eApprovers

Training Manual
Document Identification

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<th>Revision</th>
<th>Version 1.0</th>
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<td>Tracy Hudson</td>
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<td>Signature:</td>
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<td>Issue Date:</td>
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Authorities

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Document History

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<td>1.0</td>
<td>Tracy Hudson</td>
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Oracle 11i - eApprovers Course

Student Guide
Oracle 11i eApprovers
Agenda

- **ECU Business Processes**
- Approve General Ledger Journals
- Approve Purchase Requisitions
- Additional eApproval Functionality
Oracle 11i allows ECU to utilise new technology in on-line approvals for both General Ledger (GL) Journals and iProcurement Requisitions. This technology will allow Journals and Requisitions to be approved or rejected quickly and allow for Journal transactions to appear on your reports shortly after they have been approved.
Agenda

- ECU Business Processes
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- Additional eApproval Functionality
The GL Journal Approval Process obtains the necessary management approvals for manual journals. This process:

- Validates the journal.
- Determines if approval is required.
- Submits the journal to approvers (if required).
- Notifies appropriate individuals of the approval results.

The process gives one of four results:
1. Approval Not Required—The journal does not need approval.
2. Approved—The journal was approved by all necessary approvers.
3. Rejected—The journal was rejected by an approver.
4. Validation Failed—The journal failed the validation process and was never submitted to the approver.
Journal Approval via Email

You will receive an email notification when you are required to approve a Journal. You can click on the Email to view the information (as per the above slide).

1. (Optionally) click on the html attachment to the email to view the information in more detail. To review the actual journal entries you click on the link to Enter Journals and you will be automatically directed to logon to the Oracle 11i System. From the system you can review the lines of the journal, plus any attachments and other information.

2. You are given the option to Approve, Reject or Request Information on the Email. Click on the relevant response and send the email.

To approve, reject or request information for a journal:

1. Check your email notifications. Journal approval requests display the following in the Subject field of the email window: A journal batch for <batch amount> requires your approval.

2. Open the notification that requests your approval.

3. (Optional) Review the journal information before you approve or reject it.

4. Click the relevant response for the email approval.

5. Send the email.
Journal Approval via Worklist

When you logon to Oracle 11i, you may see a Worklist notification to advise that you are required to approve a Journal.

To open your Worklist:

1. Check your notifications. Journal approval requests display the following in the Subject field of the Notifications Summary window: Journal Batch *<Batch Name>* requires your approval.
2. Click on the Journal that you wish to review.
3. (Optional) Review the journal information before you approve or reject it.
4. Click the relevant response for the Journal.
Agenda

- ECU Business Processes
- Approve General Ledger Journals
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- Additional eApproval Functionality
You will receive an email notification when you are required to approve a Requisition. You can click on the Email to view the information (as per the above slide).

**To approve, approve and forward, forward, reject or request information for a requisition:**

1. Check your email notifications. Journal approval requests display the following in the Subject field of the email window: Purchase Requisition XX for XX (XX.XX).
2. Open the notification that requests your approval.
3. (Optional) Review the Requisition information before you submit your response.
4. Click the relevant response for the requisition approval.
5. Send the email.
Requisition Approval via Worklist

The next time you logon to Oracle 11i, you will see a Worklist notification to advise that you are required to approve a Requisition.

To open your Worklist:
1. Check your notifications. Requisition approval requests display the following in the Subject field of the Notifications Summary window: Purchase Requisition <Number> for <Employee Name> <Amount>.
2. Click on the Purchase Requisition that you wish to review.
3. (Optional) Review the journal information before you approve or reject it.
4. Click the relevant response for the requisition approval.
Agenda

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- Approve General Ledger Journals
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The hierarchy concept is dependent upon user interaction with the system to approve or reject documents.

So what happens when a user is not approving documents that are waiting for their approval? There is a timeout feature associated with each approval hierarchy with a schedule established to determine how long a document will wait for approval before issuing a reminder notification. This feature keeps documents moving if an approver is not approving documents in a timely fashion, or if an approver has gone on vacation without forwarding their approval notifications to another user.

Currently, the original approval notification will timeout after 1 day and then send a reminder notification email advising the approver that the document still needs to be approved. The system then gives the approver 2 more days to respond before issuing the final notification. If no response is received in 2 more days, the document is returned to the originator with a status of incomplete, and they will have to resubmit the document.
Reassigning

Notifications - Reassigning

This functionality may be used by Senior Management who are unable to access their email or worklists whilst travelling etc. They may delegate to their Executive Assistant or another nominated staff member the ability to view and action notifications on their behalf.

1. (H) Vacation Rules.
2. (B) Create Rule.
3. Select the Item Type (i.e. the Name of the Notification you want to create the rule for).
   
   **Note:** By selecting the Item Type in Step 5 you can elect to create one rule for ALL your notifications, or separate rules for each type of notification you receive.

   If you selected “--All--” GOTO Step 9, else continue.

4. (B) Next.
5. Select Notification (i.e. the specific Notification message you want to create the rule for).
6. (B) Next.
7. Enter the Start Date you want to create this rule for (including the time in 24 hour format).
8. Optionally enter the date you want this rule to stop.
11. Optionally enter a Message to be shown the person who will be receiving your notifications.

12. Reassign your notification to a specific Employee / User.

13. Select the either delegate your response or transfer the ownership of the notification.

   **Delegate your response** - Select this option if you want to give the new user authority to respond to the notification on your behalf, but you want to retain ownership of the notification yourself. For example, a manager might delegate all vacation scheduling approvals to an assistant.

   **Transfer notification ownership** - Select this option if you want to give the new user complete ownership of and responsibility for the notification. For example, use this option if you should not have received the notification and you want to send it to the correct recipient or to another recipient for resolution. A transfer may have the effect of changing the approval hierarchy for the notification. For example, a manager might transfer a notification about a certain project to another manager who now owns that project.

14. (B) Apply.
Notifications - Granting Worklist Access

This functionality must be used when Approvers are on leave or secondment, so that notifications are approved by the correct delegated employee.

1. (B) Full List.
2. (H) Worklist Access.
3. (B) Grant Worklist Access.
4. Enter or Select the name of the Employee / User you want to grant access to.
5. Optionally add a description for your own information.
6. Select the date that you want to start granting access from.
7. Optionally enter the date you want to stop granting access.
8. (B) Apply.

**Note:** By granting access to your worklist you are allowing that person to respond to notifications on your behalf. This means that notifications appear that they have been approved by you, so please use this with caution.
During this course, you should have learned how to:

- ECU Business Processes
- Approve General Ledger Journals
- Approve Purchase Requisitions
- Additional eApproval Functionality
Systems Support from the 10th January 2006
- Call: 2772
- Email: mscsystems@ecu.edu.au