

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

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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.

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

**ORACLE** All

Buyer's WorkBench

**Filter Options**

Business Unit 39000      WorkBench ID APPROVAL

Description

Enter search criteria and click on Search. Leave blank for all values.

**Search Criteria**

Purchase Order        To

PO Date        To

Activity Date        To

Due Date        To

Request BU        Requisition ID

Supplier ID

Item ID

Buyer

Contract SetID

Contract ID        Contract Version

Release Number

GPO ID

GPO Contract

**Status**

Open       Pending Approval for more than  Days       Approved       Denied

Dispatched       Cancelled       Include Closed

**Receiving**

Recv Reqd

All       Not Received       Partially Received       Fully Received

**Matching**

Required       Not Required

All       None       Partial Match       Fully Matched

**Encumbrance**

Open Encumbrances

**ChartFields** Personalize | Find | View All |  |  | First 1 of 1 Last

**Chartfields**

GL Unit	Account	Dept	Program	Class	Fund	Bud Ref	Project	Budget Date	Location Code
<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="BT"/>	<input type="text"/> <input type="button" value="Q"/>							

     [Return to Buyer's WorkBench](#)

- 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.

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 32 Last

Detail **Approval** Other

	Purchase Order	Doc Status	Hold	PO Status	No of Days Pending	Last Notified On
<input type="checkbox"/>	0000512224		N	▼ Pend Appr	76	
<input type="checkbox"/>	0000513053		N	▼ Approved		
<input type="checkbox"/>	0000514989		N	▼ Approved		
<input type="checkbox"/>	0000515225		N	▼ Approved		
<input type="checkbox"/>	0000515480		N	▼ Approved		
<input type="checkbox"/>	0000515566		N	▼ Approved		

Select All  Clear All

Action: Approve Unapprove Cancel Close  
Dispatch Preview Budget Check

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

Save

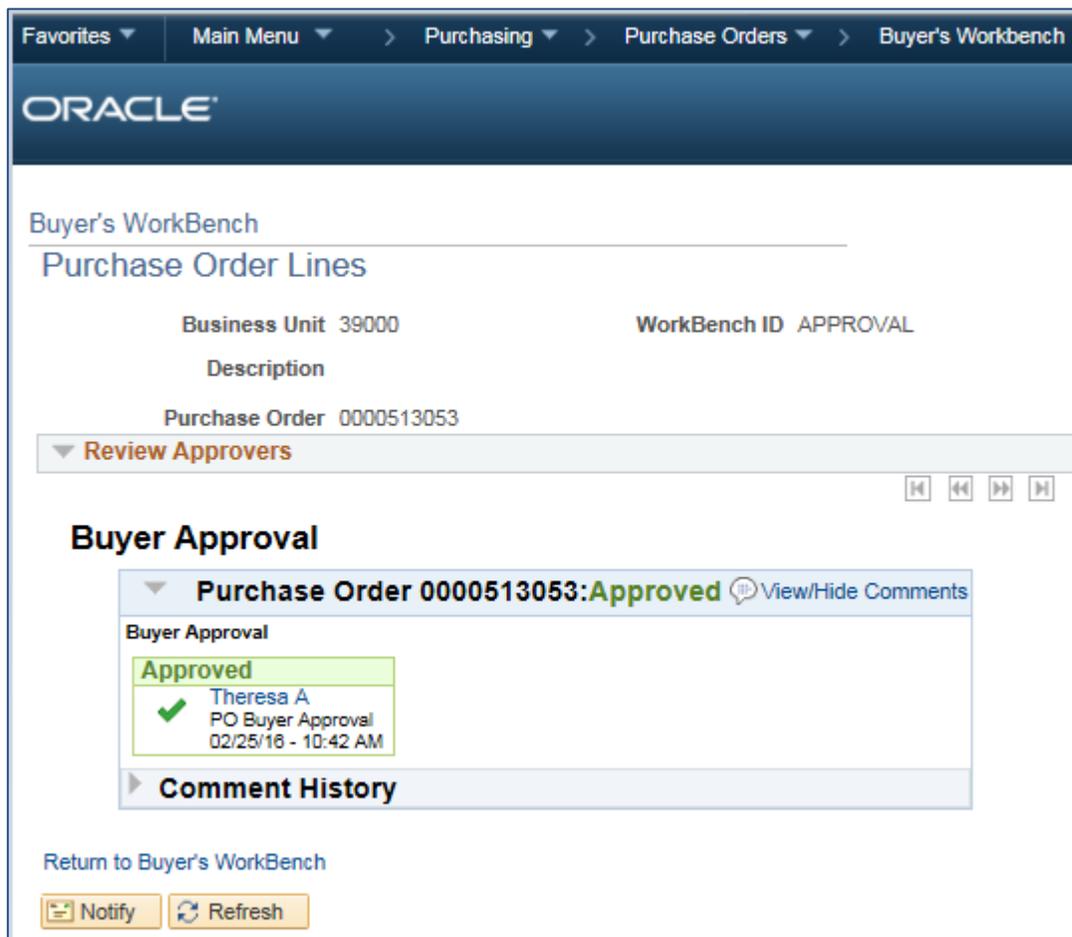
- Purchase Order 0000512224 has a PO Status of 'Pend Appr'. Looking at the 'No of Days Pending' column, you will notice that the transaction has been pending for 76 days.
- Click on the Pend Appr hyperlink, then click on the 'View Approval' option. The Approval Details page displays.
  - Notice that 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.

The screenshot shows the Oracle Buyer's Workbench interface. At the top, there's a navigation menu with 'Purchasing' > 'Purchase Orders' > 'Buyer's Workbench'. Below this, the 'Purchase Order Lines' section displays a table with columns: Line, Status, Item ID, Description, Category ID, No of Days Pending, Rev Resp, RFG ID, and RFG Line. A single line is visible with a status of 'Pending'.

Below the table, there's a 'Purchase Order Approval - Asset' section. It shows a list of approval lines. A red arrow points to a 'View/Hide Comments' button in this section. Another red arrow points to a 'Multiple Approvers POAssetApprover' button. A third red arrow points to a 'Return to Buyer's Workbench' button at the bottom left of the interface.

Approver #1	
Name:	Yother,
Empl ID:	022
Department:	03402
Supervisor ID:	02082
Telephone:	912/478-
Reports To Position Number:	
Email ID:	
Approver #2	
Name:	Edwards,
Empl ID:	020
Department:	03406
Supervisor ID:	00433
Telephone:	912/478-
Reports To Position Number:	
Email ID:	

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.



The screenshot shows the Oracle PeopleSoft interface for the Buyer's Workbench. The breadcrumb trail at the top reads: Favorites > Main Menu > Purchasing > Purchase Orders > Buyer's Workbench. The Oracle logo is visible in the header. The page title is "Buyer's WorkBench" and the sub-section is "Purchase Order Lines".

Key information displayed includes:

- Business Unit: 39000
- WorkBench ID: APPROVAL
- Description: Purchase Order 0000513053

A "Review Approvers" section is expanded, showing a "Buyer Approval" for the purchase order. The approval status is "Approved" (indicated by a green checkmark). The approver is Theresa A, with the role "PO Buyer Approval" and the date/time "02/25/16 - 10:42 AM". There is a "View/Hide Comments" link next to the approval status.

Below the approval details is a "Comment History" section. At the bottom of the page, there is a "Return to Buyer's WorkBench" link and two buttons: "Notify" and "Refresh".

## 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).

The screenshot shows the 'Purchase Order Authorizations' page in PeopleSoft. The 'Purchase Order Authorizations' tab is highlighted with a red box. The 'Allowed Purchase Order Actions' section contains a list of checkboxes, with 'Can Send Approval Reminders' checked and highlighted by a red box. Below this is a 'Buyers User Authorization' table with columns for 'Buyers User Authorized For', 'Description', 'Add', 'Update', 'Cancel', 'Delete', 'Close', and 'Reopen'. The 'Add' column has a checked checkbox. At the bottom are 'OK', 'Cancel', and 'Refresh' buttons.

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.

- 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.)

The screenshot shows the Oracle Buyer's Workbench interface. At the top, there are navigation tabs: Favorites, Main Menu, Purchasing, Purchase Orders, and Buyer's Workbench. Below this is the Oracle logo and the title 'Buyer's WorkBench'. The interface displays the Business Unit as 39000 and WorkBench ID as APPROVAL. A search field for '\*Description' contains the text 'APPROVAL'. Below this is a section for 'Select POs for Further Processing' with a 'List of Purchase Orders' table. The table has columns for Purchase Order, Doc Status, Hold, PO Status, No of Days Pending, and Last Notified On. The first row is selected (checkbox checked) and shows PO 0000512224 with a status of 'Pend Appr' and 77 days pending. Below the table are 'Select All' and 'Clear All' buttons. At the bottom, there is an 'Action:' section with buttons for Approve, Unapprove, Cancel, Close, Send Approval Reminder (highlighted with a red box), Dispatch, Preview, and Budget Check. There are also 'Go To:' links for Set filter options, Process Request Options, Process Monitor, and View Processing Results, and a 'Save' button at the very bottom.

- 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:

The screenshot shows a message dialog box with the title 'Message'. The message text reads: 'Process for sending out reminder has been scheduled with Process instance 8376704 (10109,65)'. At the bottom of the dialog is an 'OK' button.

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



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.

