

### Approval Rules: -

Requisition Line Status: Incomplete → Pending for approval → Approved.

PO → Pending for approval → Open / closed for receiving/ Closed for Invoice/ Close

Navigation: Procurement>Approval Management

The screenshot shows the Oracle Fusion Procurement Approval Management interface. On the left, there is a navigation tree under 'Functional Areas' with various nodes like 'Initial Users', 'Enterprise Profile', 'Legal Structures', etc., and 'Approval Management' is highlighted. The main area is titled 'Approval Management' and shows two tasks: 'Manage Requisition Approvals' and 'Manage Purchasing Document Approvals'. Below this, the 'Manage Requisition Approvals' page is displayed, showing a table of approval rules. The table has columns for Stage, Participant, Routing, Voting Regime, and Enabled. Key rows include 'Header Preapproval Stage' (Requester FYI, FYI, Consensus, Enabled), 'Header Stage' (Header First Responder Wins, Parallel, First Responder Wins), and 'Header Postapproval Stage' (Funds Override Approval, Parallel, Consensus).

Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FYI	FYI	Consensus	Enabled
Header Preapproval Stage	Preapproval Header Consensus	Parallel	First Responder Wins	
Header Preapproval Stage	Preapproval Header First Responder Wins	Parallel	First Responder Wins	
Header Preapproval Stage	Preapproval Header Hierarchy	Serial		
Header Stage	Header Hierarchy	Serial		
Header Stage	Header First Responder Wins	Parallel	First Responder Wins	
Header Stage	Header Consensus	Parallel	Consensus	
Header Stage	Header Hierarchy 2	Serial		
Header Stage	Header Hierarchy 3	Serial		
Header Postapproval Stage	Postapproval Header Consensus	Parallel	Consensus	
Header Postapproval Stage	Postapproval Header First Responder Wins	Parallel	First Responder Wins	
Header Postapproval Stage	Postapproval Header Hierarchy	Serial		
Header Postapproval Stage	Funds Override Approval	Parallel	Consensus	

**Stage Approval:** - We can configure approval rules for all the stages.

- **Pre-approval header stage**

This stage is used when approvals are required before routing to other stages and approvers. It typically has four participants.

- **Header stage**

This stage typically has five participants. Approvals granted at the header level are automatically granted to all of its lines.

- **Post-header stage**

This stage is used to route for post-approvals. It typically has three participants

**Routing:** -

FYI → for your information notification to the sender

**Serial:** A → B → C (approval group / approvers)

Approval goes to A, if he approves → then it will go to B → if he approves , it will go to C → if he approves, the requisition will approved status.

If any one rejects, it will return to the requester in rejected status.

**Parallel:** → two voting regimes are there for parallel routing.

**Voting Regime:** -

**First Responder wins**, : among A B C approvers, if any approver approves automatically the requisition will approves.

If any one approves, then approval notification will be withdrawn from other two person.

**Consensus:** For example A B C Users are there, All A, B, C approvers has to approve it. Everyone should approve it.

**Participants:** -

**Serial:** if it is serial Header hierarchy will come

Preapproval Header hierarchy

Header hierarchy

Post approval Hierarchy

**Parallel:** - if it is parallel

Requester FYI

Preapproval Header Consensus

Preapproval Header First Responder Wins

Header First Responder Wins

Header Consensus

Post approval Header Consensus

Post approval Header First Responder Wins

### Rules:-

Manage Requisition Approvals		Deploy	Discard	Manage User-Defined Attributes	Done		
Actions	View	Format	Freeze	Detach	Wrap	Edit Rules	Enable
Stage	Participant						
Header Preapproval Stage	Requester FYI						FYI
Header Preapproval Stage	Preapproval Header Consensus						Parallel
Header Preapproval Stage	Preapproval Header First Responder Wins						Parallel
Header Preapproval Stage	Preapproval Header <u>Hierarchy</u>						Serial
Header Stage	Header Hierarchy						Serial
Header Stage	Header First Responder Wins						Parallel
Header Stage	Header Consensus						Parallel
Header Stage	Header Hierarchy 2						Serial
Header Stage	Header Hierarchy 3						Serial
Header Postapproval Stage	Postapproval Header Consensus						Parallel
Header Postapproval Stage	Postapproval Header First Responder Wins						Parallel
Header Postapproval Stage	Postapproval Header Hierarchy						Serial
Header Postapproval Stage	Postapproval Header <u>Consensus</u>						Parallel

Select the lien, click on edit rule:

ORACLE

Edit Approval Rules: Header First Responder Wins

Approval Task: Requisition Approvals  
Version: 11.13.21.01.0  
Stage: Header Stage  
Participant: Header First Responder Wins

Routing: Parallel  
Voting Regime: First Responder Wins

Rules (1)

Create Rule

- \* Rule: Req Amount less than 1000
- \* Priority: Medium
- Description: Req Amount less than 1000
- Rule always applies

OK Cancel

Click on + , enter the Rule name, description, click on ok

Version: 11.13.21.01.0  
Stage: Header Stage  
Participant: Header First Responder Wins

Voting Regime: First Responder Wins

Rules (1)

Add Condition

Type: Approval task attribute  
Attribute: Requisitioning BU  
Operator: Equals  
Value Type: Value  
Value: KMC IND BU

Add Another OK Cancel

Add another

Version 11.13.21.01.0  
Stage Header Stage  
Participant Header First Responder Wins

Voting Regime First Responder Wins

Rules (7)

Rule	Priority	Conditions
Req Amount less than 1000: Details	Medium	Requisitioning BU Equals KMC IND BU

Columns Hidden 1

Req Amount less than 1000: Details

Conditions

Add Condition

Type: Approval task attribute  
Attribute: Requisition Amount  
Operator: Less than or equal to  
Value Type: Value  
Value: 1000

Add Another OK Cancel

Ok

Req Amount less than 1000: Details

Conditions

Action Type: Automatic  
Set Outcome To: Approved

Actions

Action 1

Action Type: Approval required  
Route Using: Approval group  
Approval Group: Automatically approve if group returns no approvers

Add Action

Here three sections

Rules,

Conditions

Action

Creating another rule:

The screenshot shows the Oracle APEX 'Create Rule' dialog. The 'Rule' field contains 'Req Amount between 1000-50000'. The 'Priority' is set to 'Medium'. The 'Description' field also contains 'Req Amount between 1000-50000'. The 'OK' button is highlighted.

**Conditions**

The conditions section shows a single condition under 'AND': 'Requisitioning BU Equals KMC IND BU'.

**Add Condition** dropdown menu open, showing options 'Above' and 'Below'.

**Actions**

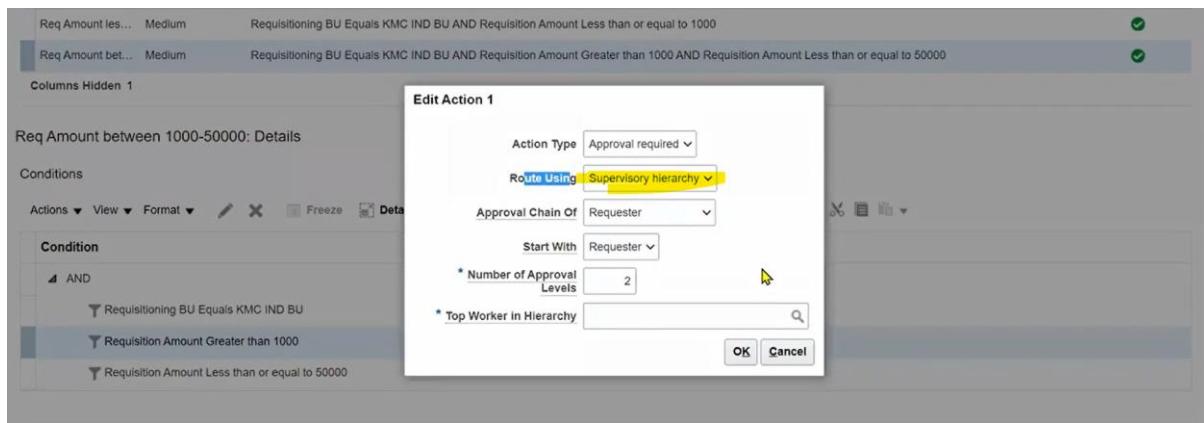
Action 1 is defined with 'Action Type' as 'Automatic'.

The screenshot shows the Oracle APEX 'Add Condition' dialog for the 'Requisitioning BU Equals KMC IND BU' condition. The 'Attribute' is 'Requisition Amount', 'Operator' is 'Between', 'Minimum Value' is '1,000', and 'Maximum Value' is '50000'. A tooltip 'Example format: #,##0.###' is shown near the maximum value input field.

Between will not consider 1000 and 50,000 , so I changed the values as shown below.

The screenshot shows the Oracle APEX 'Add Condition' dialog for the 'Requisitioning BU Equals KMC IND BU AND Requisition Amount Less than or equal to 1000' condition. The 'Attribute' is 'Requisition Amount', 'Operator' is 'Between', 'Minimum Value' is '999', and 'Maximum Value' is '50.001'. The 'OK' button is highlighted.

## Click on Action



**Supervisor hierarchy:-** Here the approval will goes to your supervisor, he has approve it.

Start with: Requester/ Manager

Number of levels: how many person do we need to approve.

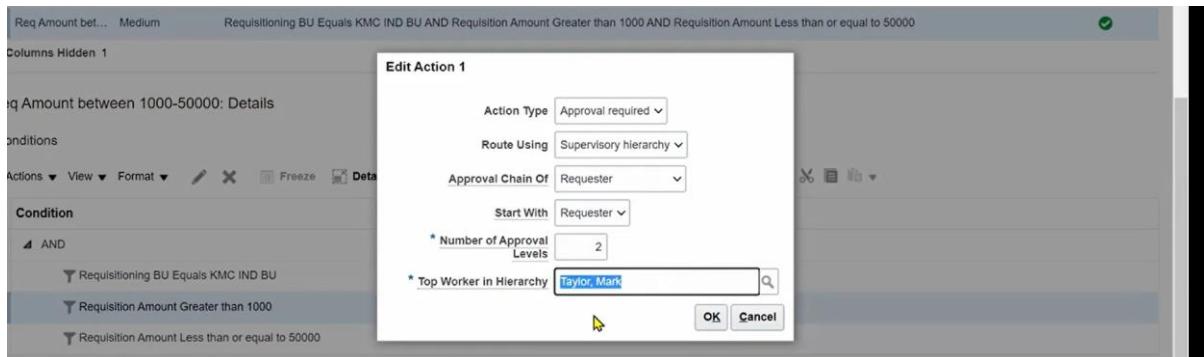
C : B's manager

B : Manager

A : Requester/ preparer

If we mention 2 , Person A has to approves, next Person B has to approve it.

**Top worker in the hierarchy:** CEO of the organization.



you can enter the top worker any name for practice purpose.

Save and close.

Manage Requisition Approvals

Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FYI	FYI		<input checked="" type="checkbox"/>
Header Preapproval Stage	Preapproval Header Consensus	Parallel	Consensus	<input type="checkbox"/>
Header Preapproval Stage	Preapproval Header First Responder Wins	Parallel	First Responder Wins	<input checked="" type="checkbox"/>
Header Preapproval Stage	Preapproval Header Hierarchy	Serial		<input type="checkbox"/>
Header Stage	Header Hierarchy	Serial		<input type="checkbox"/>
Header Stage	Header First Responder Wins	Parallel	First Responder Wins	<input checked="" type="checkbox"/>
Header Stage	Header Consensus	Parallel	Consensus	<input type="checkbox"/>
Header Stage	Header Hierarchy 2	Serial		<input type="checkbox"/>
Header Stage	Header Hierarchy 3	Serial		<input checked="" type="checkbox"/>
Header Postapproval Stage	Postapproval Header Consensus	Parallel	Consensus	<input type="checkbox"/>
Header Postapproval Stage	Postapproval Header First Responder Wins	Parallel	First Responder Wins	<input type="checkbox"/>
Header Postapproval Stage	Postapproval Header Hierarchy	Serial		<input type="checkbox"/>

Enable it, then only the rule will affect.

When you submit requisition for an approval,

Whatever you have enabled , all the rules should satisfy, other wise it will throw an error.

You can deploy at stage level

Edit Approval Rules: Header First Responder Wins

Rule	Priority	Conditions	Enabled
Req Amount les...	Medium	Requisitioning BU Equals KMC IND BU AND Requisition Amount Less than or equal to 1000	<input checked="" type="checkbox"/>
Req Amount bet...	Medium	Requisitioning BU Equals KMC IND BU AND Requisition Amount Greater than 1000 AND Requisition Amount Less than or equal to 50000	<input checked="" type="checkbox"/>

Conditions

Or

Manage Requisition Approvals				
		Actions ▾ View ▾ Format ▾		
Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FYI	FYI		<input checked="" type="checkbox"/>
Header Preapproval Stage	Preapproval Header Consensus	Parallel	Consensus	
Header Preapproval Stage	Preapproval Header First Responder Wins	Parallel	First Responder Wins	<input checked="" type="checkbox"/>
Header Preapproval Stage	Preapproval Header Hierarchy	Serial		
Header Stage	Header Hierarchy	Serial		
Header Stage	Header First Responder Wins	Parallel	First Responder Wins	<input checked="" type="checkbox"/>
Header Stage	Header Consensus	Parallel	Consensus	
Header Stage	Header Hierarchy 2	Serial		
Header Stage	Header Hierarchy 3	Serial		<input checked="" type="checkbox"/>
Header Postapproval Stage	Postapproval Header Consensus	Parallel	Consensus	
Header Postapproval Stage	Postapproval Header First Responder Wins	Parallel	First Responder Wins	

You can deploy all the rules at a time.

Preapproval → Requester has to take the approval

Header stage → actual approver → approvers as per the above rule like manager etc

Post approval → from the Project manager, from the department etc,

buyer approval also, he is the one who is going to process the requisition.

If the requisition amount is 50,00,000 , large amount, needs to take Vice president approval,'

Post approval will also called additional approval.

Oracle provides this facility, normally header stage approval required.

#### Requisition conditions:-

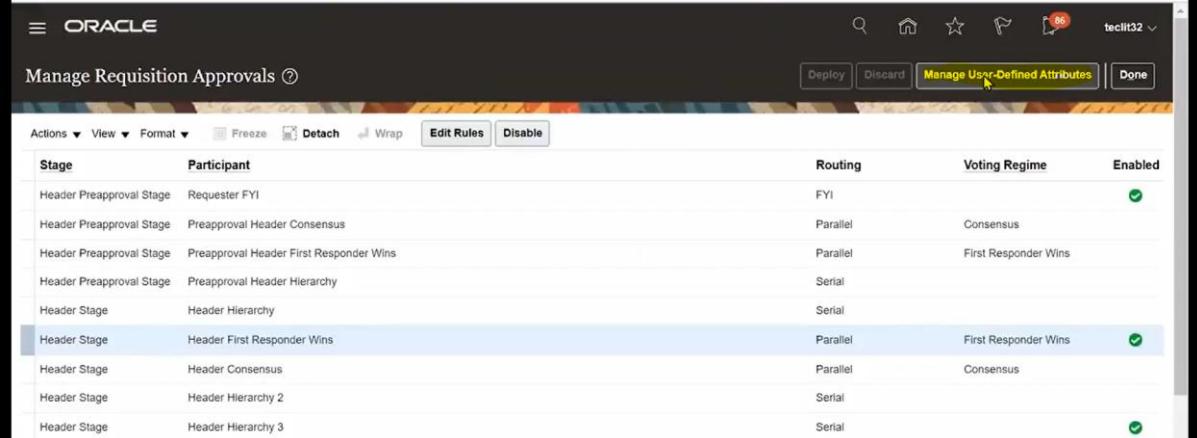
In the rules , we can use the following conditions

Requisition Conditions	
Requisition Header	Requisition Line
BU	Category
Requisition Amount	Delivery to Location
Currency	Line Amount
Internal Requisition	Line Type
Preparer Job	Requester Job,Department
DFF	DFF
User Defined Attribute	Urgent Requisition

Cost Center Manager

AMX	Approval Management Extension
Rule Name	
Conditions : Amount <,>,Between	
Action1	Supervisor Hierarchy
Action2	Position Hierarchy
	Job Level Hierarchy
	Approval Group
	Single Approver
Stage	Pre Approval
	Main Approval
	Post Approval

### Manage User defined attributes: -



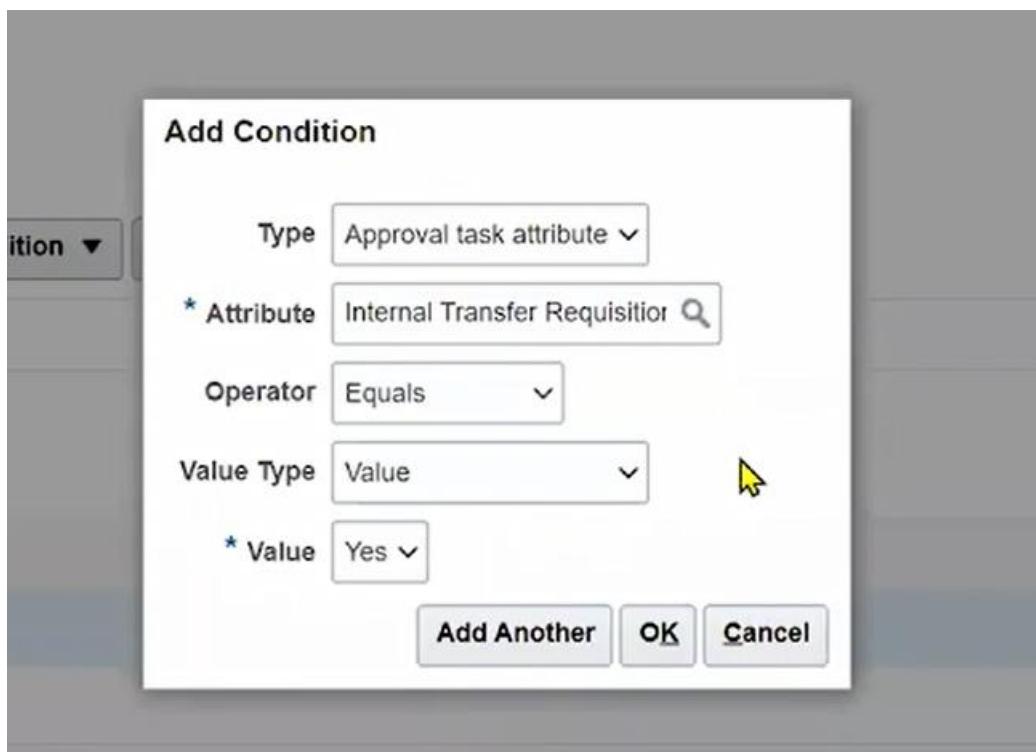
The screenshot shows the Oracle Requisition Approvals interface. At the top, there is a toolbar with various buttons like Deploy, Discard, and Manage User-Defined Attributes. Below the toolbar is a table listing different approval stages and their configurations. One row in the table is highlighted in blue, corresponding to the 'Header Stage' entry. A modal window titled 'Create User-Defined Attribute' is open in the foreground, prompting the user to define a new attribute named 'Base Currency INR'. The modal includes fields for Type (set to 'Currency based'), Attribute to Convert Type (set to 'Approval task attribute'), Attribute to Convert (set to 'Requisition Amount'), Convert To (set to 'INR'), and Conversion Rate Type (set to 'Corporate').

Creating one user defined attribute Base currency INR, requisition amount convert into INR stored in Base currency INR.

Requisitions are two types, external and internal

External → with the supplier

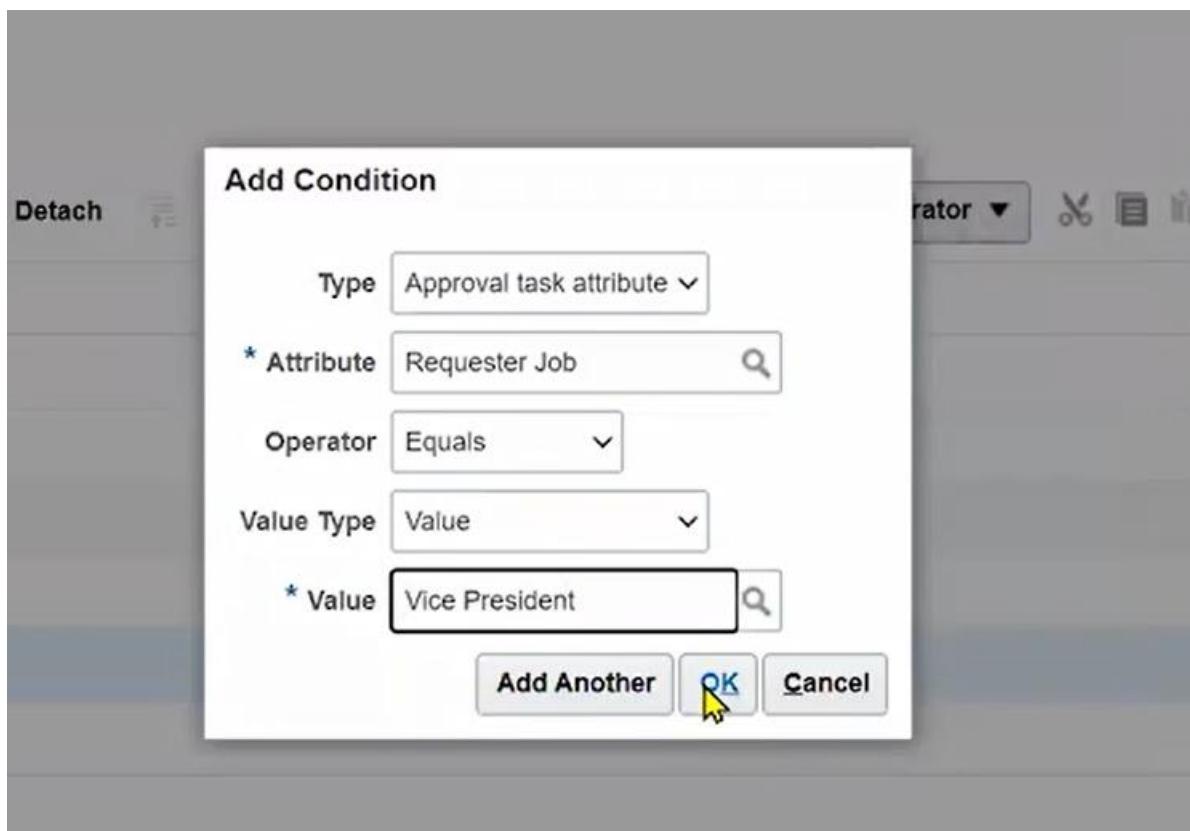
Internal → internally within the organization/ auto approval is required.



We use this type of rule for internal requisitions.

Requester by → many persons (line level , line level one requester, line 2 another requester/)

Prepared by → one person/ entered by

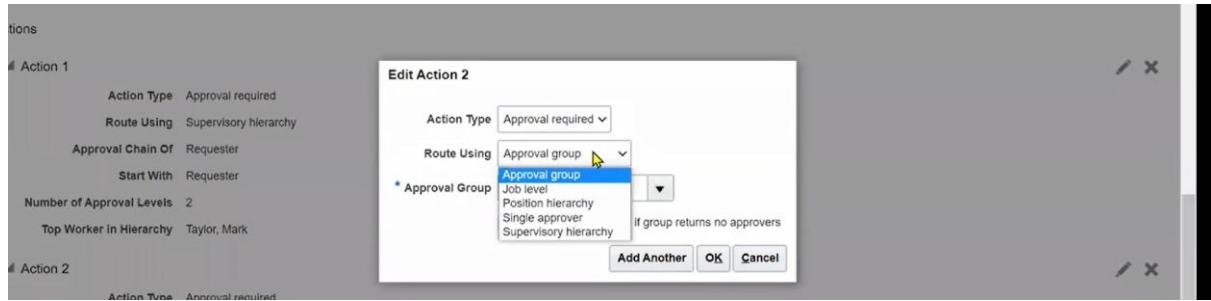


Here the Attribute is Requester Job, value is vice president.

### Approval Hierarchy:-

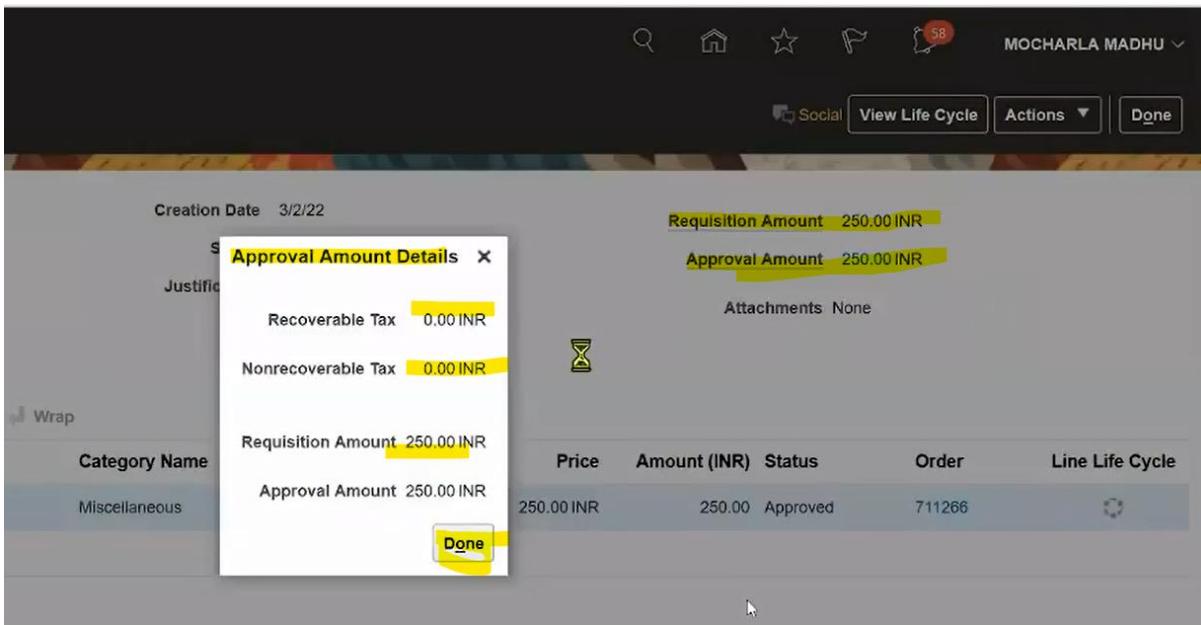
5 types of Approval Hierarchy's are there

1. Position based hierarchy
2. Supervision Hierarchy
3. Job Level Hierarchy
4. Approval Group
5. Single Approver



We can add many actions for the single rule



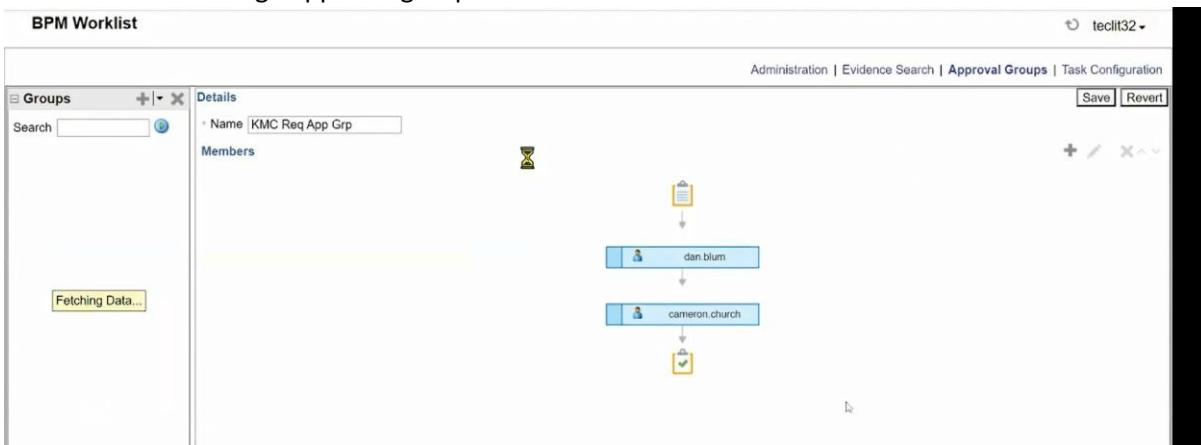


**Requisition Amount:**

Approved Amount: - (Request amount + tax part) is called Approved amount.

**Approval Group:-**

Global search> Manage approval groups>



Click on + symbol

Enter the Group Name

Click on + to add the members and save it.

This group can be used to assign in the requisition approval action conditions, whenever required as shown below.

Req Amount bet... Medium Requisitioning BU Equals KMC IND BU AND Requisition Amount Greater than 1000 AND Requisition Amount Less than or equal to 50000 AND Internal Transfer ...  
Columns Hidden 1

Req Amount less than 1000: Details

Conditions

Action Type: Approval required  
Route Using: Approval group  
Approval Group: KMC Req App Grp  
Automatically approve if group returns no approvers

Actions

Action 1: Action Type Automatic, Set Outcome To Approved  
Add Action

**PO Approval conditions also same as purchase requisition: -**

Manage Purchasing Document Approvals

Saved rules are not yet deployed. You can deploy or discard the saved changes.

Stage	Participant	Routing	Voting Regime	Enabled
Preapproval	Preapproval FYI	FYI		
Preapproval	Preapproval Serial	Serial		
Preapproval	Preapproval Consensus	Parallel	Consensus	
Preapproval	Preapproval First Responder Wins	Parallel	First Responder Wins	
Terms	Terms Approval FYI	FYI		
Terms	Terms Approval Serial	Serial		
Terms	Terms Approval Serial 2	Serial		
Terms	Terms Approval Serial 3	Serial		
Terms	Terms Approval First Responder Wins	Parallel	First Responder Wins	✓
Terms	Terms Approval Consensus	Parallel	Consensus	✓
Postapproval	Postapproval Serial	Serial		

Requisition Conditions		Requisition Distribution Charge Account Based --- Natural Account Range	PO Conditions	
Requisition Header	Requisition Line		Document Header	Document Line
BU	Category		BU	Category
Requisition Amount	Delivery to Location		Document Ordered Amount	Delivery to Location
Currency	Line Amount		Currency	Line Amount
Internal Requisition	Line Type		Document Style	Line Type
Preparer Job	Requester Job,Department		Buyer	Destination Type
DFF	DFF		Document Type (Std, BPA,CPA)	NA
User Defined Attribute	Urgent Requisition		Backing Requisition Exists	
Cost Center Manager			Change Order Type - External/Internal	