An Oracle White Paper

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Setting up Document Approvals Oracle Fusion Procurement

Release 11

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1. Introduction

As business processes and compliance continue to evolve, companies are placing more and more emphasis on document and spend approvals. Oracle Fusion Procurement uses Oracle SOA - Approvals Management extension (AMX) for requisition, purchasing documents and supplier management approvals. Approval rules can be set up using a user friendly interface that integrates with AMX in the backend for robust approvals management and unified control management across Oracle Fusion applications.

In this whitepaper, you can learn about the features available and the steps required for setting up approvals.

1.1. Key components

You can define approval rules based on your business processes and decisions, such as whether to route documents to approvers in serial or parallel, whether approvals should be based on employee supervisory hierarchy, position hierarchy, job levels, or approval groups.

There are several key components used in approvals:

- Oracle Procurement Approval Rules Management
  - The approvals rules management interface allows you to set up and manage approval rules that apply to your business documents
- Oracle SOA Approval Management extensions (AMX)
  - AMX performs task routing rules for your business documents.
- Oracle Business Process Management (BPM)
  - The BPM Worklist Application is a web-based application that lets users access tasks assigned to them and perform actions based on their roles in the approval process.
  - Administrators can setup approval groups and task level configuration via an administration portal
- Oracle Human Capital Management
  - AMX integrates with the setup in Oracle Fusion Human Capital Management to derive the supervisory and position hierarchy based approvers.

2. Before Setting Up Approvals

You must first analyze and determine the approval structure that is appropriate for your organization.

2.1. Employee Supervisor Hierarchy

Approvals can be set up to navigate the employee supervisory hierarchy, which is defined in Oracle Fusion Human Capital Management, up to a certain number of levels. Employees must be set up with appropriate jobs and supervisors.

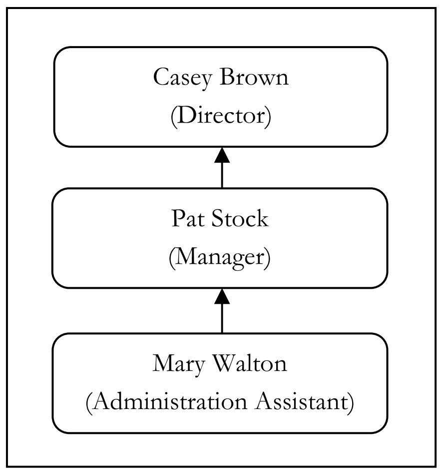

Figure 1: Sample employee supervisor approval structure

For complete details on setting up the employee supervisory hierarchy, refer to the Oracle Fusion Human Capital Management documentation.

2.2. Position Hierarchy

You can also choose to route document approvals to navigate the position hierarchy defined in Oracle Fusion Human Capital Management, until a specified job level is reached. The position hierarchy must be defined along with corresponding job levels, and the employees must be assigned the appropriate positions.

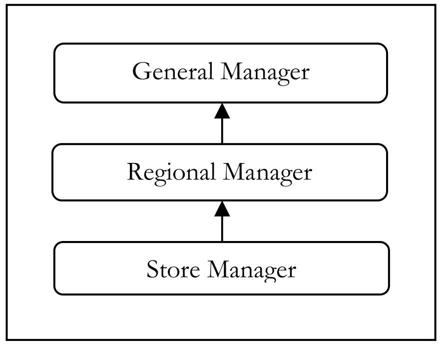

Figure 2: Sample position hierarchy

Here are the steps to set up positions for use in approvals.

a. On Manage Positions task page, create a position.

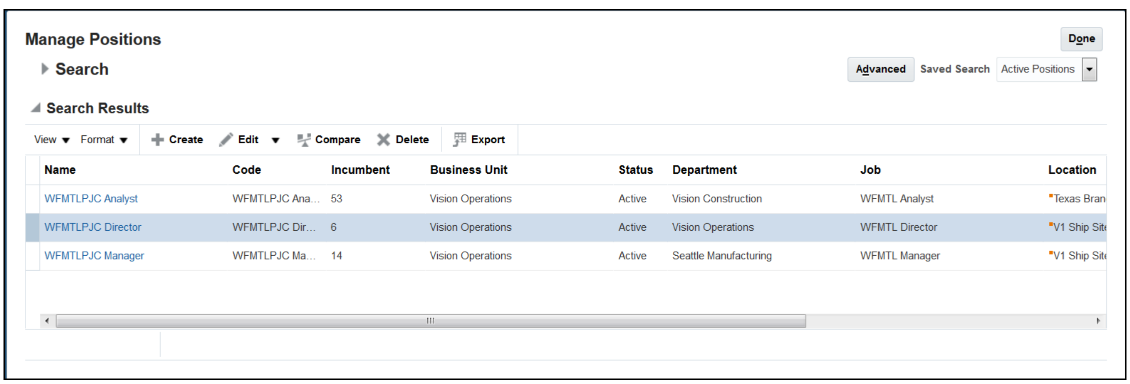

Figure 3: Manage Positions task

b. Assign a job to this position. Ensure that there is a job level defined for the job. Refer to section 2.3 for the steps to define the job level.

Figure 4: Assign job to position

2.3. Job Levels

Job level routings are based on the supervisory hierarchy defined in Oracle Fusion Human Capital Management. The approval list will be generated based on the starting person specified in a rule and continuing until an approver with a sufficient job level is found. The supervisory hierarchy must be defined along with the corresponding job levels.

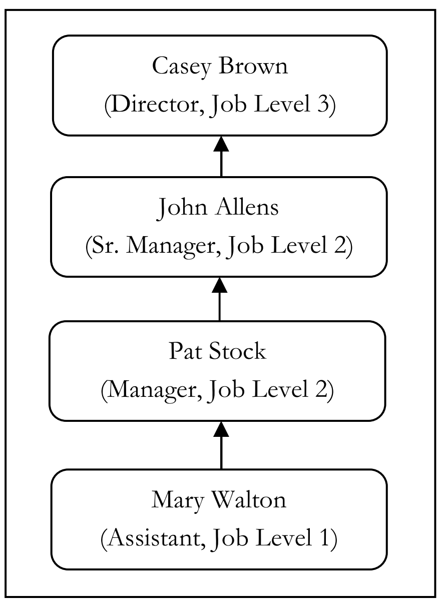

Figure 5: Sample supervisory hierarchy with job levels

Here are the steps to set up a job and to specify job levels:

a. From Manage Jobs, create a new job.

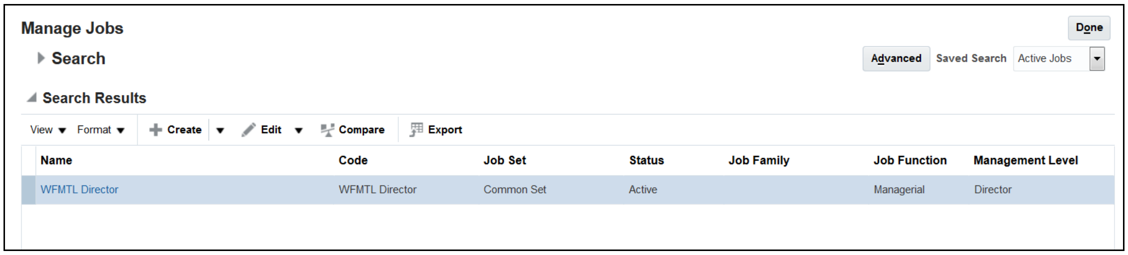

Figure 6: Manage job task

b. Enter a value in the Level field. Note the job level values are in increasing order with the lowest level being 1.

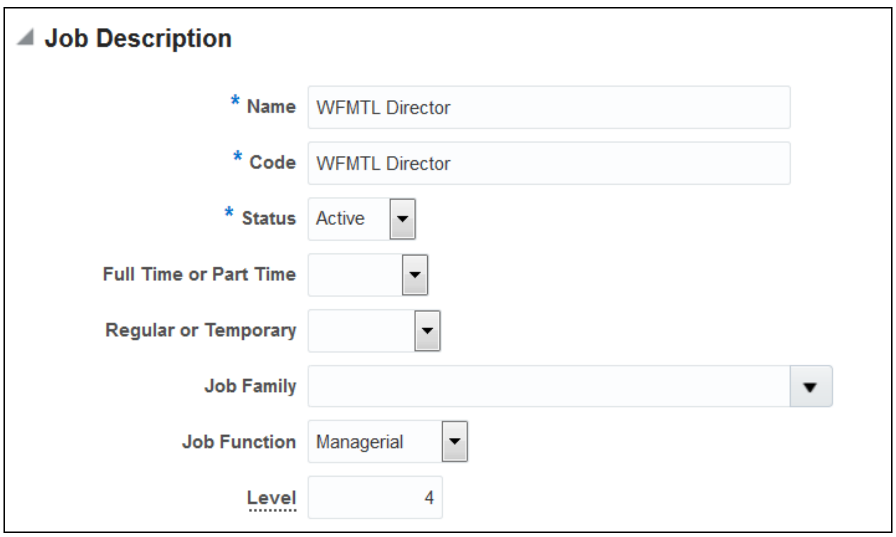

Figure 7: Enter a Level value for the job

3. Understanding Approval Rules Management for Procurement

The Oracle Procurement Approval Rules Management page integrates with the Approval Management Extension rules engine to enable administrators to organize and author approval routing rules based on numerous seeded document attributes such as requisition amount, ordered amount, price change percent, category etc. Based on your unique business requirements, administrators can choose to send the approval request to approvers in parallel or in sequence. Approvals can be routed up a supervisory chain, position or job level hierarchy, to a single approver or a list of approvers. The figure below depicts the key elements that are involved in understanding and setting up approval routing rules.

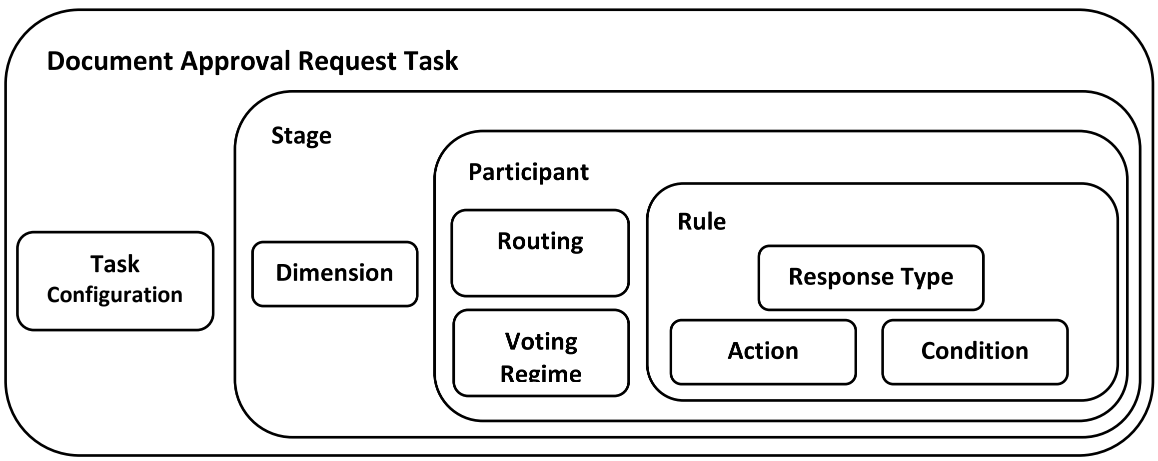

Figure 8: Components of Approval Request Task

3.1. Document Approval Request Task

In many end-to-end business processes, human intervention is required for activities such as approving documents, managing exceptions, or performing activities required to advance the business process. The document approval request task lets you send approval requests to approvers enabling them to make a decision and thus advancing the request-to-pay business process. Both task configurations and approval rules must be reviewed and completed for each document approval task before submitting documents for approval.

3.1.1. Task Configuration

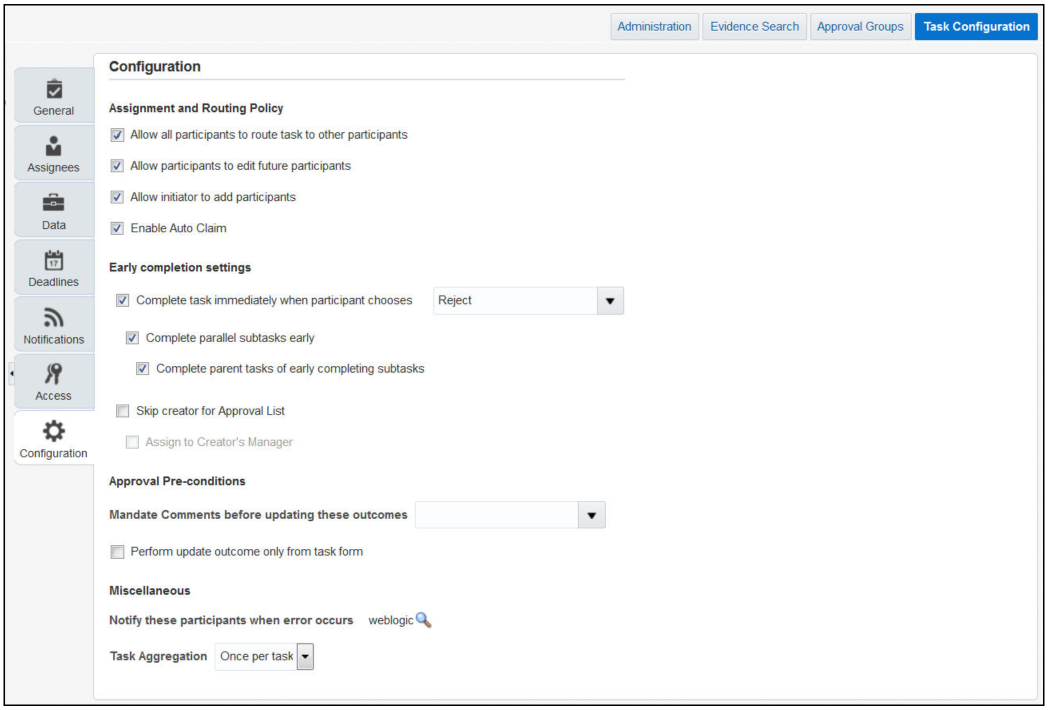

Figure 9: Task Configuration

The Task Configuration page in BPM Worklist Administration lets you set up:

Assignment and Routing Policy

- Allow all participants to route task to other participants
    a. Selected by default.
    b. Companies can control if participants can add other approvers/FYI participants in the approval list.
- Allow participants to edit future participants
    a. Selected by default.
    b. Controls if participants can update or remove participants remaining in the approval list who were not assigned the approval task.
- Allow initiator to add participants
    a. Selected by default.
    b. Deselect to prevent the person submitting a document or registration from

inserting ad-hoc approval or FYI participants.

a. Enable auto claim

   i. Selected by default.

   ii. Enabled when a task is assigned to a position, role or a LDAP group. Since there can be multiple users in a position, role, or group, a user has to first claim the task to prevent multiple users from updating the task. This does not include approvals based on approval groups. Enabling auto claim will not require a participant to first claim before performing an action, hence reducing the number of steps.

      - AMX provides the flexibility to include LDAP groups (groups created in the user directory) as participants for approval routing.

Early Completion Settings

a. Complete task when participant chooses Approve or Reject

   i. Indicates if the approval task should be completed when a Reject or Approve action is performed by a participant.

   ii. The default setting for the requisition approval task is to complete the approval task on Reject.

Approval Pre-conditions

a. Mandate comments before updating these outcomes

   i. Controls if a comment is required when an approver takes the approve action or/and the reject action for a task.

Miscellaneous

- Notify these participants when error occurs

   a. Lets you define an administrator who will be notified when an error occurs in the approval routing process.

- Task Aggregation

   a. If the same participant is returned in the same task or stage, you can select a task aggregation setting to reduce the number of tasks the participant receives for the same requisition. The options include:

i. Once per task (default setting for requisition approvals)

- Within the same task, if a participant is returned multiple times based on the approvals rules, then the participant will only receive one worklist task for action or review.

ii. Once per stage

- If the same participant is returned multiple times based on the approval rules within the same stage, then the participant will receive one worklist task per stage for action or review.

iii. None (default setting for purchasing document approvals)

- No aggregation will be performed.

Expiration and Escalation Policy

- Update the expiration and escalation policies to control when tasks should be expired, escalated or renewed. These policies apply to the entire tasks and not per approver. For instance, if a deadline of three days has been set and there are four approvers then it would mean that all four approvals need to be secured within three days from the time the task was submitted and not allocate three days to each approver totaling to twelve days.

  a. Expiration: If an assignee does not act in the time specified for expiration, the task will be automatically rejected.

  b. Escalation: If an assignee does not act in the time specified for escalation, the task will be escalated to the manager based on the management chain defined in Oracle Identify Management (LDAP).

     - Maximum escalation levels specify the number of times the task can be escalated if the approver to whom the task is escalated does not act in the time specified for escalation. If the maximum escalation level is reached without any actions, the task will be automatically rejected.

  c. Renewal: You can extend the expiration period when the assignee does not respond within a specified time. The number of times the task can be renewed upon expiration and the duration of each renewal will determine how long the task will remain unexpired.

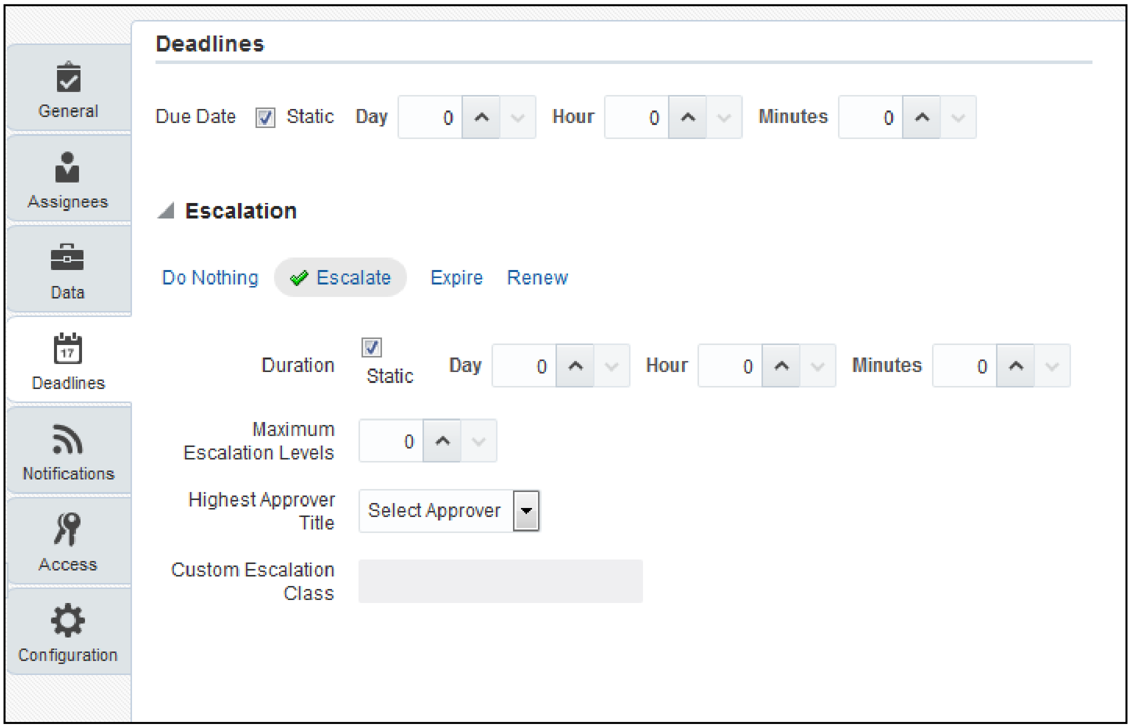

Figure 10: Deadlines

Notification Settings

- Indicates when a user or group is assigned a task or is informed that the status of a task has changed. Notifications can be sent through email, voice message, instant message, or SMS. You can also specify different types of participants to receive notifications for different actions.
- You can set up reminders to be sent before task expiration or after task assignment.
- You should enable the Make notification actionable option if approvers can take approve or reject actions from the email notifications.
- You should enable the Send task attachments with email notifications option if these attachments should be sent as email attachments.

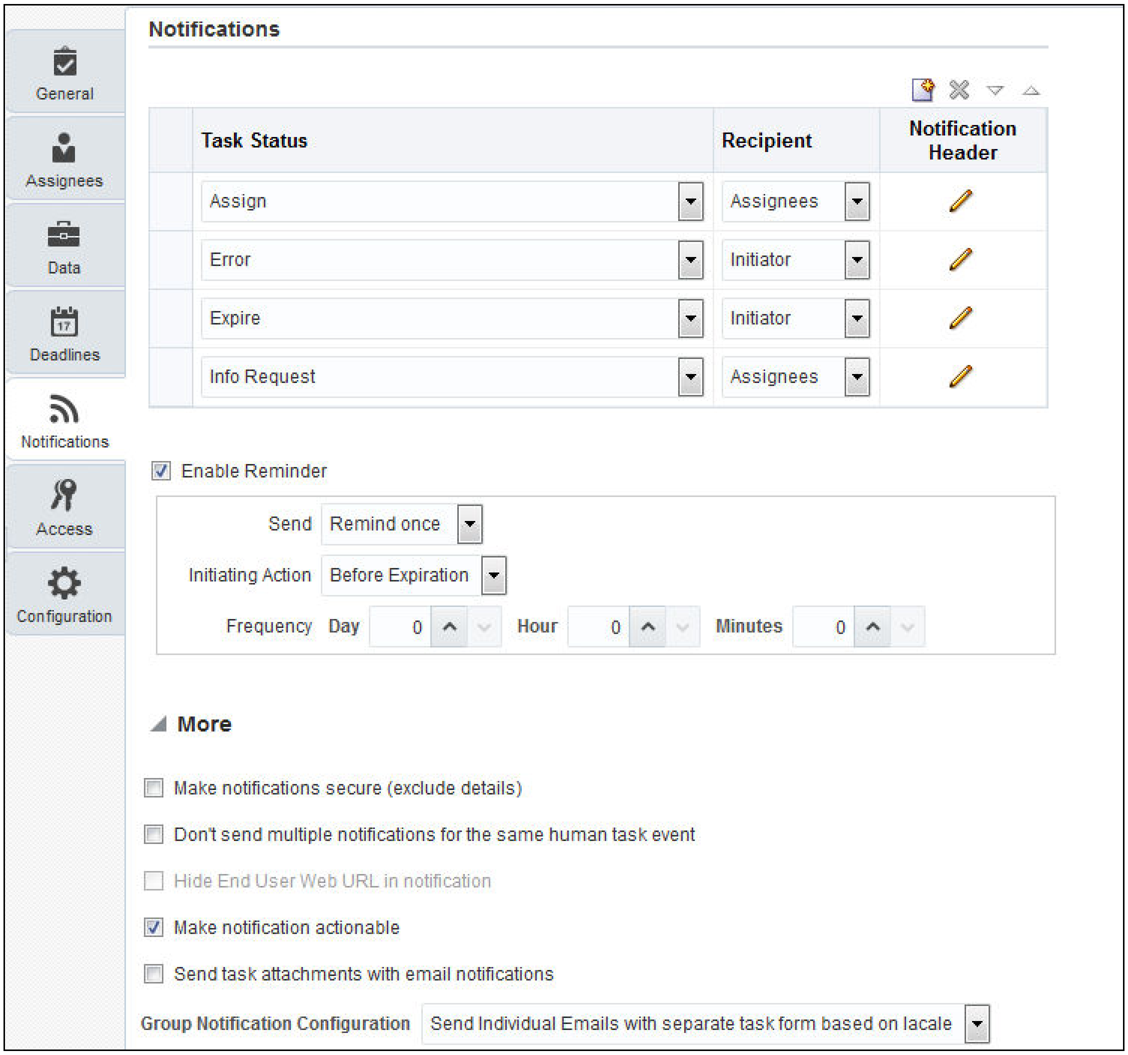

Figure 11: Notification Setting

3.1.2. Approval Rules

For approval rules specific to your business documents, you should use the Oracle Fusion Procurement Manage Approval Rules tasks via the Fusion Setup Manager. You can create approval routing rules based on your unique requirements using the components (stages, participants, and so on) and attributes delivered by Oracle Fusion Procurement for document approvals.

3.1.2.1. Stage

A stage lets you organize your approval routing rules into logical groupings. Each stage is associated with a dimension, however dimensions for an approval task do not necessarily have to map to a stage. A dimension contains a set of attributes at a specific procurement document level, such as header and lines. However, approval rules can be defined within a stage using attributes from a dimension that is lower than the dimension of the stage. For example, in a stage with header dimension, rules can be created using line or distribution level attributes.

Each procurement document has a set of stages seeded for your usage. Approval actions within each stage must be completed before entering the next stage if they are in serial.

3.1.2.2. Participant

There can be more than one participant within a stage. Properties set on the participants determine whether approvals are routed in serial or in parallel.

Oracle Fusion Procurement approval tasks are seeded with one or more participants within each stage to enable flexibility in approvals routing. Most seeded participants for requisitions, purchase orders, purchase agreements and supplier registration approvals are rule based. You can create many rules within a participant. The following two properties defined on a participant are of interest:

- Participant Type – The supported participant types are: Serial, Parallel and FYI. FYI participants cannot directly impact the outcome of a task, but in some cases can provide comments or add attachments.
- Voting Regime – The supported voting regimes are: Serial, Consensus, and First Responder Wins.

Within a participant, more than one rule can evaluate to true for a given document submitted for approvals.

Note: *When accessing the approval tasks using the BPM Administration pages, you will see options to modify the stages and participants, including delete, edit or remove. There are currently known issues with this BPM functionality, and we strongly advise you against performing any such modifications on the seeded participants.*

3.1.2.3. Rule

Approval rules are managed using tasks that belong under Define Approval Management for Procurement in Fusion Setup Manager. Select the corresponding approval task for which you want to manage. For example, for requisitions, go to the Manage Requisition Approvals task.

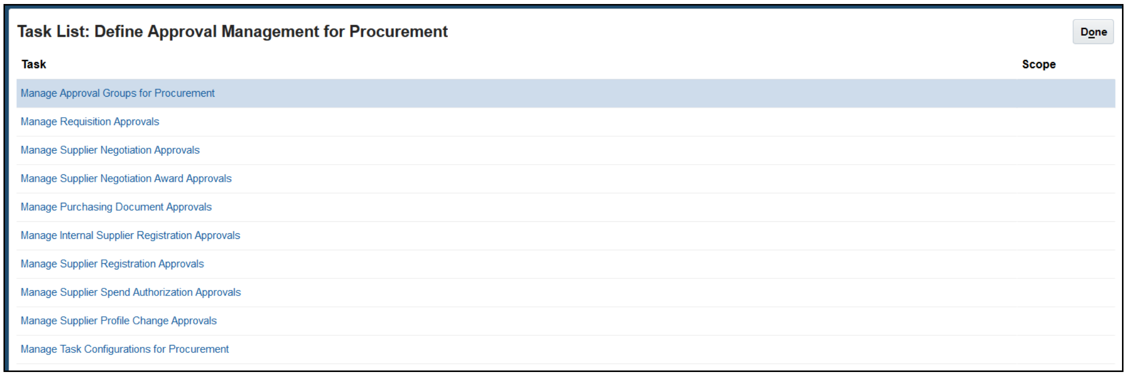

Figure 12: Define Approval Management for Procurement in Fusion Setup Manager

From the Manage Requisition Approvals page, select the participant for which you want to maintain rules.

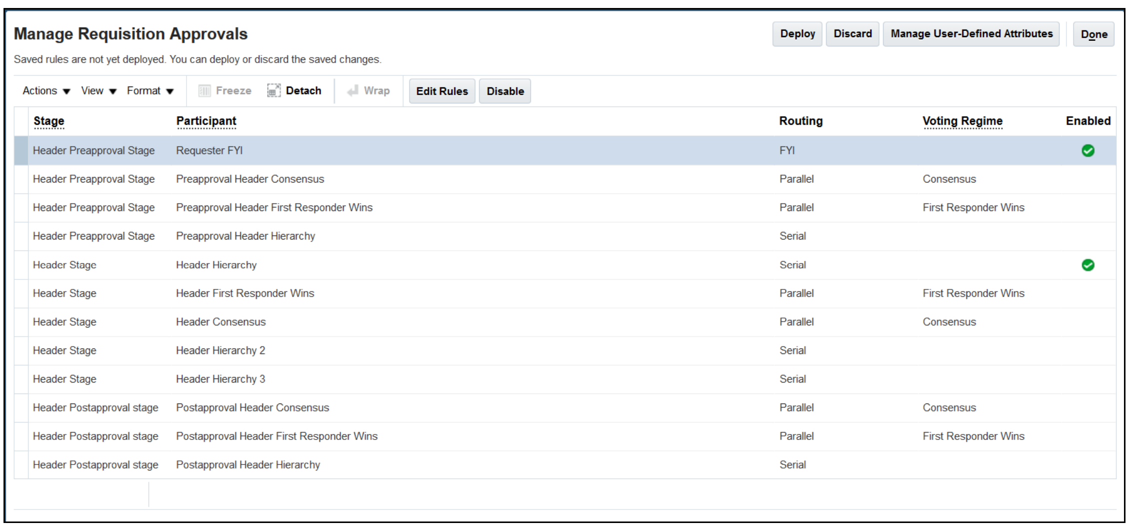

Figure 13: Manage Approval Task

3.1.3. Approval Rule Characteristics

An approval rule is composed of the following:

-Rule Name

-Condition

-Action

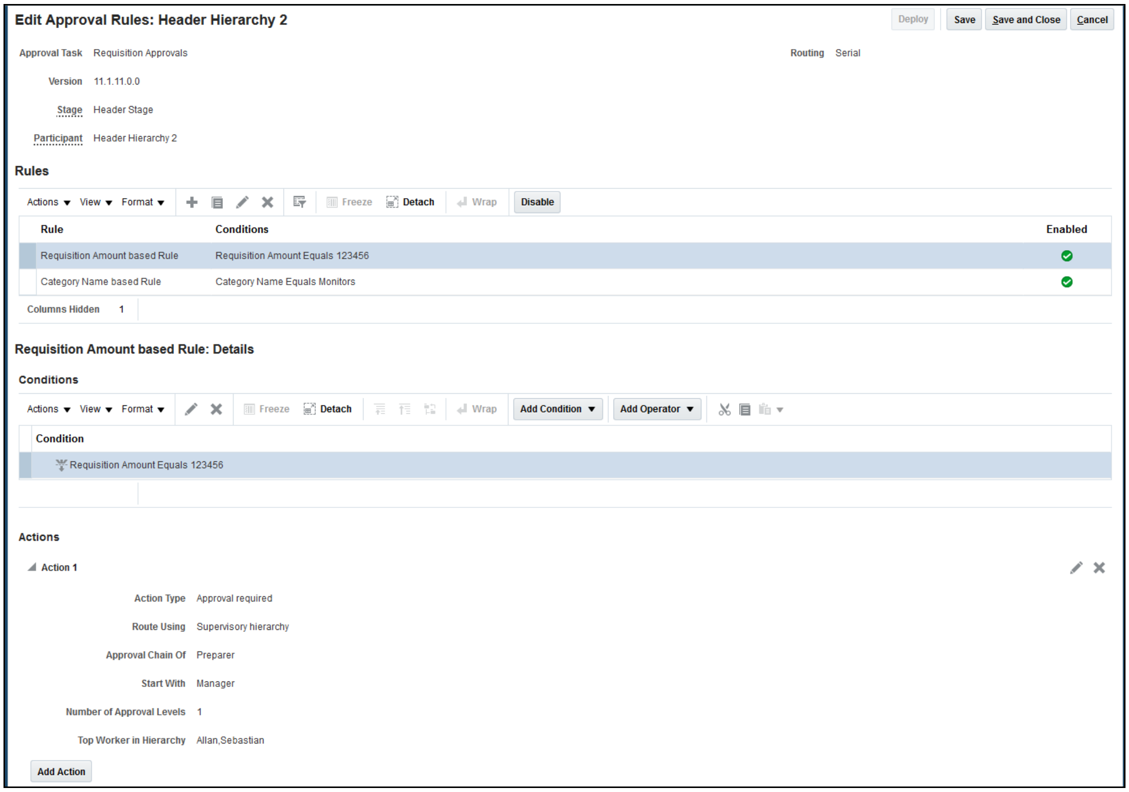

Figure 14: Example of an approval rule based on approval amount

3.1.3.1. Rule Name

The Rule Name is used to identify the approval rule.

- In cases where there are large numbers of rules, users can filter search results in the Query by Example fields.

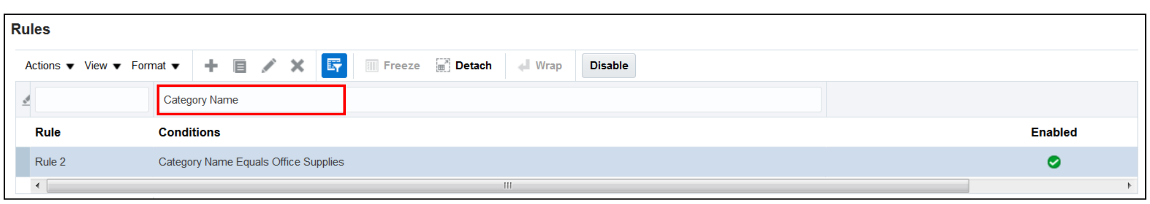

Figure 15: Example of searching for rules using Query by Example

3.1.3.2. Condition

The Condition indicates when the approval rule will be applied. For example, a rule is created to conditionally apply if the requisition approval amount is less than 10,000 USD. If a user submits a requisition that has an approval amount of 500 USD, this rule will apply.

A rule can contain multiple conditions, and you can select the "and" or "or" operators to indicate if all conditions in the approval rule must be true or if only one condition must be true for the approval rule to apply. For example, if requisition amount is less than 10,000 and requisitioning BU is US Business Unit.

A condition can be defined using attributes seeded in a dimension or user-defined attributes. See User-Defined Attributes section for more information.

3.1.3.3. Action

An action defines what needs to be done if the conditions of a rule are met. It identifies if approvals or FYI notifications are required and the type of users needed to approve or receive notification for a document.

The supported action types are:

- Approval required
    - Approval actions required from the recipients of the approval tasks
- Automatic
    - Automatically approve or reject the approval task
- Information only
    - FYI notifications sent to recipients

The following routing types are supported for both approval required and information only action types. Each type has a specific set of parameters or properties that must be defined.

- Approval Group

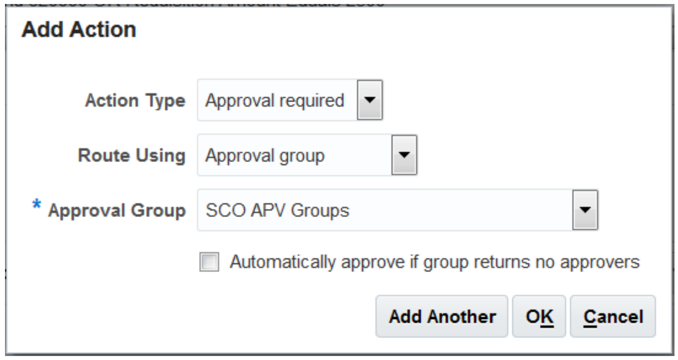

Figure 16: Approval Group Routing Type

- Approval Group: Specify the Approval Group to use.
- Automatically approve if group returns no approvers: Select this option if the approval task should be automatically approved if the selected approver group returns no approvers. An approval group may return no approvers due to updates to the approver group definition or if dynamic approval groups are used, no approvers are found.
- View, edit existing, or create approval groups from the Approvals Group tab on the BPM Worklist Application Administration page. You can create a static approval group by adding specific participants to the approvals group.

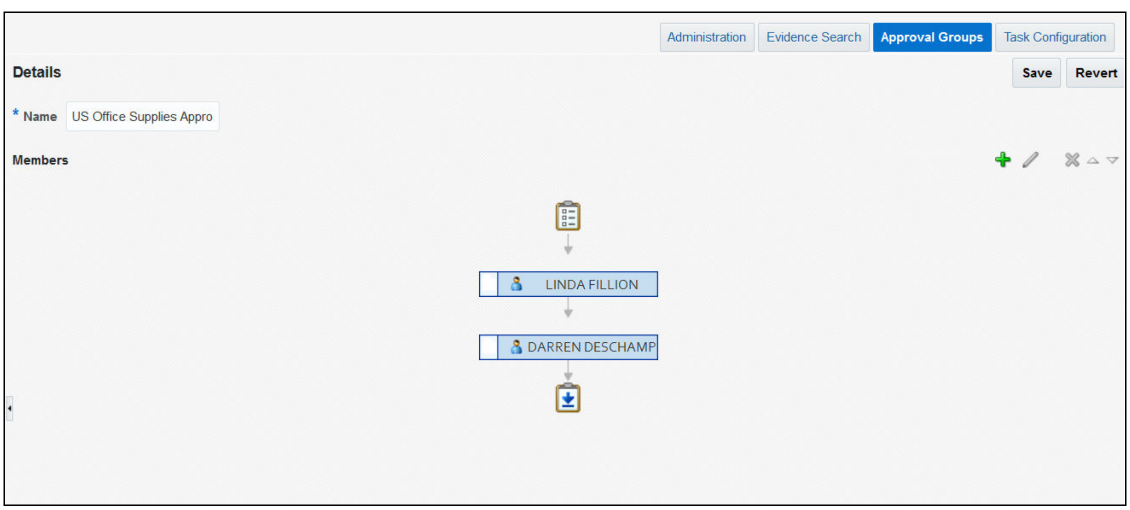

Figure 17: Approval Group Setup in BPM Worklist Application

- Job Level

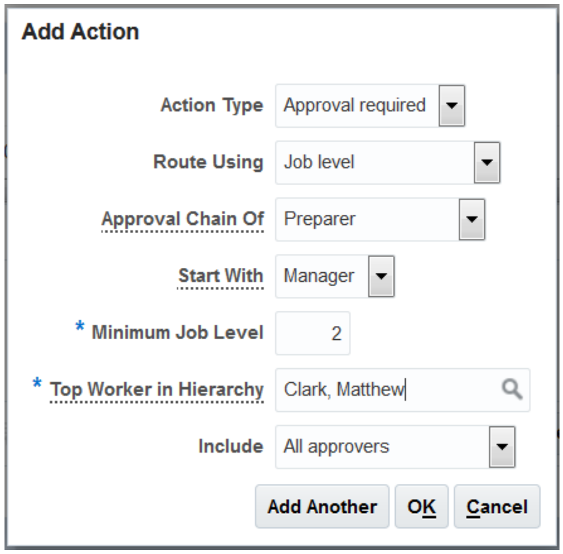

Figure 18: Job Level Routing Type

- Approval Chain Of: Specify whose approval chain the routing should be based on. It can be based on persons associated to the document for which the rules are maintained, such as requester or preparer on a requisition, an overriding approver, or a specific worker selected within the action.
- Start With: Select if the list generated should start with the person the approval chain is based on, or his manager.
- Minimum Job Level: Specify the minimum job level that is required to perform the approval action if the rule applies. For example, for requisition amounts of 1000 USD or less, a minimum of Job Level 3 is required to approve. If a submitter has job level 2 and submits a requisition with total of 500 USD, it will be routed up his supervisory hierarchy chain to an approver with at least Job Level 3.
- Top Worker in Hierarchy: This field identifies the topmost worker in the supervisory hierarchy, such as the CEO of an organization. Approvals will not be routed beyond this worker.
- Include: Specify if everyone returned in the list of participants will be included, the first and last manager from the list will be included

or only the last manager will be included.

- Position hierarchy

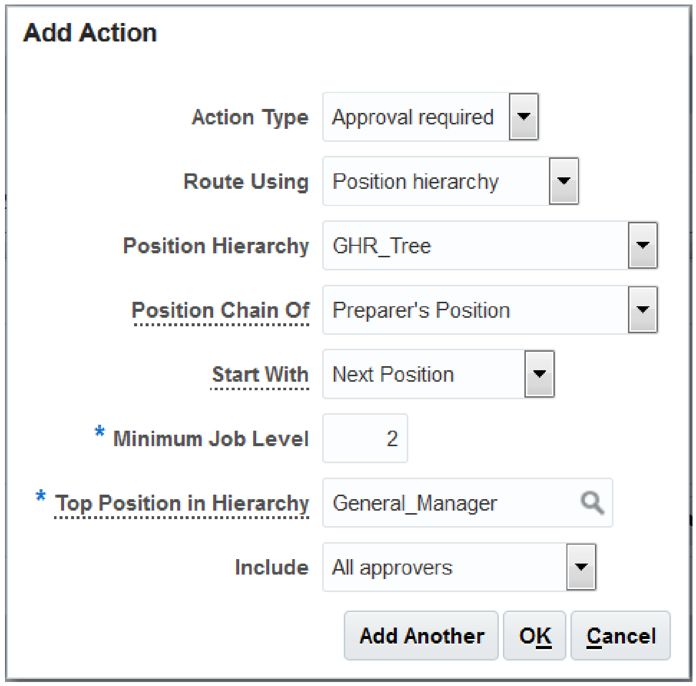

Figure 19: Position Hierarchy Routing Type

- Position Hierarchy: Specify the position hierarchy that the action should be based on.
- Position Chain Of: Specify whose position chain the routing should be based on. It will be based on persons associated to the document for which the rules are maintained, such as requester, preparer or an overriding approver on a requisition.
- Start With: Select if the list generated should start with the person the position chain is based on, or the next position up.
- Minimum Job Level: Specify the minimum job level associated with a position that is required to perform the approval action if the rule applies. For example, for requisition amounts of 1000 USD or less, a minimum of Job Level 3 is required to approve. If a submitter has a position with job level 2 submits a requisition with total of 500 USD, it will be routed up the position hierarchy to an approver with a position that has at least Job Level 3.
- Top Worker in Hierarchy: This field identifies the topmost worker in the supervisory hierarchy, such as the CEO of an organization.

Approvals will not be routed beyond this worker.

- Include: Specify if everyone returned in the list of participants will be included, the first and last manager from the list will be included or only the last manager will be included.

- Single Approver

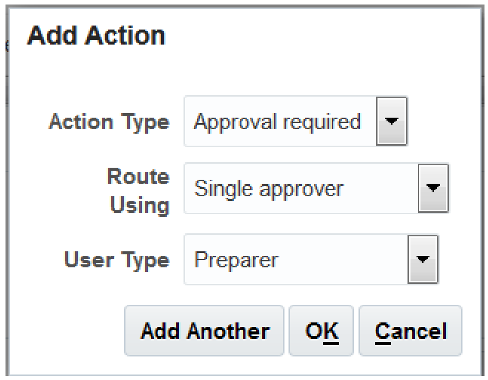

Figure 20: Single Approver Routing Type

- User Type: Select the type of single user you want to include in the list. It can be a specific worker in your organization, or persons associated with the document for which you are setting up rules, such as the requester, preparer, project manager, assigned buyer or principal investigator on requisitions.

- Supervisory Hierarchy

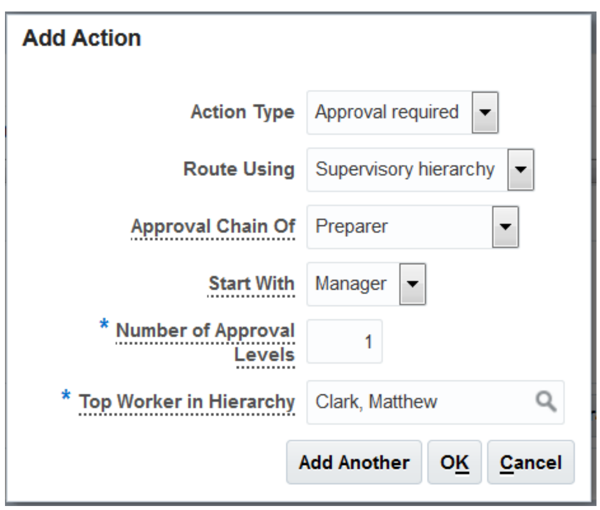

Figure 21: Supervisory Hierarchy Routing Type

- Approval Chain Of: Specify whose approval chain the routing should be based on. It can be based on persons associated to the document for which the rules are maintained, such as requester or preparer on a requisition, an overriding approver, or a specific worker selected within the action.
- Start With: Select if the list generated should start with the person the approval chain is based on, or his manager.
- Number of Approval Levels: Specify the number of levels required to perform the approval action if the rule applies. The number of levels includes the start with person identified. For example, if the Start With value is Manager, and the Number of Approval Levels is 1, then only the manager needs to approve. If the Number of Approval Levels is 2, then it will be routed first to the manager, then to the next level after the manager.
- Top Worker in Hierarchy: This field identifies the topmost worker in the supervisory hierarchy, such as the CEO of an organization. Approvals will not be routed beyond this worker.

3.1.4. User-Defined Attributes

Organizations have varied and diverse requirements around document approvals. Some of these requirements may include the need to perform currency conversions for amount based attributes, or derive approvers based on roll-up amounts across lines within a document with common attributes.

Oracle Fusion Procurement provides the ability to define user-defined attributes that you can use to author document approval rule conditions. These user-defined attributes are managed and used within a specific approval task. There are two types of user-defined attributes that can be created for cloud implementations, namely Currency Based and Summation.

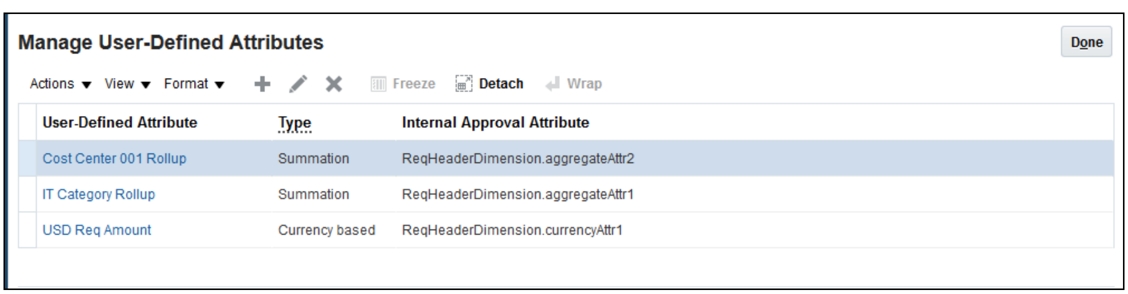

Figure 22: Manage User-Defined Attributes

3.1.4.1. Currency Based User-Defined Attributes

Organizations commonly operate in multiple geographic locations and need to create transactions in different currencies. If your organization has a standard set of approval rules that apply across these locations, you can simplify rule maintenance by setting up rules in a common currency instead of maintain currency specific rules. You can define currency based attributes such that amounts in different currencies are converted to a specific currency for rule evaluation. For example, Acme Corp. creates an attribute "USD Requisition Amount" and uses the attribute for rule conditions, such as if USD Requisition Amount is less than 500, approvals from the preparer's manager is required and so forth. If a requisition created in Mexico is submitted, where the functional currency is pesos, the requisition amount will first be converted to USD before rules are evaluated.

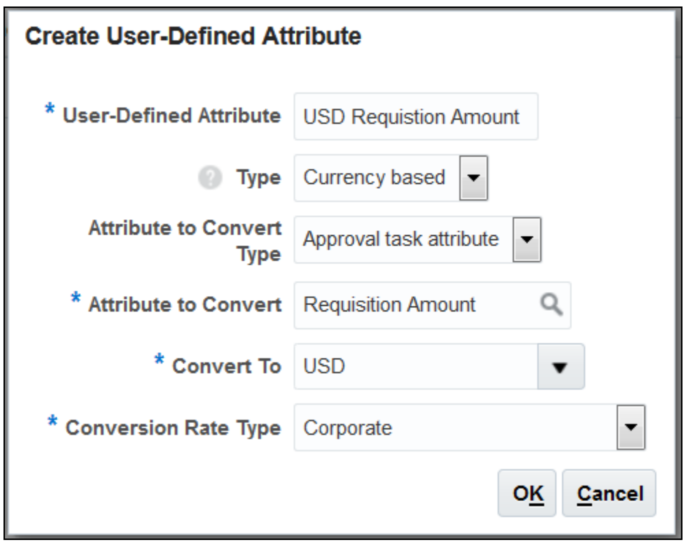

Figure 23: Currency user-defined attribute

To create a currency based user-defined attribute, you will need to provide the following information:

- Name of the attribute
- Type of attribute to perform the currency conversion
  - It can be an amount based attribute that is seeded for an approval task or a summation user-defined attribute
- The attribute to convert
- The target currency to convert to
- The rate type to apply for the conversion

The conversion rate will always be based on the date on which the transaction was submitted for approvals.

3.1.4.2. Summation User-Defined Attributes

Customers who need to perform approval routings based on data aggregated across one or more attributes when a document contains more than one line, schedule or distribution can create summation user-defined attributes to achieve this requirement.

3.1.4.2.1. Example

For example, Acme Corp's approval policy requires the number of IT approvers to be based on the total amount of IT requests within a requisition. If the total IT amount is less than 1200 USD, then the IT manager needs to approve. If the IT amount exceeds 1200 USD, then the IT manager, director and VP need to approve the document.

An employee submits the following requisition:

LINE	DESCRIPTION	CATEGORY	AMOUNT
1	Dell computer	IT.Desktop	599.00
2	LCD monitor	IT.Desktop	450.00
3	Samsung Galaxy	Telephony.Cellphones	299.99

Lines 1 and 2 both roll up to the IT category, and therefore for this requisition, the total of these two lines will drive the number of IT approvers needed to be included. Based on the sum of the two lines (1049.00), only the IT manager needs to approve. If the approval rule is set up to look at the requisition's total amount, this would be routed up to more approvers than required.

Summation attributes can be set up to filter objects based on specific attribute values, such as Item is 'XYZ001' or based on a hierarchy roll up, such as Category rolls up to IT. Hierarchical based summation will include objects with attribute values that belong to the sub-hierarchy under the specified filter value. For example:

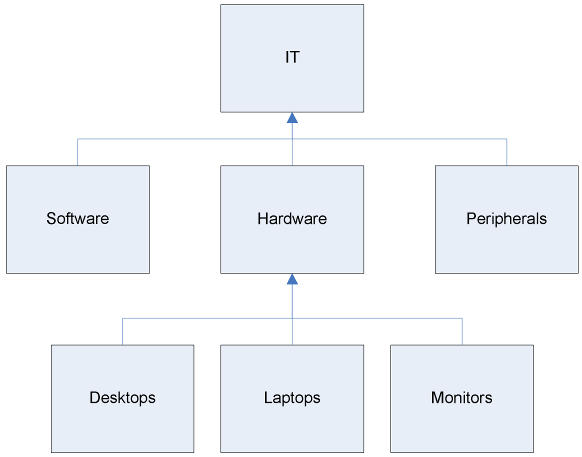

Figure 24: Procurement Category Hierarchy

If a summation attribute has been created with filters based on the Category hierarchy that rolls up to IT, any lines with Desktops, Laptops or Monitors categories will be included in the summation.

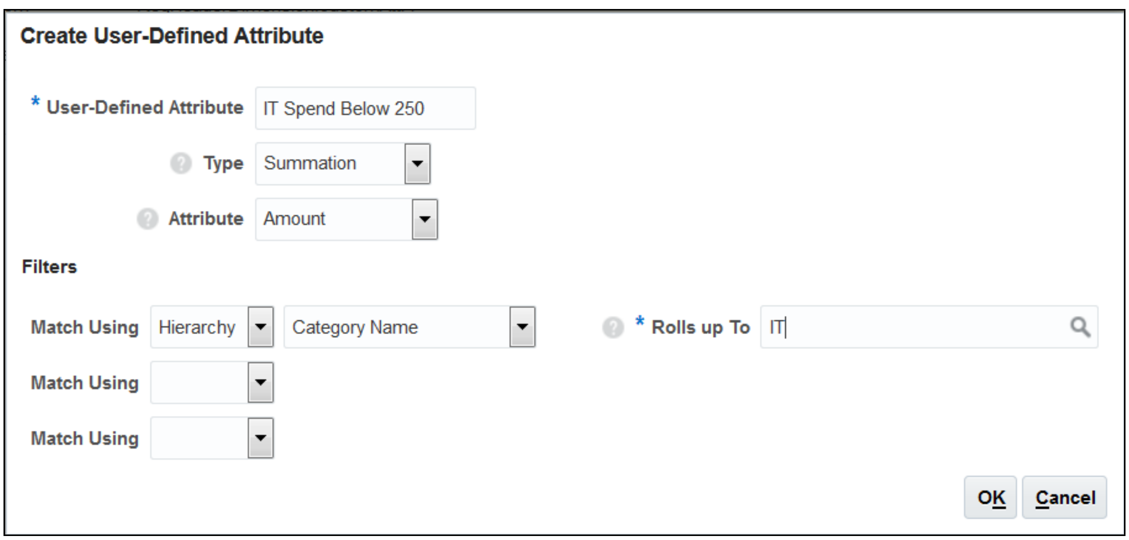

Figure 25: Summation User-Defined Attribute

To create a summation user-defined attribute, you will need to provide the following information:

- Name of the attribute
- Attribute that you want to sum across the objects

- Up to three filters
    - Match using specific attribute value or based on hierarchical roll-up
        - If specific attribute, specify the attribute and value to match
        - If hierarchical based, specify the hierarchy to use and the attribute value in the hierarchy to rollup to
            - Hierarchies supported are:
                - Balancing Segment
                - Category
                    - This is based on the Procurement Category Hierarchy
                - Cost Center
                - Management Segment
                - Natural Account

3.1.5. Deploying Approval Rules

Any changes made to the rules or any rules that have been newly added have to be deployed for them to be effective. Deploying approval rules will require users to click on the Deploy button on the Edit Rules and on the Manage Approval Rules page. If users do not intend to deploy the changes that were made to the rules, they can choose to click on the Discard button to revert the rules to the last deployed state.

The ability to configure and save rules without deploying them allows users to iterate the rules until a final version is reached without affecting the existing approval rules.

The operations that a user will see at the header level of the page are as follows:

- **Save**: Save or Save and Close will save the updated rules to the database without deploying them. Users can edit and save rules across multiple participants before deploying them.
- **Deploy**: Deploy updates the rules engine and makes all the rule changes across all participants effective. It is displayed on both the Manage Approval Rules page and the Edit Rules page. The Deploy button is disabled by default and is enabled when there are rules that have been

updated and saved. In cases where there are 100 or more rules across all participants, Deploy triggers an ESS job that updates the rules engine with all the rules across all the participants.

- **Discard**: Discard is displayed on both the Manage Approval Rules page and the Edit Rules page. It is disabled by default and is enabled when there are rules that have been updated and saved. Discard removes any rule changes that were saved and the rules will go back to the last deployed state.

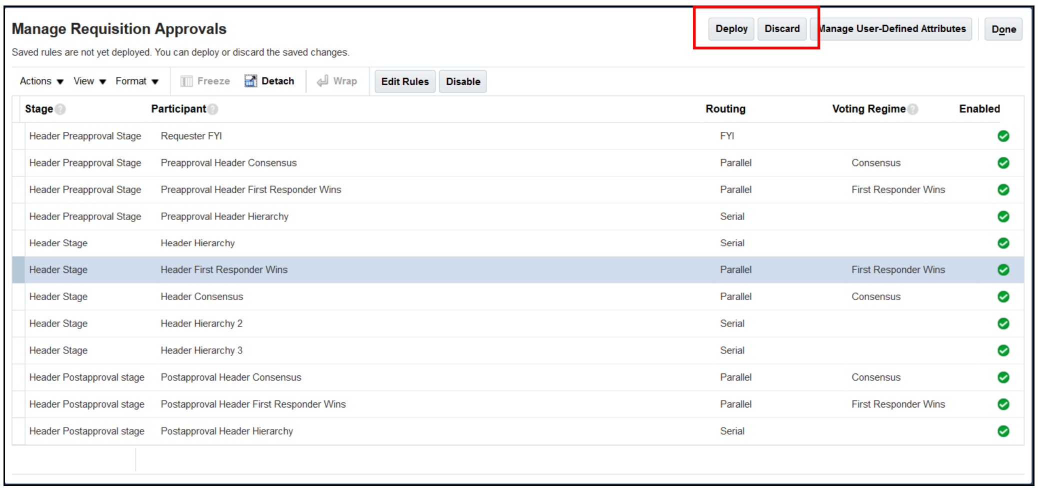

Figure 26: Deploy and Discard options on the Manage Approvals page

3.1.5.1.1. Viewing Rules Deployment Job Status

Oracle Fusion Procurement uses ESS jobs to deploy rules to the rules engine if the number of rules across all the participants is greater than 100. In cases where the number of rules is large in number, the deployment may take some time to complete. The Manage Approval Rules page displays the Approval Rules Deployment Job Status link to provide users visibility. The following status will be displayed based on the state of the job.

- Completed: Rules have been successfully deployed to the rules engine. This status is not linked.

- Pending: The deployment job is in the queue and is pending deployment.
- Running: The deployment job is in progress but has not yet completed.
- Error: The deployment job has failed to deploy the rules to the rules engine.

Note that users are not be able to make any changes to the rules while the deploy job is either in pending or in the running state.

4. Upgrade to Release 11

If you are upgrading to Release 11, please take note of the following:

- The first time you access the manage approval rules page for Procurement approval after the upgrade, an upgrade process is kicked off. If you have more than 100 rules, an ESS program will be triggered to process the upgrade. You can modify approval rules for the approval task only after the upgrade process has completed.

- Starting in Release 11, rule modifications will only be deployed if you click the Deploy button. Saving the rule modifications will save the rules to a sandbox and will not be applied to the transactions until the rule is deployed.

5. Requisition Approvals Setup

To facilitate the approvals setup process for companies, the following policies are available out of the box for requisition approvals task:

- Stages
- Participant

From Oracle Fusion Setup Manager, select "Manage Requisition Approvals" to manage rules for requisition approvals.

The following figure depicts the stages seeded for requisition approvals and the routing sequence of the stages.

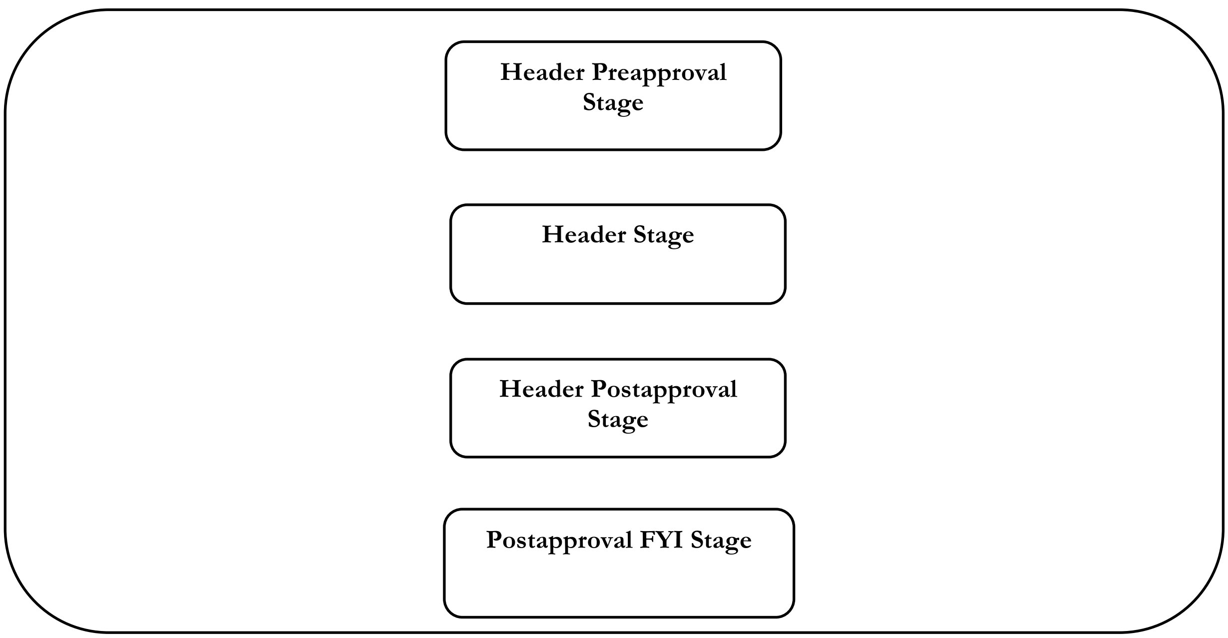

Figure 27: Seeded stages in Oracle Fusion Self Service Procurement

Approvals will be routed to the seeded stages in the following sequence:

1. Header Preapproval Stage
    a. Preapproval stages are used if approvals are required before routing to, for example, fiscal approvers.
2. Header Stage

3. Header Postapproval Stage
4. Postapproval FYI Stage

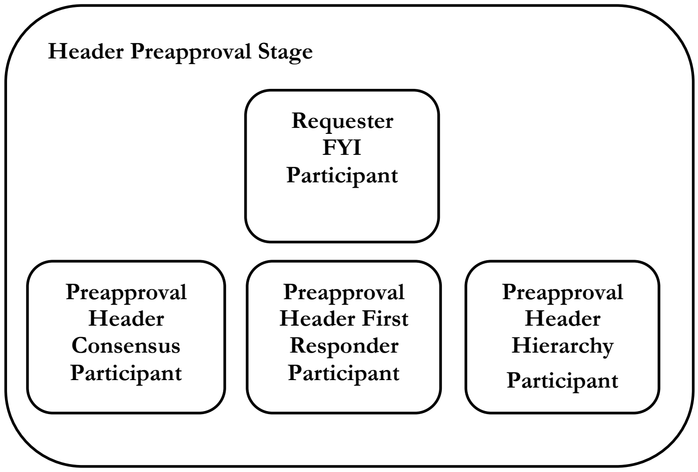

Figure 28: Seeded Participants in Header Preapproval Stage

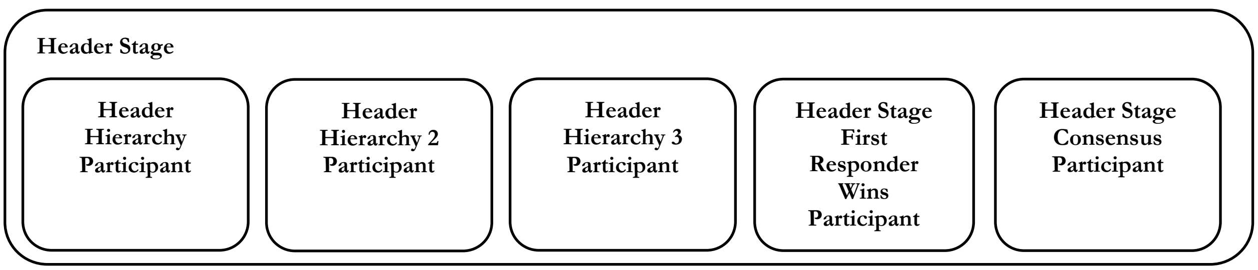

Figure 29: Seeded Participants in Header Stage

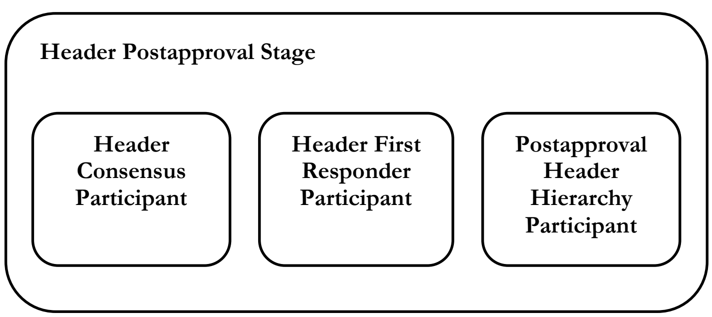

Figure 30: Seeded Participants in Header Postapproval

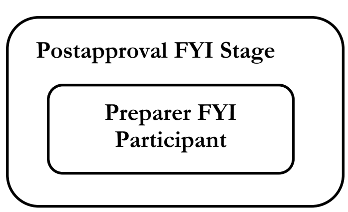

Figure 31: Seeded Participant in Postapproval FYI Stage

There are four seeded stages for requisition approvals and within each stage, there are seeded participants.

Line and distribution level rules can be defined within the stages with header dimension.

1. Header Preapproval Stage
    a. This is used to route requisitions for preapprovals, such as whether the requisition is an emergency requisition.
    b. Seeded Participants:
        i. Requester FYI
            - The requester on every line for a requisition will receive a FYI notification. This allows requesters to be notified when a preparer creates a requisition on their behalf. Each requester on every requisition line will be notified. The rule to notify the requester is available out of the box.
        ii. Preapproval Header Consensus
            - Approvals are routed in parallel for this participant. This participant is more commonly used in conjunction with approval groups. This participant requires approval from all approvers.
        iii. Preapproval Header First Responder Wins
            - Approvals are routed in parallel for this participant. This participant is more commonly used in conjunction with approval groups. The first responder to approve or reject sets the outcome for all remaining approvers.
        iv. Preapproval Header Hierarchy
            - Approvals are routed in serial for this participant.
2. Header Stage
    a. The header stage is often used for fiscal approvals, based on the requisition amount.
    b. Seeded Participants:
        i. Header Hierarchy
            - Approvals are routed in serial. This participant is generally used for supervisory or position hierarchy based routing.
            - The approvers returned based on all rules that apply in a serial participant are notified in sequence, even if the rules are evaluated against lines or distributions.

ii. Header Hierarchy 2

- Approvals are routed in serial.
- If your organization has a requirement to have a second hierarchy based routing in parallel to the Header Hierarchy participant, rules should be maintained in this participant.

iii. Header Hierarchy 3

- Approvals are routed in serial.
- Similar to Header Hierarchy 3, this participant allows another hierarchy based routing in parallel to Header Hierarchy and Header Hierarchy 2 participants.

iv. Header Stage Consensus

- Approvals are routed in parallel for this participant. This participant is more commonly used in conjunction with approval groups. This participant requires approval from all approvers.

v. Header Stage First Responder Wins

- Approvals are routed in parallel for this participant. This participant is more commonly used in conjunction with approval groups. The first responder to approve or reject sets the outcome for all remaining approvers.

3. Header Postapproval Stage

a. This is used to route for Postapprovals.

b. Seeded Participants:

i. Header Consensus

- Approvals are routed in parallel for this participant. This participant is more commonly used in conjunction with approval groups. This participant requires approval from all approvers.

ii. Header First Responder Wins

- Approvals are routed in parallel for this participant. This participant is more commonly used in conjunction with approval groups. The first responder to approve or reject sets the outcome for all remaining approvers.

iii. Postapproval Header Hierarchy

- Approvals are routed in serial for this participant.

4. Postapproval FYI Stage
    a. The Postapproval FYI stage is created to send the requisition preparer a FYI notification on the outcome of the requisition approvals.
    b. This stage is not available in the BPM Worklist Administration pages for customization.

You do not need to use all of the seeded stages and participants. If you do not need to use a seeded participant, you must disable the participant from the Manage Requisition Approvals page.

Requisition provides the ability to define an overriding approver. An overriding approver is specified by the requester to replace the application generated first approver. In cases where the system generated approver is unable to approve a document, requestors are able to specify an overriding approver to route the document to a different first approver.

The table below lists all the attributes within the three requisition dimensions that are available for you to create approval routing rules for requisitions. Attributes marked with asterisk (*) when used in approval rules need an explicit "is not blank" rule. Refer to example in section 2.c.

TABLE 1. REQUISITION HEADER LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Change in Approval Amount of Modified Lines	Amount of the difference between 'Original Approval Amount of Modified Lines' and 'New Approval Amount of Modified Lines' (includes non-recoverable taxes)
Change in Requisition Amount of Modified Lines	Amount of the difference between 'Original Requisition Amount of Modified Lines' and 'New Requisition Amount of Modified Lines'
Document Fiscal Classification	Tax attribute
Emergency Requisition	Flag indicating if the requisition is an emergency requisition
Functional Currency	Currency code of the requisitioning BU
Funds Check Failure or Warning	Identifies that funds check upon requisition submission has warnings
Funds Override Approver	User who can approve the request for funds override
Funds Override Approver User Name	Name of the user who can approve the request for funds override
Header Attribute Category	Attribute category for Requisition Header
* Header Number Attribute 1 – 20	Numeric Descriptive Flexfield attributes
Header Text Attribute 1 – 20	Text Descriptive Flexfield attributes

Insufficient Funds	Indicates whether the requisition was submitted with funds override request
Interface Source Code	Used in requisition import to identify import source
Internal Transfer Requisition	A requisition containing items which are internal to the company
Ledger	Ledger used for the requisitioning BU
New Approval Amount of Modified Lines	Sum of the amount for the new lines added during an update from catalog or split operation plus including non-recoverable taxes
New Requisition Amount of Modified Lines	Sum of the amount for the new lines added during an update from catalog or split operation
Original Approval Amount of Modified Lines	Amount for the replaced or split line, including non-recoverable taxes
Original Requisition Amount of Modified Lines	Amount for the replaced or split line, excluding taxes
* Overriding Approver	Approver specified to override the system generated approver
* Overriding Approver Position ID	Attribute used in position hierarchy routing when the Position Chain Of or the Approval Chain Of is Overriding Approver (only supported from BPM)
Percentage Change in Approval Amount of Modified Lines	Difference as a percentage between 'Original Approval Amount of Modified Lines' and 'New Approval Amount of Modified Lines' (includes non-recoverable taxes)
Percentage Change in Requisition Amount of Modified Lines	Difference as a percentage between 'Original Requisition Amount of Modified Lines' and 'New Requisition Amount of Modified Lines'
Preparer	Person who submitted the requisition
Preparer Job	Job code of the person who submitted the requisition
Preparer Job Level	Job level of the person who submitted the requisition
* Preparer's Position	Position ID of the person who submitted the requisition
Preparer Username	Username of the person who submitted the requisition
Requisition Amount	Total amount of the requisition
Requisition Approval Amount	Requisition amount with non-recoverable taxes
Requisition DFF Context	Descriptive flexfield context on the requisition header(only supported from BPM)
Requisitioning BU	BU in which the requisition is created
Taxation Country	The country in which the transaction is deemed to have taken place for taxation purpose

TABLE 2. REQUISITION LINE LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
* Agreement	Agreement Number on the requisition line
* Agreement Buyer	Buyer of the agreement on the requisition line
* Agreement Header Amount Released	Released amount on the header of the agreement on the requisition line
*Agreement Line	Line number of the agreement on the requisition line
* Agreement Line Amount	Agreement line amount of the agreement on the requisition line
Agreement Line Amount Exceeded Indicator	True if requisition line amount exceeds agreement line amount limit
* Agreement Line Amount Overage	Amount which requisition line amount exceeds agreement line amount limit
* Assessable Value	The deemed price at which a product is valued, by a tax authority, for tax calculation purposes
Assigned Buyer	Buyer assigned to process requisition line
Assigned Buyer User Name	Username of the assigned buyer
Category Name	Name of the category on the requisition line
Deliver-to Location	Location to which the request should be delivered
Deliver-to Organization	Organization of the location to which the request should be delivered
Destination Type	Type of the destination, either Expense or Inventory
Hazard Class	Hazard classification for the requisition line
* Intended Use	A tax classification based on the purpose for which a product is used
* Item	Item number
Item Revision	Revision number of the item on the requisition line
Item Source	Identifies the source from which item is added, such as non-catalog request, punchout catalog, local catalog, etc.
Line Amount	Total amount of the requisition line
Line Approval Amount	Line amount with non-recoverable taxes
Line DFF Context	Descriptive Flexfield context on the requisition line(only supported from BPM)

Line Attribute Category	Attribute category on the requisition line
* Line Number Attribute 1 – 20	Numeric Descriptive Flexfield attributes
Line Text Attribute 1 – 20	Text Descriptive Flexfield attributes
Line Type	Line type, such as Goods or Amount Based
Manufacturer	Manufacturer of the request
Manufacturer Part Number	Manufacturer Part number of the request
Negotiation Required	Flag that indicates if negotiation is required for the requisition line
New Supplier	Flag that indicates if a new supplier is specified on the requisition line
* Price	Price of the requisition line in functional currency
Procurement Card	Flag to indicate if a procurement card is used
Procurement Category Hierarchy (Level 1 - 10)	Category hierarchy used to classify products that the organization purchases
Product Category	A tax classification based on category of items entered at transaction time
* Product Fiscal Classification	A tax classification used to categorize a product for a tax and which are applicable
Product Type	A tax classification based on type of products (e.g Goods)
* Quantity	Quantity requested
Requester	Person for which the line was requested
Requester Job	Job code of person for which the line was requested
Requester Job Level	Job Level of person for which the line was requested
Requester Level 1 -10 Supervisor User Name	User name of the top 10 worker in the supervisory hierarchy of the requester. Requester Level 1 Supervisor User Name being the user name of the topmost worker
Requester Level 1 -10 Supervisor	Supervisor in the supervisory hierarchy chain of the requester. Requester Level 1 Supervisor being the topmost worker on the supervisory chain
* Requester's Position	Position ID of the person for which the line was requested
Requester Username	Username of the person for which the line was requested
* Smart Form	Name of the smart form on the requisition line
Source Organization	Inventory Organization which will supply the item to the destination inventory in internal material transfer

Source Type	Indicates the type of source of supply for the requisition line e.g source type is internal for inventory organization, external for suppliers
* Subinventory	Subinventory to which the request should be delivered, if destination type is Inventory
* Suggested Buyer	Suggested buyer on the requisition line
* Supplier	Supplier of the line requested
Supplier Configuration ID	ID used to identify a configurable item
Supplier D-U-N-S	Identifier for the supplier
Supplier Item	Supplier item number of the line requested
* Supplier Site	Site from which the supplier will process the request
Tax Classification	Tax classification code entered on the transaction for tax determination purpose
Transaction Business Category	A tax classification used to classify a transaction line to define the type of transaction (e.g Purchase Transaction)
UN Number	Hazardous substance identifier
UNSPSC	United Nations Standard Products and Services Code used to classify a request
UOM	Unit of measure of the line requested
Urgent	Indicates if the line is an urgent request
User Defined Fiscal Classification	User defined tax classification used to classify transactions to drive tax determination and reporting

TABLE 3. REQUISITION DISTRIBUTION LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Award Owning Business Unit	The business unit that manages and owns the grant award
Award Purpose	Description of an activity that the award is funding. For example, research or clinical trials
Award Type	Classification of an award. For example, federal grant or private grant
Balancing Segment Value	Balancing segment of the chart of accounts
Contract	The display name of the award contract
Charge Account	Account to which the requested item should be charged

Chart of Accounts	Name of the chart of accounts associated with the business unit
Cost Center	A unit within an organization to which costs may be charged for accounting purposes
* Cost Center Manager	The manager of a unit within an organization to which costs may be charged for accounting purposes
Cost Center Manager User Name	The user name of the manager of a unit within an organization to which costs may be charged for accounting purposes
Distribution Amount	Total amount on the distribution
Distribution Approval Amount	Distribution amount including non-recoverable tax
Distribution Attribute Category	Attribute category for requisition distribution.
Distribution DFF Context	Descriptive Flexfield context on the requisition distribution(only supported from BPM)
* Distribution Number Attribute 1 – 20	Numeric Descriptive Flexfield attributes
Distribution Text Attribute 1 – 20	Text Descriptive Flexfield attributes
* Expenditure Organization	An organization that incur expenditures and hold financial plans for projects
* Expenditure Type	A classification of cost assigned to each expenditure item, such as calculating raw costs, to plan, budget, forecast, and report on projects
Funding Source	Display name of the source of the funding that is associated to the award
Natural Account	Natural Account segment of the chart of accounts
Principal Investigator	Person responsible for the performance of the award
Principal Investigator User Name	The User Name of person responsible for the performance of the award
* Project	Name of the project business manages
* Project Manager	Project Manager of the project
* Project Manager Username	Username of the project manager
Project Owning Business Unit	Display name of the business unit that owns the project
Project Type	Primary classification for the projects business manages
* Task	Name of the task associated with a project

5.1. Considerations

1. For amount-specific approval rules you should:

    a. Either include the requisitioning business unit in the condition along with specifying the approval amount in the functional currency of the requisitioning business unit (optionally include the functional currency) if approval policies differ across business units.

    If Requisition Approval Amount less than or equals 500 and

    Functional Currency equals USD and

    Sold-to BU is Vision USA

    b. Or use the currency conversion rate function if approval limits are enforced in a standard currency. Create a user-defined attribute with currency based type to convert the amount currency in documents to the currency of the approval rule.

2. For each participant that is in use (i.e. not disabled), at least one rule must apply when a document is submitted for approvals. AMX does not auto approve if the document attributes do not meet the conditions of any of the existing rules within a participant.

    a. Example 1: You use the Header Hierarchy participant to set up rules based on requisition amounts with the following conditions:

        i. Requisitions more than 500 USD and under 1000 USD requires 1 level

        ii. Requisitions more than or equal to 1000 USD and under 2000 USD requires 2 levels

        iii. Requisitions more than or equal to 2000 USD requires 3 levels

    This means that requisitions under or equal to 500 USD do not require approvals. In this case, you will need to create a rule to automatically approve the requisition.

    b. Example 2: You use the Preapproval Header Consensus participant to set up rules based on categories on the requisition line. You need additional approvals routed for the following two categories:

        i. IT Equipment

        ii. Office Furniture

    You must add a rule to automatically approve the remaining categories in this participant.

    c. Example 3: You use the Preapproval Header Consensus participant to set up rules based on smart forms on the requisition line. You need additional approvals routed for the following smart form:

i. Work Visa Request

- Condition: If Smart Form Is Not blank and Smart Form Equals Work Visa Request

  a. Make sure to add a condition to check that the attribute is not empty. This applies to all rules using attributes in a document that may contain no value.

Since not every requisition line will have a smart form associated, you must add an autoapproval rule for the following:

i. If (Smart Form Is not blank and Does not equal Work Visa Request) or Smart Form Is blank

d. Example 4: You use the Serial Approval participant in First Stage Approvals to set up rules based on Tax Organization Type for supplier registration requests,

   i. Condition: If Tax Organization Type equals Individual.

   - To ensure that approvals are generated successfully, you can:

     a. Create multiple rule conditions using an OR separator where you expect at least one condition to be true.

     b. Add another rule in the same participant to ensure that it covers the supplier registration requests where Tax Organization Type does not equal Individual, since not all registrations will have this value.

e. Example 5: You use the Serial Approval participant in First Stage Approvals to set up an approval rule with the following condition in supplier registration:

   i. Condition: If Bank Account Country equals United States.

   - For this condition to evaluate to true, the registration request must have bank account details entered and the bank account country is United States. If the registration request does not contain any bank account information, this rule will not apply.
   - To ensure that approvals are generated successfully, the participant must contain another rule with a condition that will apply if bank account information does not exist, using If Bank Account Entered Is No.
   - This applies to approval rules created using attributes from these dimensions: Contacts, Addresses, Business Classifications, Bank Accounts and Products and Services Category. The following attributes should be used to handle cases where no information is provided for registrations for the respective children entities if attributes on these dimensions are used in rule evaluation.

a. For Contacts, use Contact Entered.

b. For Addresses, use Address Entered.

c. For Business Classifications, use Business Classification Entered.

d. For Bank Accounts, use Bank Account Entered.

e. For Product and Services Category, use Product and Services Category Entered.

3. All approvers returned within a participant that is routed in serial are ordered and notified in sequence.

    - For example, the following rules are evaluated to true in the Header Hierarchy participant for a requisition with 2 lines:

        a. Line 1 satisfies rule 1: If requisition line belongs to the IT category and amount is less than 500 USD, then approval is required from the IT Manager and IT Director.

        b. Line 2 satisfies rule 2: If requisition line belongs to the Facilities category and amount is greater than 1500 USD, then approval is required from the Facilities Manager and Facilities Director

      In this case, within the Header Hierarchy participant, approvals will be routed in the following order:

      IT Manager → IT Director → Facilities Manager → Facilities Director

    If your organization has a need to route a document for approvals to more than one hierarchical path concurrently, you should use more than one serial based participant. You can use Header Hierarchy, Header Hierarchy 2 and Header Hierarchy 3 participants in the Header Stage to maintain your rules based on your organization's requirements.

4. **Only one rule within a participant with first responder wins voting regime** should evaluate to true for a given document.

    - If more than one rule applies within a first responder wins participant, the approvers returned by each rule will be grouped together where only one response from this group will determine the approval outcome.

        1. For example, within the Header First Responder Wins participant:

            a. The following rules are defined

                i. Rule 1 includes approvers from the IT Approval Group if a requisition contains a line from the IT category.

ii. Rule 2 includes approvers from the Legal Approval Group if a requisition contains a line from the Legal category.

b. If both conditions are met and the two rules are triggered, then approvers from both the IT Approval Group and the Legal Approval Group are returned. However, if an approver from the IT Approval Group approves the requisition, this participant is considered approved, and no actions would be required from the Legal Approval Group.

2. To satisfy the requirement where at least one rule must apply within a participant, you can set up a rule to use an empty approval group rule for the conditions where no approvals are required in a first responder wins participant. This option will ensure that the participant does not get auto-approved in the event where the document contains objects that satisfy both rules that require approvals and rules that do not require approvals. Using the supervisory hierarchy based autoapproval option would be treated as an approval response for the participant, hence bypassing the other rules that actually would require approvals.

- Auto-approval rule using an empty approval group
    - Select 'Rule always applies' when creating a rule
    - Action Type = Approval required
    - Route Using = Approval group
    - Approval Group = "No Approvals"
    - This group has to be created in the Approval Groups tab in BPM Worklist application without any participants specified
    - Automatically approve if group returns no approvers = **Checked**

b. You can utilize the first responder wins based participants across the different stages if your organization requires different groups of approvers to provide approvals independently.

1. Using the same example above,

a. Rule 1 can be added to the Preapproval Header First Responder Wins participant, along with an auto-approval rule to satisfy the requirement where at least one rule must evaluate to true

b. Rule 2 can be added to the Header Stage First Responder Wins participant, along with an auto-approval rule to satisfy the requirement where at least one rule must evaluate to true

c. A response from Preapproval Header First Responder Wins participant will be required from the IT Approval Group. And a separate response from the Header Stage First Responder Wins participant will be required from the Legal Approval Group.

5. From Release 9 onwards, line level withdrawal from approved requisition is supported.
   - Example: An approved requisition (not in PO) has 4 lines. You, as a preparer, select line 2 and withdraw that line. You then modify line 2 and resubmit for approval. Only line 2 will now be routed for reapproval based on the approval rules defined. All other lines will remain in its current state.

6. On the Configure Requisitioning Business Function page, there are three approval related controls a user can define:

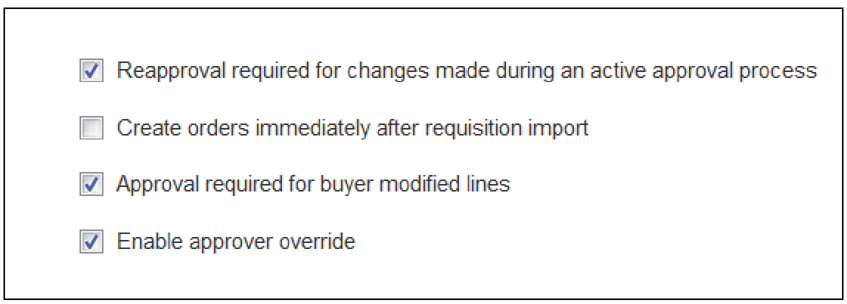

Figure 32: Configure Requisitioning Business Function page

- Reapproval required for changes made during an active approval process: This controls whether a requisition must be sent back for reapproval whenever an approver makes a modification to the requisition. It is unchecked by default.
  a. Example: When an approver modifies a requisition line and submits the requisition AND if this checkbox is checked, a new approval process is started.
- Approval required for buyer modified lines: This controls if lines modified by buyer will be submitted for approval. It is unchecked by default.
  a. Example: When requisition is approved and a PO is created, buyer can modify the lines. If this checkbox is checked, the modified lines will be routed for reapproval based on the requisition approval rules.
- Enable Approver Override: This controls if the Overriding Approver field is displayed on the requisition creation flow

7. Cost center manager based approvals can be set up using the following condition if all requisitions in your organization needs to be routed to the cost center manager for approvals:

    - If Cost Center Manager Is not Blank, route using Single User with User Type = Cost center manager

    The cost center manager is set up on Manage Department page from the setup manager

8. For autoapproval rules, transaction is approved using the internal APPID user (Application Development Framework Application) instead of the task creator (preparer).

9. Approval rule priority: From Release 11 onwards, Manage Requisitions Approval UI has been enhanced to support approval rule priority. Approvers from the higher priority rule will be notified before the approvers from the lower priority rule. The following values are supported priority: Highest, Higher, High, Medium, Low, Lower, Lowest. Medium is the default priority.

    How rule is priority applied?

    - The Approval Engine will determine the list of approvers based on the rules with conditions that evaluate to "true" for a transaction.
    - The list of approvers will be arranged by priority, so the approver with the highest priority receives the notification first and so forth.
    - Approvers from the rules having same priority will be notified in a random sequence.

10. To prevent self-approval of transactions when the submitter (task creator) is part of an approval list, the following task configuration property should be set in BPM:

    Skip creator for Approval List = Y

    When this option is set to “Y” and the requisition preparer/buyer is one of the approvers, the task will be routed to the next approver in the chain, skipping the task assignment for the creator. For a single approver scenario, skipping task assignment for the creator would mean that the task outcome is set to reject unless there is another approver in the chain (or an auto approval rule) that approves the transaction. Alternatively, you can set the flag “Assign to Creator's Manager = Y” to replace the creator with their manager as set in HCM.

    Note: Task assignment for the creator will not be skipped when using the application role or position hierarchy based routing.

6. Purchasing Approvals Setup

Oracle Fusion Purchasing has provided Stage and Participants out of the box enabling customers to easily organize and author approval routing rules. From Oracle Fusion Setup Manager, select "Manage Purchasing Document Approvals" to manage rules for purchasing document approvals.

The figure below illustrates the stages seeded for purchase order, purchase agreement and their change order approvals. There are four stages and are organized sequentially as depicted in the figure.

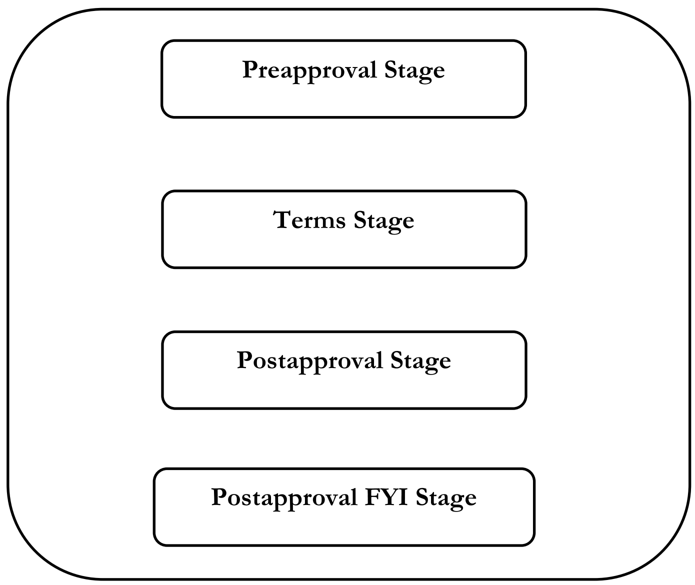

Figure 33: Seeded stages in Oracle Fusion Purchasing

The figures below illustrate participants seeded within each stage. The position of the participant in the figure conveys whether the participant is ordered sequentially or in parallel compared with other participants. For example, in Figure 27, the approvers obtained because of rules written on Preapproval Consensus participant will be notified in parallel with the approvers obtained because of rules written on Preapproval First Responder Wins participant.

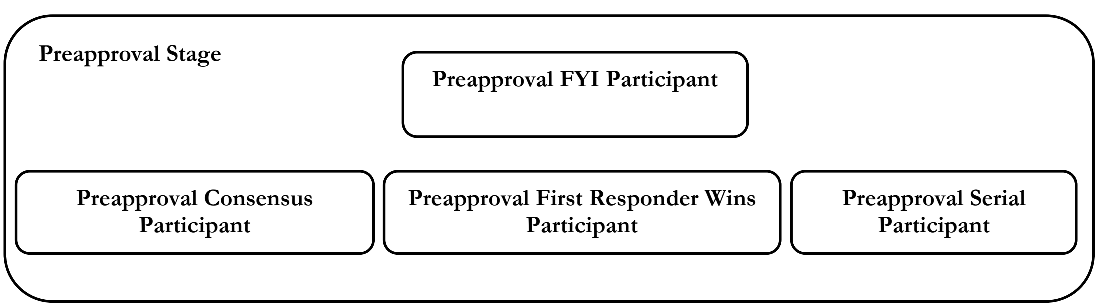

Figure 34: Seeded Participants in Preapproval Stage

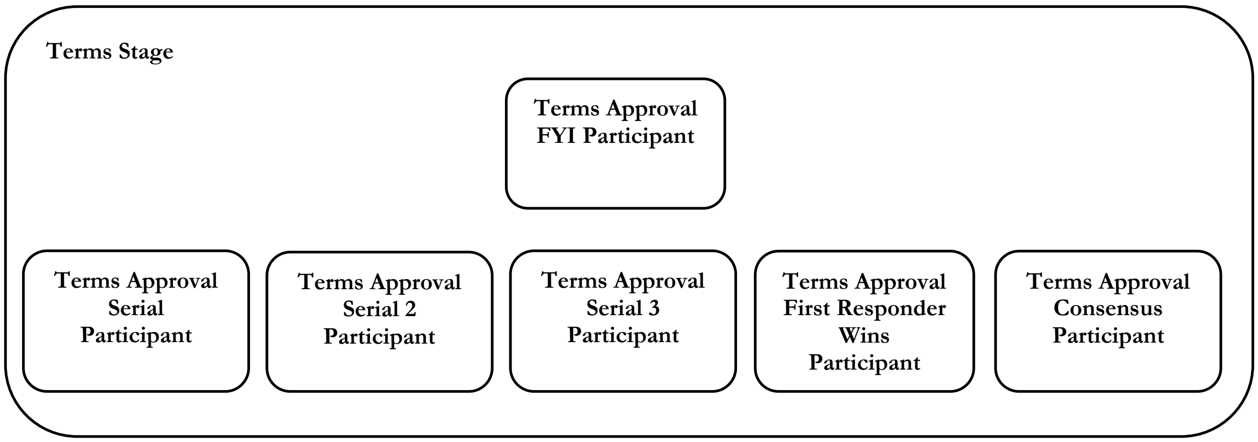

Figure 35: Seeded Participants in Terms Stage

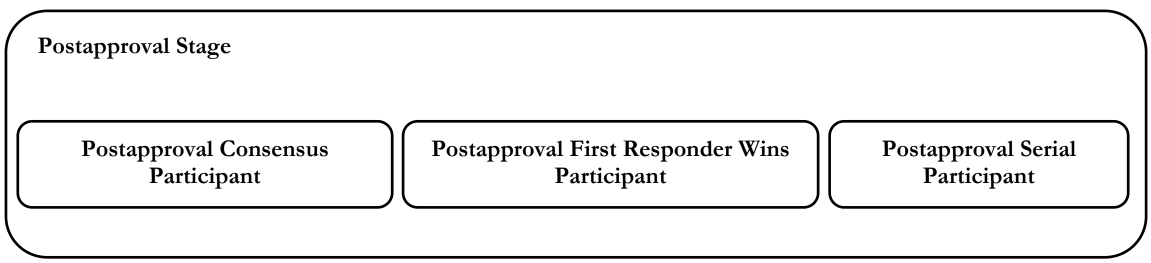

Figure 36: Seeded Participants in Postapproval Stage

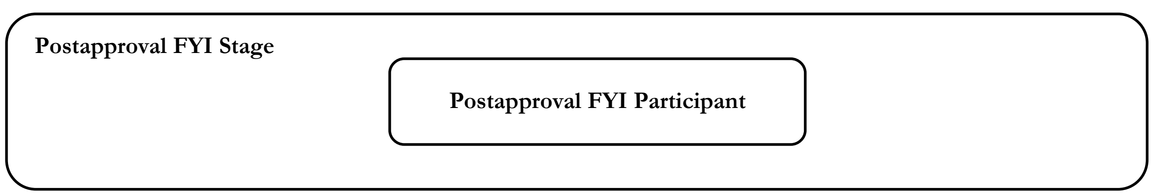

Figure 37: Seeded Participants in Postapproval FYI Stage

The table below lists all the attributes that are available for you to create approval routing rules for purchasing documents.

TABLE 4. PURCHASE ORDER AND PURCHASE AGREEMENT HEADER LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Agreement Amount	Amount agreed on an agreement line between the buying and selling organization.

Agreement Amount Change	Change in agreement amount on a change order.
Agreement Amount Change Percent	Percentage by which the agreement amount has changed on a change order.
All Lines have Backing Requisition	Indicates whether all purchase order lines have backing requisition or not.
All Lines Negotiated	Indicates that prices on all the lines on the document are negotiated.
Descriptive Flexfield Attribute 1-20	A character attribute available to customers to extend attributes captured on a purchase order.
Descriptive Flexfield Attribute Category	Category of the descriptive flexfield
Descriptive Flexfield Attribute Number 1-10	A number attribute available to customers to extend attributes captured on a purchase order.
Backing Requisition Exists	Indicates whether a requisition reference exists on any distribution on the purchase order.
Bill-to Location	The location to which the supplier should send the invoice.
Buyer Managed Transportation	Indicates that the buying company is responsible for arranging the transportation
Buyer Managed Transportation Modified	Indicates that the Buyer Managed Transportation flag has been updated
Buyer Position	The position of the buyer specified on the purchasing document.
Buyer	The user name of the buyer specified on the purchase order.
Carrier	A company that transports goods from one point to another by land, sea, or air.
Change in Document Ordered Amount	Change in ordered amount in document currency.
Change in Document Total Amount	Change in the total amount in document currency. The total amount is the sum of ordered amount and total exclusive tax amount.
Change in Functional Ordered Amount	Change in ordered amount in functional currency.
Change in Functional Total Amount	Change in the total amount in functional currency. The total amount is the sum of ordered amount and total exclusive tax amount.
Change Order Creation Method	The method or program by which the change order was created. Such as PDOI or Reassign Purchasing Document and so forth.
Change Order Initiating Party	The party that initiated the change order such as buyer or supplier.
Change Order Initiator Username	The user name of the change order initiator.
Change Order Type	Indicator to show whether the change order is an internal change order or an external change order. External changes are exposed to supplier and internal are not.
Clauses Changed From Contract Template	Indicates whether any clause has changed on the document compared to the contract template in the terms library or not.
Contract Template Expired	Indicates whether the contract template on the document has expired or not.
Contract Terms Changed	Indicates whether the contract terms are changed as part of the change order
Contract Terms Exist	Indicates whether the document has contract terms and conditions associated with it or not.
Contract Terms Template	The name of the contract terms template applied on the document.
Contractual Deliverable Exists	Indicates whether a contractual deliverable exists on the document. Contractual deliverables are commitments that must be fulfilled as part of negotiations and contractual agreements.
Contractual Deliverable Modified	Indicates whether any contractual deliverable is modified on the change order or

	not.
Document Cancellation Request	Indicates whether the change order is a document cancellation request or not.
Document Creation Method	The method or program by which the document was created. Such as PDOI or Online.
Document Currency	The three-letter ISO code associated with the document currency.
Document Fiscal Classification	A classification used by a tax authority to categorize a document associated with a transaction for a tax.
Document Ordered Amount	Ordered amount in document currency.
Document Style	The name of the document style, enabled for the purchasing document type, as displayed to the user.
Document Total Amount	The sum of ordered amount and total exclusive tax amount for the document in document currency.
Document Total Change Percent	Percentage by which the purchase order total amount has changed.
Document Type	The document type associated with a change order template.
End Date Modified	Indicates whether the agreement end date is modified on the change order or not.
FOB	Freight on board. The point or location where the ownership title of goods is transferred from the seller to the buyer.
FOB Modified	Indicates whether the FOB is modified on the change order or not.
Freight Terms	Indicates who pays the charge for transporting the goods by common carrier.
Freight Terms Modified	Indicates whether the freight terms are modified on the change order or not.
Functional Currency	Currency of the primary ledger of the sold-to legal entity.
Functional Ordered Amount	Ordered amount in functional currency.
Functional Total Amount	The sum of ordered amount and total exclusive tax amount for the document in functional currency.
Interface Source Code	Code that indicates the outside source that the data was imported from.
Internal Purchasing Deliverable Modified	Indicates whether any internal deliverable is modified on the change order or not.
Is Change Order	Indicates if approval is being requested for a new document or a change to an existing document.
Mode of Transport	Mode of Transport distinguishes substantially different ways to perform transport. E.g. Air, Ground.
Nonstandard Clause Exists	Indicates whether any nonstandard clause exists on the document or not.
Nonstandard Clause Modified	Indicates whether any nonstandard clause is modified on the change order or not.
Payment Terms	Terms used to schedule payments and to calculate due dates, discount dates, and discount amounts for invoices matched against the purchase order.
Payment Terms Modified	Indicates whether the payment terms are modified on the change order or not.
Primary Ledger of Requisitioning BU	The primary ledger associated with the requisitioning business unit.
Primary Ledger of Sold-to LE	The primary ledger associated with the sold-to legal entity.
Procurement BU	The business unit that manages and owns the purchasing document.

Requisitioning BU	The business unit that is requesting the goods or services being purchased
Service Level	Priority of transportation that affects how quickly the goods are transported.
Sold-to Legal Entity	The legal entity procuring goods or service in a country. The sold-to legal entity specified in the purchasing document.
Standard Clause Exists	Indicates whether any standard clause exists on the document or not.
Standard Clause Modified	Indicates whether any standard clause is modified on the change order or not.
Start Date Modified	Indicates whether the agreement start date is modified on the change order or not.
Submitter Job Level	Job level of the submitter of the document.
Submitter Job Name	Job name of the submitter of the document.
Submitter Position	Position of the submitter of the document.
Submitter	The user name of the submitter.
Supplier	Organization or individual that provides goods or services to the buying organization for payment, bound by a contractual obligation.
Supplier Site	The entity that models how the buying organization conducts business with the supplier.
Supplier Site Modified	Indicates whether the supplier site is modified on the change order or not.
Taxation Country	The country where the transaction is deemed to have taken place for taxation purposes.

TABLE 5. PURCHASE ORDER AND PURCHASE AGREEMENT LINE LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Agreed Price Change Percent	Percentage by which the price has changed on a purchase order line compared to the price agreed on a blanket purchase agreement.
Descriptive Flexfield Attribute 1-20	A character attribute available to customers to extend attributes captured on a purchase order.
Descriptive Flexfield Attribute Category	Category of the descriptive flexfield
Descriptive Flexfield Attribute Number 1-10	A number attribute available to customers to extend attributes captured on a purchase order.
Backing Requisition Exists	Indicates whether a requisition reference exists on any distribution associated with the purchase order line.
Catalog Name	Name of the punch out catalog.
Category Name	The name of a code used to group items with similar characteristics.
Change in Document Line Ordered Amount	Change in line ordered amount in document currency.
Change in Document Line Total Amount	Change in the line total amount in document currency. The line total amount is the sum of ordered amount and total exclusive tax amount for the line.

Change in Functional Line Ordered Amount	Change in line ordered amount in functional currency.
Change in Functional Line Total Amount	Change in the line total amount in functional currency. The line total amount is the sum of ordered amount and total exclusive tax amount for the line.
Consignment Line	Indicates whether the item on line will be purchased under consignment arrangement from a supplier.
Document Line Ordered Amount	Line ordered amount in document currency.
Document Line Total Amount	The sum of ordered amount and total exclusive tax amount for the line in document currency.
Entity Change Type	Type of change made to the line, schedule or distribution. Whether it was added, changed or canceled.
Functional Line Ordered Amount	Line ordered amount in functional currency.
Functional Line Total Amount	The sum of ordered amount and total exclusive tax amount for the line in functional currency.
Hazard Class	Name to identify and classify hazardous materials, to facilitate safety regulations compliance.
Item	Anything you make, purchase, or sell, including components, finished products, or supplies.
Item Revision	The revision of the item specified on the purchase order line.
Line Agreement Amount	Amount agreed on an agreement line between the buying and selling organization.
Line Agreement Amount Change	Change in the amount agreed on an agreement line between the buying and selling organization.
Line Agreement Amount Change Percent	Percentage by which line agreement amount has changed.
Line Description Modified	Indicates whether the line description is modified on the change order or not.
Line Total Amount Change Percent	Percentage by which the line total amount has changed.
Line Type	A type to indicate whether a purchasing document line is for goods or services, as well as some default attributes associated with the line.
Negotiated	Indicates that the price on the document line is a value agreed on in advance during discussions between the buyer and the supplier.
Parent Item	The buying organization’s identification number or code for the immediate parent item associated with the option or sub-model
Price	Price of the item on the document line.
Price Change Percent	Percentage by which the price has changed on a line on a change order
Procurement Category Hierarchy (Level 1 - 10)	Category hierarchy used to classify products that the organization purchases
Quantity	The ordered quantity on the purchase order line, schedule, or distribution.
Top Model	The buying organization’s identification number or code for the top model item associated with the option or sub-model. The top model is the item from which the configuration was built

UN Number	The United Nations identification number for the hazardous material.
UOM	A division of quantity defined as a standard of measurement or exchange.

TABLE 6. PURCHASE ORDER SCHEDULE AND PURCHASE AGREEMENT PRICE BREAK LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Assessable Value	The deemed price at which a product is valued, by a tax authority, for tax calculation. The same product can have more than one assessable value, as given by different tax authorities.
Back to Back Indicator	Indicates that the material to be received is being specifically purchased to fulfill a sales order from a customer
Descriptive Flexfield Attribute 1-20	A character attribute available to customers to extend attributes captured on a purchase order.
Descriptive Flexfield Attribute Category	Category of the descriptive flexfield
Descriptive Flexfield Attribute Number 1-10	A number attribute available to customers to extend attributes captured on a purchase order.
Backing Requisition Exists	Indicates whether a requisition reference exists on any distribution associated with the purchase order schedule.
Carrier	A company that transports goods from one point to another by land, sea, or air.
Change in Document Schedule Ordered Amount	Change in schedule ordered amount in document currency.
Change in Document Schedule Total Amount	Change in schedule total amount in document currency. The schedule total amount is the sum of ordered amount and total exclusive tax amount for the schedule.
Change in Functional Schedule Ordered Amount	Change in schedule ordered amount in functional currency.
Change in Functional Schedule Total Amount	Change in schedule total amount in functional currency. The schedule total amount is the sum of ordered amount and total exclusive tax amount for the schedule.
Country of Origin	The country from which goods are exported.
Destination Type	Indicator to show whether the item should be charged to an inventory or should be expensed.
Document Schedule Ordered Amount	Schedule ordered amount in document currency.
Document Schedule Total Amount	The sum of ordered amount and total exclusive tax amount for the schedule in document currency.
Entity Change Type	Type of change made to the line, schedule or distribution. Whether it was added, changed or canceled.
Functional Schedule Ordered Amount	Schedule ordered amount in functional currency.
Functional Schedule Total Amount	The sum of ordered amount and total exclusive tax amount for the schedule in functional currency.

Import Source	Indicates the source application from which the transaction was imported
Intended Use	A tax classification based on the purpose for which a product is used.
Invoice Match Option	The option that determines whether invoices for the purchase order schedule should match to the purchase order or the receipt.
Match Approval Level	The level determines how purchase order, receipt, inspection, and invoice quantities should match before the corresponding invoice can be paid.
Mode of Transport	Mode of Transport distinguishes substantially different ways to perform transport. E.g. Air, Ground.
Price Change	Change in the price on a document line.
Product Category	A type of product fiscal classification used to classify products.
Product Fiscal Classification	A classification used by a tax authority to categorize a product for a tax. There could be more than one by tax. For example, for Brazil two classifications are required.
Product Type	The nature or the product involved in a taxable transaction. For example, goods or services.
Promised Delivery Date Change in Days	Days by which the promised delivery date has changed.
Promised Ship Date Change in Days	Days by which the promised ship date has changed.
Requested Delivery Date Change in Days	Days by which the requested delivery date has changed.
Requested Ship Date Change in Days	Days by which the requested ship date has changed.
Service Level	Priority of transportation that affects how quickly the goods are transported.
Schedule Total Amount Change Percent	Percentage by which the schedule total amount has changed.
Ship-to Location	The name of the location where the supplier should ship the goods.
Ship-to Location Modified	Indicates whether the ship-to location is modified on the change order or not.
Ship-to Organization	The name of the inventory organization where the supplier should ship the goods.
Shipping Method Modified	Indicates if any component of the shipping method (Carrier, Mode of Transport, Service Level) have been modified.
Tax Classification	A grouping of taxes for reporting and processing purposes.
Transaction Business Category	A business classification used to identify and categorize an external transaction for tax purposes.
User Defined Fiscal Classification	A classification for any tax requirement that you cannot define using the existing fiscal classification types.

TABLE 7. PURCHASE ORDER DISTRIBUTION LEVEL ATTRIBUTES

ATTRIBUTE	NOTES

Award Contract	The display name of the award contract
Award Owning Business Unit	The business unit that manages and owns the grant award
Award Purpose	Description of an activity that the award is funding. For example, research or clinical trial
Award Type	Classification of an award, for example, federal grant or private grant
Descriptive Flexfield Attribute 1-20	A character attribute available to customers to extend attributes captured on a purchase order.
Descriptive Flexfield Attribute Category	Category of the descriptive flexfield
Descriptive Flexfield Attribute Number 1-10	A number attribute available to customers to extend attributes captured on a purchase order.
Backing Requisition Exists	Indicates whether a requisition reference exists on the distribution.
Change in Document Distribution Ordered Amount	Change in distribution ordered amount in document currency.
Change in Document Distribution Total Amount	Change in distribution total amount in document currency. The distribution total amount is the sum of ordered amount and total exclusive tax amount for the distribution.
Change in Functional Distribution Ordered Amount	Change in distribution ordered amount in functional currency.
Change in Functional Distribution Total Amount	Change in distribution total amount in functional currency. The distribution total amount is the sum of ordered amount and total exclusive tax amount for the distribution.
Cost Center	An organizational element of a chart of accounts typically used for assigning revenues and expenses.
Cost Center Manager	The manager of a unit within an organization to which costs may be charged for accounting purposes
Cost Center Manager User Name	The user name of the manager of a unit within an organization to which costs may be charged for accounting purposes
Deliver-to Location	The final location where you deliver goods previously received from a supplier.
Destination Charge Account Modified	Indicates whether the destination charge account is modified on the change order or not.
Distribution Total Amount Change Percent	Percentage by which the distribution total amount has changed.
Document Distribution Ordered Amount	Distribution ordered amount in document currency.
Document Distribution Total Amount	The sum of ordered amount and total exclusive tax amount for the distribution in document currency.
Entity Change Type	Type of change made to the line, schedule or distribution. Whether it was added, changed or canceled.
Expenditure Organization	The organization that incurred the cost on the expenditure item.
Expenditure Type	A classification of cost that you assign to each expenditure item. Expenditure types are grouped into cost groups and revenue groups.
Functional Distribution Ordered Amount	Distribution ordered amount in functional currency.
Functional Distribution Total Amount	The sum of ordered amount and total exclusive tax amount for the distribution in functional currency.
Funding Source	Display name of the source of the funding that is associated to the award
Funds Status	Status of funds check or funds reservation validation result

Management Segment	A segment in the chart of accounts that represents an entity with management responsibility, such as the department, cost center, or line of business. Used for management reporting.
Natural Account	The segment that determines whether an account is an asset, liability, owners' equity, revenue, or expense account
PO Charge Account Modified	Indicates whether the PO charge account is modified on the change order or not.
Primary Balancing Segment Value	An accounting flexfield segment used to automatically balance all journal entries for each value of this segment.
Primary Ledger	The primary ledger associated with the purchasing business unit
Principal Investigator	Person responsible for the performance of the award
Project	A finite endeavor, with specific start and finish dates, undertaken to create a product or provide a service.
Project Attributes Modified	Indicates whether project information is modified on the change order or not.
Project Manager	Owner of the project specified on the purchase order distribution.
Project Owning Business Unit	Display name of the business unit that owns the project
Project Type	An implementation entity that defines basic project options.
Projects Billable	Indicates whether the project is billable or not.
Projects Capitalizable	Indicates whether the project is capitalizable or not.
Projects Reserved Attribute 1-10	Attribute used by Oracle Fusion Projects to extend purchase order distribution.
Projects User Defined Attribute 1-10	Reserved for user-definable project information.
Requester Level 1 -10 Supervisor	Supervisor in the supervisory hierarchy chain of the requester. Requester Level 1 Supervisor being the topmost worker on the supervisory chain
Requester Level 1 -10 Supervisor User Name	User name of the top 10 worker in the supervisory hierarchy of the requester. Requester Level 1 Supervisor User Name being the user name of the topmost worker
Requester Modified	Indicates whether the requester is modified on the change order or not.
Requester Position	The position of the requester specified on the purchase order.
Requester Username	The user name of the requester.
Subinventory	Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom or receiving dock.
Task	The name assigned to a task. A task is subdivision of project work. Each project can have a set of top tasks and a hierarchy of subtasks below each top task.
Work Type	The name of a classification of the work associated with a task

TABLE 8. REQUISITION LINE LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Amount Exceeded Percent	Percentage by which the amount has changed on a purchase order line compared to the requisition line amount.
Negotiation Required	Indicates whether negotiation is required for the requested item or not.

Order Functional Currency	The three-letter ISO code associated with the functional currency of the document.
PO Deliver-to Person Username	The user name of the requester specified on the purchase order distribution associated with the requisition line.
PO Ordered Amount in Document Currency	The purchase order amount associated with the requisition line in document currency.
PO Ordered Amount in Functional Currency	The purchase order amount associated with the requisition line in functional currency.
PO Tax Exclusive Amount in Document Currency	Ordered amount exclusive of all the transaction taxes involved in document currency.
PO Total Amount in Document Currency	The purchase order total amount associated with the requisition line in document currency. The total amount is the sum of ordered amount and total exclusive tax amount for the document.
PO Total Amount in Functional Currency	The purchase order total amount associated with the requisition line in functional currency. The total amount is the sum of ordered amount and total exclusive tax amount for the document.
Preparer Position	Position of the preparer of the requisition associated with the purchase order.
Preparer Username	The user name of the preparer of the requisition line.
Requisition Deliver-to Person Username	The user name of the requester of the requisition line.
Requisition Functional Currency	Functional currency of the requisition line.
Requisition Line Amount in Document Currency	Requisition line amount without tax in document currency of the requisition line.
Requisition Line Amount in Functional Currency	Requisition line amount without tax in functional currency of the requisition line.
Requisition Line Amount with Tax in Document Currency	Requisition line amount with tax in document currency of the requisition line.
Requisition Line Amount with Tax in Functional Currency	Requisition line amount with tax in functional currency of the requisition line.
Requisition Line Amount without Tax in Document Currency	Requisition line amount without tax in document currency of the requisition line.
Requisition Line Amount without Tax in Functional Currency	Requisition line amount without tax in functional currency of the requisition line.
Smart Form	Name of a special request form.

7. Supplier Registration Approvals Setup

To manage approval rules for supplier registrations, access “Manage Supplier Registration Approvals” tasks from the Functional Setup Manager task list under Define Approval Management for Procurement.

There are two registration approval tasks representing the distinct registration flows:

- Manage Supplier Registration Approvals
  - Used to maintain approval routing rules for registrations submitted by external users of companies interested in becoming a supplier

- Manage Internal Supplier Registration Approvals
  - Maintains approval routing rules for registrations submitted by internal users on behalf of companies interested in becoming a supplier.

The following figure depicts the seeded stages and routing sequence for supplier registration approvals

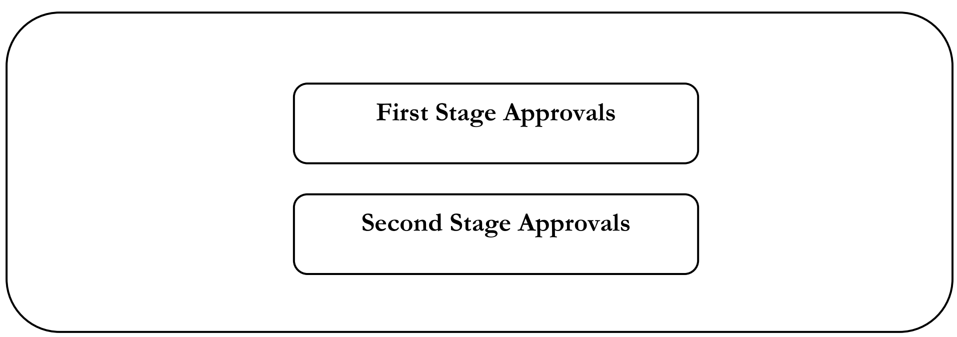

Figure 38: Seeded Stages for Supplier Registration Approvals in Oracle Fusion Supplier Portal

Approval rules configured in the seeded stages are executed in the following sequence:

1. First Stage Approvals
2. Second Stage Approvals

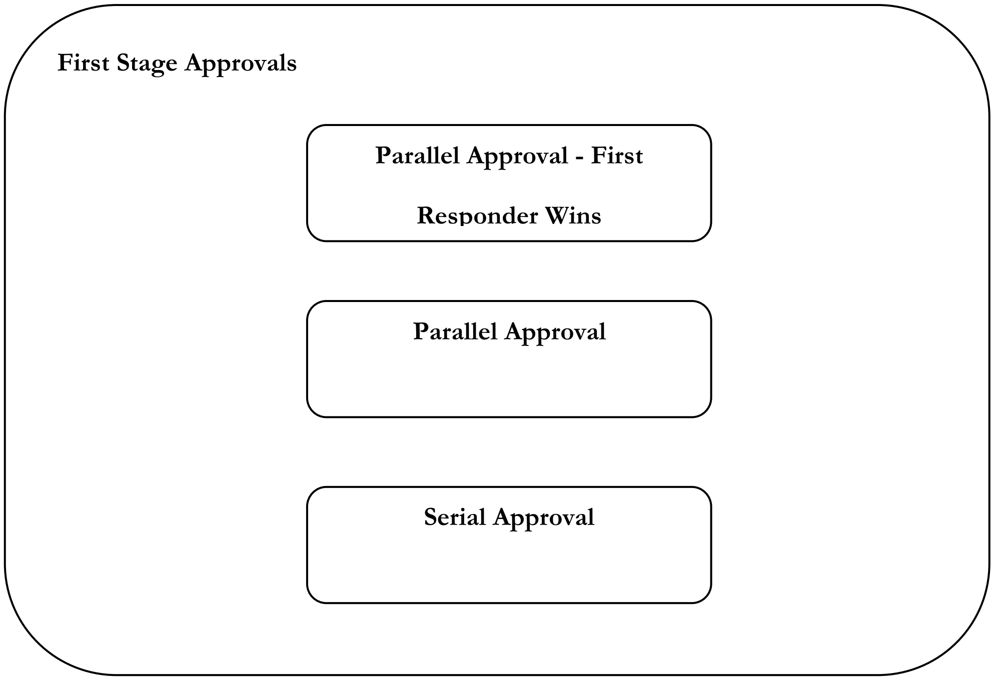

Figure 39: Seeded Supplier Registration Participants in First Stage Approvals

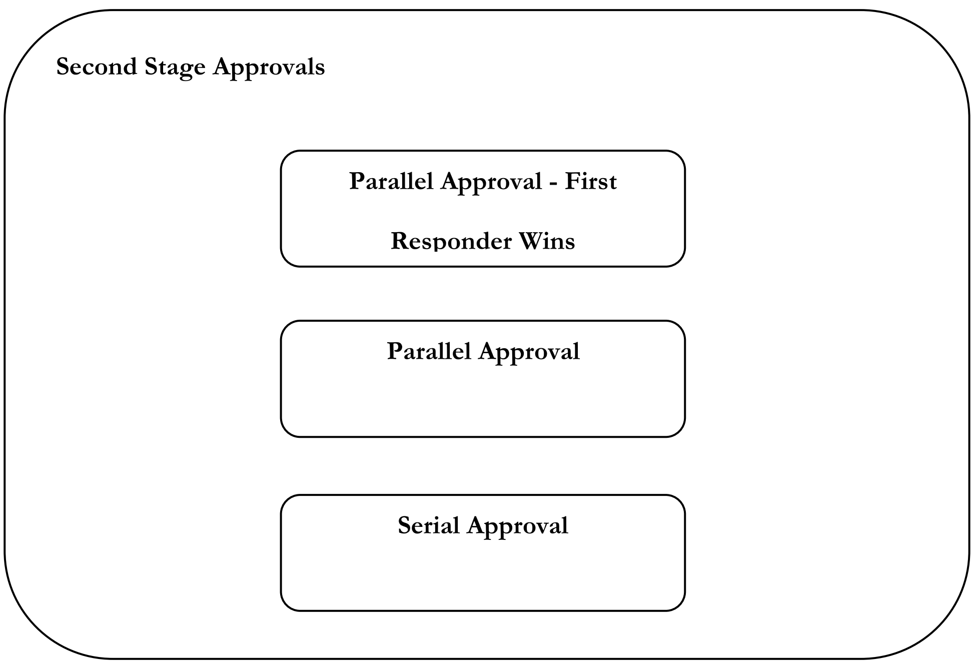

Figure 40: Seeded Supplier Registration Participants in Second Stage Approvals

Approvals are completed in a two-stage concept that gives you flexibility in sequencing the approvers required to review supplier registration requests.

Within each stage, there are three seeded participants. You do not need to use all of the seeded stages and participants. You can disable unused participants using the disable button for the unused participant on the Manage Approvals Task page.

1. First Stage Approvals
    a. Seed Participants
        i. Parallel Approval First Responder Wins
            - All identified approvers receive a notification for approval in parallel. The first responder to approve or reject the request defines the outcome of all remaining approvers.
        ii. Parallel Approval
            - All identified approvers receive a notification for approval in parallel. Approval is required from all approvers.
        iii. Serial Approval
            - Approvals are routed in serial. The approval is completed sequentially from approver to approver.

2. Second Stage Approvals
    a. Parallel Approval First Responder Wins
        - All identified approvers receive a notification for approval in parallel. The first responder to approve or reject the request defines the outcome of all remaining approvers.
    b. Parallel Approval
        - All identified approvers receive a notification for approval in parallel. Approval is required from all approvers.
    c. Serial Approval
        - Approvals are routed in Serial. The approval is completed sequentially from approver to approver.

You do not need to use all of the seeded stages and participant. If you do not need to use any of the seeded participants, you will need to disable the participant from the Manage Supplier Registration Approvals page.

Approval rules are seeded in the first stage participant: Parallel Approval First Responder Wins. The seeded approval rules route registration requests based on the business relationship assigned to the registration. Registration requests with prospective relationship are routed to the Supplier

Administrators of a Procurement BU, and registration requests with spend authorized relationship are routed to the Supplier Managers of a Procurement BU for approvals. You can modify or delete the seeded rules.

Out of the box, Supplier Administrators of BU and Supplier Managers of BU routing groups are available for the supplier registration tasks. These routing groups route registration requests for approval to Supplier Administrators or Supplier Managers of a Procurement BU who are users set up as procurement agents who can Manage Suppliers for that Procurement BU. These routing groups can be used in any user defined approval rule. When configuring the approval action details, select Route Using as 'Single Approver', and User Type as 'Supplier Administrators of BU' or 'Supplier Managers of BU' as needed.

TABLE 9. REGISTRATION HEADER LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Company	The organization identified on the supplier registration request interested in becoming a supplier for the buying organization.
Address Entered	Indicates if an address was provided on the supplier registration request.
Bank Account Entered	Indicates if a bank account was provided on the supplier registration request.
Business Classification Entered	Indicates if a business classification was provided on the supplier registration request.
Contact Entered	Indicates if a contact was provided on the supplier registration request.
Products and Services Category Entered	Indicates if a products and services category was provided on the supplier registration request.
D-U-N-S Number	Unique number provided to an organization by Dun and Bradstreet.
Tax Country	Country code associated with the company's tax identifiers; tax registration number or taxpayer ID.
Tax Country Name	Country name associated with the company's tax identifiers; tax registration number or taxpayer ID.
Tax Registration Number	The company's tax identifier for a specific tax registration.
Tax Organization Type	The categorization used for tax reporting purposes, for example; corporation, foreign corporation, individual, or partnership.
Taxpayer ID	The company's primary supplier tax identifier issued by federal tax authorities.

Inviting Procurement BU	The business unit responsible for reviewing and approving the supplier registration request.
Inviting Procurement BU Name	The name of the business unit responsible for reviewing and approving the supplier registration request.
Approval Status	Indicates the current status of a supplier registration request.
Requester	The individual that submitted the supplier registration request.
Source	Identifies if the supplier registration request was created by the potential supplier company or by an internal user on behalf of the company.
DFFs of input type as Text	User defined attributes which capture additional information on a supplier registration request.
Business Relationship	The relationship intended for business between the supplier and the buying organization.
Business Classification Not Applicable	Indicates if suppliers have business classifications applicable for them.
Request Reason	The reason provided by internal user for raising the registration request on behalf of the supplier.
Supplier Type	Categorization of registering suppliers.

TABLE 10. REGISTRATION CONTACT LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Contact user account request	Indicates if a contact user account is requested.
DFFs of input type as Text	User defined attributes which capture additional contact related information on a supplier registration request.

TABLE 11. REGISTRATION ADDRESS LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Address Country	The country code for a supplier address.
Address Country Name	The country for a supplier address.
Remit To Address Purpose	Indicates that invoice payments can be processed at the supplier address.
RFQ or Bidding Address Purpose	Indicates that negotiations and bids can be communicated to the supplier address.
Ordering Address Purpose	Indicates that purchasing documents can be communicated to the supplier

	address.
City	The city for a supplier address.
County	The county for a supplier address.
Postal Code	The postal code or zip code for a supplier address.
Province	The province for a supplier address.
State	The state for a supplier address.
DFFs of input type as Text	User defined attributes which capture additional address related information on a supplier registration request.

TABLE 12. REGISTRATION BUSINESS CLASSIFICATION LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Classification	The business classification code used to categorize a supplier, for example; minority owned, small business, or veteran owned.
Classification Name	The name of the business classification used to categorize a supplier, for example; minority owned, small business, or veteran owned.
Certifying Agency	The agency code that certifies the eligibility of a supplier for a specific business classification.
Certifying Agency Name	The name of the agency that certifies the eligibility of a supplier for a specific business classification.
Other Certifying Agency	The user provided certifying agency that was not available in the list of certifying agencies.
Minority Type	The minority classification captured on minority owned business classifications.

TABLE 13. REGISTRATION BANK ACCOUNT LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Bank	The code identifying the bank for which the company’s bank account is defined.
Bank Name	The bank for which the company’s bank account is defined.
Bank Number	The number of the bank for which the company’s bank account is defined.
Bank Account Country	The country code for the bank account.

Bank Account Country Name	The country for the bank account.
Branch	The branch code of the bank for which the company’s bank account is defined.
Branch Name	The branch of the bank for which the company’s bank account is defined.
Branch Number	The branch number of the bank for which the company’s bank account is defined.
Currency	The currency code for the bank account.
Currency Name	The currency of the bank account.

TABLE 14. REGISTRATION PRODUCT AND SERVICES CATEGORY LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Category	The products and services category code indicating what the company supplies.
Category Name	The products and services category indicating what the company supplies.

8. Supplier Spend Authorization Approvals Setup

Buying organizations enter into a business relationship with suppliers for various requirements. Some suppliers are only required to participate in transactions with no financial impact such as participate in sourcing and qualification processes while others are available for transactions involving financial spend such as purchasing and invoicing. The Fusion Supplier Model product supports these aspects of a supplier lifecycle. A prospective supplier is one with whom the buying organization enters into a business relationship with no financial impact while spend authorized suppliers as the name suggests are available for transactions with financial spend. Buying organizations may use the promotion feature to progress a prospective supplier to become spend authorized.

The promotion process generates an approval request that sends notifications to a set of approvers who can then review the supplier details and determine if the supplier is ready for financial spend commitments. The approval process is configurable where various approval rules, based on specific business cases, are created to determine the set of approvers to receive the approval notification for their action.

To manage approval rules for supplier spend authorization requests, access “Manage Supplier Spend Authorization Approvals” task from the Functional Setup Manager task lists under Define Approval Management for Procurement.

The following figure depicts the seeded stages and routing sequence for supplier spend authorization approvals

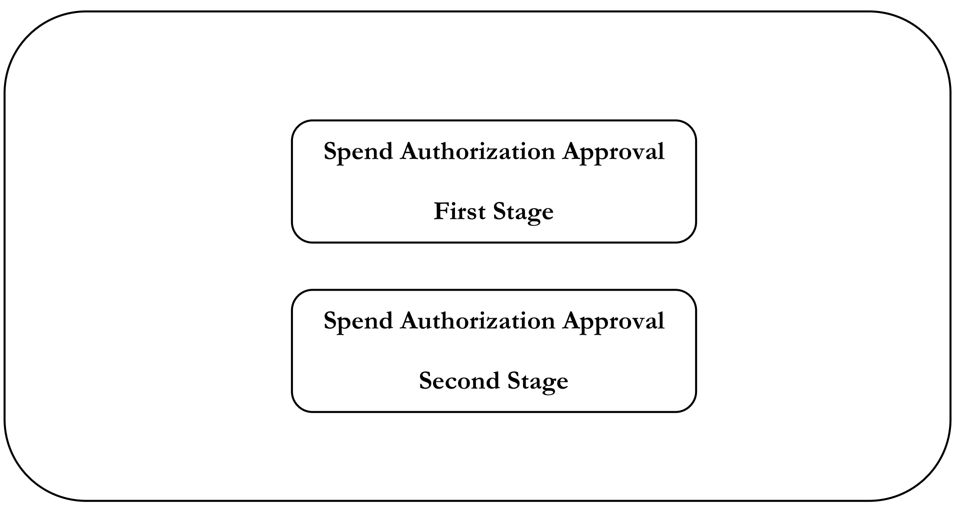

Figure 41: Seeded Stages for Supplier Spend Authorization Approvals in Oracle Fusion Supplier Portal

Approval rules configured in the seeded stages are executed in the following sequence:

1. Spend Authorization Approval First Stage

2. Spend Authorization Approval Second Stage

Similar to supplier registration requests, approvals for spend authorization requests for suppliers are also completed in a two-stage concept to give you flexibility in sequencing the approvers required to review supplier spend authorization requests.

Within each stage, there is one participant to determine routing behavior of the requests.

3. First Stage Approvals
    a. Seed Participants
        iv. Parallel Approval First Responder Wins
            - All identified approvers receive a notification for approval in parallel. The first responder to approve or reject the request defines the outcome of all remaining approvers.
4. Second Stage Approvals
        d. Parallel Approval First Responder Wins
            - All identified approvers receive a notification for approval in parallel. The first responder to approve or reject the request defines the outcome of all remaining approvers.

You do not need to use all of the seeded stages and participants. If you do not need to use a seeded participant, you must disable the participant from the Manage Supplier Spend Authorization Approvals page.

An approval rule is seeded in the Spend Authorization First Stage participant: Parallel Approval First Responder Wins. The seeded rule routes all spend authorization requests to the supplier managers of a Procurement BU. The supplier managers of a Procurement BU are procurement agents of a Procurement BU who are granted the access to the Manage Suppliers action through the Manage Procurement Agents setup. You can modify or delete the seeded rule.

The Supplier managers routing group, which routes approval requests to all the supplier managers for a given Procurement BU, is available out of the box for the supplier spend authorization approvals task. It can be used in any user defined approval rule. When configuring the approval action details select Route Using as 'Single Approver', and User Type as 'Supplier Managers for BU'.

The tables below lists the attributes that are available for you to create approval routing rules for spend authorization requests

TABLE 15. SPEND AUTHORIZATION REQUEST HEADER LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION

Supplier	Name of the organization which is being promoted for spend transactions.
Supplier Type	Type of the supplier which is being promoted for spend transactions.
Business Relationship	The relationship intended for business between the supplier and the buying organization.
Spend Authorization Review Status	Approval review status of the spend authorization requests.
Tax Organization Type	The categorization used for tax reporting purposes, for example; corporation, foreign corporation, individual, or partnership.
Tax Country	Country code associated with the company's tax identifiers; tax registration number or taxpayer ID.
Taxpayer ID	The company's primary supplier tax identifier issued by federal tax authorities.
Tax Registration Number	The company's tax identifier for a specific tax registration.
D-U-N-S Number	Unique number provided to an organization by Dun and Bradstreet.
Requested By	User who initiated the promotion process for the supplier.
Spend Authorization Request Source	Source of origin for the spend authorization requests for a supplier.
Procurement BU	The name of the business unit with which supplier is associated for business.
Has Sites	Indicates if the spend authorization request includes supplier sites to be created.

TABLE 16. SPEND AUTHORIZATION REQUEST SITE LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Site Procurement BU	Procurement Business Unit identifier for supplier site.
Site	The entity that models how the buying organization conducts business with the supplier.
Purchasing Site Purpose	Indicates site purpose of Purchasing.
Pay Site Purpose	Indicates site purpose of Primary Pay.
RFQ only Site Purpose	Indicates site purpose of RFQ only.
Address Country	The country for a supplier address.
Address Country Code	The country code for a supplier address.

9. Sourcing Approvals Setup

Oracle Fusion Sourcing has provided Stage and Participants out of the box to enable customers to easily organize and author approval routing rules for negotiation and award approval tasks. From Oracle Fusion Setup Manager, select the following:

1. Manage Supplier Negotiation Approvals
   - To create and maintain approval rules for negotiation approval flow.
2. Manage Supplier Negotiation Award Approvals
   - To create and maintain approval rules for award negotiation approval flow.

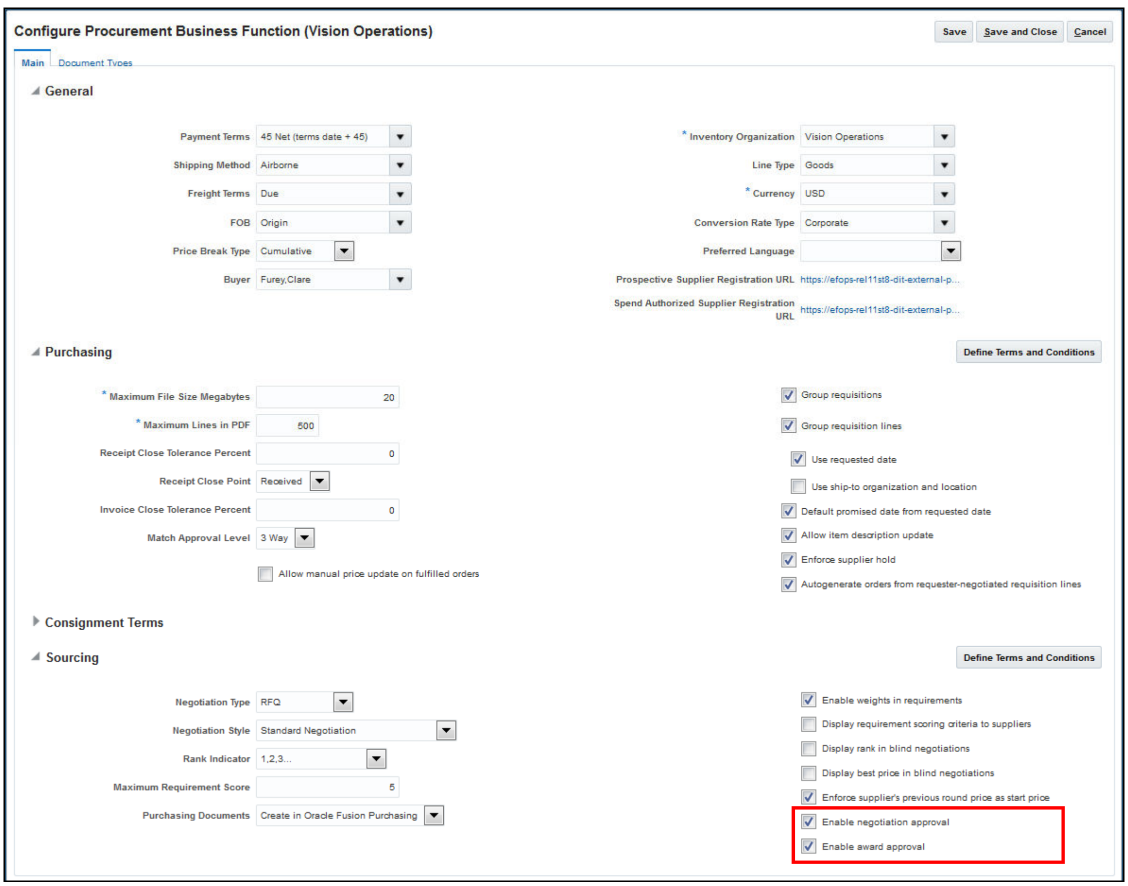

Figure 42: Configure Procurement Business Function page

Negotiation and Award Approvals can be enabled from Configure Procurement Business Function page.

The following figure depicts the seeded stages and routing sequence for Negotiation and Award approval flow.

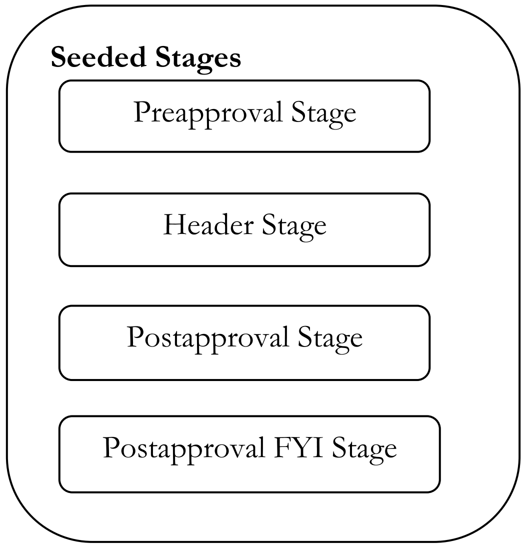

Figure 43: Seeded Stages for Negotiation Approvals and Award Approvals tasks.

Approval rules configured in the seeded stages are executed in the following sequence:

1. Preapproval Stage
2. Header Stage
3. Postapproval Stage
4. Postapproval FYI Stage

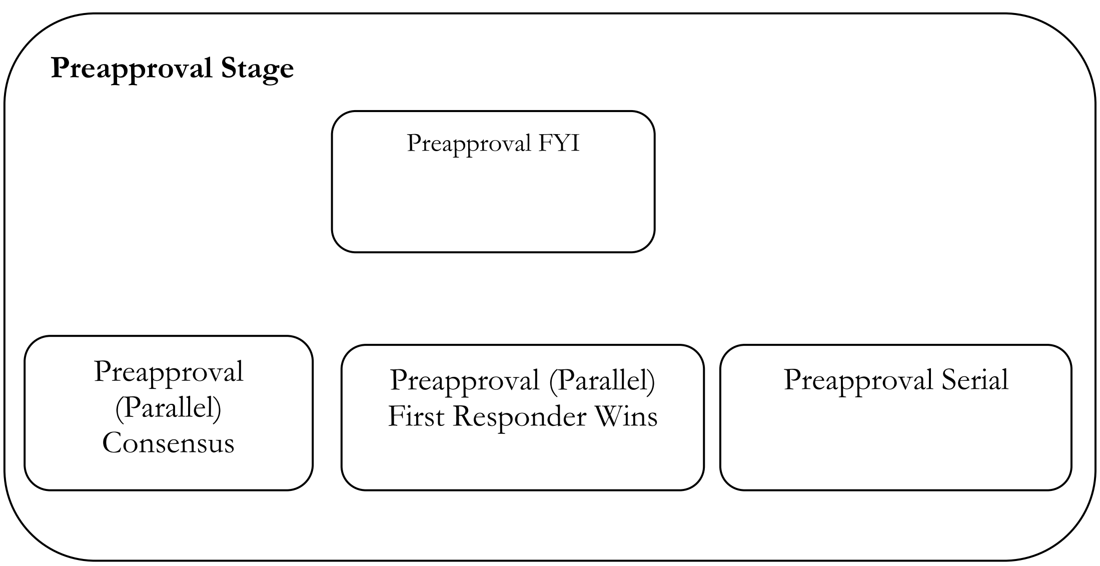

Figure 44: Seeded Participants in Preapproval Stage for Negotiation and Award Approval

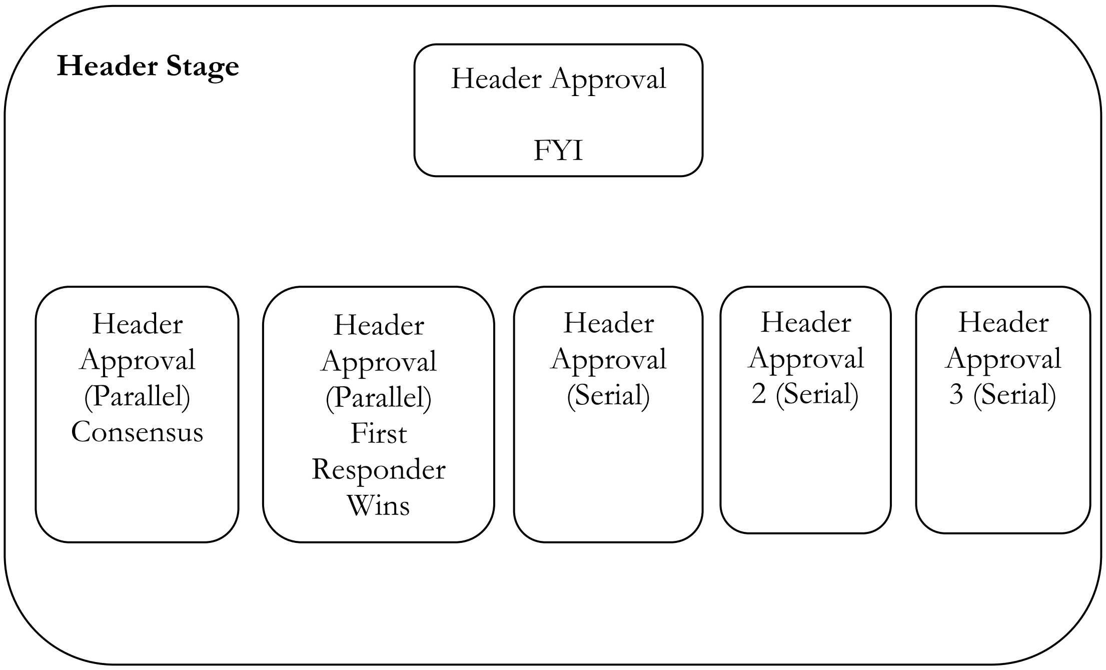

Figure 45: Seeded Participants in Header Stage for Negotiation and Award Approvals

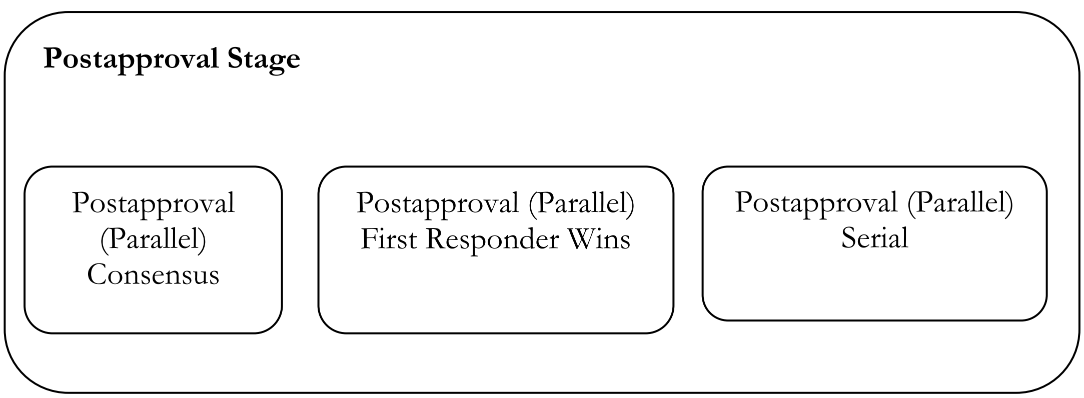

Figure 46: Seeded Participants in Postapproval Stage for Negotiation and Award Approvals

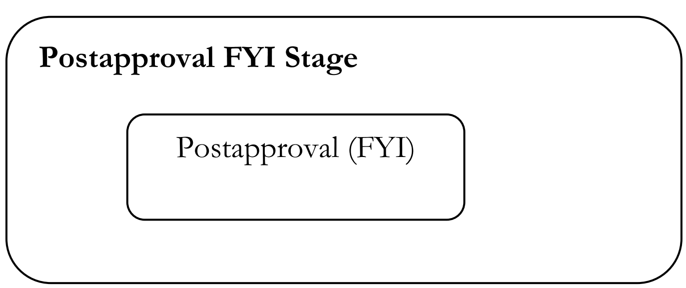

Figure 49: Seeded Participants in Postapproval (FYI) Stage for Negotiation and Award Approvals

There are four seeded stages for negotiation and award approval flows respectively and within each stage there are seeded participant types. The non FYI participant types are seeded as rule based, which allows picking the list builder (Supervisory, Position, Job Level, and Approval Groups) that is applicable for any organization.

1. Preapproval Stage
    a. This stage is used if approvals are required before routing to other stages and to different approvers.
    b. Seeded Participants
        i. Preapproval (FYI) - The buyer for negotiation will receive a negotiation FYI notification. A single person will be notified using this participant type. The rule to notify the buyer is available out of the box
        ii. Preapproval (Parallel) Consensus - All identified approvers receive a notification for approval in parallel. Approval is required from all approvers.
        iii. Preapproval (Parallel) First Responder Wins - Approvals are routed in parallel for this participant type. This participant type is more commonly used in conjunction with approval groups. The first responder to provide approve or reject action will represent the outcome of all remaining approvers.
        iv. Preapproval Serial - Approvals are routed in Serial. Approval process is completed sequentially from approver to approver.

2. Header Stage
    a. Seeded Participants
        i. Header Approval (FYI) – User can configure rule to send FYI notifications to approvers.
        ii. Header Approval (Parallel) Consensus- Approvals are routed in parallel for this participant type. This participant type is more commonly used in conjunction with approval groups. This participant type requires approval from all approvers.

iii. Header Approval (Parallel) First Responder Wins - All identified approvers receive a notification for approval in parallel. The first responder to approve or reject the request defines the outcome of all remaining approvers.

iv. Header Approval (Serial) - Approvals will be routed in serial. This participant is generally used for supervisory or position hierarchy based routing. The approvers returned based on all rules that apply in a serial participant will be notified sequentially from approver to approver.

v. Header Approval 2 (Serial) - Approvals will be routed in serial. If your organization has a requirement to have a second hierarchy based routing in parallel to the Header Approval (Serial) participant, rules should be maintained in this participant.

vi. Header Approval 3 (Serial) - Approval will be routed in serial. Similar to Header Approval 2 (Serial), this participant allows another hierarchy based routing in parallel to Header Approval (Serial) and Header Approval 2 (Serial) participants.

3. Postapproval Stage
   a) This is used to route for Postapprovals.
   b) Seeded Participants
      i. Postapproval (Parallel) Consensus - Approvals are routed in parallel for this participant. This participant is more commonly used in conjunction with approval groups. This participant requires approval from all approvers.
      ii. Postapproval (Parallel) First Responder Wins - Approvals are routed in parallel for this participant. This participant is more commonly used in conjunction with approval groups. The first responder to approve or reject sets the outcome for all remaining approvers.
      iii. Postapproval (Serial) **-** Approvals are routed in serial for this participant.

4. Postapproval (FYI) Stage
   a) This stage is not available in the BPM Worklist Administration page for customization.
   b) Seeded Participant
      i. Postapproval (FYI) - The Postapproval FYI stage is created to send the negotiation owner, FYI notification for negotiation approvals outcome.

You do not need to use all of the seeded stages and participant. If you do not need to use any of the seeded participants, you will need to disable the participant from “Manage Supplier Negotiation Approvals” or “Manage Supplier Negotiation Award Approvals pages.

TABLE 17. NEGOTIATION APPROVAL HEADER LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Procurement BU	The business unit that manages and owns the purchasing document.
Negotiation Type	Type of negotiation such as RFQ, Auction or RFI
Approval Amount	Negotiation approval amount for negotiation approval flow.
Negotiation Currency	The currency code of the functional currency of negotiation.
Header Attribute 1 – 20	Text typed descriptive flex field attribute.
Header Attribute Number 1 - 10	Number typed descriptive flex fields attribute.
Header Attribute Category	Text Category typed descriptive flex field attribute.
Two Stage Evaluation	Two Stage Negotiation flag is set to Yes or No.
Negotiation Outcome	Selected outcome for the negotiation.
Payment Terms	Terms used to schedule payments and to calculate due dates, discount dates, and discount amounts for invoices matched against the purchase order.
Clauses Changed from Contract Template	Indicates whether any clause has changed on the negotiation compared to the contract template in the terms library or not.
Contract Template Expired	Indicates whether the contract template on the negotiation has expired or not.
Contract Terms Exist	Indicates whether the negotiation has contract terms and conditions associated with it or not.
Standard Clause Exist	Indicates whether any standard clause exists or not.
Standard Clause Modified	Indicates whether any standard clause is modified or not.
Non-Standard Clause Modified	Indicates whether any nonstandard clause is modified or not.
Contract Deliverable Modified	Indicates whether any contract deliverable is modified or not.
Contract Terms Template	Name of the contract terms template applied on the negotiation. Precede The name of the contract terms template applied on the negotiation.
Non-Standard Clause Exist	Indicates whether any nonstandard clause exists or not.
Contract Deliverable Exists	Indicates whether a contract deliverable exists on the negotiation. Contract deliverables are commitments that must be fulfilled as part of negotiations and contract agreements.

TABLE 18. NEGOTIATION APPROVAL LINE LEVEL ATTRIBUTES

ATTRIBUTE	NOTES

Requisitioning BU	BU in which the requisition is created
Item	Item number
Description	Description of the item.
Line Type	A type to indicate whether a purchasing document line is for goods or services, as well as some default attributes associated with the line.
Category Name	The products and services category indicating what the company supplies.
UOM	A division of quantity defined as a standard of measurement or exchange.
Location	Location to which the request should be delivered
Current Price	Current price of the item.
Start Price	It refers to the highest price at which responding for a line can begin and all response price must be equal to or below the Start Price
Target Price	Target Price for the negotiation line item.
Backing Requisition Exists	Indicates whether backing requisition exists for the negotiation.
Line Attribute 1 - 20	Text typed descriptive flex field attribute.
Line Attribute Number 1 - 10	Number typed descriptive flex fields attribute.
Line Attribute Category	Text Category typed descriptive flex field attribute.
Procurement Category Hierarchy Level 1-10	Number of procurement category hierarchy level attribute.

TABLE 19. AWARD APPROVAL HEADER LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Award Amount	Indicates negotiation award amount.
Procurement BU	The business unit that manages and owns the purchasing document.
Negotiation Type	Indicates type of negotiation such as RFQ, Auction or RFI
Contract Terms Exist	Indicates whether negotiation has contract terms and conditions associated with it or not.
Negotiation Currency	The currency code of the functional currency of negotiation.
Payment Terms	Terms used to schedule payments and to calculate due dates, discount dates, and discount amounts for invoices matched against the purchase order.
Clauses Changed from Contract Template	Indicates whether any clause has changed on the negotiation compared to the contract template in the terms library or not.

Contract Template Expired	Indicates whether the contract template on the negotiation has expired or not.
Standard Clause Exists	Indicates whether any standard clause exists or not.
Non-Standard Clause Exist	Indicates whether any nonstandard clause exists or not.
Contract Deliverable Exist.	Indicates whether a contract deliverable exists on the negotiation. Contract deliverables are commitments that must be fulfilled as part of negotiations and contract agreements.
Standard Clause Modified	Indicates whether any standard clause is modified or not.
Non-Standard Clause Modified	Indicates whether any nonstandard clause is modified or not.
Contractual Deliverable Modified	Indicates whether any contract deliverable is modified or not.
Contract Terms Template	The name of the contract terms template applied on the negotiation.
Header Attribute 1 – 20	Text typed descriptive flex field attribute.
Header Attribute Number 1 – 10	Number typed descriptive flex fields attribute.
Header Attribute Category	Text Category typed descriptive flex field attribute.

TABLE 20. AWARD APPROVAL LINE LEVEL ATTRIBUTES

ATTRIBUTE	NOTES
Requisitioning BU	Business Unit in which the requisition is created
Item	Item number
Description	Description of the item.
Line Type	A type to indicate whether a purchasing document line is for goods or services, as well as some default attributes associated with the line.
Category Name	The products and services category indicating what the company supplies.
UOM	A division of quantity defined as a standard of measurement or exchange.
Location	Location to which the request should be delivered
Current Price	Current price of the item.
Start Price	It refers to the highest price at which responding for a line can begin and all response price must be equal to or below the Start Price
Target Price	Target Price for the negotiation line item.
Awarded Quantity	Indicates quantity being awarded.
Recommended Award Amount	Indicates system recommended award amount

Savings Amount	Indicates savings amount for the award line item.
Backing Requisition Exists	Indicates whether backing requisition exists for the negotiation.
Line Attribute 1 - 20	Text typed descriptive flex field attribute.
Line Attribute Number 1 - 10	Number typed descriptive flex fields attribute.
Line Attribute Category	Text Category typed descriptive flex field attribute.
Procurement Category Hierarchy Level 1-10	Number of procurement category hierarchy level attribute.

TABLE 21. AWARD APPROVAL AWARDED SUPPLIERS ATTRIBUTES

ATTRIBUTE	NOTES
Supplier Business Relationship	Indicates Business Relationship of Supplier with the buying organization as Prospective or Spend Authorized.
Supplier	Name of the supplier.
Supplier Site	Site from which the supplier will process the request.
Requirement Score	Score for requirement response.

Customers can define their own attributes and can use them for creating rules by accessing “Manage User Defined Attributes” page. Oracle Fusion Sourcing Approvals will support user defined attributes of type ‘Custom Function’ (for non-cloud implementations) and ‘Currency Conversion Function’. User defined attributes can be created in negotiation and award approval tasks.

10. Supplier Profile Change Request Approvals Setup

Supplier Qualification and Sourcing enable supplier contacts to respond to questionnaires that may include questions mapped to supplier profile attributes. A change management process is initiated if the responses to these questions deviate from existing profile information. The supplier profile updates are aggregated on a profile change request which is routed for approval. When the change request is approved, the responses provided by the supplier contact are saved to the profile.

To manage approval rules for these change requests, access the Manage Supplier Profile Change Approvals setup task from the Functional Setup Manager task list Define Approval Management for Procurement.

The setup task has a simple approval configuration containing a single stage. The stage has three seeded participants as depicted in the following chart. Out of the three, participant Parallel Approval First Responder Wins is enabled out of the box. The other two participants are disabled to simplify the approval process and approval history reporting that picks all the enabled participants in its report. You may enable or disable any participant as per use.

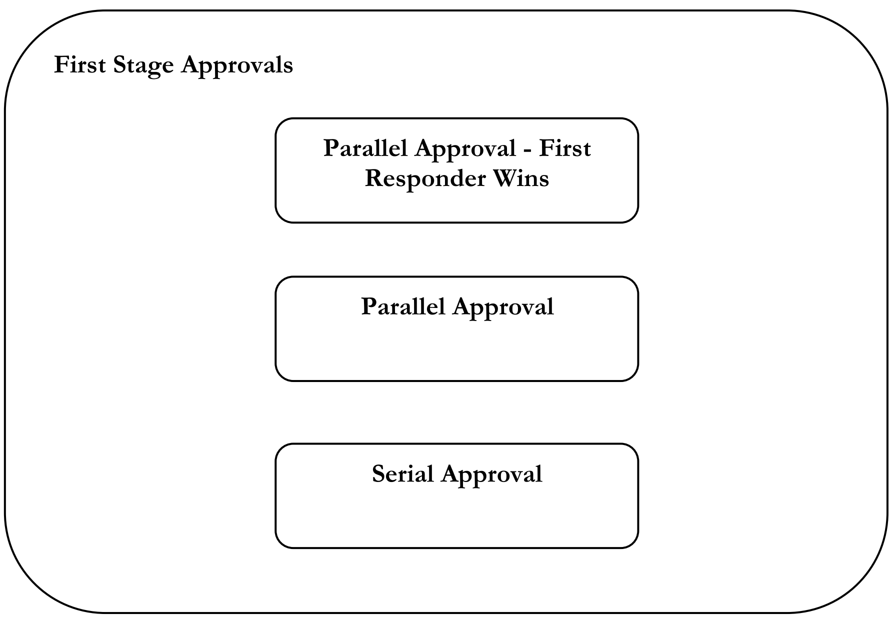

Figure 47: Seeded Supplier Profile Change Approvals Participants in First Stage Approvals

First Stage Approvals

a. Seeded Participants
   i. Parallel Approval First Responder Wins

- All identified approvers receive a notification for approval in parallel. The first responder that approves or rejects the request defines the outcome of all remaining approvers.

ii. Parallel Approval

- All identified approvers receive a notification for approval in parallel. Approval is required from all approvers.

iii. Serial Approval

- Approvals are routed in serial. The approval is completed sequentially from approver to approver.

An approval rule is seeded in the first stage participant: Parallel Approval First Responder Wins. The seeded approval rule routes profile change requests to the Supplier Administrators group which is a list of users that are set up as procurement agents with supplier administrator job role and can manage suppliers. Like supplier registration and spend authorization approval tasks, Supplier Administrators and Supplier Managers routing groups are available for the supplier profile change request approval task. These routing groups can be used in any user defined approval rule. When configuring the approval action details, select Route Using as 'Single Approver', and User Type as 'Supplier Administrators' or 'Supplier Managers' as needed.

CHANGE REQUEST APPROVAL ATTRIBUTES:

It is important to understand how the application will interpret change request approval rules that are configured for supplier profile attributes. When authoring an approval rule condition based on a supplier profile attribute value, the rule is considered true when:

- The value is changed to the specified value, or
- The value is present on the supplier profile.

In other words, even if the profile change request does not include the attribute value specified in the approval rule, but the value does not exist on the supplier's profile, the approval rule is still applied and the change request is routed.

To illustrate with an example, if a rule has a condition:

If Tax Organization Type is 'Individual', then the condition is evaluated as true when

- The change request is requesting Tax Organization Type to be changed to 'Individual', or
- Tax Organization Type is 'Individual' on the supplier's profile and the change request does not include any change to Tax Organization Type

The following tables list the attributes which are available to author approval routing rules. All the non-header level attributes mentioned can be updated through Supplier Qualification or Sourcing questionnaire responses.

TABLE 21. CHANGE REQUEST HEADER LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Business Relationship	The relationship intended for business between the supplier and the buying organization.
Change Request Source	Indicates the flow that initiated the change process – Supplier Qualification or Supplier Negotiation.
Requested By	User responsible for initiating the change request.
Supplier	Name of the organization for which the change request is created.
Supplier Number	Indicates the supplier's functional identifier in the supplier master.
Business Classifications Changed	Indicates if supplier's business classifications are changed.
Organization Details Changed	Indicates if supplier's organization details are changed.
Payment Methods Changed	Indicates if supplier's payment methods are changed.
Site Details Changed	Indicates if supplier's site details are changed.
Tax Identifiers Changed	Indicates if supplier's tax identifiers are changed.

TABLE 22. CHANGE REQUEST ORGANIZATION DETAILS LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Currency	Indicates supplier's primary currency code.
Current Fiscal Year Potential Revenue	Indicates the supplier's current fiscal year potential revenue.
D-U-N-S Number	Unique number provided to an organization by Dun and Bradstreet.
National Insurance Number	Number provided to supplier's organization for administration of national insurance or social security system.
Supplier Type	Categorization of the supplier for which the change request is created.
Tax Organization Type	The categorization used for tax reporting purposes, for example; corporation, foreign corporation, individual, or partnership.
Year Established	The year of establishment for the supplier's organization.
Year Incorporated	The year of incorporation for the supplier's organization.

TABLE 23. CHANGE REQUEST BUSINESS CLASSIFICATION LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Business Classification	The business classification used to categorize a supplier, for example; minority owned, small business, or veteran owned.
Certifying Agency	The agency that certifies the eligibility of a supplier for a specific business classification.
Other Certifying Agency	The user provided certifying agency that was not available in the list of certifying agencies.
Subclassification	The minority classification captured on minority owned business classifications.

TABLE 24. CHANGE REQUEST PAYMENT METHOD LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Supplier Payment Method	Mode of payment from customer to supplier at the supplier level.
Supplier Site	The entity that models how the buying organization conducts business with the supplier.
Supplier Site Payment Method	Mode of payment from customer to supplier for a specific supplier site.

TABLE 25. CHANGE REQUEST TAX IDENTIFIER LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Name Control	Name control assigned to the supplier by the government.
State Reportable	Indicates if the supplier is reportable to a state taxing authority.
Tax Reporting Name	Supplier’s legal name associated with its Tax Identification Number.

TABLE 26. CHANGE REQUEST SUPPLIER SITE LEVEL ATTRIBUTES

ATTRIBUTE	DESCRIPTION
Country of Origin	Supplier site’s country from where the items are supplied.
FOB	Indicates the Free on Board term defined for the supplier’s site.
Freight Terms	Indicates the freight terms defined for the supplier’s site.

Pay Date Basis	Indicates the basis on which invoices are selected for payment i.e. either scheduled payment discount date of the scheduled payment due date.
Payment Terms	Indicates the terms under which a supplier site completes a sale.
Shipping Method	Indicates the carriers and services used to ship items from the supplier’s site.
Supplier Site	The entity that models how the buying organization conducts business with the supplier.
Term Date Basis	Indicates the date used as payment terms start date.

11. Business Cases

11.1. Business Case 1: Acme Corp Approval Policies

This business case example illustrates concepts established so far. Acme Corp has agreements in place for most facilities and IT services. Any non-catalog service request for these must be routed to respective category managers for approval. In addition they have set up approvals using supervisory hierarchy based on requisition amount. The figure below illustrates Acme Corp's approval policies.

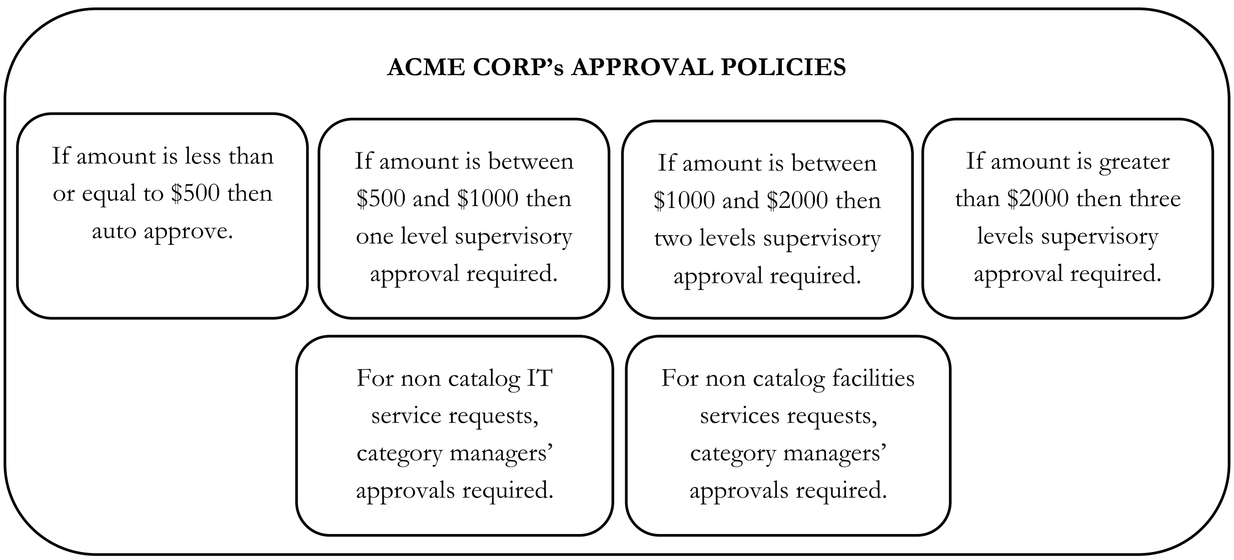

Figure 48: Acme Corp Approval Policies

Approach to set up requisition approvals for Acme Corp:

There are two categories for which additional requisition approvals need to come from the category managers hence create two approval groups:

- IT Service Category Approval Group
- Facilities Service Category Approval Group

Rules in Header Hierarchy Participant:

1. No approvals required (such as self-approved) for requisitions under or equal to 500 USD.
    - Rule setup:

      If Requisition Approval Amount less than or equal to 500 and

Functional Currency Code equals USD and

Requisitioning BU equals US Business Unit

Then

Action Type = Automatic

Set Outcome To = Approved

2. One level of supervisory approval required for requisitions more than 500 USD and less than or equal to 1000 USD.

    - Rule setup:

    If Requisition Approval Amount greater than 500 and

    Requisition Approval Amount less than or equal 1000 and

    Functional Currency Code equals USD and

    Requisitioning BU equals US Business Unit

    Then

    Action Type = Approval required

    Route Using = Supervisory hierarchy

    Approval Chain Of = Preparer

    Start With = Manager

    Number of Approval Levels = 1

    Top Worker in Hierarchy = Joe Smith (CEO)

3. Two levels of supervisory approval required for requisitions more than 1000 USD and less than or equal to 2000 USD.

    - Rule setup:

    If Requisition Approval Amount greater than 1000 and

    Requisition Approval Amount less than or equal 2000 and

    Functional Currency Code equals USD and

    Requisitioning BU equals US Business Unit

    Then

    Action Type = Approval required

    Route Using = Supervisory hierarchy

    Approval Chain Of = Preparer

Start With = Manager

Number of Approval Levels = 2

Top Worker in Hierarchy = Joe Smith (CEO)

4. Three levels of supervisory approval required for requisitions more than 2000 USD.

   - Rule setup:

   If Requisition Approval Amount greater than 2000 and

   Functional Currency Code equals USD and

   Requisitioning BU equals US Business Unit

   Then

   Action Type = Approval required

   Route Using = Supervisory hierarchy

   Approval Chain Of = Preparer

   Start With = Manager

   Number of Approval Levels = 3

   Top Worker in Hierarchy = Joe Smith (CEO)

Rules in Header Postapproval Stage – Header Consensus Participant:

1. If category on requisition line is IT service, then approvals from IT Service Category Approval Group required

   - Rule setup:

   If Category Name equals IT Service

   Then

   Action Type = Approval required

   Route Using = Approval group

   Approval Group = IT Service Category Approval Group

   Automatically approve if group returns no approvers = Unchecked

2. If category on requisition line is facilities service, then approvals from Facilities Service Category Approval Group required

   - Rule setup:

   If Category Name equals Facilities Service

   Then

Action Type = Approval required

Route Using = Approval group

Approval Group = Facilities Service Category Approval Group

Automatically approve if group returns no approvers = Unchecked

Disable all the other participants that are not in use.

11.2. Business Case 2: Beta Corp Approval Policies

Beta Corp's approval policies are driven by spending limits assigned to job levels. In this example, we will take a look at how spending limits can be modeled using as approval rules.

The following is the spending limit assigned to job levels:

JOB LEVEL	SPENDING LIMIT
1	500
2	2500
3	10000
4	Unlimited

Beta Corp also requires all requisitions to be approved by the preparer's manager, even if the preparer has the spending limit authority based on the requisition amount.

Rules in Header Hierarchy Participant:

1. Job Level 1 has spending limit of 500.
   - Rule setup:

     If Requisition Approval Amount less than or equal to 500 and

     Functional Currency Code equals USD

     Then

     Action Type = Approval required

     Route Using = Job level

     Approval Chain Of = Preparer

     Start With = Manager

Minimum Job Level = 1

Top Worker in Hierarchy = Joe Smith (CEO)

Include = All approvers

2. Job Level 2 has spending limit of 2500.

   - Rule setup:

     If Requisition Approval Amount greater than 500 and

     Requisition Approval Amount less than or equal to 2500

     Functional Currency Code equals USD

     Then

     Action Type = Approval required

     Route Using = Job level

     Approval Chain Of = Preparer

     Start With = Manager

     Minimum Job Level = 2

     Top Worker in Hierarchy = Joe Smith (CEO)

     Include = All approvers

3. Job Level 3 has spending limit of 10000.

   - Rule setup:

     If Requisition Approval Amount greater than 2500 and

     Requisition Approval Amount less than or equal to 10000

     Functional Currency Code equals USD

     Then

     Action Type = Approval required

     Route Using = Job level

     Approval Chain Of = Preparer

     Start With = Manager

     Minimum Job Level = 3

     Top Worker in Hierarchy = Joe Smith (CEO)

     Include = All approvers

4. Job Level 4 has unlimited spending limit.
    - Rule setup in AMX:

      If Requisition Approval Amount greater than 10000 and

        Functional Currency Code equals USD

      Then

        Action Type = Approval required

        Route Using = Job level

        Approval Chain Of = Preparer

        Start With = Manager

        Minimum Job Level = 4

        Top Worker in Hierarchy = Joe Smith (CEO)

        Include = All approvers

12. Document approvals in Oracle Fusion Procurement

Once document approvals are set up, users can review approvals generated based on these rules before the document is submitted. Users can also insert additional approvers or FYI participants if necessary. The approvals list is displayed in both tabular and graphical layouts.

Figure 49: Manage Approvals in Oracle Fusion Self Service Procurement

Upon submission of the document, approvals are triggered and the document will be routed to approvers or FYI participants for review and action through the BPM Worklist application. Approvers and FYI participants can also be notified through email. Submitters can view the approvals progress and status for submitted document. The application stores every action performed by a user on a document including who performed the action and when it was performed.

13. Approval Notifications

12.1 Worklist Task

Approvers can access Worklist tasks for documents pending their disposition with Fusion applications. The actions that the approver can perform on the Worklist tasks are:

- Reassign or Delegate tasks
  - The reassign action transfers the task to another user or group. The task will then be routed based on the specified user's hierarchy.
  - The delegate action allows another user to act on your behalf.
- Request information from the preparer, a previous approver or another user in the enterprise.
- Approve or Reject the task.
- Add attachments to the Worklist task.
- Add comments to the Worklist task.
- Insert additional approvers to the approval task.
- Modify a requisition if the approver has the privilege to edit requisitions pending his approval.

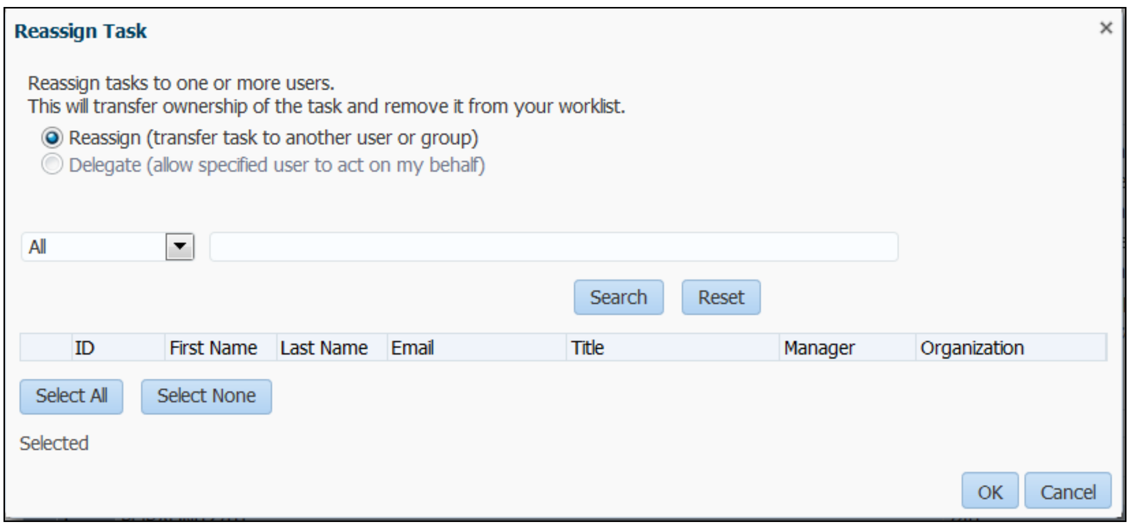

Figure 50: Reassign Approval Task

12.2 Email notifications

When an approval task is sent out as an email, it contains only key information including attachments to help the approver make his approval decision. If there are more than 25 lines in the requisition then the approver will have to log into the application to view the remaining lines. The approver can approve or reject via email response. To perform other actions, the approver should access the worklist task within Fusion applications.

Please note that email notifications are not supported by Oracle BPM for position hierarchy based routings.

12.3 Customizations

You can customize notifications to hide displayed fields or to render hidden by default fields, as well as add static text within the notification.

To customize a notification, the administrator must first generate the notification. From the online notification, click the Edit link that is displayed on the top left corner. This will launch the page composer for the notification page.

For requisition approval and purchasing document approval requests, the email notification can be customized separately from the online notifications as viewed in the Worklist application. However, you can customize both layouts when using page composer from the online notification. The section for email notification will come after the online notification section. For all other notifications, customizations would apply to both online and email versions.

13 Conclusion

Oracle Fusion Procurement provides a highly flexible and robust rule based engine to author your unique document approval routing policies and manage them effectively. It also provides full visibility of future and current approvers and a comprehensive audit trail of actions performed on a document is captured by the application.

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Oracle is committed to developing practices and products that help protect the environment

Setting up Document Approvals
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