APPROVING PURCHASE ORDER REQUISITIONS IN ORACLE FOR USER APPROVALS

Purchase Order Requisitions 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 responsibility choose Notifications Summary to access the Worklist.

When Purchase Order Requisitions 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 PO Requisitions in numerical order click on the “Subject” column header. Subject begins 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 requisition to be reviewed. The requisition may either be approved or returned to the
requestor 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.

In order to see all the detail about a requisition click on the “Open Form Command” Icon in the lower left of the Notification Detail. When this Icon is clicked another small screen will pop up. Do not close this screen. If it is closed the requisition form will not open. Once the requisition form is open all the requisition detail may be reviewed.
Once the review of the requisition is complete, close the requisition form and return to the Notification Detail screen. Be sure not to close out of the Oracle application, only the requisition. The Notification Detail will be minimized in the Tray with all other open programs.

**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 put all requisitions belonging to one person together.

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

4. Click on the “Open Form Command” to open the requisition form in the Oracle Application.

5. Review the requisition.

6. Close the requisition form.

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.

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.