APPROVING PAYMENT REQUESTS IN ORACLE FOR USER APPROVALS

Payment Requests are approved from Oracle’s Worklist. Approvers are assigned to certain approval groups within workflow. All requisitions for each approval group will be in each approver’s Worklist. This allows everyone to see all requisitions related to a specific approval group and approve for others in the case of emergencies or employee absence.

From the UAB FN Document Entry/Approval Menu choose Notifications Summary to access the Worklist.

When Payment Requests enter the Worklist for approval there will be three things used for identification. Those three things are Type, Subject, and Sent. 
- **Type** indicates what type of document it is. In this case it will be PO Requisition Approval.
- **Subject** indicates the requisition number, the requisition total, and what level of approval the document is.
- **Sent** indicates when the notification as sent.

Data may be sorted by clicking on any of the column headers in the Worklist. In order to group all Payment Requests in numerical order click on the “Subject” column header. Subject begins with the document type and then the requisition number.

Once in the Worklist choose a subject line and click. This is a link to a Notification Detail screen for the Payment Request to be reviewed. The Payment Request may be approved, returned to the requestor, or cancelled from this screen. In the UAB Notes field a message may be entered...
that will be documented on the Notification Detail screen for subsequent approvers or for the requestor if the requisition is returned to them.

The Payment Request may be approved without having to view the Payment Request entry form. All detail on the Payment Request entry form is displayed on the Notification Detail screen. Backup documentation (if any) must be reviewed using OptiDoc. The Payment Request Number is the key when looking in OptiDoc.
Once the review of the requisition is complete, close the Payment Request form (if it was opened) and return to the Notification Detail screen. Be sure not to close out of the Oracle application, only the Payment Request. The Notification Detail Screen will be minimized in the Tray with all other open programs. In order to see the changes made, click on the refresh button in the browser.

Step By Step Instruction for Approving a Purchase Order Requisition

1. From the UAB FN Document Entry/Approval Menu choose Notifications Summary to access the Worklist.

2. Click on the Subject Column Header to sort the list. This will group by the "Subject" and group all requisitions.

3. Click on a specific Subject Line to open the Notification Detail.

4. Review the requisition.

5. Review backup documentation in OptiDoc.

6. Close the requisition form if it was opened.

7. Click on the Notification detail.

8. Add any comments in the UAB Notes field if necessary.
9. Click on the “Approve” button to approve the requisition or click on the “Return to Requestor” button to return the document to the requestor or the “UAB Cancel” button to cancel the Payment Request.

10. If no action is taken on the requisition at this time, click on the browsers back button to return to the Worklist.

11. If the requisition is approved or returned to the requestor the Worklist will automatically be displayed.

12. To exit the Worklist, close the browser window.