

# **Rochester Institute of Technology**

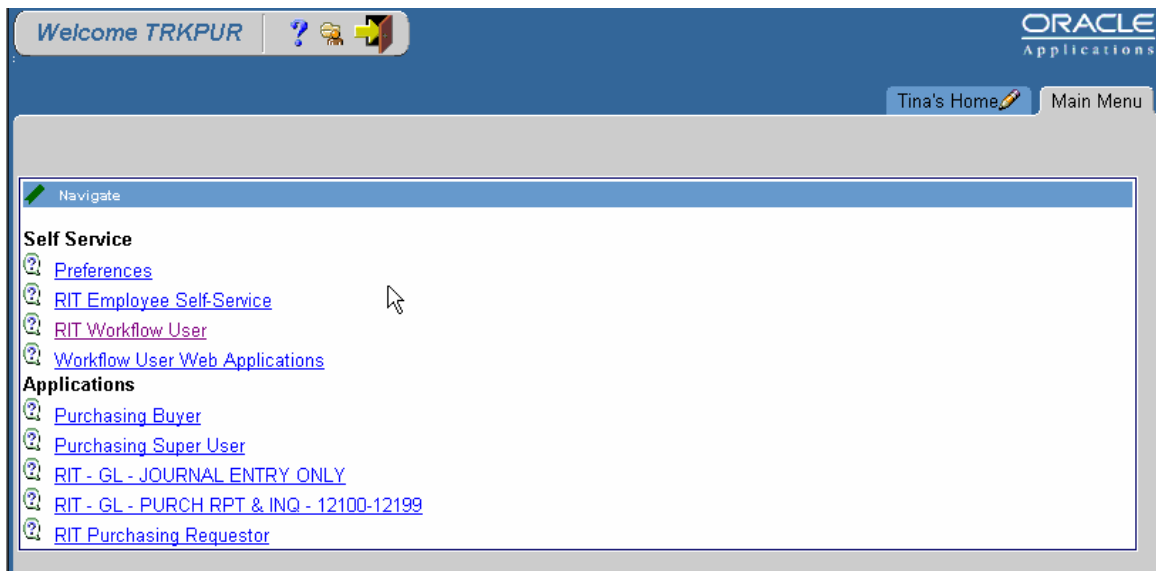
## ***Oracle Training: Workflow User – Purchasing Applications***

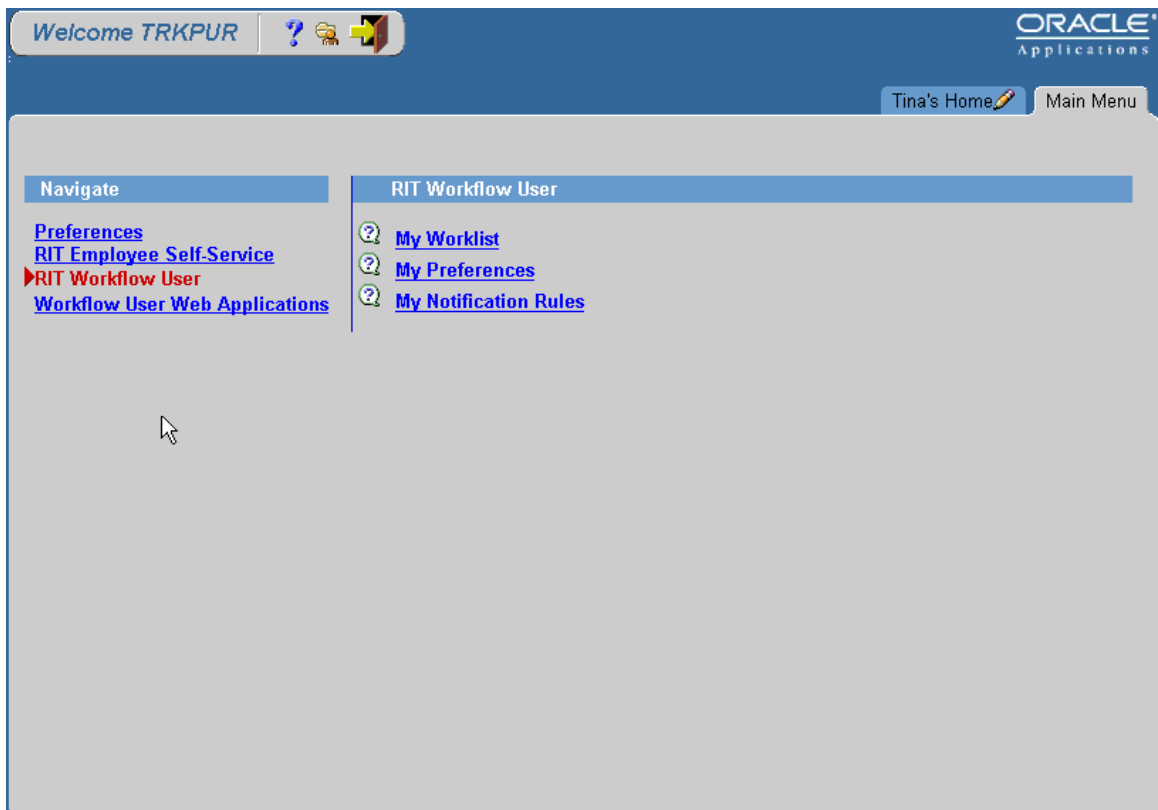
## Workflow User

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The Workflow User has three parts: Worklist, Preferences and My Notification Rules. The Workflow User is helpful in managing some of your purchasing functions.

The Workflow User is accessed from your Main Menu. Click on RIT Workflow User.





Click on My Worklist.

Select	Priority	Type	From	Subject	Sent	Due
<input type="checkbox"/>		PO Requisition Approval	Todd, Richard	<a href="#">Purchase Requisition 18806 forwarded from Todd, Richard for USD 500.00 requires your approval.</a>	05-FEB-2002	
<input type="checkbox"/>		PO Requisition Approval	Kiely, Rebecca L	<a href="#">Purchase Requisition 18803 forwarded from Kiely, Rebecca L for USD 990.00 requires your approval.</a>	24-JAN-2002	
<input type="checkbox"/>		PO Requisition Approval	Kiely, Rebecca L	<a href="#">Purchase Requisition 18793 forwarded from Kiely, Rebecca L for USD 300.00 requires your approval.</a>	08-JAN-2002	

Buttons: Close, Reassign...

This displays your Worklist.

Click on My Preferences.

**General Preferences**

Modify your preferences and then click on the Apply button

Known As:

Language: American English

Date Format: 31-DEC-2000

Number Format: 10,000.00

Territory: United States

Send me electronic mail notifications: HTML mail

Document Home Node:

Old Password:

Password:

Repeat Password:

Buttons: Cancel, Apply

This screen allows you to change how and if you want to receive e-mail notifications. It is recommended that you keep the defaults of Language, Date Format, Number Format and Territory. It is also recommended that your e-mail notification be sent “HTML mail” If you choose not to receive e-mail notifications, click on the down arrow and change to Do not send me mail.

Click on Apply to finish.

General Preferences

Modify your preferences and then click on the Apply button

Known As

Language American English ▾

Date Format 31-DEC-2000 ▾

Number Format 10,000.00 ▾

Territory United States ▾

Send me electronic mail notifications HTML mail ▾

Document Home Node HTML mail  
Plain text mail with HTML attachments  
Plain text mail  
Plain text summary mail  
Do not send me mail

Old Password

Password

Repeat Password

Cancel Apply

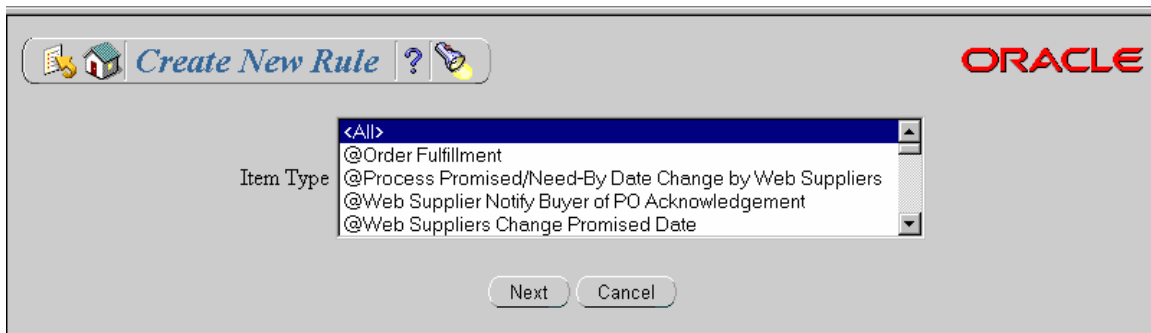
You can also change your password from this screen.

Click on My Notification Rules



This screen is used to reassign approval authority. You may want to reassign approval authority when you have an extended leave or vacation. When you set up this rule, your notifications will go to a person you assign the responsibility to.

Click on Create Rule



You can pick and choose which function you want to create a rule for or you can select <All> which will send all your notifications to the person you assign the responsibility to.

Click Next

Fill in the dates of when you want to reassign.

Include a comment such as I am on vacation or I am on an extended leave.

Pick the name of the person you are reassigning to.

Click either Delegate Authority for responding to Notifications or Transfer Ownership of Notification. This will allow your delegate to inherit your approval authority. The difference is that the Delegate Authority will update the Approval History with the name of the person that got the document transferred to them. The Transfer Ownership would still show the original approver's name in the approval history.

Click OK.

Item Type	Notification	Result of Applying Rule	Active	Delete Rule
<All>	<All>	<a href="#">Delegate Fisher, Mr. James R.</a>	✓	✗