Hello and welcome to our Oracle Procurement Video Guide series. This video on approving requisitions will cover approval email notifications, notifications and worklists in Oracle and potential actions when reviewing a requisition.

Getting started, there are three ways in which you can interact with the requisitions pending your approval. We're going to walk through each option and their best uses.

The first and most immediate way in which you may interact with your approvals is through your Outlook email. One of the first things you may notice are the three options to approve, reject or request info. Before we review these options, it's important to note that if you are using a custom email other than your official, UC Path email, you will not be able to use the approve, reject or request info options in Outlook. Instead, you may refer to our knowledge base article on setting up approval through your Gmail.

- Approve lets the requisition continue in its workflow of becoming a Purchase Order.
- Reject returns the requisition to the individual who submitted the order with your comments. The PO Requisitioner can at any time edit and resubmit the requisition you've rejected.
- Request info will open a new email in which you can populate questions for the PO Requisitioner. You can wait for them to respond before deciding whether the order should be approved or rejected.

Other information on the email includes:

- A hyperlink which will allow you to view the requisition in Oracle,
- Basic information about the line items being ordered,
- Charge accounts being used,
- A history of comments, attachments, and actions that have been taken over the course of the requisition's approval workflow,
- And a link to take action on the requisition in Oracle.

It's important to note the approval email is missing key information about the requisition such as distribution fields, purchasing categories and the deliver-to address. Always double check the requisition in Oracle Procurement before taking action on the requisition.

The second way to access your approval queue is through any bell icon in the Oracle environment. You can use the search bar at the top to search for a particular requisition. Once you find what you're looking for, you can open any of the notifications by clicking on the blue hyperlink.

Although this is a convenient way to access your requisition approvals, the bell icon displays all notifications sorted from newest to oldest, complete or not, which have been sent to you. As such, you may use the menu to quickly find an approval notification, but the notifications appearing will not be up to date.

The third and final way to access your approval queue is through the worklist. This can be found under the tools section of the Oracle homepage. As with the bell icon, you can search for particular requisitions and click on the blue hyperlinks to open them up. This view also allows you to sort by any of the headings by clicking on the arrows next to their titles. You can expand the notifications appearing by opening the servers menu in the view dropdown, and increasing the maximum tasks up to 30. To easily access this module in the future, you can add it is a favorite using the star icon at the top of your screen.

Once you click on a notification, an approval window will open for the requisition you've selected.

- Click on the hyperlink to open the requisition in a new tab in Oracle,
- View the line item details and charge accounts used,
- And review the history of attachments, comments and actions taken during the course of the approval workflow.

If based on this information you decide that you should be the one reviewing this requisition, claim it. Using the new Actions menu, you can approve, reject or request information as before in the email. You can also release the requisition to allow someone else to take action.

The link at the bottom will allow you to edit anything on the requisition or add attachments before approving the requisition. Changes to the charge account, project information, distribution fields, or purchasing category may result in the requisition re-routing once you submit your changes. We recommend either rejecting the requisition or communicating the changes you've made to the PO Requisitioner to reinforce training.

Thank you for taking the time to watch our video guide – we hope this information has been helpful. If you have any further questions, please reach out to us by submitting a case through Services & Support or by calling us at 858.534.9494.