Viewing Approval Details and Sending Approval Reminder Notifications Using Requester's or Buyer's Workbench

An Oracle Enhancement was introduced in Image 10 to provide users with the ability to more efficiently view Approver details from the Requester's or Buyer's Workbench, instead of visiting multiple transaction pages to view the same information.

This functionality can be used for requisitions and purchase orders with a status of Pending Approval or Approved.

In addition, users are now able to send ad-hoc reminder notifications (e-mail) to approvers with whom a requisition or purchase order is pending. This reminder notification does not take the place of the delivered workflow but can be used on an ad-hoc basis if desired.

This Job Aid demonstrates how to review the Approver details, as well as send an ad-hoc reminder notification to approvers with whom a requisition or purchase order transaction is pending.

Steps for Reviewing Approver Details

1. **Navigate to Purchasing > Requisitions > Requester's Workbench OR Purchasing > Purchase Orders > Buyer's Workbench.** (For this example we will navigate to the Buyer's Workbench.)
2. Select or create a new WorkBench ID.
3. Check the boxes next to 'Pending Approval' and 'Approved' in the STATUS section. If desired, you may enter the number of days that the transaction has been in a status of Pending Approval.
4. Click Search.

5. The Buyer's Workbench page displays. Select the Approval tab. To review the Approval details for a specific transaction, click on the hyperlink in the PO Status column.

6. Purchase Order 0000512224 has a PO Status of 'Pend Appr'. Looking at the 'No of Days Pending' column, you will notice that the transaction has been pending for 76 days.

7. Click on the Pend Appr hyperlink, then click on the 'View Approval' option. The Approval Details page displays.
   - Notice that Lines 1 – 5 are Pending Asset Approval. You can find out who the asset approvers are by clicking on the 'Multiple Approvers' hyperlink.
   - You can also view the line comments by clicking on the comment bubble, if a comment has been entered for the line.
   - Click on the 'Return To Buyer's Workbench' to return to the previous page.

8. Purchase Order 0000513053 has a PO Status of 'Approved'. Click on the Approved hyperlink, then click on the 'View Approval' link. The Approval Details page displays.
   - The page will display each level of approvals that the transaction has gone through and list the approver details for each level (approver name, date, and time).
   - Line Comments can be viewed by clicking on the comment bubble, if a comment has been entered for the line.
   - Click on the 'Return To Buyer's Workbench' to return to the previous page.

Steps for Sending Ad-Hoc Reminder Notifications

1. A new user preference option will need to be defined in order for a user to send an Approval Reminder notification.
   - Your local security administrator will need to select the 'Can Send Approval Reminders' checkbox on the Purchase Order Authorizations page for users who should have this authority.
   - Navigate to Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Purchase Order Authorizations (or Requisition Authorizations for requisition transactions).

2. Once the user preference is defined, navigate to Purchasing > Requisitions > Requester's Workbench OR Purchasing > Purchase Orders > Buyer's Workbench. (For this example we will navigate to the Buyer's Workbench.)
3. Select or create a new WorkBench ID.
4. Check the box next to 'Pending Approval' in the STATUS section. If desired, you may enter the number of days that the transaction has been in a status of Pending Approval.
5. Click Search.
6. The Buyer's Workbench page displays. Select the Approval tab.

7. Purchase Order 0000512224 has a PO Status of 'Pend Appr'. Looking at the 'No of Days Pending' column you will notice that the transaction has been pending for 77 days. (**Note:** The 'Last Notified On' field will be populated with the date of the last notification.)

Favorites ▼   Main Menu ▼   >   Purchasing ▼   >   Purchase Orders ▼   >   Buyer's Workbench

ORACLE

Buyer's WorkBench

Business Unit 39000   WorkBench ID APPROVAL
*Description APPROVAL   ×

Select POs for Further Processing

List of Purchase Orders   Personalize | Find | View All | 🖻 | Download   First ◀ 1-6 of 7 ▶ Last

Detail	Approval	Other					
	Purchase Order	Doc Status	Hold	PO Status	No of Days Pending	Last Notified On	
☑	0000512224	📄	N	▼ Pend Appr	77		
☐	0000516308	📄	N	▼ Pend Appr	74		
☐	0000516424	📄	N	▼ Pend Appr	76		
☐	0000516541	📄	Y	▼ Pend Appr	77		
☐	0000516550	📄	N	▼ Pend Appr			
☐	0000516575	📄	N	▼ Pend Appr	74		

☑ Select All   ☐ Clear All

Action: [Approve]   [Unapprove]   [Cancel]   [Close]   [Send Approval Reminder]

[Dispatch]   [Preview]   [Budget Check]

Go To: Set filter options   Process Request Options
          Process Monitor   View Processing Results

[Save]

8. If you decide to send an approval reminder, you will select the box next to PO number, then click on the Send Approval Reminder button. The message below will display:

Message

Process for sending out reminder has been scheduled with Process instance 8376704 (10109,65)

[OK]

9. The Approver will receive an email notification similar to the one below:


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To:          ☑ Teresa Page
Cc:
Subject:     Approval Reminder: Approval is Requested for Purchase Order "0000512224" Business Unit "GEORGIA SOUTHERN UNIVERSITY

Approval Reminder:
A purchase order has been entered which requires your attention.
Business Unit:  GEORGIA SOUTHERN UNIVERSITY
PO ID:          0000512224
PO Reference:   S0000042-000
PO Date:              2015-07-01
Buyer:          hkirk
Line:                1
Description:    S/N: MAV782050, LEASE, COPIER, DIGITAL, XEROX, X700X
INC: SUPPLIES (NOT PAPER,STAPLES)PARTS & LABOR 0K (BLK) CPM @ $.0099/C+0K (CLR) CPM @ $.0439/C MOS 31-42 OF 48 MO LEASE
Pending for   77   days.
You can navigate directly to the approval page by clicking the link below.

https://scitest.gafirst.usg.edu/psc/pshome/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.PO_APPROVAL.GBL?Page=PO_APPROVA
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10. Another way to send the reminder notification is to click on the Pend Appr hyperlink, then select the Send Reminder option. The message stating that the reminder has been sent will display and the approver will receive an email notification.