Set Up Requisition Approval Delegation

1 Click t	he notifications ico	٦			
environment, refreshed	from DEV7 on July 26.				
E Q Sear	ch		2		AS
ood mor	ning, Abigai	I Shellist	HR Assist	Contract Manage	
ACTIONS	APPS				
Notifications		Set Preferences	Worklist	Reports and	

2 Click "Show All"

ment, refreshed from DEV7 on July 26.	
O Search (2)	
Notifications	Show All
d moi	
FYI Document (Purchase Order) PO01000000131 Failed Validation	5 days ago
My Team Abigail Shellist	Dismiss
Requisition REQ01000000242 Approved Abigail Shellist	Dismiss
ifications • FYI Approve Requisition REQ01000000242	5 days ago
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• FYI	5 days ago

Click "Worklist"

environment, refreshed from DEV7 on July 26.	·
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d to Me (71) Created by Me (6) All	
ırch	Dismiss All
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-124	Actions 🔻			Q =	Me & My Group	✓ Assigned	~	>
	Status	€	Title	Number	Creator	Assigned	Priority	
	Ê		Document (Purchase Order) PO01000000	2397916	Abigail Shellist	12/18/2024 5:13 PM	3 🗸	
	Ê		Requisition REQ01000000242 Approved	2398728	Abigail Shellist	12/18/2024 5:12 PM	3	
	Ê		Approve Requisition REQ01000000242	2397906	Abigail Shellist	12/18/2024 5:12 PM	3	
	Ê		Document (Contract Purchase Agreement)	2398726	Abigail Shellist	12/18/2024 5:10 PM	3	
	Ê		Document (Purchase Order) PO01000000	2398715	Abigail Shellist	12/18/2024 5:03 PM	3	

Click the dropdown next to your name and click "Preferences"

1 Worklist						<u>କ୍</u> ରେ	Abigail Shellist 🗸	
							User Details	
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	Ê		Document (Contract Purchase Agreement)	2398726	Abigail Shellist	12/18/	2024 5:10 PM 3	
	Ê		Document (Purchase Order) PO01000000	2398715	Abigail Shellist	12/18/	2024 5:03 PM 3	-

6 If you	want to tempo	orarily set a d	elegate yo	u can en	able a va	cation peri	od	
ORACLE	BPM Worklist						බො	Ał
						My Rules	Certificates	N
Rules	· · · + ×	Vacation Per	iod : ashelli	s				
Vacation Period	(Disabled)							
My Rules		Remove yoursel	f from automatic t	ask assignme	nt by enabling a	vacation date ran	ige.	
		Optionally, more	specific vacation	rules can be	created under "I	My Rules".		
		Enable vaca	tion period					
		Start Date	11/1/2024 5:52 PI	M Č				
		End Date	11/7/2024 5:52 PI	M Čo				
		Reassign to:	User 🗸	rgentr10		Q		
	L	O Delegate to:			٩			

7 Choos	e the date range	
I (Disabled)	Remove yourself from automatic task assignment by enabling a vacation date range. Optionally, more specific vacation rules can be created under "My Rules".	<u> 2002</u>
	Start Date 3/17/2025 5:52 PM End Date 11/7/2024 5:52 PM	
	 Reassign to: User v rgentr10 Delegate to: 	

8 Click "OK"

Start Date	3/17/2025 5:52 PM	Ē							
End Date	11/7/2024 5:52 PM	te						_	
		Select	Date a	and 1	Time			:	×
Reassign to:	User V rgentr10	<	Marc	h	~	2025	^ >	· >	
		SUN	MON	TUE	WED	THU	FRI	SAT	
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d/or its affiliates.									

9 Click save **1** Worklist Abigail Shellist 🗸 ... My Rules Certificates Notification Accessibility Vacation Period : ashellis $+\times$ Revert Save led) Remove yourself from automatic task assignment by enabling a vacation date range. Optionally, more specific vacation rules can be created under "My Rules". Enable vacation period to. Start Date 3/17/2025 5:52 PM 10 End Date 3/21/2025 5:52 PM Q • Reassign to: User ~ rgentr10 Q O Delegate to:

10 To set up delegations for specific roles, click on my rules.

ORACLE	BPM Worklist						ଷ୍ପ	Ał
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Rules	~ ~ + ×	Vacation Per	iod : ashelli	s				
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11 Click the + sign to a	idd a rule	
ORACLE [®] BPM Worklist	My Rules Certific	Ał Ał
Rules Vacation Period (Disabled) My Rules		

12 Name the rule

ORACLE BPM Worklist		6 9	Ał
	My Re	ules Certificates	N
🖌 Rules 💎 ^ 🕂 🗙	My Rule		
 Vacation Period (Disabled) My Rules User Rule 	Name * User Rule		
	Execute rule only between these dates:		
	Start Date		
	End Date		
	Tasks Tasks matching these conditions		
	Match 💿 All 🔿 Any 🗣]	
	▲ Task Type is ✓	٩ ٢	R

Search for the task you want to enable a delegate for. In this case, ReqApproval

	Task Type	Composite Name	Description	Outcomes
	QnnaireCanceledFyi	PrcPoqNotificationsQnnaire		Approve,Rejec
	QualityIssueHumantask	EnqCommonNotificationCo		Ok
	ReadyForEvalFyi	PrcPoqNotificationsReadyF		Approve,Rejec
	RecallFyi	HcmCompWorkbenchFyiN		Ok
	ReceiptCreationErrorFyi	RcvConfirmReceiptCompos	This FYI notification notifies B	Ok
	RejectedInvoiceCorrecti	FinApInvTransactionsRejec		Edit Invoice
	RejectedOrgFYI	HhrVolunteeringApprovalC		Ok
	RejectedProjectFYI	HhrVolunteeringApprovalC		Ok
	RepositoryUpdateFyi	PrcPoqNotificationsReposit		Approve,Rejec
	ReqApproval	PrcPorManageReqApprova		Approve, Reject
	ReqLinesCanceledFYI	PrcPorManageReqComposite		Approve,Reject
	ReqReassignedFYI	PrcPorManageReqComposite		Approve,Reject
	ReqReturnedFYI	PrcPorManageReqComposite		Approve,Reject
	ReqStatusFYI	PrcPorManageReqApprova		Approve,Reject
	ReqWithdrawnFYI	PrcPorManageReqComposite		Approve,Reject
	RequestInformationFyi	HcmCompWorkbenchFyiN		Ok,Reply
	RequestNewPositionAp	HcmWorkPositionsApprova		Approve,Reject
	RequestPositionChang	HcmWorkPositionsApprova		Approve,Reject
pyright © 1997, 2022, Oracle a	RequestShiftApprovalT	HcmSchedulesShiftsAppro		Approve, Rejec

Highlight the task and click OK

RepositoryUpdateFyi	PrcPoqNotificationsReposit	Approve,Rejec	
ReqApproval	PrcPorManageReqApprova	Approve,Rejec	
ReqLinesCanceledFYI	PrcPorManageReqComposite	Approve,Rejec	
ReqReassignedFYI	PrcPorManageReqComposite	Approve,Rejec	
ReqReturnedFYI	PrcPorManageReqComposite	Approve,Rejec	
ReqStatusFYI	PrcPorManageReqApprova	Approve,Rejec	
ReqWithdrawnFYI	PrcPorManageReqComposite	Approve,Rejec	
RequestInformationFyi	HcmCompWorkbenchFyiN	Ok,Reply	
RequestNewPositionAp	HcmWorkPositionsApprova	Approve,Rejec	
RequestPositionChang	HcmWorkPositionsApprova	Approve,Rejec	
RequestShiftApprovalT	HcmSchedulesShiftsAppro	Approve,Rejec	
RequesterChangeRequ	PrcPoApprovalComposite	Approve,Rejec	
RequireLearnerContent	HcmEngmtVideoSharePres	Ok	
RequireOwnerContentD	HcmEngmtVideoSharePres	Ok	
RequisitionApprovalHu	HcmRecHiringCoreRequisit	Approve,Rejec	
ResignationApproval	HcmEmploymentTerminatio	Approve,Rejec	
•			
		OK Cancel	

15 Choose who you want to be your delegate for this task.



Click the "Delegate" field.

Tasks matching the	ese conditions 🗸	·				
		Match	All O Any	+		
Task Type	is	~	ReqApproval	٩,	:	×
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) Rea • Del	assign to: legate to:	User	×] q	۹.	
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Click this image.

Match Any Task Type is ReqApproval	Tasks	Tasks matching these conditions V	•		
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Action					
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 Set outcome to: Take no action 	Action	 Reassign to: Delegate to: Set outcome to: Take no action 	User v rgentr10 APPROVE v	9	

Click the "Enter Search String" field.

				My Rules	Certificates N
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 ✓ Vacation Period (Disabled) ✓ My Rules ✓ User Rule 	Name * Requisition App	roval Delegation n rule			
		between these date	.5.		
Users 🗸)				
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Enter the name or net ID and click search

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20 Click the "Select" field.

First							
	Name			Last Name			
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			[Search Reset			
	D	First Name	Last Name	Email	Title	Manager	Organizatio
0	🔓 rgentr10@u	Chad	Gentry	rgentr10@utk.edu			
0	gentr10	Robert	Gentry	chad.gentry@xt		ashellis	

21 Click "OK"

			Last Name ID Search Reset			
	First Name	Last Name	Email	Title	Manager	Organization
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22 Click "Save"

1 Worklist								වෙ	Abigail Shel	list 🔻	
							My Rules	Certificates	Notification	Access	ibility
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ed)	Name *	Requisition App	oroval Delegatio	on							
		Use as vacatio	n rule								
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	Start Date	e									
	End Date	e									
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