

ORACLE MASTERMINDS

Doyen System Pvt. Ltd.

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DOYEN DOMAINS

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- AME (2)
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- API (10)
- API Create a valid category set (1)
- API to Assign Item to Inventory (1)
- API to Create Item Category in Oracle Inventory (1)

Showing posts with label **AME**. [Show all posts](#)**TUESDAY, 16 JANUARY 2018****Dynamic Approver List for AME**

Oracle has provided an API to get the dynamic list of approvers for AME. ame_dynamic_approval_pkg.get_ame_apprs_and_ins_list. We need to pass the transaction type id and transaction number. Transaction Id is available in HR_API_TRANSACTION_TABLE and transaction_type_id is available in AME_CALLING_APPS table.

API Usage Code

```

CREATE OR REPLACE PROCEDURE GET_AME_TRANSACTION_APPROVERS
(
P_AME_TRANSACTION_ID IN NUMBER,
P_TRANSACTION_TYPE_ID IN VARCHAR2 DEFAULT 'LSGEXLR',
P_AME_APPROVERS_LIST OUT AME_APPROVER_RECORD2_TABLE_SS )
IS
p_apprs_view_type varchar2(100):='Active';
p_coa_insertions_flag varchar2(100):= 'N';
v_ame_approvers_list ame_approver_record2_table_ss;
v_ame_order_type_list ame_insertion_record2_table_ss:= ame_insertion_record2_table_ss();
v_all_approvers_count varchar2(100);
v_warning_msg_name varchar2(100);
v_error_msg_text varchar2(100);

BEGIN
--Reference to get the Transaction Type ID, Note that LSG is my custom Application Name
--select * from ame_calling_apps
--where fnd_application_id = 800
--and application_name = 'LSG External Learning Request'

v_ame_approvers_list := ame_approver_record2_table_ss();

AME_DYNAMIC_APPROVAL_PKG.GET_AME_APPRS_AND_INS_LIST
(

```

[API to Delete Valid Category Set](#)

(1)

[API to Update the category description](#) (1)[Approval Chain](#) (1)[Approved Supplier List](#) (1)

AR (4)

[AR Aging](#) (1)[AR to PA link](#) (1)[AR Transaction](#) (4)

ASL (1)

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Conversion (1)

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Customization (1)

cXML (1)

Data Loader (1)

[Databank configuration](#) (2)[Database Table](#) (2)

DBA Hiring (1)

DIR file list VALUE SET (1)

```

p_application_id => 800
,p_transaction_type =>P_TRANSACTION_TYPE_ID
,p_transaction_id => P_AME_TRANSACTION_ID
,p_ame_approvers_list => v_ame_approvers_list
,p_ame_order_type_list => v_ame_order_type_list
,p_all_approvers_count => v_all_approvers_count
,p_warning_msg_name => v_warning_msg_name
,p_error_msg_text => v_error_msg_text

);

P_AME_APPROVERS_LIST := v_ame_approvers_list;

EXCEPTION WHEN OTHERS THEN
dbms_output.put_line('exception 'sqlerrm');

END;

Sample procedure given below:

DECLARE

v_AME_TRANSACTION_ID NUMBER:=21610630 ;
v_TRANSACTION_TYPE_ID VARCHAR2(20):='LSGEXLR';
v_AME_APPROVERS_LIST AME_APPROVER_RECORD2_TABLE_SS ;

BEGIN

GET_AME_TRANSACTION_APPROVERS

(
P_AME_TRANSACTION_ID =>v_AME_TRANSACTION_ID
,P_AME_APPROVERS_LIST =>V_AME_APPROVERS_LIST
);

IF(v_ame_approvers_list.count() ) > 0THEN
FOR i IN 1..v_ame_approvers_list.count() LOOP
dbms_output.put_line(' approver_order_number =>' v_ame_approvers_list(i).approver_order_number
' **** display_name =>'v_ame_approvers_list(i).display_name
' **** Approver Category =>'v_ame_approvers_list(i).approver_category
' **** approval_status =>'v_ame_approvers_list(i).approval_status
' **** source =>'v_ame_approvers_list(i).source );

END LOOP;

```

DIR Files list LOV (1)
 Directory (1)
 Discrete Jobs Cycle with Cost Roll-up (1)
 Document Manager Failed with Error Number 3 while processing Purchase Requisition XXXX (1)
 Dropship Order (1)
 EBS (2)
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 EBS Functional- AR Trx & Receipt Creation (1)
 EBS Technical (44)
 EBS to FUSION table changes (1)
 Email (1)
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 Fusion Report (1)
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 GL CODE (3)
 GL Exchange Rates Query (1)
 GL Period and Exchange Rates in Fusion (1)
 GL Periods Query (1)
 GL Revaluation query in Fusion (1)
 GL table links in Fusion (1)
 GL transactions (5)

```
ELSE
dbms_output.put_line(' No Approver Found');

END IF;

END;

Posted by DoyenTeam at 01:54 7 comments:
Labels: AME, API
```

THURSDAY, 16 APRIL 2015

White Paper on Advanced Approval using Approval Management Engine - AME

"If you want something new, you have to stop doing something old"- as Peter F. Drucker says many organizations are stop doing old and keep innovating new technologies to stay in the competitive market. Thanks to customer expectations, Organizations are updating the existing products with new technology to delight the customer with enhanced features.

Oracle has also steering to achieve more customer satisfaction by keep updating their products. Recently Oracle E-Business suite updated from their R11i to R12.1.3. Oracle has added many new features in R12.1.3 version which spanning across different modules.

In this white paper, we would like to discuss about enhanced "Advanced Approval Support" features in iProcurement Module using Oracle Approval Management Engine (AME). The enhanced Advanced Approval Support features are:

1. Position Hierarchy Based Approvals
 - Position Hierarchy can be used for Purchase Requisition approval using Oracle Approval Management (AME)
2. Parallel Approvals
 - Simultaneous approve by multiple approvers for Purchase Requisition to speed up the Requisition approval
3. Supports FYI Notifications
 - For Your information (FYI) notification are enabled to notify the action taken on the purchasing decision to certain individuals where the decision need to be communicated.
4. Graphical display of Approval Chain
 - A graphical view of approval chain and requisition status display provided to view during purchase requisition creation in iProcurement.

The above enhanced features, Setup required to use the features with some examples are detailed in this white paper.

GST (1)
GUID (1)
HR (1)
HRMS (5)
iExpense (1)
Intercompany (1)
Interface (1)
Internal Sales Order (1)
Inventory (11)
iProcurement (2)
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Java (1)
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Min-Max Planning Method (2)
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OATS 12.5.0.2.537 Installation Strcuk/Hang. (1)
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OLT user creation (1)
Open Project with Terminated PMs or PDs (1)
Open Script (2)
OPM Process flow (1)
OPM Setups (1)
OPM Transactions (1)
OPM. Process Manufacturing (1)
ORA -00980 (1)
ORA -00980 Synonym (1)

Introduction

Thanks to the global technology advancement, all organizations are updating or implementing new technologies to grow faster and to be successful in the current competitive world. Oracle Corporation has released an updated version of Oracle E-Business suite (EBS) 11i to R12 to sustain in the fast growing technology world. There are number of new features introduced and some of the existing features are enhanced to give full benefit to the customer.

However, we are limiting this document to discuss only on “Advanced Approval Support” features in iProcurement R12.1.3. Oracle Corporation has released next version of Oracle EBS R12.2. But no further new or enhanced features are added with respect to “Advanced Approval support”.

The new / enhanced approval support such as “*Position Hierarchy Based Approvals, Parallel Approvals, Supports FYI Notifications and Graphical display of Approval Chain*” will enhance the Customer approval process in Purchase Requisition Process. Features like Parallel Approval will speed up the buying process which enables the buyer to procure items on time.

This white paper discusses the details about all new and enhanced approval support, setup required to enable the features with examples.

Position Hierarchy Based Approvals for Purchase Requisition

Organizations are used to have Position Based approval to overcome the personnel changes. This type of approval hierarchy ensures the organization work seamlessly even if the approver moves out of the organization. This new feature allows the organization to use Position hierarchy for Purchase requisition approval without any change. Approval Management engine enhanced to support Position based Hierarchy approval for Purchase requisitions transaction type.

There are 2 new action types such as “**HR Position Level**” and “**HR Position**” is introduced to support position hierarchy approvals. HR Position level will be used to get approval based on position level (Ex: Require approvals up to first two positions up) and HR position will be used to approval from a particular HR position (Ex: Requires approval up to HR Positions: MM400.Materials Manager)

Setup required for Position Hierarchy Based Approvals for Purchase Requisition

1. Define Job



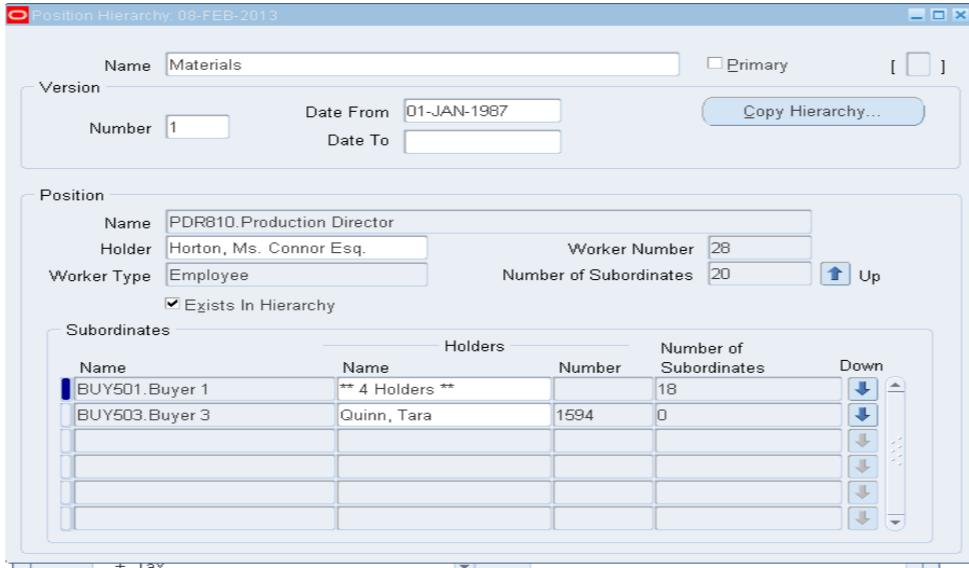
2. Define Position.

ORA Errors (1)
 Oracle (10)
 Oracle Alerts (2)
 Oracle Apps (1)
 oracle apps form error ORA-00980 (1)
 Oracle Apps R12 (1)
 Oracle EBS (1)
 Oracle Forms (5)
 Oracle Fusion (4)
 Oracle Fusion GUID (1)
 Oracle Fusion HCM (1)
 Oracle Fusion surrogate ID (1)
 Oracle iProcurement (1)
 oracle load Testing User Creation in Windows (1)
 oracle payables (3)
 Oracle Process Manufacturing
 Oracle Product Development. (1)
 oracle receivables (4)
 Oracle Reports (1)
 oracle utl_smtp (1)
 Order Management (17)
 OTM (1)
 PA Billing Events tables joins (1)
 PA invoice details in Fusion (1)
 PA Invoice tables in Fusion (1)
 PA Revenue Tables in fusion (1)
 PA Table changes (1)
 PA to employee links (1)
 PA to XLA links (1)
 PA to XLA links in fusion (1)
 Password (1)
 Password of Application User (1)
 Payment (1)
 Payroll (1)
 Performance tuning (1)
 Physical Counting (1)
 PL/SQL (16)
 PLSQL Function in SQL Query Fusion (1)
 PO (4)
 PO Approval (1)
 PO Category (1)
 Preparer (1)

3. Define Employee and assign Job and Position to employee

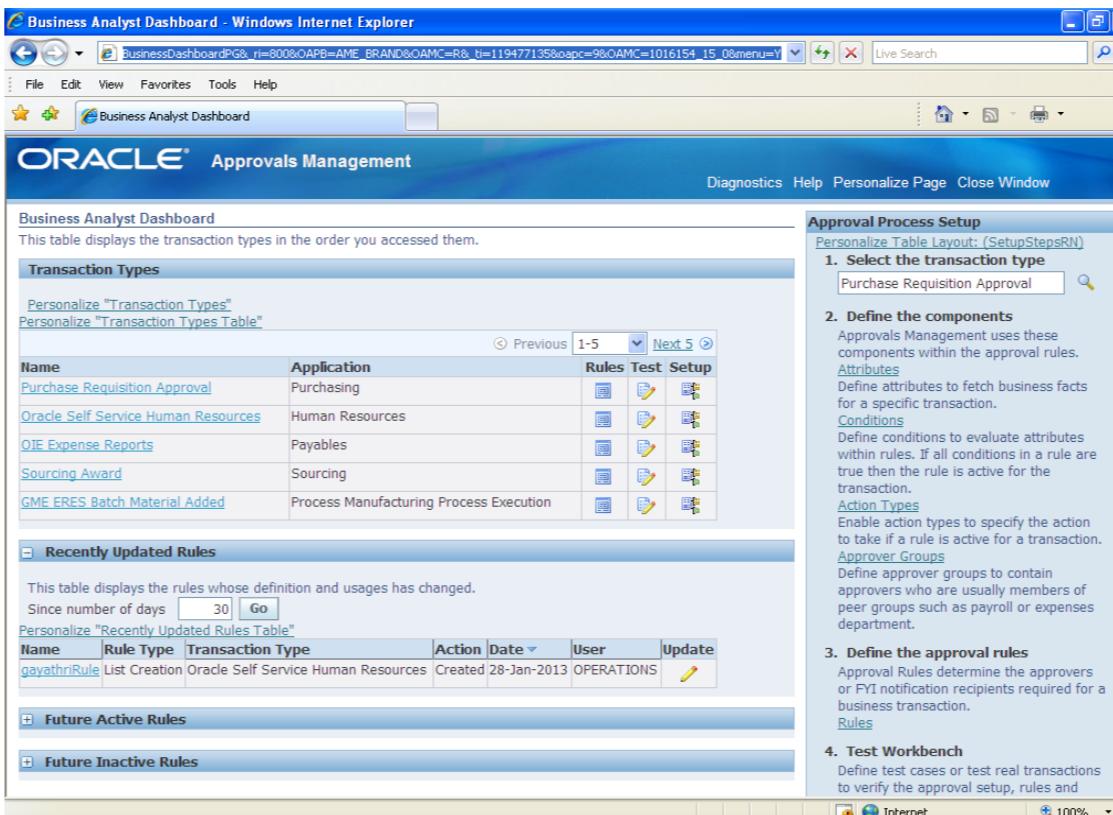
4. Define Position Hierarchy

Price Tolerances (1)
 Profile Option (3)
 Program for Return to Vendor in Oracle purchasing (1)
 Program to create receipts for approved Purchase order (1)
 Project Accounting (1)
 Project Contract Table Links in Fusion (1)
 Project Cost query (1)
 Project Details query Fusion (1)
 Project Directory query in Fusion (1)
 Project invoice query in fusion (1)
 Project Manager query in Fusion (1)
 Project Revenue query in fusion (1)
 Project table to Project Revenue Table links (1)
 Project to Revenue table links in fusion (1)
 Project Unbilled (1)
 Project Unbilled Balances query in Fusion (1)
 Projects (1)
 Property Management (4)
 Punchout (1)
 Punchout from Oracle iProcurement Directly to Supplier-Hosted Catalog (cXML) (1)
 Purchase Order (2)
 Purchase Requisition Approval (1)
 Purchasing (17)
 Purchasing News. Excel Link in iProc (1)
 Purchasing (1)
 Query (1)
 R12 Upgrade (1)
 Receipt Register (1)
 Receipt Register Report (1)
 Receipt with Bank statement details (1)
 Receiving (5)
 Receiving Issues (1)
 Repetitive Schedule (1)
 Requisition (1)
 Responsibilities and Users (1)
 Returns/Cancellation (1)



5. Define Rule in Approval Management engine using “HR Position Level” action type for Purchase Requisition transaction type

a. Navigate to “Approval Management Engine Business Analyst” Responsibility and select “Purchase Requisition Approval” as transaction type and click



on Setup button.

Revenue transfer (1)
 RMA (1)
 Sales Quotes (1)
 Sales Tax (1)
 Salesrep (1)
 Security Hierarchy (1)
 Setup (1)
 Setups (1)
 SGA Details - JROD COPY (1)
 Shipping Exceptions (1)
 SLA (1)
 smtp mail (1)
 Source key (1)
 Sourcing Rules (1)
 SQL Queries (30)
 SQL query (4)
 Stores (1)
 Submenu (1)
 Supplier (3)
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 Transaction Type UTL Mail (1)
 Type2b Punchout (1)
 Under Tolerance Shipment (1)
 UOM (1)
 Update (1)
 Upload (1)
 Use with class in SQL (1)
 User key (1)
 Users and Responsibilities (1)
 UTL_SMTP (1)
 validation (3)
 Vendor Ledger (1)
 WHT (1)
 WIP (3)
 Workflow (3)
 Workflow Status (1)
 XLA (3)
 XML (3)
 XML Publisher (1)

b. Navigate to “Rule” button and click on “Create” to create a Rule based on Position Hierarchy.

Attribute	Description	Category	Usage Type	Item Class	Data Type	Update	Delete
ADS_QA_ERES_DISPOSITION_UPDATE_ENABLED	ADS QA ERES DISPOSITION UPDATE ENABLED	Required	Static	Header	String		
ADS_QA_ERES_DISPOSITION_UPDATE_ENABLED_PM	ADS QA ERES DISPOSITION UPDATE ENABLED FOR PROJMG	Required	Static	Header	String		
ADS_QA_ERES_NONCONFORMANCE_CREATION_ENABLED	ADS QA ERES NONCONFORMANCE CREATION ENABLED	Required	Static	Header	String		
ADS_QA_ERES_NONCONFORMANCE_CREATION_ENABLED_PM	ADS QA ERES NONCONFORMANCE CREATION ENABLED FOR PROJMG	Required	Static	Header	String		

c. Enter Name, Rule type as “List Creation” and Start date during Step1.

* Name	Position Approval Hierarchy Rule
* Rule Type	List Creation
Item Class	Header
* Start Date	07-Feb-2013 <small>(Example: 23-Jan-2013)</small>
* End Date	31-Dec-4712

POPULAR POSTS

Parsing Comma Separated string in WHERE Clause of SQL Statement in Oracle Forms

Find the query of Receivable (AR) for the Invoice Number (TRX_NUMBER) Wise, Customer wise, Sales Order Wise, Transaction Date and GL Date Wise in Oracle Apps EBS R12

IR & ISO - Internal Sales Order Cycle with Setup Steps in R12.2

SQL Query to find details from PO till Cheque payment

Project Expenditure Extraction Query

iProcurement Setup Document and it's basic flows in R12.2

How to Add or Assign the Printer to a desired Reports

Back 2 Back and Dropship Order Process in Oracle R12.2

Oracle Order Management Setup Document in R12.2

Credit Check Functionality in Order Management

BLOG ARCHIVE

▼ 2020 (25)

▼ September (5)

What are the disposition status in Quality sample

AP Supplier query with Bank and Tax details (GST &...)

Invoice posted register Query

Customer Bill To Role update API

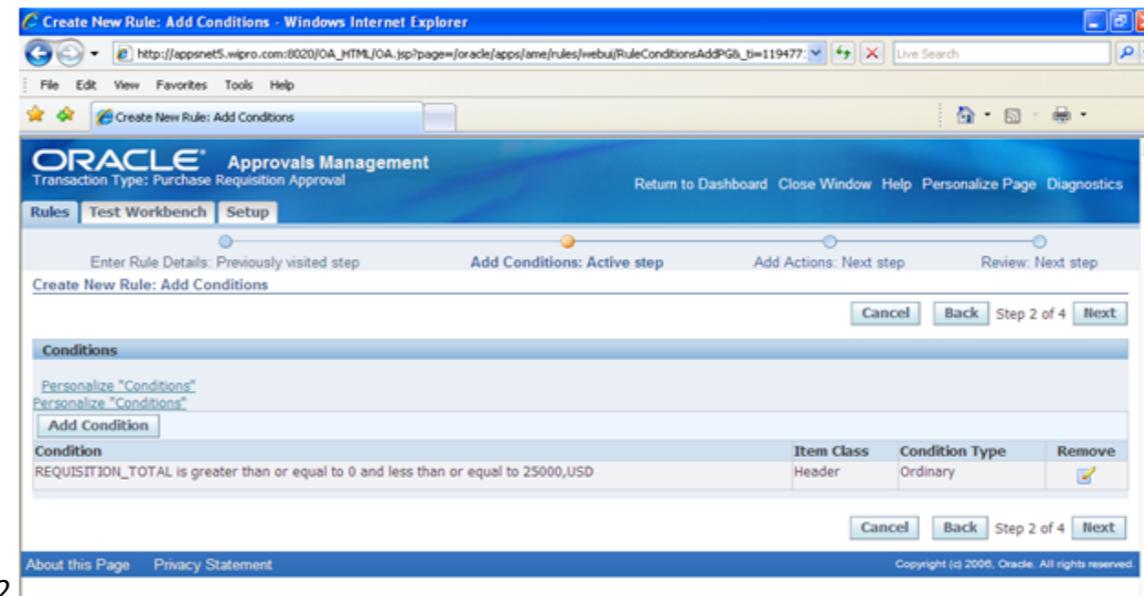
Customer Name Update API

► March (18)

► January (2)

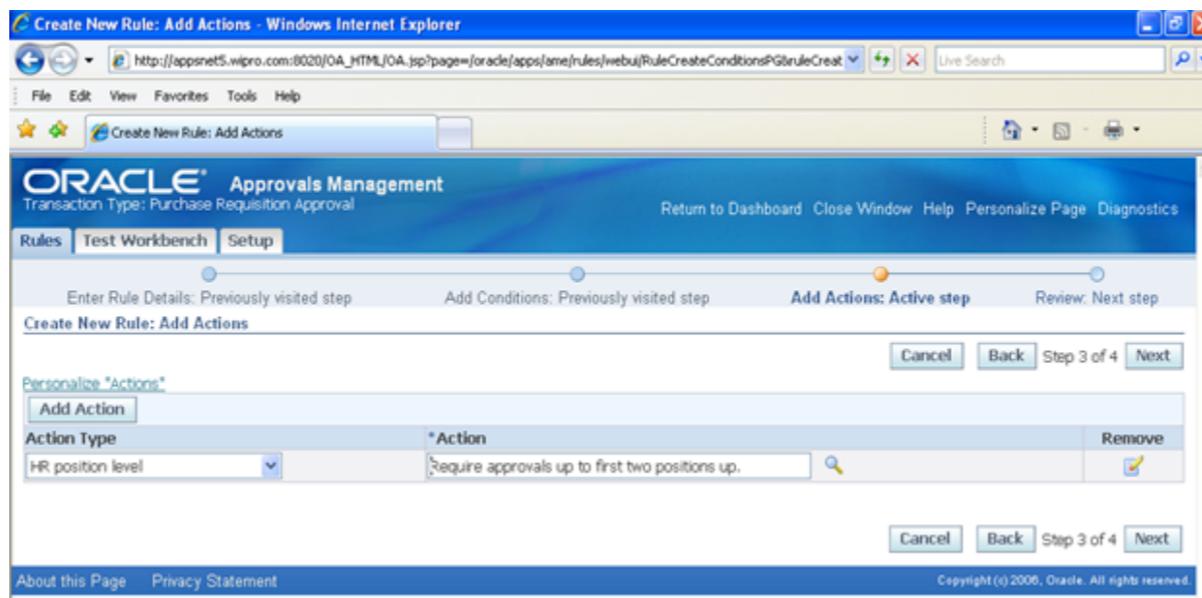
► 2019 (96)

► 2018 (190)

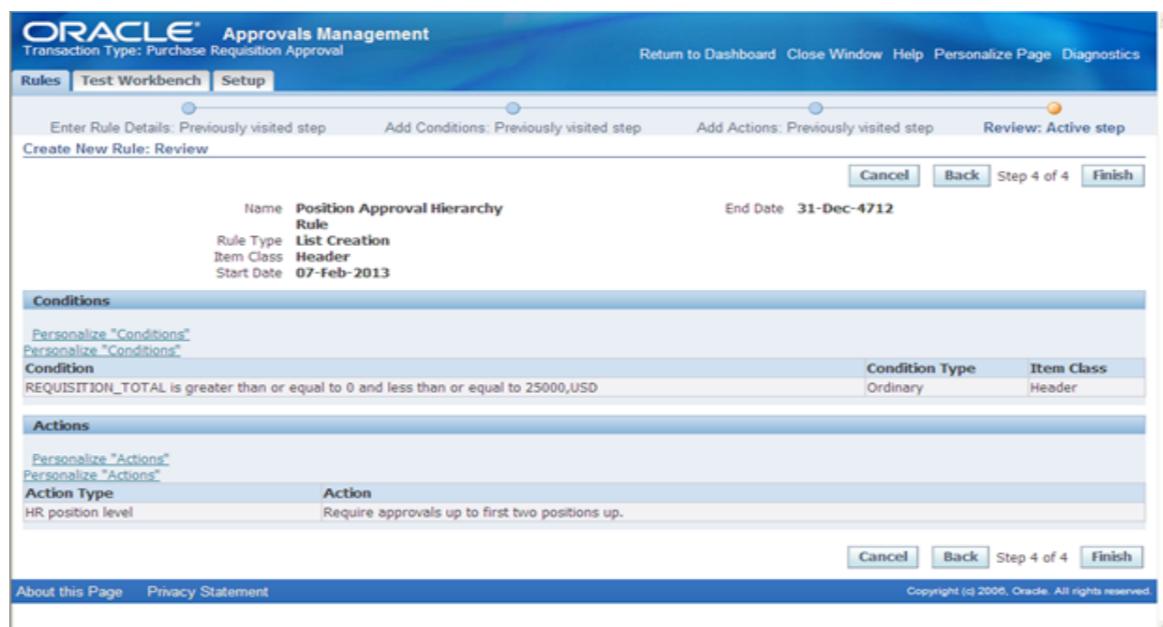


d. Add condition In Step2

e. Add "Action Type" "HR Position Level" and select Required action in Step3



f. Review all the details and click finish button to create Rule.



g. You will get confirmation message once the rule has been created.

- 2017 (75)
- 2016 (116)
- 2015 (96)
- 2014 (66)

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Unknown

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The screenshot shows the Oracle Approvals Management interface. At the top, it says "ORACLE® Approvals Management" and "Transaction Type: Purchase Requisition Approval". Below that are tabs for "Rules", "Test Workbench", and "Setup". A "Confirmation" message box is open, stating "Rule Position Approval Hierarchy Rule has been created successfully.". Under the "Rules" section, there is a note: "To use a rule defined in another transaction type or an inactive rule in this transaction type, click Use Existing Rule." There is also a link to "Show Search Options".

6. Select "PURCHASE_REQ" as Approval Transaction Type for "Purchase Requisition" Document Type

The screenshot shows the Oracle Purchasing interface with a dialog box titled "Update Document Type: Requisition Purchase for Vision Operations". The "Approval Transaction Type" dropdown is set to "PURCHASE_REQ". Other settings include "Workflow Start Process" (Main Requisition Approval) and "Forward Method" (Hierarchy). The "Control" section includes options for security level (Public), access level (Full), and workflow creation. Buttons for "Cancel" and "Apply" are at the bottom.

Example

1. Raise a Non catalogue Purchase requisition (PR) in iProcurement for \$100.

The screenshot shows the Oracle iProcurement interface with a "Non-Catalog Request" screen. The "Item Description" field contains "Position Hierarchy Test Item". Other fields include "Category" (060.36), "Quantity" (10), "Unit of Measure" (EA), "Unit Price" (10), and "Currency" (USD). The "Shopping Cart" sidebar shows one item added. Buttons for "Clear All", "Add to Cart", and "Add to Favorites" are visible.

2. Check out from the shopping cart.

The screenshot shows the Oracle iProcurement interface. At the top, there's a navigation bar with tabs: Shop, Requisitions, Receiving, Contractors, Shopping Cart, Close Window, Preferences, Help, Personalize Page, and Diagnostics. Below the navigation bar is a section titled "Personalize Stack Layout: (MainRN)". A table displays a single item: Position Hierarchy Test Item, quantity 10, price 10 USD, and amount 100.00. There are "Save" and "Checkout" buttons at the bottom right of the table.

This screenshot shows the "Checkout: Requisition Information" step. It has three tabs at the top: "Requisition Information: Active step" (selected), "Approvals: Next step", and "Review And Submit: Next step". The "Delivery" section contains fields for Need-By Date (11-Feb-2013 00:00:00), Requester (Stock, Ms. Pat), and Deliver-To Location (V1- New York City). The "Billing" section contains fields for P-Card (000000000), Project, Task, Expenditure Type, Expenditure Organization, and Expenditure Item Date. Buttons at the bottom include Cancel, Save, Submit, Edit Lines, Step 1 of 3, and Next.

3. Based on the Approval Limit Approval hierarchy generated. In our case, Approval hierarchy generated using the Position Hierarchy level. Click on next to go to review page

Requisition Information: Previously visited step Approvals: Active step Review And Submit: Next step

Checkout: Approvals and Notes
Your requisition will be sent to the following list of approvers.

Personalize "Approvals"

Approvals

Personalize Table Layout: (GraphLayout)

Horton, Ms. Connor Esq → Brown, Ms. Casey
[CDR810.Production Director]

Personalize "Notes"

Notes

Personalize "Notes": Justification [Text Area] Note To Buyer [Text Area]

Attachments

Personalize "Attachments": Personalize "Attachments of associated record"
Add Attachment

4. Review and submit the requisition for approval.

Requisition Information: Previously visited step Approvals: Previously visited step Review And Submit: Active step

Checkout: Review and Submit Requisition

Save Printable Page Back Step 3 of 3 Submit

Requisition 14505: Total 100.00 USD

Personalize "Requisition Number: Total (Currency) Amount":
Personalize Table Layout: (ReqHeaderTableLayout)

Created By Stock, Ms. Pat
Creation Date 09-Feb-2013 03:57:05
Description Position Hierarchy Test Item
Justification

Requisition Attachments

Personalize "Attachments": Personalize "Attachments of associated record"

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Lines

Personalize "This table contains the details of..."

Details Line	Description	Cost Center	Unit	Quantity	Price	Amount (USD)	Attachments
Show 1	Position Hierarchy Test Item	110	EA	10	10 USD	100.00	
				Total		100.00	

Save Printable Page Back Step 3 of 3 Submit

5. Requisition submitted and Click on requisition number to see the current status.

Approval History for Requisition 14505

Sequence	Approver	Organization Name	Action	Action Date	Notes
1	Stock, Ms. Pat	Vision Corporation	Submitted	09-Feb-2013 03:59:17	
2	Horton, Ms. Connor Esq.	Vision Corporation	Pending		
3	Brown, Ms. Casey	Vision Corporation			

Please navigate to "**Approval Management Business Analyst**" responsibility to cross check and to confirm the rules used to generate approval hierarchy. Please note that I have shown these details to confirm that the rule created based on Position hierarchy are used and this is not a step to create purchase requisition from iProcurement.

- Click on "Run Real Transaction Test" button
- Enter **Requisition_header_id** of the Purchase Requisition and click GO

Real Transaction Test - Windows Internet Explorer

ORACLE® Approvals Management

Test Workbench > Real Transaction Test

* Transaction Id Go

TIP Transaction ID is the ID of a real transaction which AME uses to evaluate rules and generate approvers.

Personalize "Transaction Attributes and values"

Transaction Data	Value
No results found.	

Cancel Save for Later (1) Run Test Case (2)

- Click on "Run Test Case(2)" button and results will be shown as below:

Run Real Transaction - Windows Internet Explorer
http://appsnets5.wipro.com:8020/OA_HTML/OA.jsp?page=/oracle/apps/ame/test/webui/RealTransactionTestPG&_ti=137381
File Edit View Favorites Tools Help
Run Real Transaction
ORACLE® Approvals Management
Transaction Type: Purchase Requisition Approval
Return to Dashboard Close Window Help Personalize Page Diagnostics
Rules Test Workbench Setup
Test Workbench > Real Transaction Test >
Run Real Transaction
To review the process stages that Approvals Management took to arrive at the applicable rules and approver list, click View Approval Process Stages.
View Approval Process Stages (1)
Transaction ID 237790
Applicable Rules
Personalize "Applicable Rules"
Personalize "Final Rule Details"
Details Description Class Rule Type Category
Show Position Approval Hierarchy Rule Header List Creation Approver
Final Processed Approver List
Personalize "Final Processed Approver List"
Personalize "Final Approvers List"
Details Order Number Approver Type Approver Category Status
Show 1 HR Positions PDR81 Final Approvers List Approver NOTIFIED
Show 2 HR Positions EX140,Chief Financial Officer Approver
Return to Test Workbench View Approval Process Stages (1)
About this Page Privacy Statement Copyright (c) 2006, Oracle. All rights reserved.
Done.

6. Login as Horton and Approve PR and Once approved, PR will go the next approver.

ORACLE® E-Business Suite
Navigator Favorites Diagnostics Home Logout Help Personalize Page
Oracle Applications Home Page >
Purchase Requisition 14505 for Stock, Pat (100.00 USD)
Approve Reject Reassign Request Information
Personalize "Notification Details Function"
Personalize "Notification Details Attributes"
Personalize Table Layout: (leftTable)
From Stock, Pat
To Horton, Connor
Sent 08-Feb-2013 11:29:18
ID 4790187
Personalize Stack Layout
Description Position Hierarchy Test Item
Requisition Total 100.00 USD (&CURRENCY: Rate not available)
Non-Recoverable Tax 0.00 USD (&CURRENCY: Rate not available)
Personalize Stack Layout
Requisition Lines
Personalize "Requisition Lines"
Personalize "Table contains the details of requi...."
Line Description Supplier Cost Center Unit Quantity Price (USD) Amount (USD)
1 Position Hierarchy Test Item 110 EA 10 10 100.00
Personalize Stack Layout
Approval Sequence
Personalize "Approval Sequence"
Horton, Ms. Connor Esq. → Brown, Ms. Casey → In Process
Personalize "Table contains the list of approve..."
Num Name Action Action Date Note
1 Stock, Ms. Pat Submitted 08-Feb-2013 11:29:17
2 Horton, Ms. Connor Esq. Pending
3 Brown, Ms. Casey

7. Login as Brown and Approve PR and Once approved, PR will get approved.

Personalize "Notification Details Function"
Personalize "Notification Details Attributes"
Personalize Table Layout: (leftTable)
From Horton, Connor
To Brown, Casey
Sent 21-Feb-2013 15:26:11
ID 4795192
Personalize Stack Layout

Personalize Stack Layout: (rightStack)
Personalize Table Layout: (rightTable)
Description Position Hierarchy Test Item
Requisition Total 100.00 USD (&CURRENCY: Rate not available)
Non-Recoverable Tax 0.00 USD (&CURRENCY: Rate not available)

Requisition Lines

Personalize "Requisition Lines"
Personalize "Table contains the details of requ..."

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Position Hierarchy Test Item		110	EA	10	10	100.00

Personalize Stack Layout

Approval Sequence

Personalize "Approval Sequence"

```

graph LR
    A[Horton, Ms. Connor Esq.] --> B[Brown, Ms. Casey]
    B --> C[In Process]
    style A fill:#e0f2ff
    style B fill:#e0f2ff
    style C fill:#e0f2ff
  
```

Personalize "Table contains the list of approve..."

Num	Name	Action	Action Date	Note
1	Stock, Ms. Pat	Submitted	08-Feb-2013 11:29:17	
2	Horton, Ms. Connor Esq.	Approved	21-Feb-2013 15:26:10	
3	Brown, Ms. Casey	Pending		

8. Login as requestor to see the PR status and you can see that PR is fully approved.

ORACLE® iProcurement

Shop | Requisitions | Receiving | Contractors

Requisitions | Notifications | Approvals

Requisitions: Requisitions >

Approval History for Requisition 14505

OK

Personalize "Approval Sequence"

```

graph LR
    A[Horton, Ms. Connor Esq.] --> B[Brown, Ms. Casey]
    B --> C[Approved]
    style A fill:#e0f2ff
    style B fill:#e0f2ff
    style C fill:#e0f2ff
  
```

OK

Sequence	Approver	Organization Name	Action	Action Date	Notes
1	Stock, Ms. Pat	Vision Corporation	Submitted	09-Feb-2013 03:59:17	
2	Horton, Ms. Connor Esq.	Vision Corporation	Approved	22-Feb-2013 07:56:10	
3	Brown, Ms. Casey	Vision Corporation	Approved	22-Feb-2013 07:57:28	

OK

About this Page

Parallel Approvals for Purchase Requisition

Oracle introduced Parallel Approval process to speed up purchase Requisition approval. Due to high volatile environment, organizations can not depend on one approval authority. The buying process delayed or stopped when the approval authority is not available to provide his approval for the requisition. To continue the buying process without any gap or delay, organizations are depending on another approval authority, who can approve the request.

Parallel approval process allows multiple approvers to approve the once purchase Requisitions simultaneously. This ensures the buying process in an organization is moving continuously.

Setup required for Parallel Approvals for Purchase Requisition

1. Navigate to “Approval Management Business Analyst” Responsibility and Select Purchase Requisition transaction Type. Click on “Setup” button to modify the setups

The screenshot shows the Oracle Approvals Management interface. On the left, there's a sidebar titled "Approval Process Setup" with four numbered steps:

- Select the transaction type**: Shows "Purchase Requisition Approval" selected.
- Define the components**: Describes "Attributes", "Conditions", and "Action Types".
- Define the approval rules**: Describes "Approval Rules" and "Rules".
- Test Workbench**: Describes "Define test cases or test real transactions to verify the approval setup, rules and".

The main content area has two sections:

- Transaction Types**: A table listing transaction types with columns: Name, Application, Rules, Test, and Setup. The "Purchase Requisition Approval" row is selected.
- Recently Updated Rules**: A table showing a single rule named "gayathriRule" with details like Rule Type (List Creation), Transaction Type (Oracle Self Service Human Resources), Action (Created), Date (28-Jan-2013), User (OPERATIONS), and Update (pencil icon).

2. Navigate to “Action Type” and create new action type (if required) or use existing action types. We are using existing action type “Approval –Group chain of authority” action type.
 - a. Select ordering method as “Parallel” to setup Parallel approval process. (“Serial” ordering mode is normal approval Process. i.e. Approval goes from one approver to next approver in a sequence)
 - b. Select Voting method. Oracle provides multiple options in voting method.
 - i. **Serial:**
Serial voting is a normal voting method where approvers are notified one after other. All approvers must approve the request to get Purchase Requisition approval
 - ii. **Consensus:**
All Approvers are notified in parallel. All approvers must approve the request to get Purchase Requisition approval.
 - iii. **First Responder Wins**
All Approvers are notified in parallel. The first responder’s choice will be group’s response. Purchase Requisition will get approved, if the first responder approves. Purchase Requisition will get rejected, if the first responder rejects.
- Note: “First Responder Wins” option used here to explain the functionality

The screenshot shows the Oracle Approvals Management interface under the 'Action Types' tab. It displays a list of five action types:

Select Name	Description	Rule Type	Order Number	Ordering Mode	Voting Method	Remove
Supervisory level	Chains of authority based on number of supervisory levels	Chain Of Authority	1	Serial	Serial	
pre-chain-of-authority approvals	group approvals before the chain of authority	Pre List Approval Group	1			
approval-group chain of authority	chain of authority includes an approval group	Chain Of Authority	1	Parallel	First Responder Wins	
HR position level	Chains of authority based on HR positions	Chain Of Authority	1	Serial	Serial	
HR position	Chains of authority based on a particular HR position	Chain Of Authority	1	Serial	Serial	

3. Create approver Groups with voting method as “First Responder Wins” and add all Approvers in the approval group.

The screenshot shows the Oracle Approvals Management interface under the 'Approver Groups' tab. A new approver group named 'Facilities Approver Group' is being created with the following details:

Name	Facilities Approver Group
* Description	Facilities Approver Group
* Order Number	1
Voting Method	First Responder Wins
Usage Type	Static

The 'Group Members' section lists two approvers:

Approver Type	Approver	Order Number	Delete
HR People	HR People: Smith, Jonathan	1	
HR People	HR People: Horton, Connor	2	

4. Create Rule using Parallel approval Action type and approver Groups.

The screenshot shows the Oracle Approvals Management (AME) interface. At the top, it says "ORACLE® Approvals Management" and "Transaction Type: Purchase Requisition Approval". The menu bar includes "Return to Dashboard", "Home", "Logout", "Help", "Personalize Page", and "Diagnostics". Below the menu, there are tabs for "Rules", "Test Workbench", and "Setup". A sub-menu under "Rules" shows "Update Rule: VO Category = SUPPLIES.FACILITIES". A note indicates "*Indicates required field". On the right, there are "Cancel" and "Apply" buttons.

Header

Item Class: **Header**
 Rule Type: **List Creation**
 * Name: **VO Category = SUPPLIES.FACILITIES**
 * Start Date: **23-Aug-2006** (example: 21-Feb-2013)
 * End Date: **31-Dec-4712**

Other Instances of this Rule

Conditions

Condition	Condition Type	Item Class	Remove
ITEM_CATEGORY in (SUPPLIES.FACILITIES)	Ordinary	Line Item	
TRANSACTION_SET_OF_BOOKS_ID is equal to 1	Ordinary	Header	

Actions

Action Type	Action	Remove
approval-group chain of authority	Require approval from Facilities Approver Group	

Cancel | Apply

Example:

1. Create Non catalogue request using "SUPPLIES.FACILITIES" as category and check out

The screenshot shows the Oracle iProcurement interface. At the top, it says "ORACLE® iProcurement". The menu bar includes "Shop", "Requisitions", "Receiving", "Contractors", "Stores", "Shopping Lists", "Non-Catalog Request", and "Contractor Request". The sub-menu under "Non-Catalog Request" shows "Non-Catalog Request". A note indicates "* Indicates required field". On the right, there is a "Shopping Cart" section with the message "Your cart is empty." and fields for "Contract Number", "Supplier Name", "Site", "Contact Name", "Phone", and "Supplier Item". There are also "Clear All", "Add to Cart", and "Add to Favorites" buttons. The main form has fields for "Item Type" (selected: "Goods billed by quantity"), "Item Description" (Parallel Approval Test), "Category" (SUPPLIES.FACILITIES), "Quantity" (10), "Unit of Measure" (Each), "Unit Price" (10), "Currency" (USD), and checkboxes for "RFQ Required" and "Negotiated".

Non-Catalog Request

* Indicates required field

* Item Type: Goods billed by quantity
 * Item Description: Parallel Approval Test
 * Category: SUPPLIES.FACILITIES
 * Quantity: 10
 * Unit of Measure: Each
 * Unit Price: 10
 * Currency: USD
 RFQ Required
 Negotiated

Shopping Cart
 Your cart is empty.

Contract Number: _____
 New Supplier
 Supplier Name: _____
 Site: _____
 Contact Name: _____
 Phone: _____
 Supplier Item: _____

Clear All | Add to Cart | Add to Favorites

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The screenshot shows the Oracle iProcurement Shopping Cart page. At the top, there's a navigation bar with links for Shop, Requisitions, Receiving, Contractors, Shopping Cart, Close Window, Preferences, Help, Personalize Page, and Diagnostics. Below the navigation is a table for the shopping cart:

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (USD)	Delete
1	Parallel Approval Test		Each	10	10 USD	100.00	
							Total 100.00

Below the table, there are two checkboxes: one for needing a purchase order number immediately (unchecked) and one for purchase order number being assigned after completing checkout (checked). Buttons for Save and Checkout are at the bottom.

The screenshot shows the Oracle iProcurement Requisition Information: Active step page. It has three tabs at the top: Requisition Information (Active step), Approvals (Next step), and Review And Submit (Next step). The current tab is Requisition Information. The page is titled "Checkout: Requisition Information" and includes a note that indicates required fields with an asterisk (*).

Delivery section:

- * Need-By Date: 25-Feb-2013 00:00:00 (example: 21-Feb-2013 19:45:00)
- * Requester: Stock, Ms. Pat
- * Deliver-To Location: V1- New York City
- Deliver to Maintenance
- Urgent

Billing section:

- P-Card: XXXXX0000
- Project:
- Task:
- Expenditure Type:
- Expenditure Organization:
- Expenditure Item Date: (example: 21-Feb-2013)

Buttons at the bottom include Cancel, Save, Submit, Edit Lines, Step 1 of 3, and Next.

- Approval and Notes section displays the approval group selected for this purchase requisition.
- In our example “Facilities Approval Group” selected for approval.
- This group consist 2 approvers namely Horton and Smith. Both the approvers will be notified once request submitted.

ORACLE® iProcurement

Requisition Information: Previously visited step Approvals: Active step Review And Submit: Next step

Checkout: Approvals and Notes
Your requisition will be sent to the following list of approvers.

Approvals

Facilities Approver Group [Manage Approvals](#)

Notes

Justification Note To Buyer

Attachments

[Add Attachment](#)

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Save **Submit** **Back** Step 2 of 3 **Next**

ORACLE® iProcurement

Requisition Information: Previously visited step Approvals: Active step Review And Submit: Next step

Approval Group

[Return](#)

Facilities Approver Group

Name	Title	Email
Horton, Connor	PDR810.Production Director	nobody@localhost
Smith, Jonathan	VPM200.VP Materials	nobody@localhost

[Return](#)

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2. Review the PR and Submit for Approval.

Requisition 14510: Total 100.00 USD

Created By Stock, Ms. Pat
Creation Date 22-Feb-2013 06:50:17
Description Parallel Approval Test
Justification

Requisition Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Lines

Details	Line	Description	Cost Center	Unit	Quantity	Price	Amount (USD)	Attachments
Show	1	Parallel Approval Test	110	Each	10	10 USD	100.00	
								Total 100.00

Save | Printable Page | Back | Step 3 of 3 | Submit

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3. Click on the status to know the status of the notification. Both approvers are notified for approval.

Approval History for Requisition 14510

In Process

Sequence	Approver	Organization Name	Action	Action Date	Notes
1	Stock, Ms. Pat	Vision Corporation	Submitted	22-Feb-2013 06:53:41	
2	Smith, Mr. Jonathan (Facilities Approver Group)	Vision Corporation	Pending		
3	Horton, Ms. Connor Esq. (Facilities Approver Group)	Vision Corporation	Pending		

OK | OK

About this Page

4. Login as Smith to view the Purchase Requisition approval notification.

From Stock, Pat
To Smith, Jonathan
Sent 21-Feb-2013 14:23:44
ID 4795187

Description Parallel Approval Test
Requisition Total 100.00 USD (&CURRENCY: Rate not available)
Non-Recoverable Tax 0.00 USD (&CURRENCY: Rate not available)

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Parallel Approval Test		110	Each	10	10	100.00

Approval Sequence

```

graph LR
    Start(( )) --> Step1[Facilities Approver Group]
    Step1 --> InProcess[In Process]
    
```

Num	Name	Action	Action Date	Note
1	Stock, Ms. Pat	Submitted	21-Feb-2013 14:23:41	
2	Smith, Mr. Jonathan (Facilities Approver Group)	Pending		
3	Horton, Ms. Connor Esq. (Facilities Approver Group)	Pending		

Related Applications

- Edit Requisition
- View Requisition Details
- Open Document

5. Login as Horton to see the notification for the same purchase Requisition and Click "Approve" button to approve the Request.

From Stock, Pat
To Horton, Connor
Sent 21-Feb-2013 14:23:46
ID 4795188

Description Parallel Approval Test
Requisition Total 100.00 USD (&CURRENCY: Rate not available)
Non-Recoverable Tax 0.00 USD (&CURRENCY: Rate not available)

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Parallel Approval Test		110	Each	10	10	100.00

Approval Sequence

```

graph LR
    Start(( )) --> Step1[Facilities Approver Group]
    Step1 --> InProcess[In Process]
    
```

Num	Name	Action	Action Date	Note
1	Stock, Ms. Pat	Submitted	21-Feb-2013 14:23:41	
2	Smith, Mr. Jonathan (Facilities Approver Group)	Pending		
3	Horton, Ms. Connor Esq. (Facilities Approver Group)	Pending		

6. Login as Requestor to check the status of the Purchase Requisition and you can see the request is approved by Horton and "no action taken" by Smith.

The screenshot shows the Oracle iProcurement interface. At the top, there's a navigation bar with links like Shop, Requisitions, Receiving, Contractors, Requisitions, Notifications, and Approvals. Below that, it says 'Requisitions: Requisitions > Approval History for Requisition 14510'. A message box is open with the title 'Approved' and a sub-message 'Facilities Approver Group'. Below this, a table lists the approval history:

Sequence Approver	Name	Organization Name	Action	Action Date	Notes
1	Stock, Ms. Pat	Vision Corporation	Submitted	22-Feb-2013 06:53:41	
2	Horton, Ms. Connor Esq. (Facilities Approver Group)	Vision Corporation	Approved	22-Feb-2013 07:02:05	
3	Smith, Mr. Jonathan (Facilities Approver Group)	Vision Corporation	No action taken	22-Feb-2013 07:02:08	Requisition has been approved by other approver

At the bottom of the page, there's a link 'About this Page'.

For Your Information (FYI) Notification support for Purchase Requisition

Recent technical advancements bring bigger organizations closely. Industries are operating with less manpower to cut down expenses to increase profit. Also, Employees are started working in multiple locations.

Due to these advancements, Requestor or Buyer may require to inform buying decision to other person who would like to have information. These persons are not in the approval hierarchy and their approval is not required for buying.

Setup required to configure “For Your Information (FYI) Notification”

1. Navigate to “Approval Management Business Analyst” responsibility and click on Configuration variables.

The screenshot shows the Oracle Approvals Management interface. At the top, there's a navigation bar with links like Diagnostics, Help, Personalize Page, and Close Window. The main area is divided into several sections:

- Business Analyst Dashboard:** Displays transaction types in the order accessed: Purchase Requisition Approval, Oracle Self Service Human Resources, OIE Expense Reports, Sourcing Award, GME ERES Batch Material Added.
- Transaction Types:** A table showing transaction details like Name, Application, and Rules.
- Recently Updated Rules:** A table showing recently updated rules with columns for Name, Rule Type, Transaction Type, Action, Date, User, and Update.
- Future Active Rules:** A table showing future active rules.
- Approval Process Setup:** A sidebar with the following steps:
 1. Select the transaction type: Purchase Requisition Approval
 2. Define the components: Approvals Management uses these components within the approval rules. It includes sections for Attributes (Define attributes to fetch business facts for a specific transaction), Conditions (Define conditions to evaluate attributes within rules. If all conditions in a rule are true then the rule is active for the transaction), Action Types (Enable action types to specify the action to take if a rule is active for a transaction), and Approver Groups (Define approver groups to contain approvers who are usually members of peer groups such as payroll or expenses department).
 3. Define the approval rules: Approval Rules determine the approvers or FYI notification recipients required for a business transaction. It includes a section for Rules.
 4. Test Workbench: Define test cases or test real transactions to verify the approval setup, rules and associated approvers. It includes a section for Test Workbench.
- Quick Links:** Includes links for Configuration Variables and Setup Report.

2. Select Transaction type as "Purchase Requisition Approval" and click Go. Then Select "YES" under Transaction type for the variable name "Allow For your Information Notifications"

The screenshot shows the Oracle Approvals Management Configuration Variables page. The Transaction Type is set to "Purchase Requisition Ap". In the General Configuration Variables table, the "Allow For Your Information Notifications" row has its "Transaction Type" dropdown set to "Yes". Other variables like "Administrator Approver" and "Allow All Approver Types" also have their "Transaction Type" dropdowns set to "Yes".

Variable Name	Description	Default	Transaction Type
Administrator Approver	An Administrator who should be notified in case of any exceptions in Approvals Management.	SYSADMIN	Yes
Allow All Approver Types	Whether Approvals Management allows all approver types	No	Yes
Allow All Item Class Rules	Whether Approvals Management allows to create subordinate item class rules	No	Yes
Allow For Your Information Notifications	Whether Approvals Management allows For Your Information notifications	No	Yes
Currency Conversion Window	How many days Approvals Management should look back, at most, to find a currency-conversion rate	120	
Distributed Environment	Whether Approvals Management runs in a distributed-database environment (yes or no)	No	
Production Functionality	What types of production-rule functionality are allowed	No production rules	
Purge Frequency	How many days temporary Approvals Management data ages before being purged	15	
Record Approval Deviations	Whether to record approval deviations or not	No	

3. Save the Changes and you will get below confirmation message

The screenshot shows a confirmation message box titled "Confirmation" stating "The configuration variables have been updated successfully."

4. Create new rule with the category "For Your Information" or update existing rule

The screenshot shows the Oracle Approvals Management Create New Rule: Step 1 of 4 page. The "Category" dropdown is set to "For Your Information". Other fields include "Name" (FYI Notification Rule), "Rule Type" (List Creation), "Item Class" (Header), "Start Date" (21-Feb-2013), and "End Date" (31-Dec-4712).

5. Add condition to the Rule, Action Type, and Action. Complete the rule creation.

ORACLE® Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard Close Window Help Personalize Page Diagnostics

Rules Test Workbench Setup

Enter Rule Details: Previously visited step Add Conditions: Active step Add Actions: Next step Review: Next step

Create New Rule: Add Conditions

Cancel Back Step 2 of 4 Next

Conditions

Add Condition

Condition	Item Class	Condition Type	Remove
REQUISITION_TOTAL is greater than or equal to 0 and less than or equal to 25000,USD	Header	Ordinary	

Cancel Back Step 2 of 4 Next

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ORACLE® Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard Close Window Help Personalize Page Diagnostics

Rules Test Workbench Setup

Enter Rule Details: Previously visited step Add Conditions: Previously visited step Add Actions: Active step Review: Next step

Create New Rule: Add Actions

Cancel Back Step 3 of 4 Next

Add Action

Action Type	*Action	Remove
Supervisory level	Require approvals up to the first superior.	

Cancel Back Step 3 of 4 Next

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ORACLE® Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard Close Window Help Personalize Page Diagnostics

Rules Test Workbench Setup

Enter Rule Details: Previously visited step Add Conditions: Previously visited step Add Actions: Previously visited step Review: Active step

Create New Rule: Review

Cancel Back Step 4 of 4 Finish

Name	FYI Notification Rule	End Date	Category
Rule Type	List Creation	31-Dec-4712	For Your Information
Item Class	Header		
Start Date	21-Feb-2013		

Conditions

Condition	Condition Type	Item Class
REQUISITION_TOTAL is greater than or equal to 0 and less than or equal to 25000,USD	Ordinary	Header

Actions

Action Type	Action
Supervisory level	Require approvals up to the first superior.

Cancel Back Step 4 of 4 Finish

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ORACLE® Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard Close Window Help Personalize Page Diagnostics

Rules Test Workbench Setup

Confirmation

Rule FYI Notification Rule has been created successfully.

Example

1. Create Non catalogue Request to test this FYI information notification.

Non-Catalog Request

* Indicates required field

* Item Type	Goods billed by quantity
* Item Description	FYI Notification Test
* Category	SUPPLIES.FACILITIES
* Quantity	10
* Unit of Measure	Each
* Unit Price	10
* Currency	USD
<input type="checkbox"/> RFQ Required	
<input type="checkbox"/> Negotiated	

Contract Number:

Supplier Name:
 New Supplier

Site:

Contact Name:

Phone:

Supplier Item:

Shopping Cart
Your cart is empty.

Buttons: Clear All, Add to Cart, Add to Favorites, Save.

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2. Add to Cart and Checkout.

Shopping Cart

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (USD)	Delete
1	FYI Notification Test		Each	10	10 USD	100.00	

Total: 100.00

I need a purchase order number immediately
 TIP Purchase Order number will be assigned after completing checkout.

[Return to Shopping](#) [Save](#) [Checkout](#)

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Requisition Information: Active step

Checkout: Requisition Information

* Indicates required field

* Requisition Description: FYI Notification Test	
Delivery	
* Need-By Date	<input type="checkbox"/> Urgent 25-Feb-2013 00:00:00 (example: 21-Feb-2013 19:45:00)
* Requester	Stock, Ms. Pat
* Deliver-To Location	V1- New York City Enter one-time address <input type="checkbox"/> Deliver to Maintenance
Billing	
P-Card	<input type="text"/> XXXXX0000
Project	<input type="text"/>
Task	<input type="text"/>
Expenditure Type	<input type="text"/>
Expenditure Organization	<input type="text"/>
Expenditure Item Date	<input type="text"/> (example: 21-Feb-2013)

Buttons: Cancel, Save, Submit, Edit Lines, Step 1 of 3, Next, Save.

3. Approval and Notes page displays the Approval Sequence. Both FYI notification and Approval Authority shown in the display.

ORACLE® iProcurement

Shop Requisitions Receiving Contractors

Requisition Information: Previously visited step Approvals: Active step Review And Submit: Next step

Checkout: Approvals and Notes Your requisition will be sent to the following list of approvers.

Save Submit Back Step 2 of 3 Next

Approvals

Tucker, William

Horton, Ms. Connor Esq. Brown, Ms. Casey

Manage Approvals

Notes

Justification Note To Buyer

Attachments

Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

4. Review and Submit the Request.

ORACLE® iProcurement

Shop Requisitions Receiving Contractors

Requisition Information: Previously visited step Approvals: Previously visited step Review And Submit: Active step

Checkout: Review and Submit Requisition

Save Printable Page Back Step 3 of 3 Submit

Requisition 14512: Total 100.00 USD

Created By Stock, Ms. Pat
Creation Date 22-Feb-2013 08:43:50
Description FYI Notification Test
Justification

Requisition Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Lines

Details Line	Description	Cost Center	Unit	Quantity	Price	Amount (USD)	Attachments
Show 1	FYI Notification Test	110	Each	10	10 USD	100.00	
				Total		100.00	

Save Printable Page Back Step 3 of 3 Submit

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5. Check the Status of the Request in Approval History.

Approval History for Requisition 14512

In Process

Sequence	Approver	Organization Name	Action	Action Date	Notes
1	Stock, Ms. Pat	Vision Corporation	Submitted	22-Feb-2013 08:45:47	
2	Horton, Ms. Connor Esq.	Vision Corporation	Pending		
3	Brown, Ms. Casey	Vision Corporation			

About this Page

6. Login as FYI Notification user. User notified with FYI message.

Oracle Applications Home Page >

Description FYI Notification Test
Requisition Total 100.00 USD (&CURRENCY: Rate not available)
Non-Recoverable Tax 0.00 USD (&CURRENCY: Rate not available)

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	FYI Notification Test	110	Each	10	10	100.00	

In Process

Num	Name	Action	Action Date	Note
1	Stock, Ms. Pat	Submitted	21-Feb-2013 16:15:47	
2	Horton, Ms. Connor Esq.	Pending		
3	Brown, Ms. Casey			

7. Login as Approver and Approve the Request.

Purchase Requisition 14512 for Stock, Pat (100.00 USD)

Approve **Reject** **Reassign** **Request Information**

Personalize "Notification Details Function"
 Personalize "Notification Details Attributes"
 Personalize Table Layout: (leftTable)
 From **Stock, Pat**
 To **Horton, Connor**
 Sent **21-Feb-2013 16:15:47**
 ID **4795197**
 Personalize Stack Layout

Description **FYI Notification Test**
 Requisition Total **100.00 USD (&CURRENCY: Rate not available)**
 Non-Recoverable Tax **0.00 USD (&CURRENCY: Rate not available)**

Requisition Lines

Personalize "Requisition Lines"
 Personalize "Table contains the details of requ..."

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	FYI Notification Test	110	Each	10	10	100.00	

Personalize Stack Layout

Approval Sequence

Personalize "Approval Sequence"

```

graph LR
    A[Tucker, William] --> B[Horton, Ms. Connor Esq.]
    B --> C[Brown, Ms. Casey]
    style A fill:#d9e1f2
    style B fill:#d9e1f2
    style C fill:#d9e1f2
    
```

In Process

Num	Name	Action	Action Date	Note
1	Stock, Ms. Pat	Submitted	21-Feb-2013 16:15:47	
2	Horton, Ms. Connor Esq.	Pending		
3	Brown, Ms. Casey	Pending		

Purchase Requisition 14512 for Stock, Pat (100.00 USD)

Approve **Reject** **Reassign** **Request Information**

Personalize "Notification Details Function"
 Personalize "Notification Details Attributes"
 Personalize Table Layout: (leftTable)
 From **Horton, Connor**
 To **Brown, Casey**
 Sent **21-Feb-2013 16:22:17**
 ID **4795198**
 Personalize Stack Layout

Description **FYI Notification Test**
 Requisition Total **100.00 USD (&CURRENCY: Rate not available)**
 Non-Recoverable Tax **0.00 USD (&CURRENCY: Rate not available)**

Requisition Lines

Personalize "Requisition Lines"
 Personalize "Table contains the details of requ..."

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	FYI Notification Test	110	Each	10	10	100.00	

Personalize Stack Layout

Approval Sequence

Personalize "Approval Sequence"

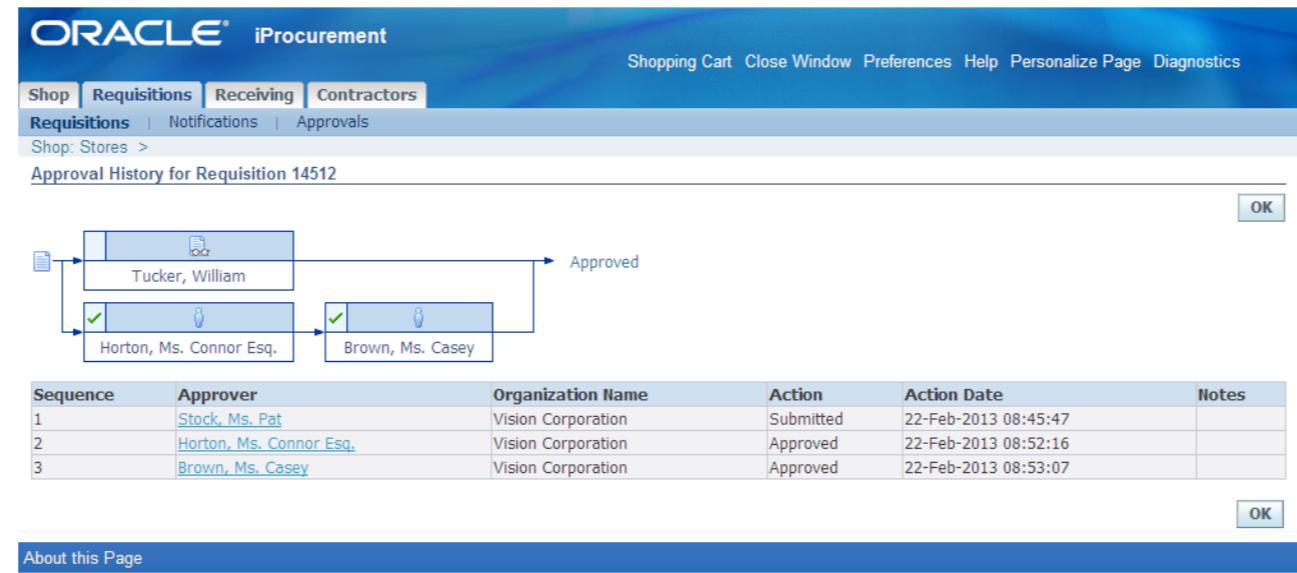
```

graph LR
    A[Tucker, William] --> B[Horton, Ms. Connor Esq.]
    B --> C[Brown, Ms. Casey]
    style A fill:#d9e1f2
    style B fill:#d9e1f2
    style C fill:#d9e1f2
    
```

In Process

Num	Name	Action	Action Date	Note
1	Stock, Ms. Pat	Submitted	21-Feb-2013 16:15:47	
2	Horton, Ms. Connor Esq.	Approved	21-Feb-2013 16:22:16	
3	Brown, Ms. Casey	Pending		

- Once all Approvers are approved the PR, Check Approval History of the PR. History displays the Request approved only by approval authority and FYI user only got FYI notification.



Graphical display of Approval Chain

As Napoleon said “A picture is worth a thousand words”, Oracle enhanced purchase Requisition approval page (Step 2 of 3 Page) with graphical display to show PR approvers. This feature enables the user to clearly understand approval sequences without any confusion. Oracle also enhanced the Approval notification with the graphical display to show the approval sequence.

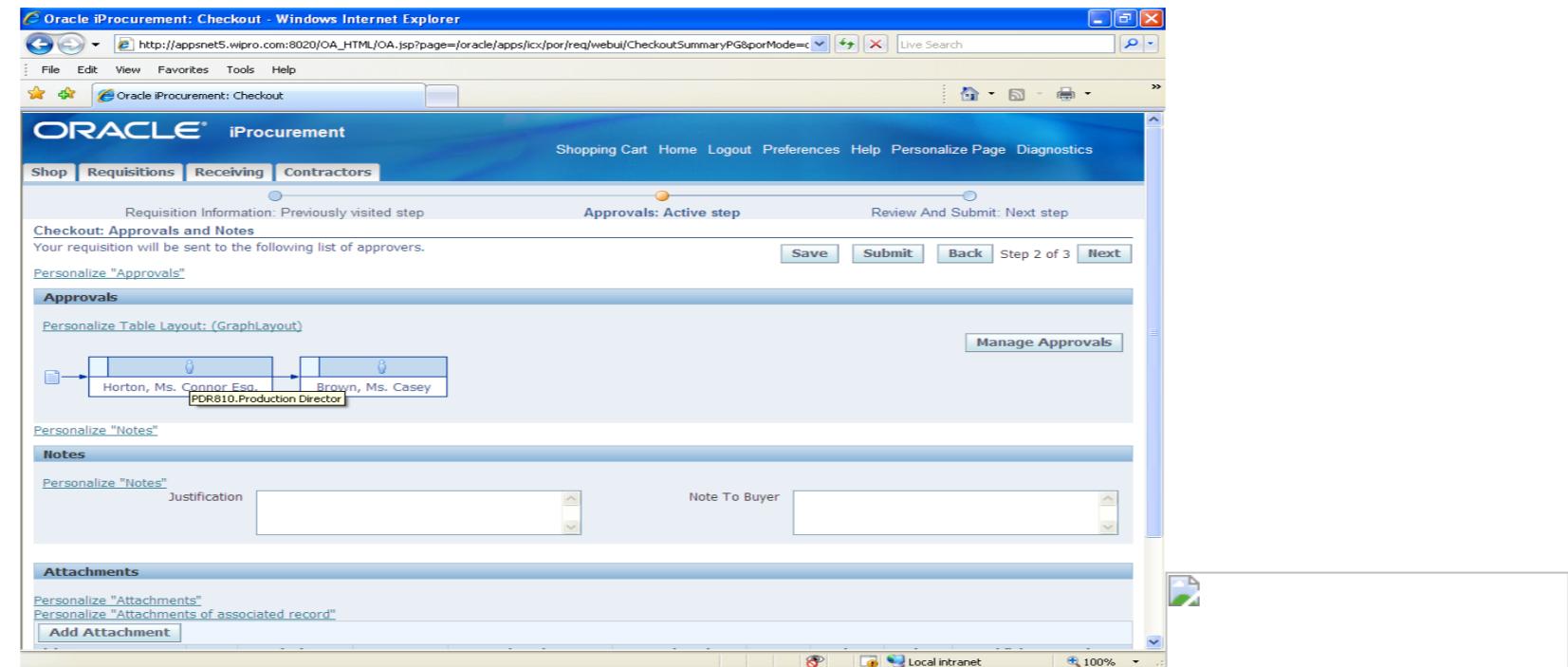
Different symbols are used to indicate to represent whether it is an Approval notification or it is a FYI notification.

Setup required for Graphical display of Approval Chain

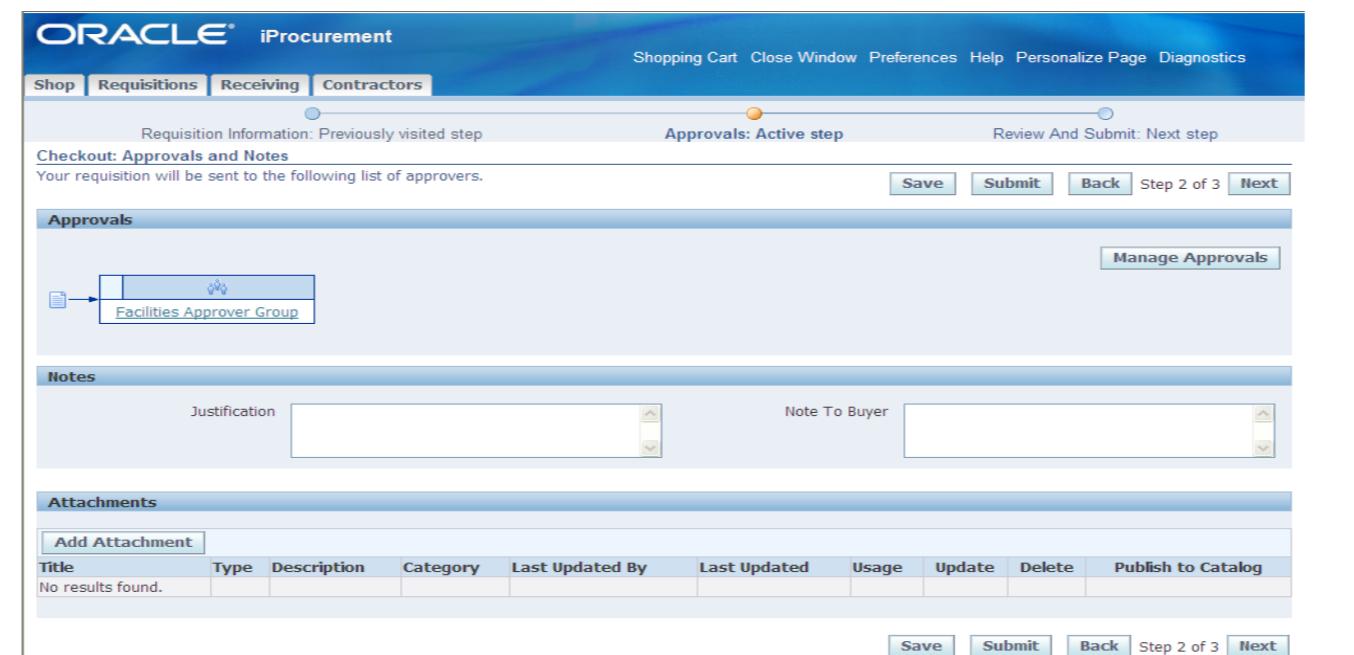
No Specific Setup required for this functionality. This is a standard feature from R12 of Oracle EBS.

Example

1. Below example depicts approval required from one approver in a sequence.



2. Below example depicts approval required from group of approvers. Click on the Group name to view all approvers attached with this Group



This screenshot shows the Oracle iProcurement interface. At the top, there's a navigation bar with links for Shop, Requisitions, Receiving, Contractors, Shopping Cart, Close Window, Preferences, Help, Personalize Page, and Diagnostics. Below the navigation bar, a status bar indicates "Requisition Information: Previously visited step", "Approvals: Active step", and "Review And Submit: Next step". A link "Approval Group" is also present. In the main content area, there's a section titled "Facilities Approver Group" containing a table with two rows. The first row has columns for Name (Horton, Connor), Title (PDR810.Production Director), and Email (nobody@localhost). The second row has columns for Name (Smith, Jonathan), Title (VPM200.VP Materials), and Email (nobody@localhost). Below the table is a "Return" button. At the bottom of the page, there are links for "About this Page", "Privacy Statement", and "Copyright (c) 2006, Oracle. All rights reserved."

3. Below example depicts approval required from Series of Approvers and “For Your Information” Notification approvers.

This screenshot shows the Oracle iProcurement interface on the "Checkout: Approvals and Notes" page. The top navigation bar and status bar are identical to the previous screenshot. The main content area starts with a message: "Your requisition will be sent to the following list of approvers." Below this, there are two sections: "Approvals" and "Notes". The "Approvals" section displays a graphical flowchart of approvers. It shows three boxes connected by arrows: a top box labeled "Tucker, William", a middle-left box labeled "Horton, Ms. Connor Esq.", and a middle-right box labeled "Brown, Ms. Casey". An arrow points from the top box down to the middle-left box, and another arrow points from the middle-left box to the middle-right box. To the right of the flowchart is a "Manage Approvals" button. The "Notes" section contains two text input fields: "Justification" and "Note To Buyer", each with a small preview window below it. Below the "Notes" section is the "Attachments" section, which includes a "Add Attachment" button and a table for managing attachments. The table has columns for Title, Type, Description, Category, Last Updated By, Last Updated, Usage, Update, Delete, and Publish to Catalog. A message "No results found." is displayed. To the right of the attachments table is a large, empty rectangular area with a file icon.

4. Below example depicts Graphical display of approvers in the PR Approval Notifications.

Purchase Requisition 14512 for Stock, Pat (100.00 USD)

Approve Reject Reassign Request Information

Personalize "Notification Details Function"
 Personalize "Notification Details Attributes"
 Personalize Table Layout: (leftTable)
 From Horton, Connor
 To Brown, Casey
 Sent 21-Feb-2013 16:22:17
 ID 4795198
 Personalize Stack Layout

Personalize Stack Layout: (rightStack)
 Personalize Table Layout: (rightTable)
 Description FYI Notification Test
 Requisition Total 100.00 USD (&CURRENCY: Rate not available)
 Non-Recoverable Tax 0.00 USD (&CURRENCY: Rate not available)

Requisition Lines

Personalize "Requisition Lines"
 Personalize "Table contains the details of requ..."

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	FYI Notification Test		110	Each	10	10	100.00

Personalize Stack Layout

Approval Sequence

Personalize "Approval Sequence"

```

graph LR
    Start(( )) --> Tucker[Tucker, William]
    Start --> Horton[Horton, Ms. Connor Esq.]
    Start --> Brown[Brown, Ms. Casey]
    Tucker --> InProcess[In Process]
    Horton -- Approved --> Brown
    
```

Personalize "Table contains the list of approve..."

Num	Name	Action	Action Date	Note
1	Stock, Ms. Pat	Submitted	21-Feb-2013 16:15:47	
2	Horton, Ms. Connor Esq.	Approved	21-Feb-2013 16:22:16	
3	Brown, Ms. Casey	Pending		

References

- Release Content document R12 Oracle Advanced Procurement.

About the Author

Suresh Kumar Mani, a Lead functional consultant who is having 12 years 9 Month of Functional experience in Sales, Distribution and purchasing domains and having 6 Year and 4 Months of IT Experience in Oracle Apps. He has worked in SCM modules like PO, INV, OM and Manufacturing Modules like OPM & OPM Costing, BOM and WIP.

He is currently working as “Lead Functional consultant” in Rheem Manufacturing Company Project. He has worked in Morrisons Project at Onsite and provided his contribution in SCM and process manufacturing module implementations.

He is also having Sales and Distribution domain knowledge by working in manufacturing industries like “Domino Printech India Pvt. Ltd, Nilkamal Crates and Bin and Raipur Rotocast Ltd.

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