	@Requisition	Purchase Requisition 43032 for Barilla, Marcia (180.00 USD)	02-May-2008	04-May-2						
		PO Approval Error	Document Manager Failed With Error Number while processing Standard Purchase Order 133181	31-Mar-2008							
		PO Approval Error	Document Manager Failed With Error Number while processing Standard Purchase Order 133180	31-Mar-2008							
		PO Approval Error	Document Manager Failed With Error Number while processing Standard Purchase Order 133179	31-Mar-2008							
€TIP	Vacation Rules - Re	edirect or auto-respond	to notifications.								

Preferences Help Close Window

Under the subject heading, click on the Requisition you want to view.

Note: The requisition will NOT open up by clicking on the select box.

Note: Please note the "Due" field on the far right. Each day, the prior's day notification will be cancelled and a new one issued. On the due date, if the document still is not approved, the prior day's notification will be cancelled but a new one will not be issued. Instead, the requisitioner will get a notification that says "No Approver Found". This means that the document has "timed out" and will need to be resubmitted to you for approval.

Copyright (c) 2006, Oracle. All rigi

The notification will open and display as follows:

Purchas	e Requisition 43035 1	for Barilla, Marcia (8,745.00	USD)					
				Approve	Approve And Forward	Forward Rej	ect Reassign	Request Information
From To Sent Due ID	Barilla, Marcia Kiely, Rebecca O2-May-2008 15:22 O4-May-2008 15:22 911286	2:39 2:39	Description n Requisition Total 8 Non-Recoverable Tax 0 Justification Fi	otification ,745.00 USD .00 USD or testing only				
Requis	ition Lines							
Line	# Description	Supplier	Cost Center		Unit	Quantity	Price (USD)	Amount (USD)
1	1 testing	AAA AUTOMOBILE CLUB	01.15500.731	50.35.00000.00000	Earh	Quantity 55	159	8.745.00
-								-,
Approv	val Sequence							
	🛛 👔 Kiely, Rebecca L	In Process						
Num	Name		Action	Action Date			Note	
1	Barilla, Marcia		Submitted	02-May-2008 15:22	:38		For testing only	
2	Kiely, Rebecca L		Pending					
Relate	d Applications							
<u></u> <u>o</u>	en Document							
Respor	ise							
	Forward To All B	Employees and Users 🔽		۹.				
	Note					×		
<u>Return to</u> □ Displa	Worklist w next notification after	my response		Approve	Approve And Forward	Forward Rej	Reassign	Request Information
			ł	ome Logout Preferenc	es Help			

Click on the appropriate button at the top or the bottom of the page to respond to the notification:

Approve Approve And Forward	Forward	Reject	Reassign	Request Information
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The status of the requisition will change to "Approve" if the dollar amount is within in your Approval authority.

Note: Do not select "Approve And Forward" and put in a Buyer's name. You do not have to manually send the document to Purchasing. Oracle does that for you. Only use "Approve And Forward" if you want your authorized approver to see the document when it would not normally go to that person. For instance, if your assistant creates a requisition for \$500 and your approval limit is \$10,000 but you still want your supervisor to sign off on the transaction. Otherwise, please just click "Approve". If the transaction is within your signatory authority, the transaction is approved and Purchasing will process the Purchase Order. If it is for an amount greater than your signatory authority, you can still click "Approve". Oracle will automatically route the document up the hierarchy to the next person until it is approved by someone with enough signatory authority to approve the transaction.

To Forward a Requisition.

If you do need to forward a requisition, click on the flashlight in the "Response" area of the notification:

Purchas	e Requisition 43035 fo	or Barilla, Marcia (8,745.00	USD)					
				Approve	Approve And Forward	Forward Rej	ect Reassign	Request Information
From To Sent Due ID	Barilla, Marcia Kiely, Rebecca 02-May-2008 15:22: 04-May-2008 15:22: 911286	39 39	Description Requisition Total Non-Recoverable Tax Justification	notification 8,745.00 USD 0.00 USD For testing only				
Requis	ition Lines							
Line	# Description	Supplier	Cost Cente	er -	Unit	Quantity	Price (USD)	Amount (USD)
1	1 testing	AAA AUTOMOBILE CLUB	01.15500.73	3150.35.00000.00000	Each	55	159	8,745.00
Approv	val Sequence	In Decrease						
	Kiely, Rebecca L	INPROCESS						
Num	Name		Action	Action Date			Note	
1 2	Kielv, Rebecca L		Pendina	02-May-2008 15:22	38		For testing only	
-	,,		,					
Relate	d Applications							
<u></u>	pen Document							
Respo	nse							
	Forward To All Er	mployees and Users 🔻						
	Note					X		
<u>Return to</u> □ Displa) <u>Worklist</u> ay next notification after r	ny response		Approve	Approve And Forward	Forward Rej	ect Reassign	Request Information

The following screen will appear:

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Search and Select: User or Role									
				Cance <u>l</u> Select					
Coorch									
Jearch									
To find yo	ur item, select a filter item in the pulldown list ar	nd enter a value in t	he text field, then select th	e "Go" button.					
Search By	Name 🔽	Go							
Doculte									
Colort				F					
Select	No search conducted.	Name	user Name	Email					
				Cancel Select					
				Canooj Goloce					
				1811					
				A Stocal intranet					
Done									

Type in the last name of the person you want to forward the requisition to and click on the "Go" button.

🎒 Search	and Select List o	f Values - Microsoft Inter	rnet Explorer	
Search	n By Name	▼ kelly	Go	-
Rosul	te			
Kesui	13			
Coloct	Outel: Colort	Name	Heer Neme	O Previous 1-10 ▼ Next 10 S Fexal S
Select	QUICK Select			
0		KELLY, CARAMECIA	CARAMECIAK@HOTMAIL.COM	
0		Kelly, Angela	AMKPPH	amkpph@rit.edu
0		Kelly, Ewen	EXK2323	exk2323@rit.edu
0		Kelly, Jacquelyn	JFKNC4	
0		Kelly, Janel	JJK3017	jjk3017@rit.edu
0		Kelly, Lyn	LSQPPA	lsqppa@rit.edu
0		Kelly, Martin	MGKELLY13@GMAIL.COM	mgkelly13@gmail.com
0		Kelly, Robert	RKELLY10@TRIAD.RR.COM	rkelly10@triad.rr.com
0		Kelly, Robert	ROBERTKELLY260@COMCAST.NET	robertkelly260@comcast.net
0		Kelly, Ronald	RRKNCP	rrkncp@rit.edu
				O Previous 1-10 Next 10
				Cance <u>l</u> Select
E				Local Intranet

Click in the "Select" circle of the name you are searching for then click the "Select" button in the lower right corner. You will have to do this even if only one name is displayed.

Response						
Forward To	All Employees and Users 🔽 Kelly, Lyn	9				
Note				<u>^</u>		
				v		
				_		
Return to Worklist	n after mv response	Approve	Approve And Forward	Forward Reject	Reassign	Request Information

Add a "Note" to the next level approver if you wish, and click on "Approve And Forward" to submit for approval. The status of the document will show as "Pre-Approved" and a notification will be emailed to the person that you selected to Forward To.

To Forward the requisition without approving it, follow the same steps to select the "Forward" to person and click the "Forward" button rather than the "Approve and Forward" button.

If you click on "Forward", the status of the document will remain "In Process" until it is approved by someone with sufficient approval authority.

To Reject a Requisition.

You can reject the requisition back to the requisitioner. The requisitioner can then either modify the requisition and forward it back to you or the requisitioner can cancel the requisition at this time.

In the Response area of the notification, click on the "Reject" button.

Purchas	e Requisition 43035 f	or Barilla, Marcia (8,745.00	USD)					
				Approve	Approve And Forward	Forward Re	ject Reassign	Request Information
From To Sent Due ID	Barilla, Marcia Kiely, Rebecca 02-May-2008 15:22 04-May-2008 15:22 911286	:39 :39	Description noti Requisition Total 8,74 Non-Recoverable Tax 0.00 Justification For	ification 15.00 USD 0 USD testing only				
Requis	ition Lines							
Line	# Description	Supplier	Cost Center		Unit	Quantity	Price (USD)	Amount (USD)
1	1 testing	AAA AUTOMOBILE CLUB	01.15500.73150	.35.00000.00000	Each	55	159	8,745.00
Approv	val Sequence							
	🖉 👔 Kiely, Rebecca L	In Process						
Num	Name		Action	Action Date			Note	
1	Barilla, Marcia		Submitted	02-May-2008 15:22	38		For testing only	
2	Kiely, Rebecca L		Pending					
Relate	d Applications							
<u>)</u> 0	een Document							
Respon	ise							
	Forward To All E	mployees and Users 💌		٩				
	1000					×		
<u>Return to</u> □ Displa	<u>Worklist</u> w next notification after	my response		Approve	Approve And Forward	Forward	ject Reassign	Request Information
			Hon	ne Logout Preference	s Heln			

The screen with then automatically forward back to your Worklist.

Summary

1-Access Oracle either through the email notification from Oracle Workflow or by going to <u>https://mybiz.rit.edu</u> and log in.

2-From your personal home page, click on either the RIT Purchasing Requestor responsibility or the RIT Workflow User responsibility,

3-Click on Notifications from the Navigator.

4-Click on the Subject heading of the Notification that you wish to open.

5-To forward a document, click on the flashlight in the "Response" area of the notification.

6-Type the person's name into the search box and click Go.

7-Click the Select circle next to their name, then click the Select button in the lower right corner.

8-Click on the appropriate button at either the top or the bottom of the page:

Click "Approve" to approve it, even if you know that the requisition is greater than your signatory authority. Oracle will route it properly.

Click on "Approve and Forward" if the document is within your signatory authority and you do want to approve it, but you also want the next level approver to approve it.

Click on "Forward" if you want the document to go to the next level approver without you approving it.

Click on "Reject" if you want to return the document to the requestor, either to be Modified and resubmitted or to be cancelled.