

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

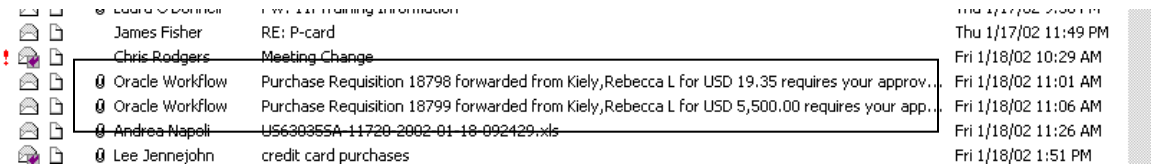
In the daily course of business, it is often necessary to secure outside goods and services. As an employee with Approval authority, it will become necessary for you to approve requisitions for outside expenditures.

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.

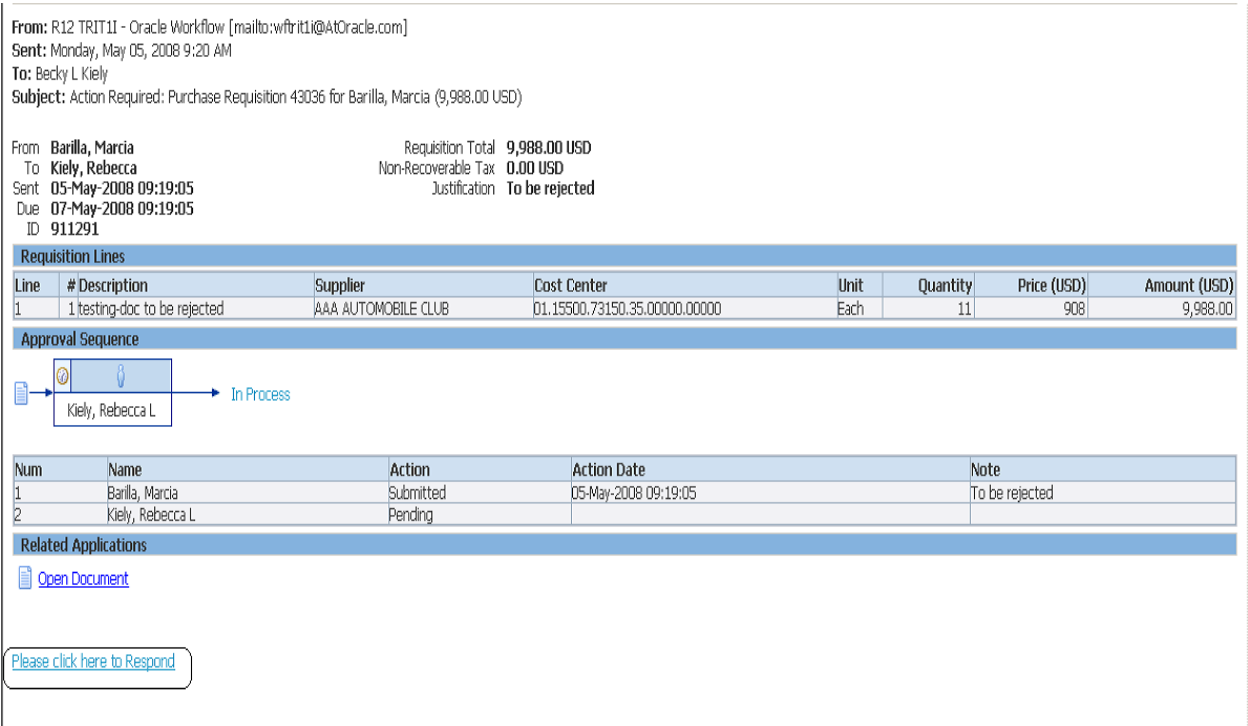
When a requisitioner forwards a requisition to you for approval, you will receive an email notification from Oracle Workflow.

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



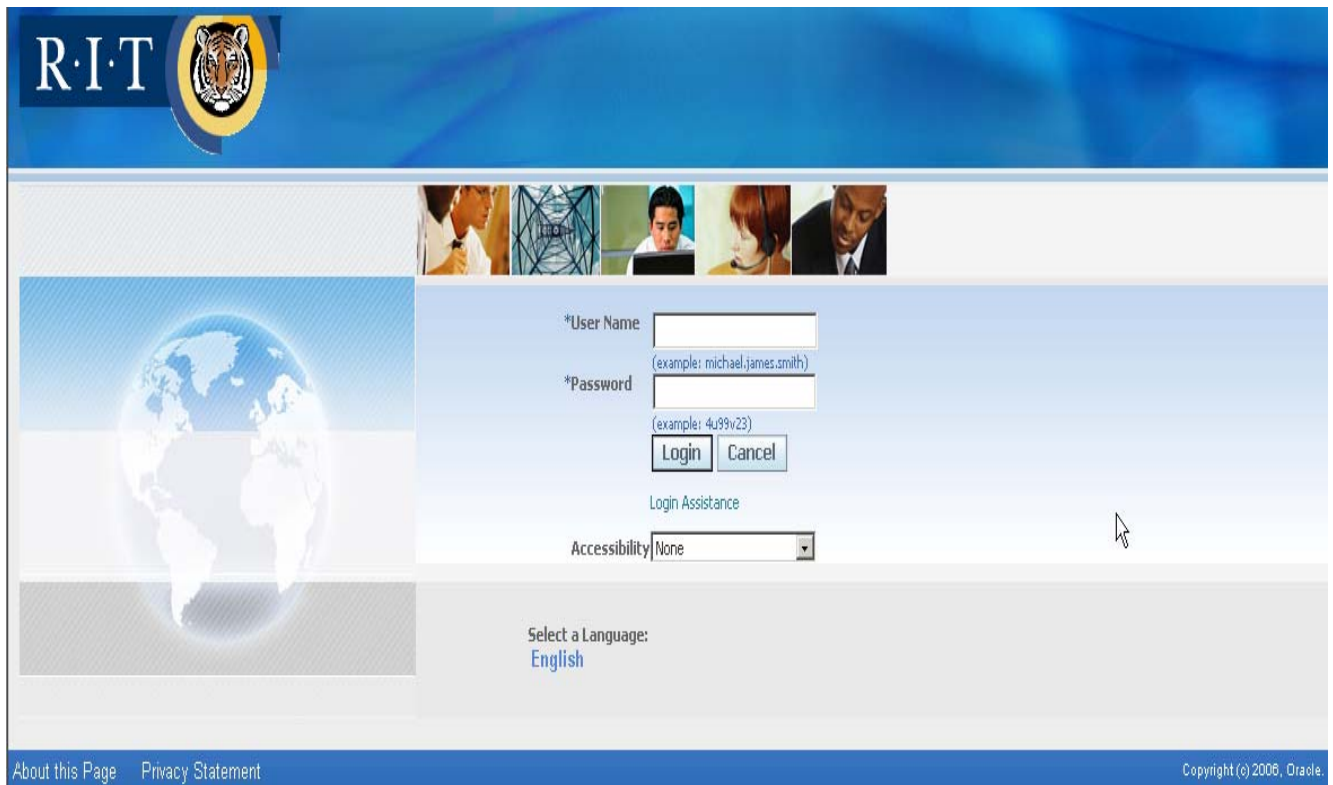
Click on the e-mail and a summary of the requisition to be approved appears.

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



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 <https://mybiz.rit.edu>.

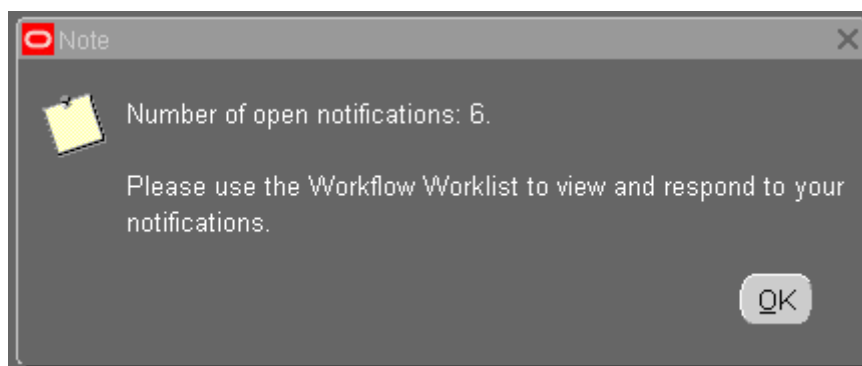


When you log in, Oracle will automatically take you to your personal home page.

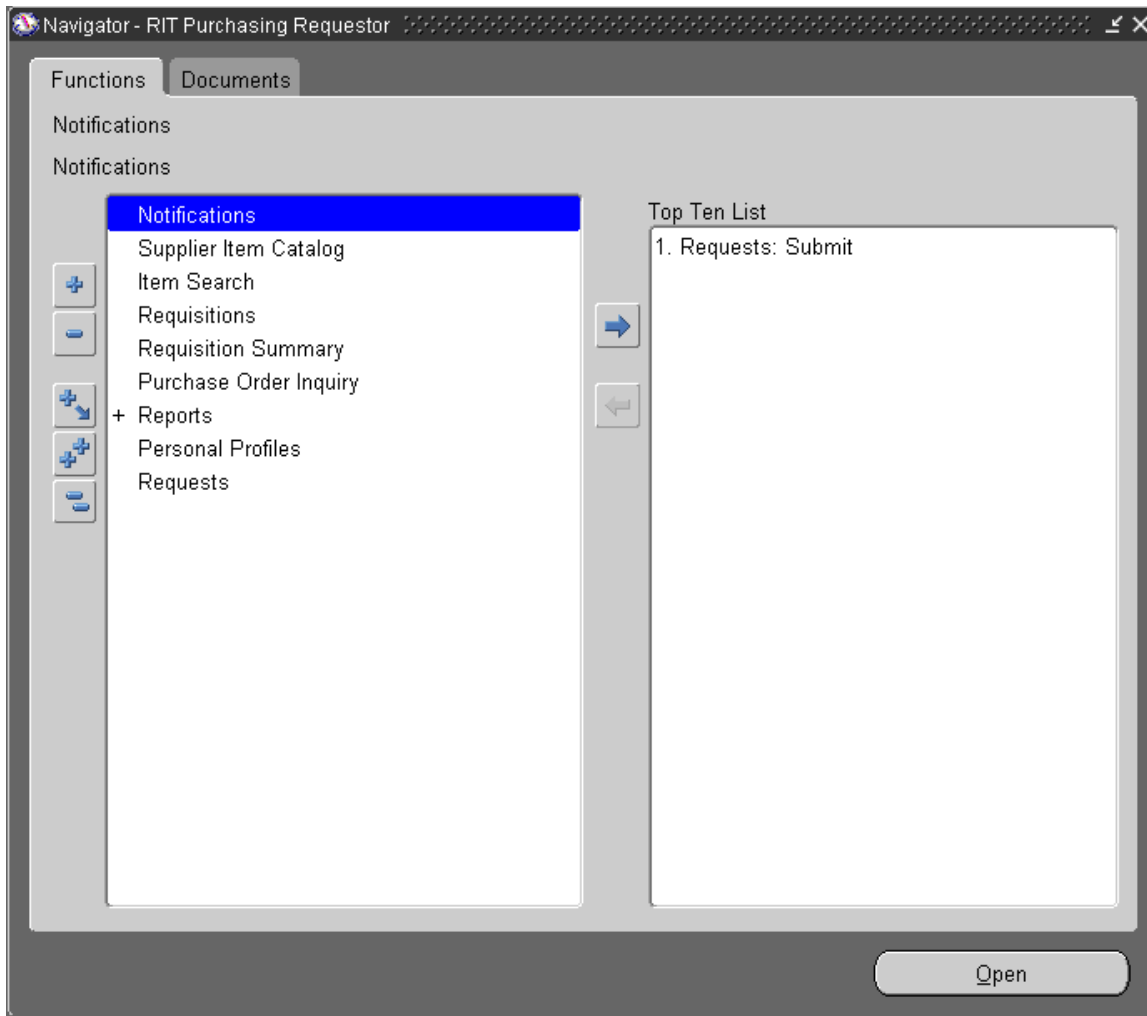
From your personal home page, click on either RIT Purchasing Requestor or the RIT Workflow User responsibility



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.

Worklist

View

Select Notifications:

[Select All](#) | [Select None](#)

Select From	Type	Subject	Sent	Due
<input type="checkbox"/> Barilla, Marcia	@Requisition	Purchase Requisition 43035 for Barilla, Marcia (8,745.00 USD)	02-May-2008	04-May-2
<input type="checkbox"/> Barilla, Marcia	@Requisition	Purchase Requisition 43034 for Barilla, Marcia (1,100.00 USD)	02-May-2008	04-May-2
<input type="checkbox"/> Barilla, Marcia	@Requisition	Purchase Requisition 43032 for Barilla, Marcia (180.00 USD)	02-May-2008	04-May-2
<input type="checkbox"/>	PO Approval Error	Document Manager Failed With Error Number while processing Standard Purchase Order 133181	31-Mar-2008	
<input type="checkbox"/>	PO Approval Error	Document Manager Failed With Error Number while processing Standard Purchase Order 133180	31-Mar-2008	
<input type="checkbox"/>	PO Approval Error	Document Manager Failed With Error Number while processing Standard Purchase Order 133179	31-Mar-2008	

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.
 [TIP Worklist Access](#) - Specify which users can view and act upon your notifications.

Privacy Statement Preferences Help Close Window Copyright (c) 2006, Oracle. All rights reserved.

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.

The notification will open and display as follows:

Purchase Requisition 43035 for Barilla, Marcia (8,745.00 USD)

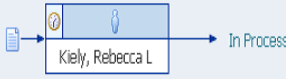
From Barilla, Marcia
To Kiely, Rebecca
Sent 02-May-2008 15:22:39
Due 04-May-2008 15:22:39
ID 911286

Description notification
Requisition Total 8,745.00 USD
Non-Recoverable Tax 0.00 USD
Justification For testing only

Requisition 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

Approval Sequence




Num	Name	Action	Action Date	Note
1	Barilla, Marcia	Submitted	02-May-2008 15:22:39	For testing only
2	Kiely, Rebecca L	Pending		

Related Applications

 [Open Document](#)

Response

Forward To: 

Note:

[Return to Worklist](#)

Display next notification after my response

[Home](#) [Logout](#) [Preferences](#) [Help](#)

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

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:

Purchase Requisition 43035 for Barilla, Marcia (8,745.00 USD)

From Barilla, Marcia
 To Kiely, Rebecca
 Sent 02-May-2008 15:22:39
 Due 04-May-2008 15:22:39
 ID 911286

Description notification
 Requisition Total 8,745.00 USD
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Line	# Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
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Approval Sequence

Num	Name	Action	Action Date	Note
1	Barilla, Marcia	Submitted	02-May-2008 15:22:38	For testing only
2	Kiely, Rebecca L	Pending		

Related Applications

[Open Document](#)

Response

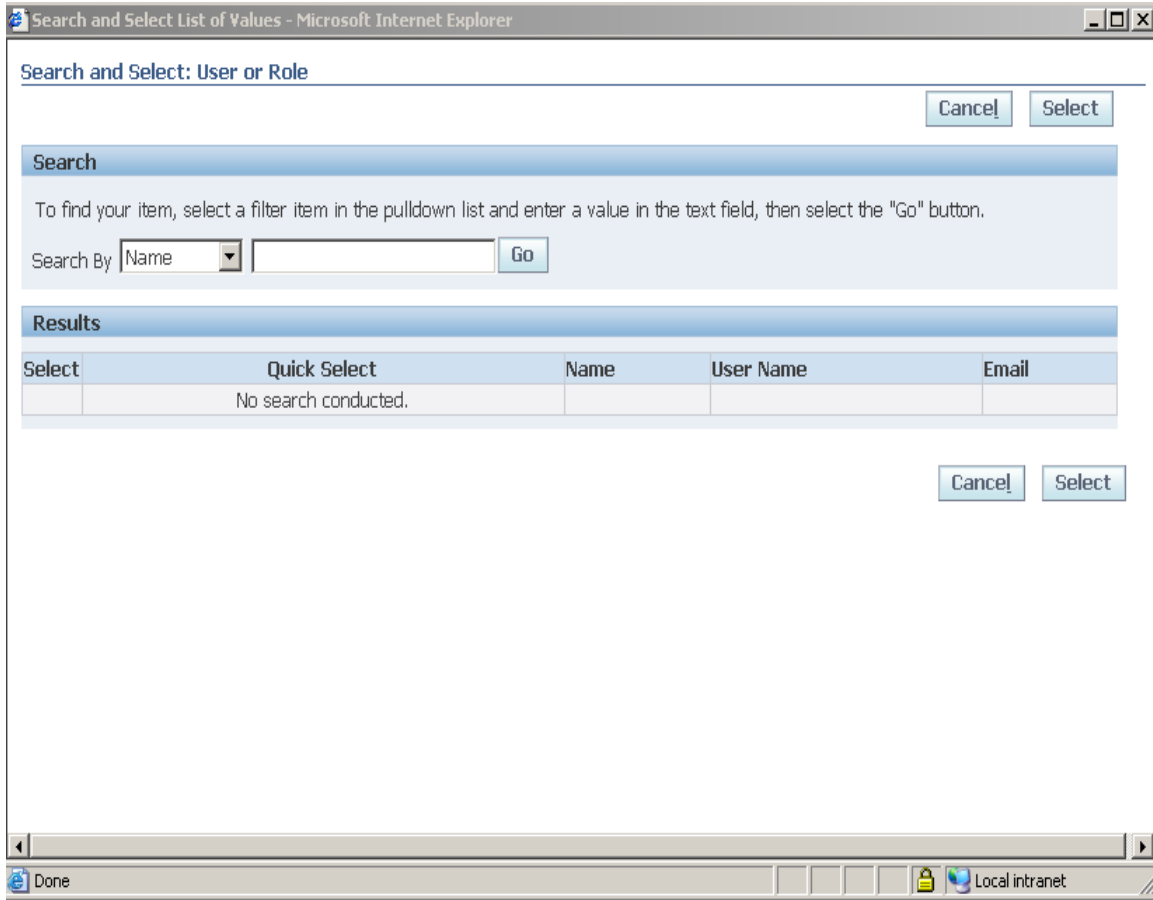
Forward To: All Employees and Users

Note:

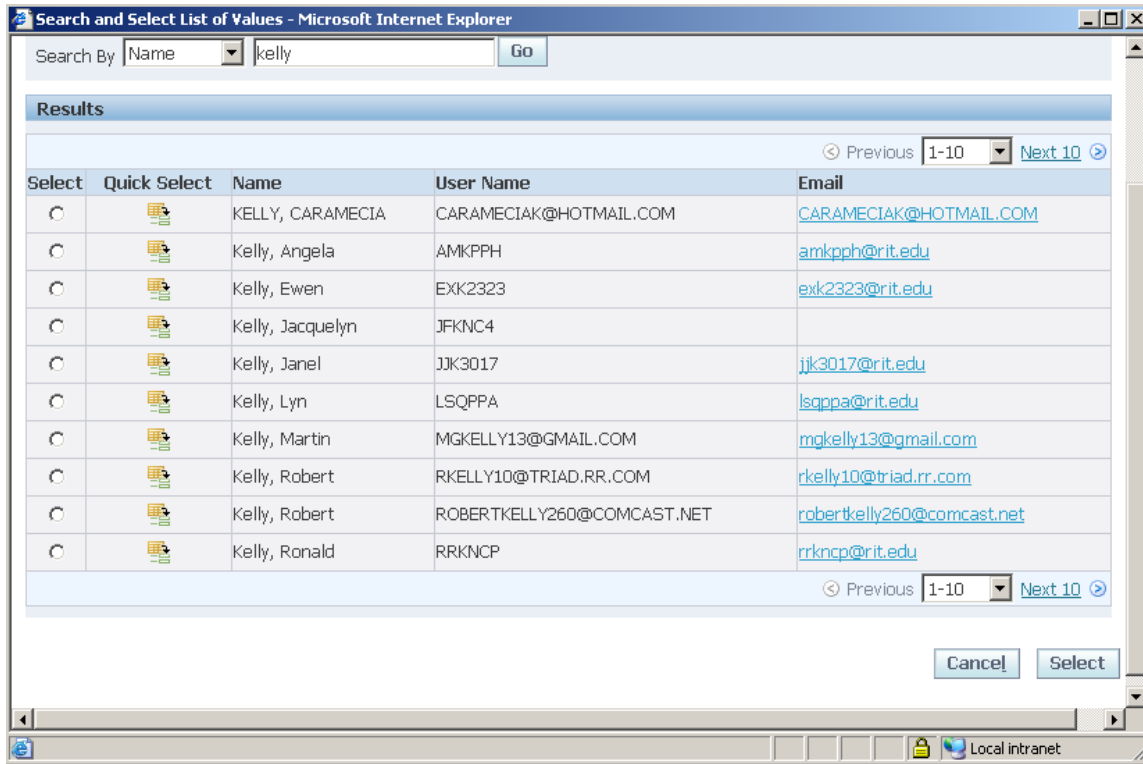
[Return to Worklist](#)
 Display next notification after my response

Home Logout Preferences Help

The following screen will appear:



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



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

Note: [Empty text area]

[Return to Worklist](#)

Display next notification after my 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.

Purchase Requisition 43035 for Barilla, Marcia (8,745.00 USD)

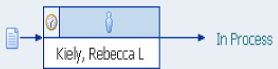
Approve Approve And Forward Forward **Reject** Reassign Request Information

From Barilla, Marcia Description notification
To Kiely, Rebecca Requisition Total 8,745.00 USD
Sent 02-May-2008 15:22:39 Non-Recoverable Tax 0.00 USD
Due 04-May-2008 15:22:39 Justification For testing only
ID 911286

Requisition 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

Approval Sequence




Num	Name	Action	Action Date	Note
1	Barilla, Marcia	Submitted	02-May-2008 15:22:38	For testing only
2	Kiely, Rebecca L	Pending		

Related Applications

[Open Document](#)

Response

Forward To: All Employees and Users 

Note:

[Return to Worklist](#) Display next notification after my response

Approve Approve And Forward Forward **Reject** Reassign Request Information

Home Logout Preferences Help

The screen will then automatically forward back to your Worklist.

Summary

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