



Procurement

Oracle Financials Step-by-Step Guide

Requestors to add additional Approvers in the Approval workflow

February 2021

Adding additional Approvers in the Approval workflow

Additional Approvers can be added to a Requisition depending on any need to approve the document by approvers which are not assigned by the system automatically.

There are two features which allow the Requisitioner to add additional approvers.

1. Overriding Approver at the Requisition Header Feature

The Overriding Approver field appears in the Requisition allowing the Requisitioner to select a additional approver who will receive the document for approval at the first approval stage.

The following steps have to be completed by the Requisitioner:

1. Search for the approver by last name using the loop icon on the right of the Override Approver field
2. Select the name and click OK of the additional approver to add in the Override Approver field
3. Save the Requisition and click on the Manage Approvals button to open the workflow
4. Review the Approval Workflow to check that this approver has been added. You can now either add another Approver (see instructions below), go back to your requisition by clicking the back button or submit your requisition if completed.

The screenshot shows the 'Edit Requisition' form for requisition UCMR00001393. The 'Overriding Approver' field is highlighted with a red box and a red circle with the number 1, indicating where to click the search icon. Other fields visible include 'Requisitioning BU', 'Additional Approver', 'Justification', 'Requisition Amount', 'Approval Amount', 'Funds Status', and 'Attachments'.

The screenshot shows the 'Search and Select: Overriding Approver' dialog box. A search for 'Lingam' has been performed, and the results table shows 'Lingam, Suresh' as the selected approver. A red box and a red circle with the number 2 highlight the search and selection area. The dialog box includes fields for Name, Department, Job, Email, and Phone, and buttons for Search, Reset, OK, and Cancel.

Name	Department	Job	Email	Phone
Lingam, Suresh	UCM Global	UCM User	slingam@ucmerced.edu	

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Edit Requisition: UCMR00001393 ⓘ

Requisitioning BU: UCM Business Unit

* Description: Additional Approver Demo

Justification:

Overriding Approver: (Lingam, Suresh) ⓘ

Attention:

Bldg/Room:

Shop Check Fund Manage Approvals View PDF Save Submit

Requisition Amount: 10.00 USD

Approval Amount: Calculate Amount with Tax

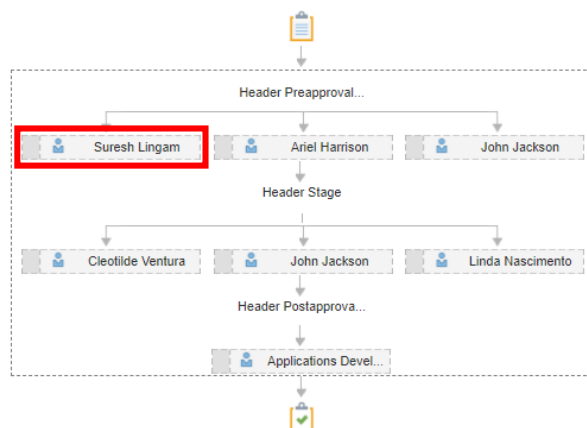
Funds Status: Not reserved

Attachments: None ⓘ

Manage Approvals (Requisition UCMR00001393)

Options ▾ Apply Reset ▾

Section	Stage or Participant
1	Header Preapproval Stage
1.1	Parallel
1.1.1	Preapproval Header Consensus
1.1.1.1	Suresh Lingam - Preapproval Header Consensus
1.1.1.2	Ariel Harrison - Preapproval Header Consensus
1.1.1.3	John Jackson - Preapproval Header Consensus
2	Header Stage
2.1	Parallel
2.1.1	Header Stage Consensus
3	Header Postapproval Stage




2. Additional Approvers added in the Requisition Approval Workflow

Requisitioners can add additional approvers, other than the Overriding Approver, in the approval workflow. The additional approvers are selected one by one. The Requisitioner can define their approval role, the approval stage where they must approve the document, and whether the approver must approve before or after the other approvers.

Note: Approvers assigned automatically by the workflow cannot be deleted or their position in the workflow changed.

The following steps must be completed by the Requisitioner:

1. Click on the Manage Approvals button to open the workflow
2. Review the Approval Workflow to plan where the additional approvers must be added and what action they will be required to complete
3. Select an approver in a stage of the workflow where the additional approver will be added
 - a. Note you only can add an approver in a stage where there are already approvers. You can't add an approver in a stage where there's no approver assigned by the workflow
4. Click on the + icon
5. Search for the approver using the search criteria and select the approver by clicking OK
6. Check the FYI checkbox if the approver only must receive a notification but no approval action is required or leave the box unchecked if the approver must approve
7. Select an option in the Position section depending on which stage the additional approver must approve the document. Click OK
8. Optionally delete the additional approver if added by mistake
9. Use the pencil icon  to update an additional approver if needed, Select the options to change
10. If no changes need to be made click the Apply icon. Then click the Back icon and click the Manage Approvals icon to verify that your additional Approver is within workflow. You can now go back to your requisition or submit your requisition into workflow



1

Edit Requisition: UCMR00001393 ⓘ

Stop Check Funds **Manage Approvals** View PDF Save Submit

Requisitioning BU UCM Business Unit

* Description Additional Approver Demo

Overriding Approver [Lipam, Surell] 🔍

Attention

Bldg/Room

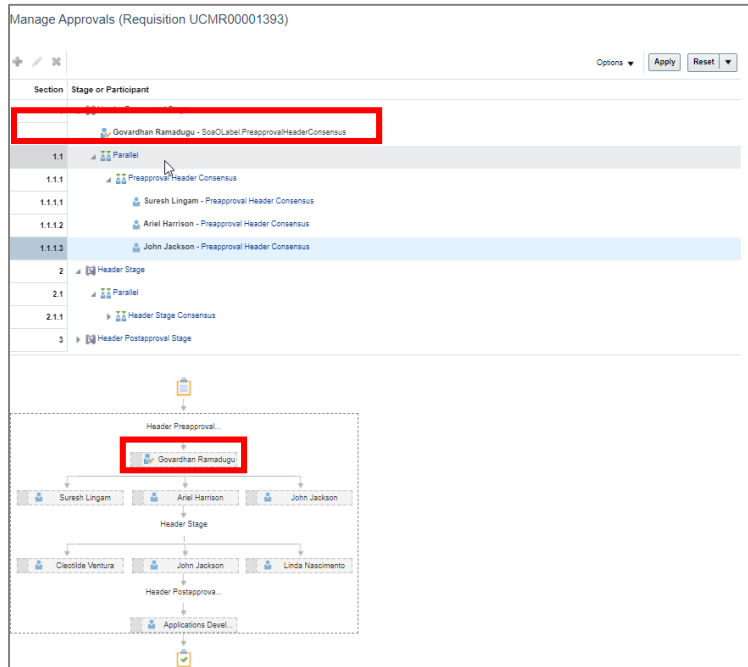
Justification

Requisition Amount 10.00 USD

Approval Amount Calculate Amount with Tax

Funds Status Not reserved

Attachments None ➕



Manage Approvals (Requisition UCMR00001393)

Options ▾ Apply Reset ▾

Section	Stage or Participant
1	Header Preapproval Stage
	Govardhan Ramadugu - SoaOLabel.PreapprovalHeaderConsensus
1.1	Parallel
1.1.1	Preapproval Header Consensus

The additional approver is deleted

Manage Approvals (Requisition UCMR00001393)

Options ▾ Apply Reset ▾

Section	Stage or Participant
1	Header Preapproval Stage
1.1	Parallel
1.1.1	Preapproval Header Consensus
1.1.1.1	Suresh Lingam - Preapproval Header Consensus
1.1.1.2	Ariel Harrison - Preapproval Header Consensus

Manage Approvals (Requisition UCMR00001393)

Options ▼ Apply Reset ▼

Section	Stage or Participant
1	Header Preapproval Stage
1.1	Govardhan Ramadugu - SoaOLabel.PreapprovalHeaderConsensus
1.1	Parallel

Edit Assignee

User: gramadugu

☐ FYI only

Position:

☐ before

☐ Start of stage

☒ End of stage

☐ Start of entire task

OK Cancel

Manage Approvals (Requisition UCMR00001393)

Options ▼ Apply Reset ▼

Section	Stage or Participant
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1.1.1.1	Suresh Lingam - Preapproval Header Consensus
1.1.1.2	Ariel Harrison - Preapproval Header Consensus
1.1.1.3	John Jackson - Preapproval Header Consensus
1.1.1.3	Govardhan Ramadugu - SoaOLabel.PreapprovalHeaderConsensus
2	Header Stage
2.1	Parallel
2.1.1	Header Stage Consensus
3	Header Postapproval Stage

Header Preapproval...

Suresh Lingam Ariel Harrison John Jackson

Govardhan Ramadugu

Header Stage

Cleotilde Ventura John Jackson Linda Nasimento

Header Postapproval...

Applications Devel...