Approvals Management Responsibilities and Setups in AME.B

An Oracle White Paper

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Document Overview

The purpose of this White Paper is to discuss the new procedure for assigning the Approvals Management responsibilities to individual users. The process has completely changed with AME.B. The responsibilities are no longer just attached to the FND_USER record in the base application.

Audience

This document is intended for the functional and technical person implementing AME and for support engineers.

AME Introduction

AME is a self-service web application which lets users define business rules governing who should approve transactions that originate in other Oracle applications like in SSHR. It mainly provides the following services to the calling application,

- A centralized rules repository for defining and sharing rules.
- Based on specific transaction date, it provides an execution engine to evaluate the rules.
- It provides the List Management capabilities.
- It also provides the history of approval status.

Announcing Approvals Management Minipack AME.B (4428060). This release sees the adoption of OAF (Applications Framework) in place of the mod pl/sql UI previously available within AME.

Announcing Approvals Management Minipack AME.B rollup patch (4873179). This fixes some issues with AME.B as well as introducing some functionality for future uptake by integration teams. AME.B patch is the OAF version of AME. Please note that the version of AME in R12 is equivalent to AME.B (up to its rollup) and hence all the documents for AME.B are also applicable for R12 with some minor change.

Knowing AME.B

In AME B, the UI has moved to new OAF tech. With this, the old AME Application administrator responsibility is end-dated and instead we have the following two responsibilities;

- Approvals Management Business Analyst
- Approvals Management Administrator

Assigning these responsibilities directly to a user will NOT work. From AME.B onwards RBAC (Role Based Access Control) is used. So, for the responsibilities to work, AME roles should be assigned and data grand has to be provided to the users. This is explained in detail in following sections.

For the Existing users, you can run the 'Approvals management Post Upgrade Process' concurrent process, which will attach the new responsibilities to the existing AME Users. Using the System Administrator Responsibility, you can attach the concurrent program to System Administrator Reports Request Group.

The migration is implemented as a concurrent program with Switches. To migrate users, pass 'MIGRATE_USERS' as parameter. To migrate item class usages, pass 'MIGRATE_ITEM_CLASS_USAGES' as parameter. To migrate both pass 'MIGRATE_ALL' as parameter. Ensure that concurrent manager and workflow BES are up before running the program. Also, please ensure that the port is bounced once the CP has been executed/run successfully.

Setting up Responsibilities

This section gives a step-by-step illustration of adding the two AME responsibilities to the user.

1. Login as SYSADMIN user (or a user that has full User Management functionality – Review Note 378262.1 for the steps to update an existing user to full user management capabilities).
2. Create a New user account and give an appropriate effective date. Do NOT add any Approval responsibility.
3. Save the record.

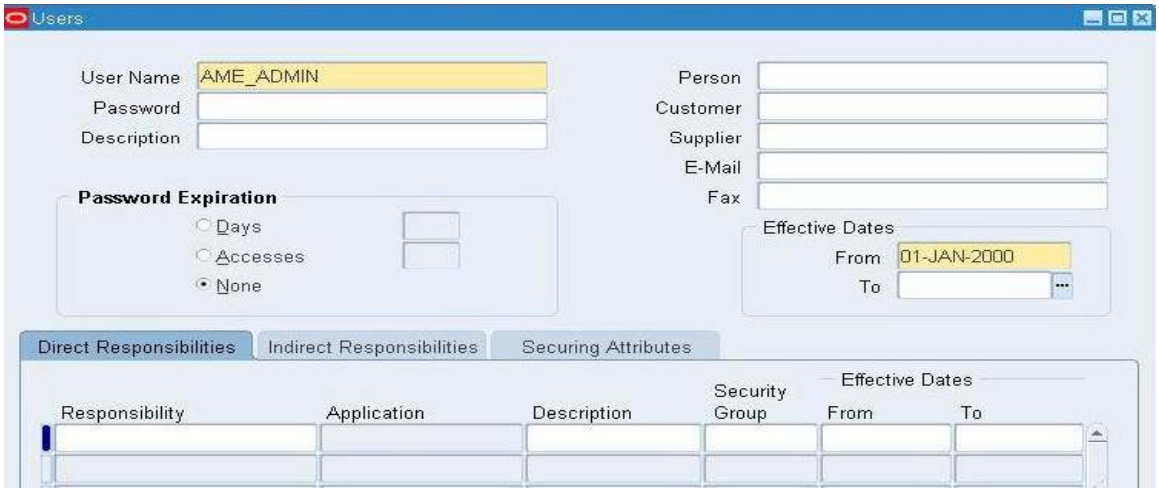

Figure 1 : Creating User

4. Switch the responsibility to User Management and Navigate to the Users function.

Figure 2 : User Mgt Functions

5. Query for the newly created user.
6. Click on the update action from the result table.

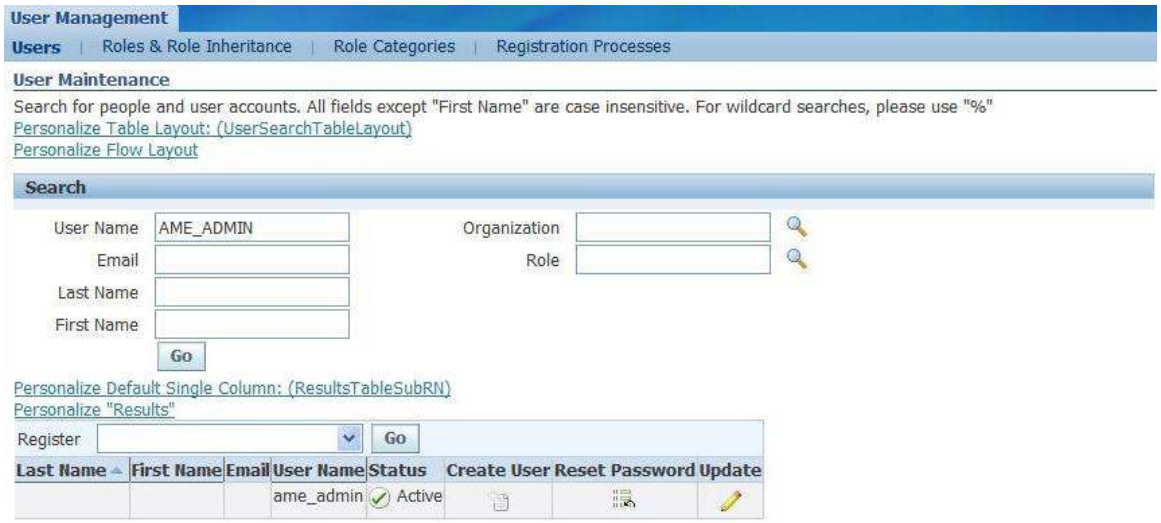

Figure 3 : User Mgt, Search option

7. In the Update User page, click on the Assign Roles button

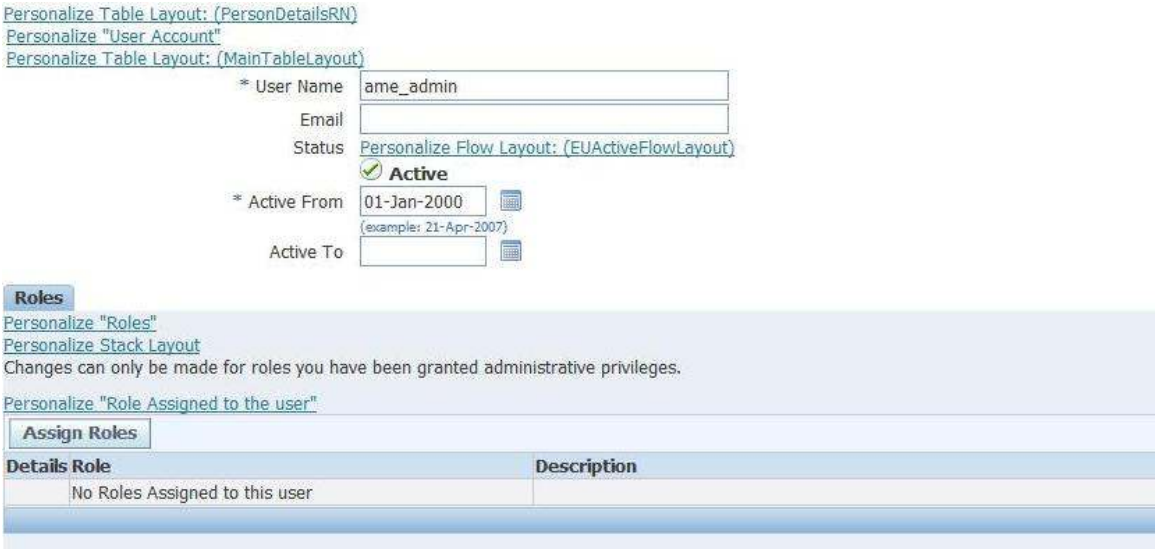

Figure 4 : Update User Page

8. Change the “Search By” field from “Roles and Responsibilities” to “Roles”
9. In the search window, query for Approval%
10. Following five roles will be displayed.
11. Select only the “Approvals Management Administrator” and “Approvals Management Business Analyst” roles.

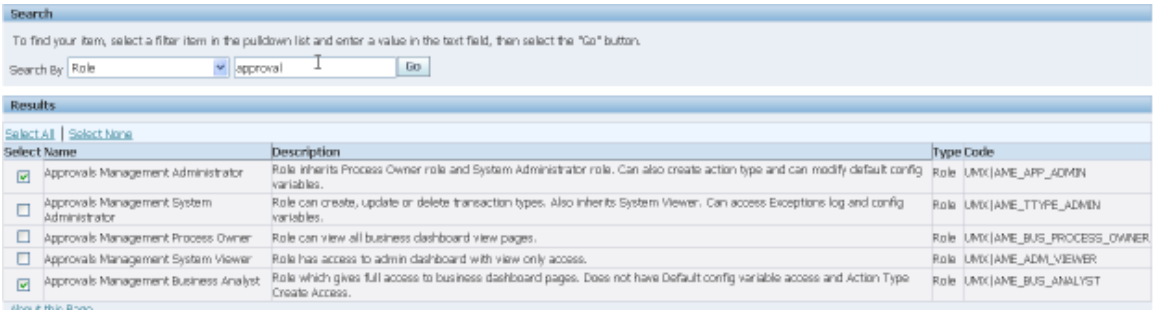

Figure 5 : All the Approval roles

12. After selecting the Roles, provide the Justification for the role and the effective date.

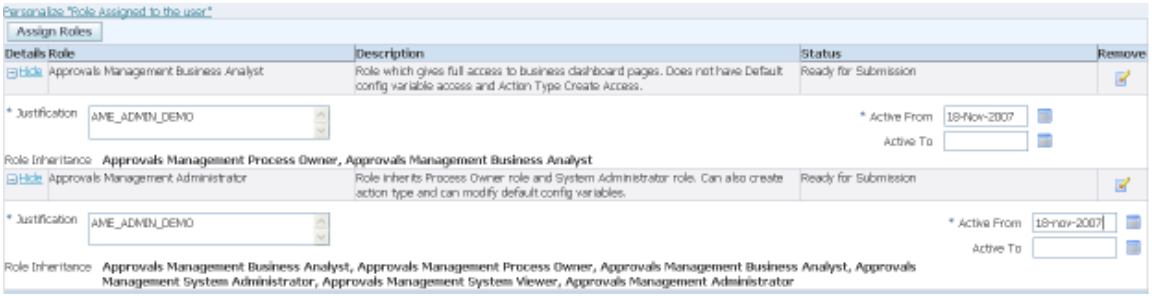

Figure 6 : Roles - Justification and Active date

13. After completing the action, you can query back the same user and can verify the list of roles being attached to the user.

Figure 7 : Roles assigned to the user

14. Now switch the responsibility to Functional Administrator.
15. Click on create grants under the grants sub-tab.

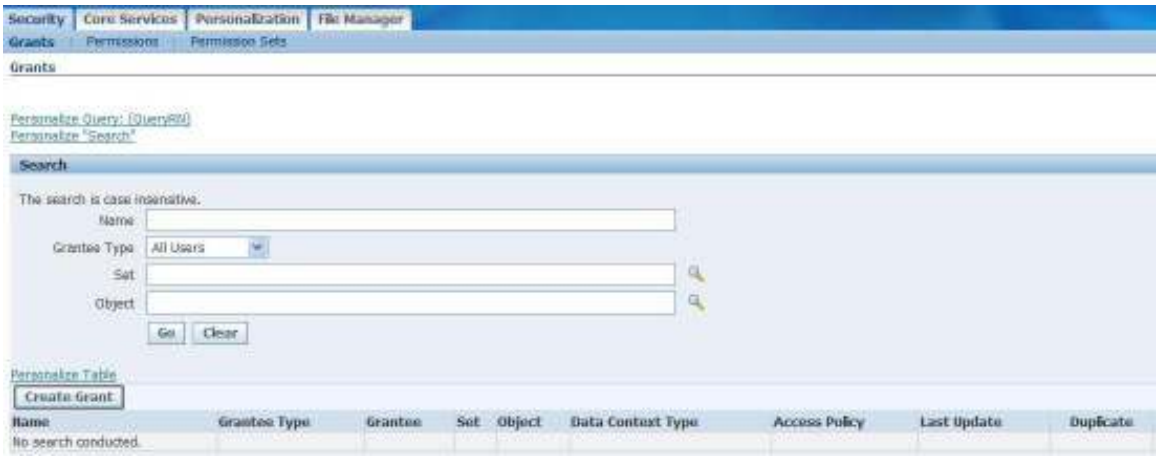

Figure 8 : Functional Admin Page

16. Enter a Grant Name and provide an effective date.
17. Navigate to the security Context region and select the Grantee Type as ‘Specific User’
18. In the Grantee field select the newly created User
19. In the Data Security region select ‘AME Transaction Types’ as the Object.

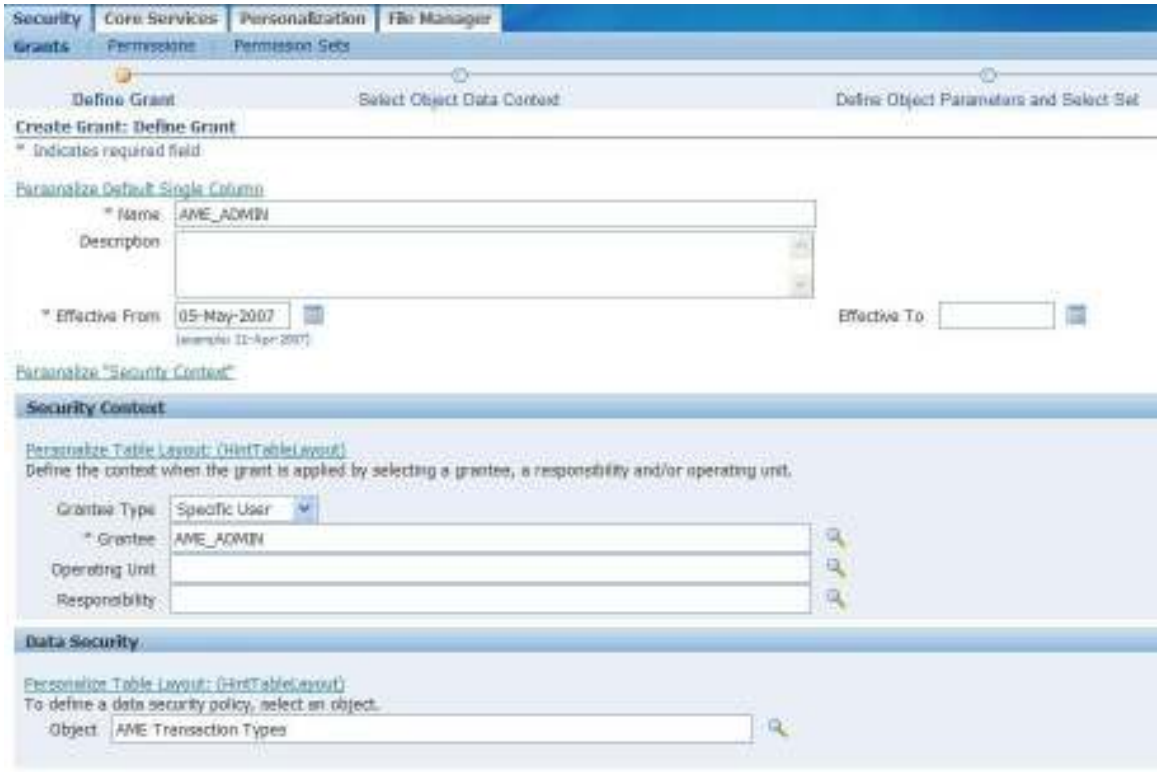

Figure 9 : Define Grant

20. Clicking Next will take you to the 'Select Object Data Context' page'.
21. You have a default value of 'All Rows' in the Data Context Type, leave it as it is, and navigate further.

Figure 10 : Object Data context page

22. In the 'Object parameter and Select Set' page, enter 'AME calling applications' as the value in the Set field.

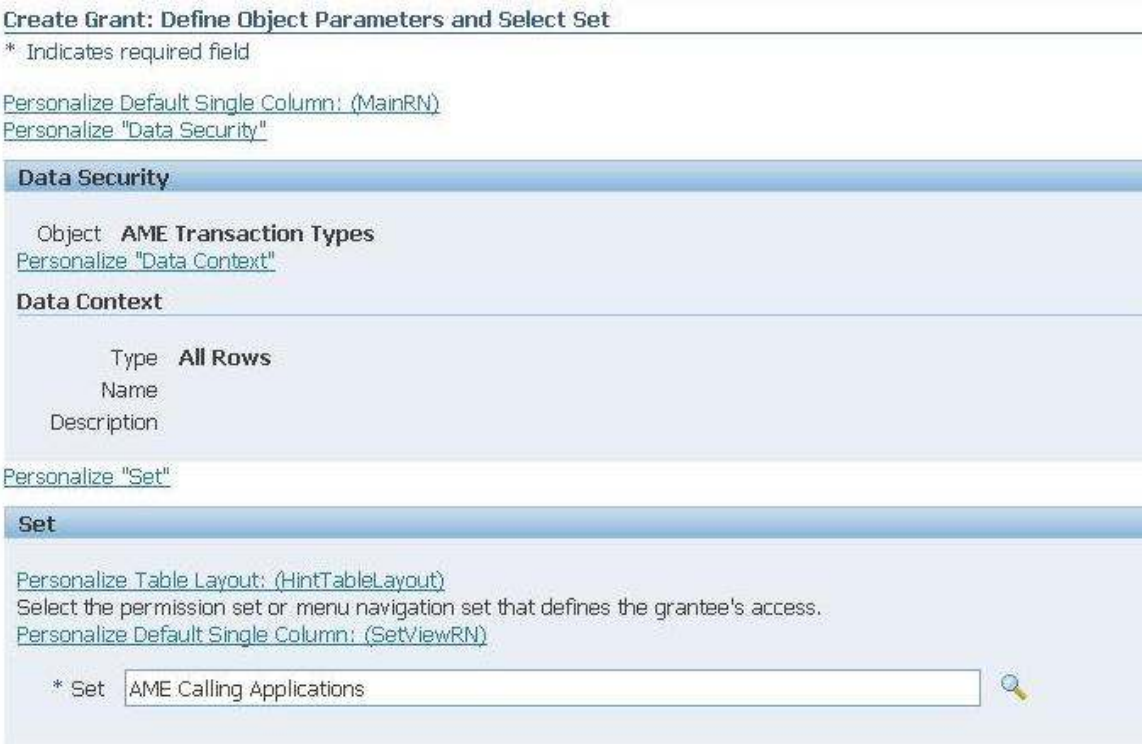

Figure 11 : Object Parameter and Permission set

23. Clicking Next will take you to the Review page.
24. Verify the information and submit the transaction.

25. Now Switch the responsibility to System Adminstrator and Navigate to System Profiles.
26. Query for the profile 'AME:Installed' at the required level and set the value to 'Yes'.
27. Save the data.

Figure 12 : AME Profile

28. Now you can login as the newly created user.
29. You should be able to see the following responsibilities:
    a. Approvals Management Administrator
    b. Approvals Management Business Analyst

Figure 13 : New AME Responsibilities

Responsibility and its features

Approvals Management Administrator Dashboard

Approvals Management Administrator responsibility has full access to AME's user interface. To perform any technical tasks such as setting AME's configuration variables, at least one user administrative privilege in AME should be granted.

The administrator dashboard mainly consists of three regions,

- The transaction Type
- Unused Approver Groups
- Quick Links

Figure 14 : Admin Dashboard - Transaction type and Quick Links

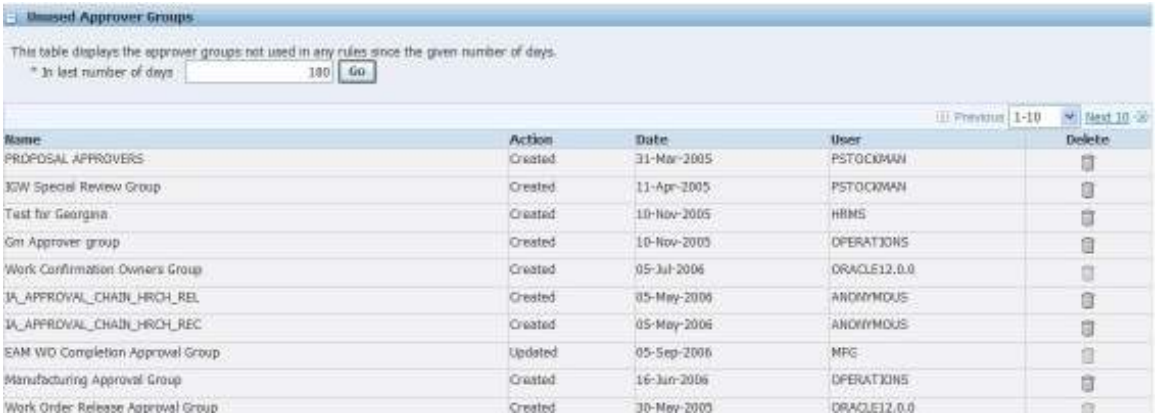

Figure 15 : Admin Dashboard - Unused Approver Groups

Unused Approver Groups:

The table gives a list of approver groups that is not been used in any rules for the given number of days. The table also provides an option to delete the group.

Note: You will not be able to delete any seeded groups.

Quick Links :

Quick link under Approvals Management Administrator responsibility have the following links,

- Configuration Variables
- Exception Log
- Setup Report
- Approver Types

Configuration Variables :

It provides an option to set a default value for the General configuration variables. It also select a particular transaction type and set the variables specific to the transaction type. The next region provides you with the options for setting Rule Priority Modes for different rule types.

You can also set the forwarding behavior, where the approver list should be recalculated when a particular approver forwards an approval. You will have the following options to select from,

- Forward to forwardee only
- Forward to forwardee and forwarder
- Ignore Forwarding
- Repeat Forwarder
- Skip forwarder

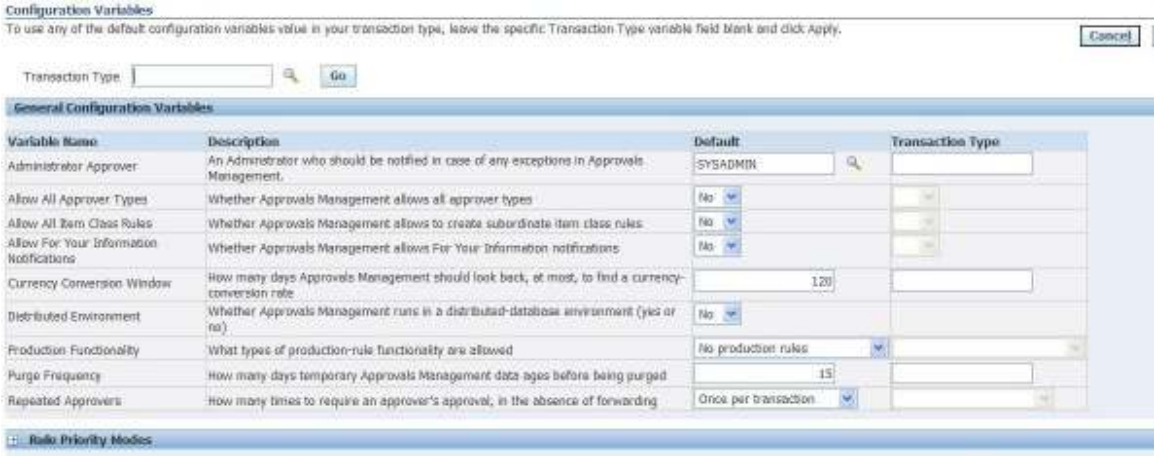

Figure 16 : Configuration Variables - Common variables

Figure 17 : Configuration Variables - Rule priority mode and Forwarding Behaviour

Exception Log :

From the quick links, you have an option to navigate to the Exception log page. By providing the Transaction Type, you will be able to view all the exception details generated. You can also query based on the transaction ID, along with the transaction type. You have an option to clear the exception log as well.

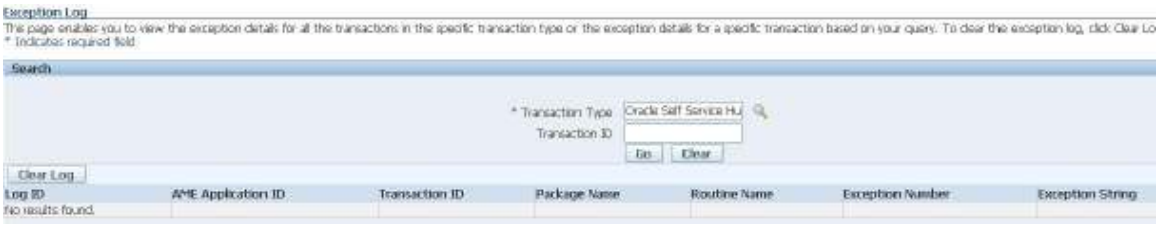

Figure 18 : Exception Log

Setup Report :

The setup report provides you with complete exhaustive detail about a particular transaction type. It gives the information about the Mandatory Attributes, Attributes, Conditions, Rules, Action Types, Approval Group, Item Class and the details about Configuration Variables (General Configuration Variables, Rule Priority Modes and Forwarding Behaviors). You also have a provision to have a printable page

Figure 19 : AME Setup Report

Approver Types :

In the quick link you also have an option to navigate to the Approver Types page. The page provides you with the list of existing Approver Types and also provides an option to create new ones.

Note : For all the pages navigated from the dashboard, you will get a global link 'Return To Dashboard' which will take you to the respective dashboard.

Approvals Management Business Analyst Dashboard

Approvals Management Business Analyst responsibility enables you to access areas of the user interface that do not require expertise in SQL or PL/SQL programming, or technical knowledge of Oracle Applications.

The Business Analyst dashboard mainly consist of the following regions,

- Transaction Types
- Recently Updated Rules
- Future Active Rules
- Future Inactive Rules
- Approval Process Setup
- Quick Links

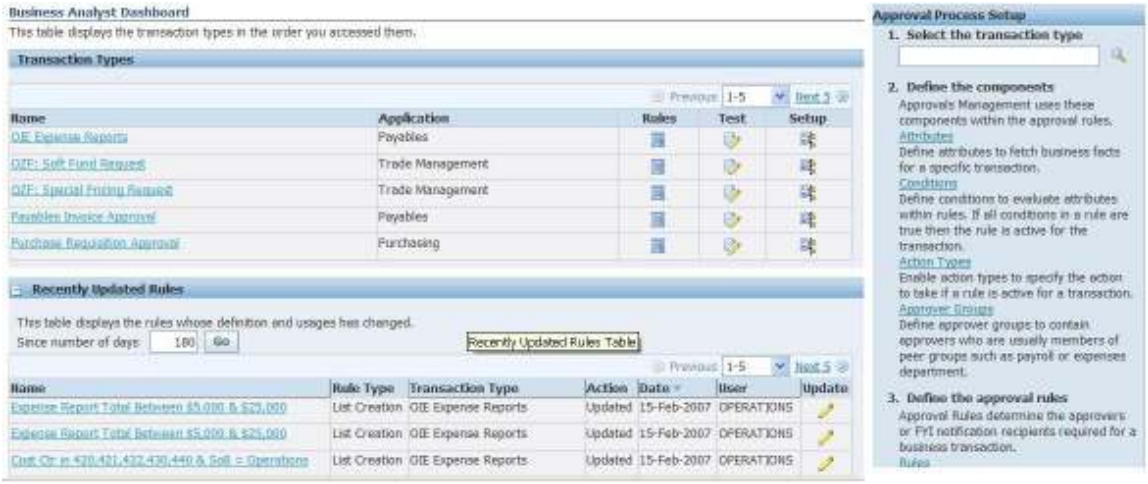

Figure 20 : Biz Analyst Dashboard

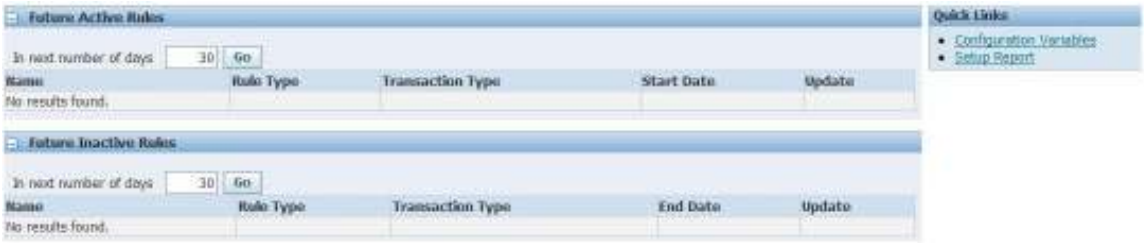

Figure 21 : Biz Analyst Dashboard

Transaction Types - Table :

The table displays all the transaction types in the sequence it is been accessed. You will not be able to sort them. On clicking the Transaction type name, it will give all the details of the Item Classes, Mandatory Attributes and Configuration variables.

Figure 22 : Transaction Type - Item classes

Figure 23 : Transaction Type - Mandatory Attributes

Figure 24 : Transaction Type - Configuration Variables

In the table you have an option to check the Rules, Test a transaction and to verify the setup. Under Rules, you an option to use any existing rules or to create new ones. You also have option to duplicate an existing one, apart from updating and deleting options.

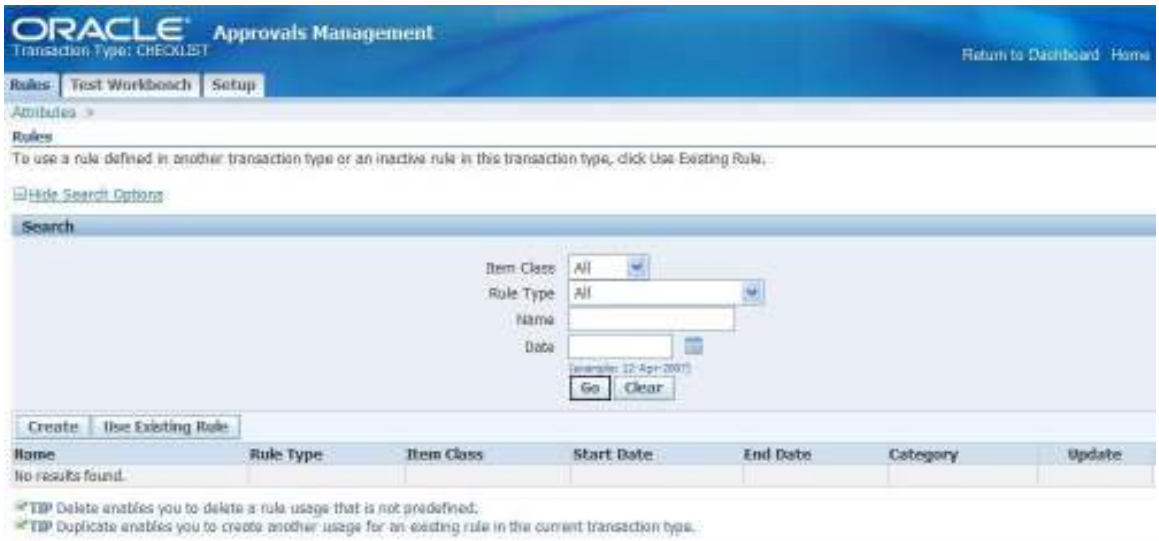

Figure 25 - Rules

Under the Test Workbench, you can run a test against a Transaction ID. You also have an option to build your own test cases.

Figure 26 : Test Workbench

From the table, you also have an option to work on the setup. You can create, update or delete Attributes, conditions, Action types and Approver Groups.

Figure 27 - Setups

Trouble Shooting Section
For Some of the More Common Issues Encountered Immediately After Implementation
Actually, if the preceeding document was followed, none of the following issue should occur.

1) After the application of AME.B, new users created with the AME responsibilities receive following message while clicking on any AME responsibility : "User has no functions available to this responsibility"

   Cause

   From AME.B onwards, the responsibilities are Role based.
   Use the User Management responsibility to attach roles to the users.
   Existing employees that had these responsibilities had them automatically converted to roles when AME.B was applied and the 'Approvals Management Post Upgrade Process' concurrent process is run.

   Solution
   Refer to Steps 4 – 24 above and verify your user has the correct Roles assigned.

2) When attempting to open Approvals Management Application Administrator, the following error occurs.

   ERROR
   Content-type: text/html; charset=UTF-8 Location:
   http://orafinprd2.corp.*mycompany*.com:8011/oa_servlets/oracle.apps.fnd.sso.AppsLogin?requestUrl=APPS HOMEPAGE&cancelUrl=http%3A%2F%2Forafinprd2.corp.*mycompany*.com%3A8011%2Foa_servlets%2 Foracle.apps.fnd.sso.AppsLogin&errText=Please%20contact%20the%20Web%20Master%20or%20System %20Administrator.%20ORA-01403%3A%20no%20data%20found%0AORA-06512%3A%20at%20%22APPS.AME_UI%22%2C%20line%20496%0AORA-06512%3A%20at%20%22APPS.AME_RULES_UI%22%2C%20line%206055%0AORA-01403%3A%20no%20data%20found%0A

   Solution
   Refer to Steps 4 – 24 above and verify your user has the correct Roles assigned.

3) How does one enable Oracle Approvals Management in order to see it?

Solution
Refer to Steps 25 – 27 above and verify your System Profile Setting.

4) After application of HR_PF.K RUP2 Patch 5337777, the approvals for several SSHR functions have stopped working. In cases where there is a one level approval, the function is auto approving.

Cause
The cause of this problem has been identified and verified in an Unpublished Bug 6196709. The list creation rule requires priority values. This is because the rule priority mode is set at default level, which will be applicable to all the transaction types.

Solution
Apply Patch 6196709 or later. Update to the following file versions or higher:
amescvar.lct 115.11
amescvar.ldt 115.30

Reference Documents:

- Oracle Approvals Management Implementation Guide Release 11i.
- AME.B 11i/R12 TOI Doc.

Integration Notes – How to Make Approvals Management Work With Unrelated Products

Product Area	Note Number	Note Title
SSHR	111574.1	Configuring SSHR V3.x and V4.0 - Approvals
	316871.1	Does SSHR Support AME FYI Notifications?
	360515.1	SSHR Approvals Using AME
	471125.1	Configuring Parallel Approvers Notification
OLM		
	312963.1	LEARNERS CAN ENROLL IN A CLASS WITHOUT APPROVAL
	377073.1	Learner Enrollment Gives Ora-06502, Ora-06512, Ora-20001
APINV		
	315269.1	APINV - How Do I Setup AP to Use Invoice Approval Workflow?
	330709.1	APINV - Invoice Approval Not Sending Emails. AME TEST
	470823.1	APINV: Warning Errors in AME Test Tab. Why Are They
Purchasing		
	434143.1	How To Setup And Use AME For Purchase Requisition Approvals
	435346.1	Purchase Requisition AME Workflow Errors ORA-20001: Approver does not have Entry in WF_ROLES
iReq		
	312832.1	Encountering Error When Trying to Approve Requisitions
	412833.1	How To Diagnose Issues in Building The Requisition Approval
Talent Mgmt		
	563277.1	How To Set Up AME Approvals For Talent Management
Misc		
	251770.1	FAQ Internet Expenses - Oracle Approvals Management
	280453.1	Setting Up Oracle Approvals Manager for use with Oracle Internal Controls Manager
	282349.1	Configuring Approvals Management R11i10 for Self-Service
	293315.1	11.5.10 FAQ for Approvals Management (AME) Integration For
	370810.1	Active Employee / User Not Found Through AME HR People /
	396216.1	FAQ AME iProcurement In Release 12
Comp WorkBench		
	362430.1	Compensation Workbench (CWB) Focus Area
	460444.1	AME Setup for iRecruitment