

Granting Worklist Access for an unplanned absence

iProc Approver | Oracle Financials

This guide is intended for iProc Approvers to follow in order to grant access to their School Accountant to cover their approvals during an unplanned absence in the iProcurement (iProc) part of the Oracle Financials system.

If you're unavailable to approve requisitions but you haven't set up an out-of-office *Vacation Rule*, the *Approvals Administrator* in your area can re-assign your urgent approvals. An *Approvals Administrator* is your School Accountant.

An Approver must have granted worklist access to their area in order for requisitions to be re-assigned. This is to cover any unplanned absence. Each Approver has to grant worklist access to their own area. If this hasn't been set up the School Accountant is unable to see your approvals to re-assign them.

It is therefore advisable to set this up as soon as you receive your Approver access to the Oracle Financials system.

You can access Oracle Financials via this link: <http://financelive.fin.manchester.ac.uk/>

To grant worklist access you will need to:

1. Click the **PO Internet Approver (UOM)** responsibility to open iProc.
2. Click the **Approvals** tab then click the **Worklist Access** link at the top left area of the screen.
3. Click the **Grant Worklist Access** button.
4. Leave the **Name** field set to the default of *All Employees and Users*.
5. Click into the field next to *Name*. Type in the **Approvals Administrator** for your School/area to your worklist. This will be **APPROVALSADMIN....** followed by your 3 letter area code.

You can either:

- Search for the exact *Approvals Administrator* for your School/area by typing your exact *Approvals Administrator with the 3 letter area code*, eg **APPROVALSADMINMDZ** and then press the **Tab** key.
- Display the full list and then select the *Approvals Administrator* for your school/area by typing **APPROVALSADMIN%** and then press the **Tab** key or click the **magnifying glass** icon to run the search. Find the correct option for your area in the results list that appears, using the **Next** and **Previous** options as necessary to move through the full list. Use the **Quick Select** icon to select the correct option.

6. The *Approvals Administrator* you selected will be shown.

7. The **Start Date** defaults to today's date. **The End date must be left blank.**
8. Click **Apply**. The *Approvals Administrator* to whom you have granted access will now be shown. You have now granted access to the School Accountant for your School/area, who will now be able to re-assign requisitions if you are on an unplanned absence.
9. If you need to edit or delete the *Worklist Access*, you can click onto the **Approvals** tab then click the **Worklist Access** link at the top left area of the screen and use **Update** to edit the worklist access or **Delete** to remove the access, if necessary.



You will only need to set this up once for your School/area. It is highly recommended that you grant worklist access as soon as you receive your access to PO Internet Approver (UoM) role.



If you grant worklist access to someone other than the *Approvals Administrator*, they will be able to see your *Notifications*. They will also be able to approve your approvals with no audit trail, ie you will still appear as the Approver. It is therefore not acceptable to use the functionality for approvals.