

## 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

**Manage Requisition Approvals**

Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FYI	FYI		✓
Header Preapproval Stage	Preapproval Header Consensus	Parallel	Consensus	
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 be 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 be approved.

If any one approves, then approval notification will be withdrawn from other two persons.

**Consensus:** For example A B C Users are there, All A, B, C approvers have 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:-

Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FYI	FYI		✓
Header Preapproval Stage	Preapproval Header Consensus	Parallel	Consensus	
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		

Select the lien, click on edit rule:

**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

**Create Rule**

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

OK Cancel

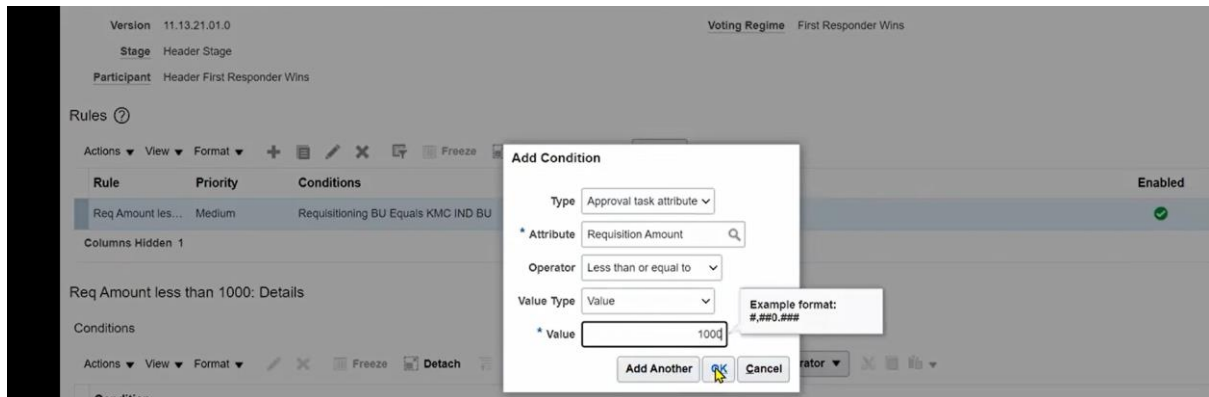
Click on + , enter the Rule name, description, click on ok

**Add Condition**

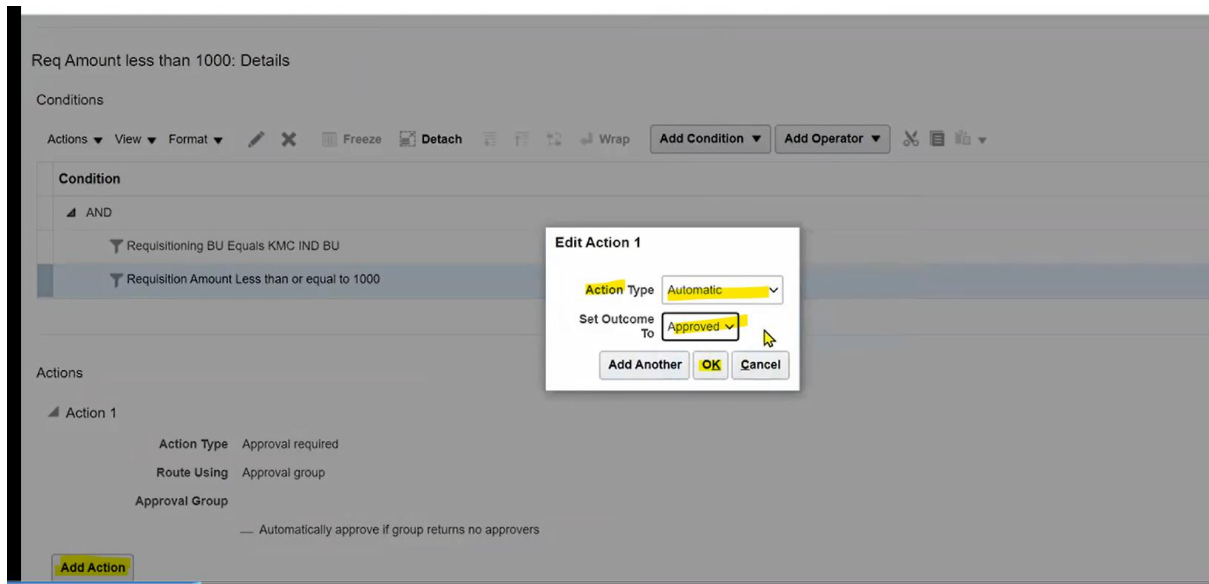
Type: Approval task attribute  
\* Attribute: Requisitioning BU  
Operator: Equals  
Value Type: Value  
\* Value: KMC IND BU

Add Another OK Cancel

Add another



Ok



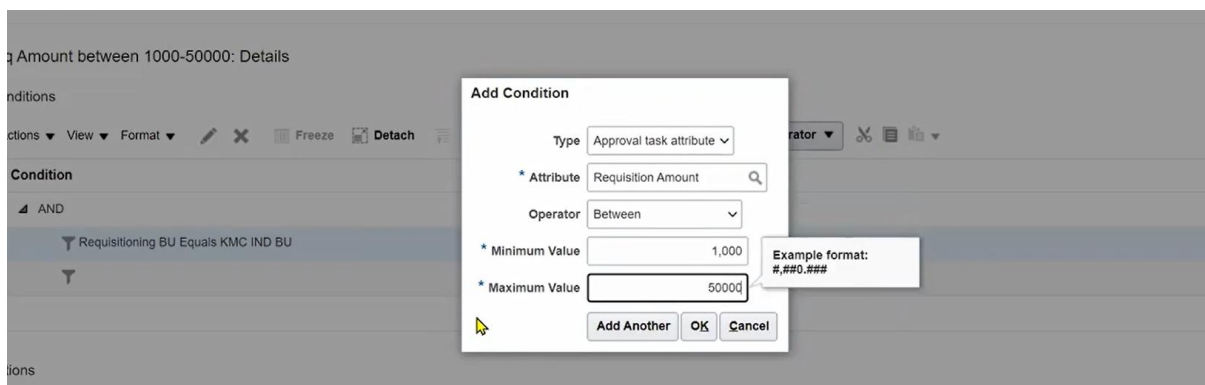
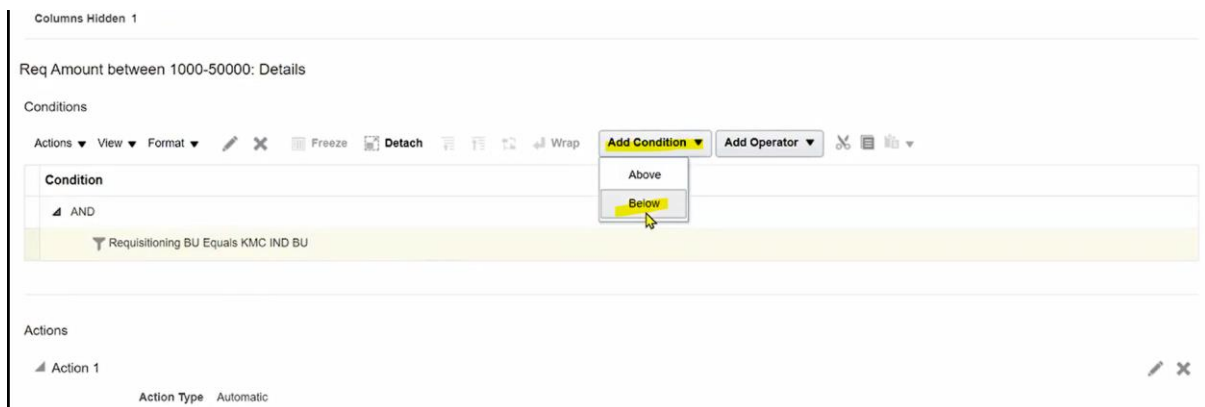
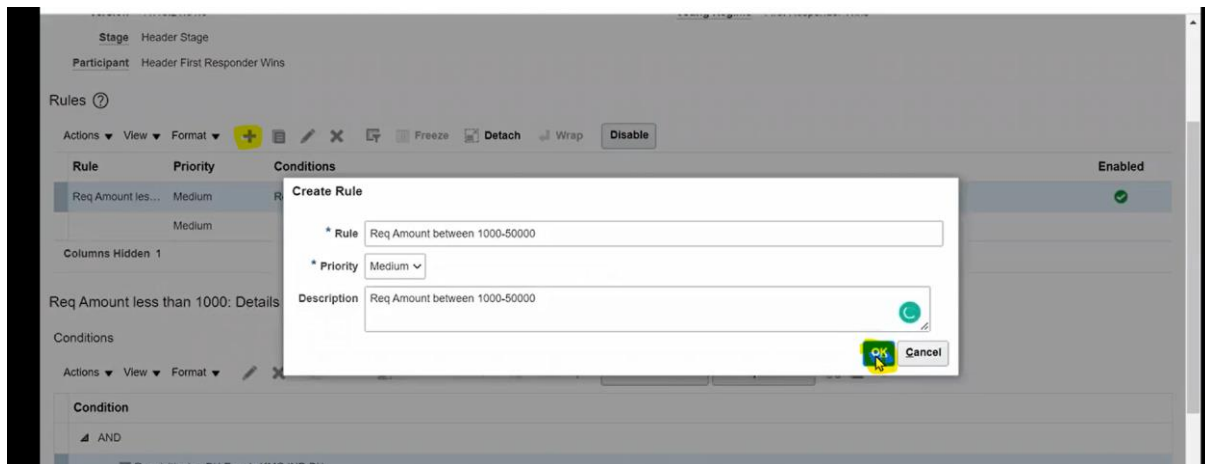
Here three sections

Rules,

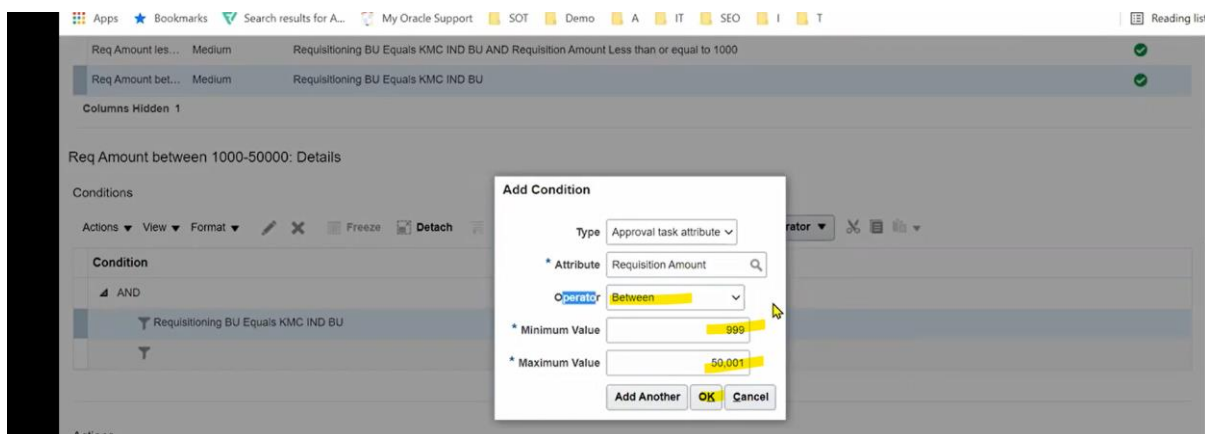
Conditions

Action

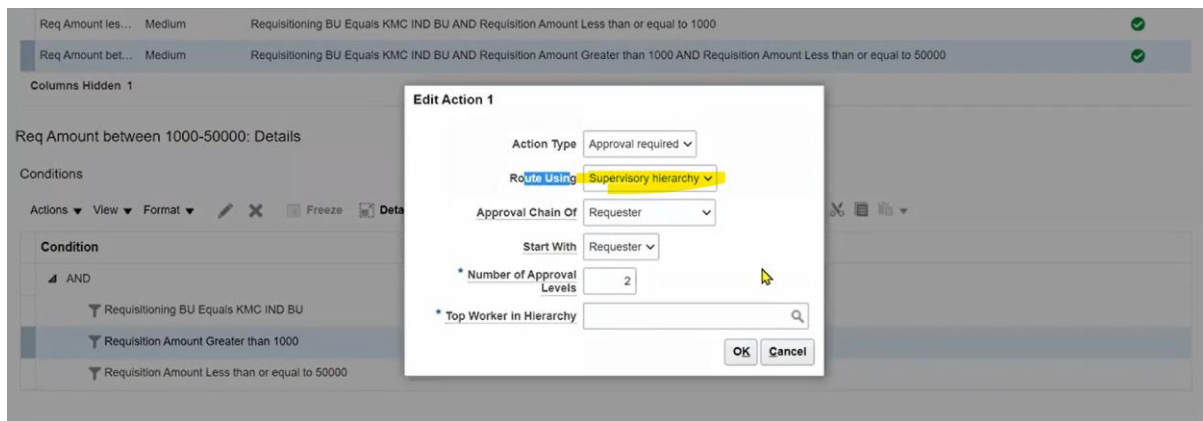
Creating another rule:



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



## Click on Action



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

Start with: Requester/ Manager

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

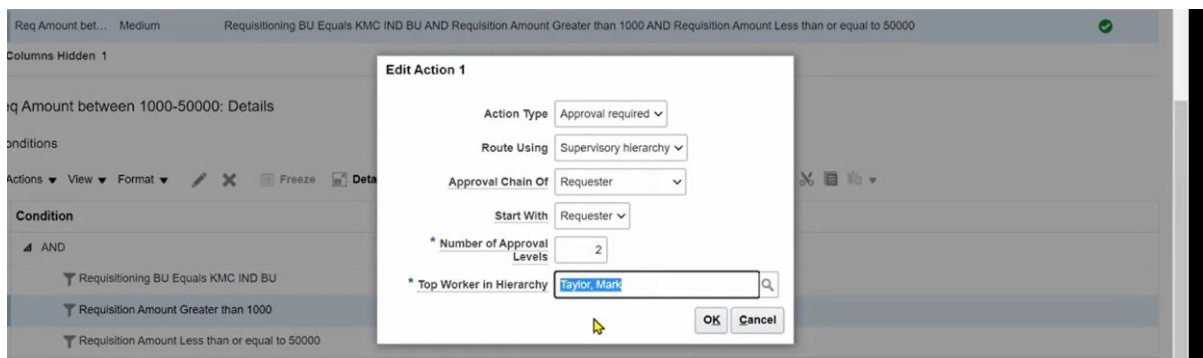
C : B's manager

B : Manager

A : Requester/ preparer

If we mention 2, Person A has to approve, 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 ?

Deploy

Discard

Manage User-Defined Attributes

Done

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

Actions

▼

View

▼

Format

▼

Freeze

Detach

Wrap

Edit Rules

Disable

Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FY1	FY1		✓
Header Preapproval Stage	Preapproval Header Consensus	Parallel	Consensus	
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		

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**

Last Saved 3/2/22 2:01 AM

Approval Task	Requisition Approvals	Routing	Parallel
Version	11.13.21.01.0	Voting Regime	First Responder Wins
Stage	Header Stage		
Participant	Header First Responder Wins		

**Rules**

Actions View Format + [Icons] Freeze Detach Wrap Disable

Rule	Priority	Conditions	Enabled
Req Amount les...	Medium	Requisitioning BU Equals KMC IND BU AND Requisition Amount Less than or equal to 1000	✓
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	✓

Columns Hidden 1

Req Amount between 1000-50000: Details

Conditions

Or



Manage Requisition Approvals ②				
<div> <span>Deploy</span> <span>Discard</span> <span>Manage User-Defined Attributes</span> <span>Done</span> </div>				
Saved rules are not yet deployed. You can deploy or discard the saved changes.				
<div>             Actions ▾ View ▾ Format ▾             <span>Freeze</span> <span>Detach</span> <span>Wrap</span> <span>Edit Rules</span> <span>Disable</span> </div>				
Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FYI	FYI		✓
Header Preapproval Stage	Preapproval Header Consensus	Parallel	Consensus	
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	

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: -

Stage	Participant	Routing	Voting Regime	Enabled
Header Preapproval Stage	Requester FYI	FYI		✓
Header Preapproval Stage	Preapproval Header Consensus	Parallel	Consensus	
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		✓

to data to display.

**Create User-Defined Attribute**

\* User-Defined Attribute:

Type:

Attribute to Convert Type:

\* Attribute to Convert:

\* Convert To:

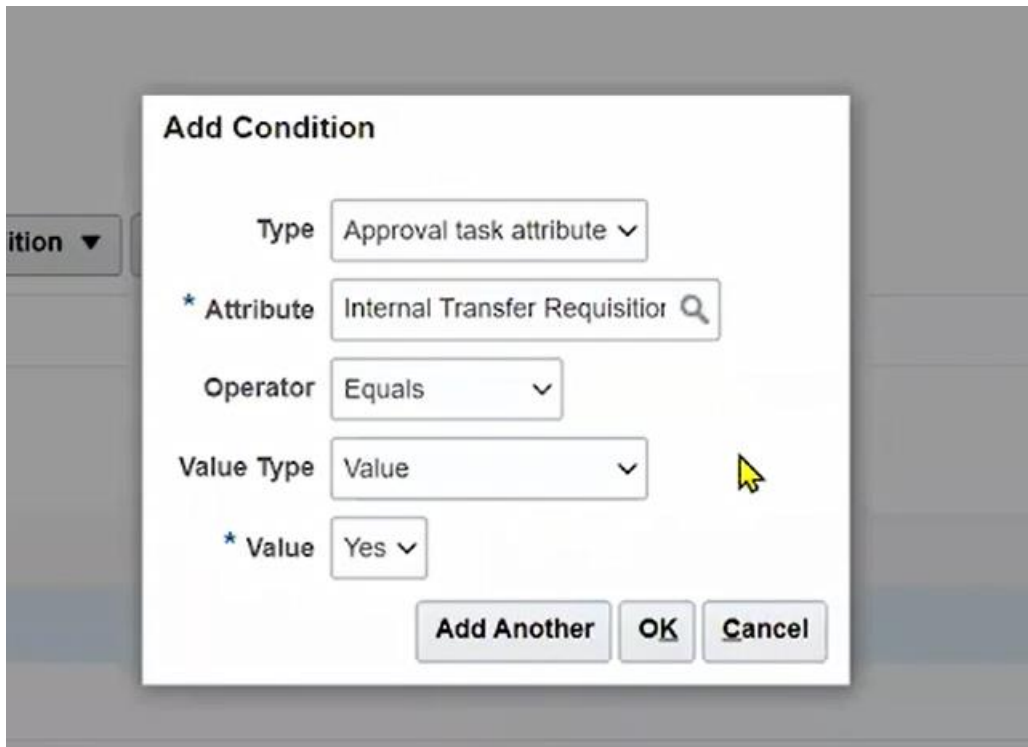
\* Conversion Rate Type:

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.



**Add Condition**

Type: Approval task attribute ▼

\* Attribute: Internal Transfer Requisition 🔍

Operator: Equals ▼

Value Type: Value ▼

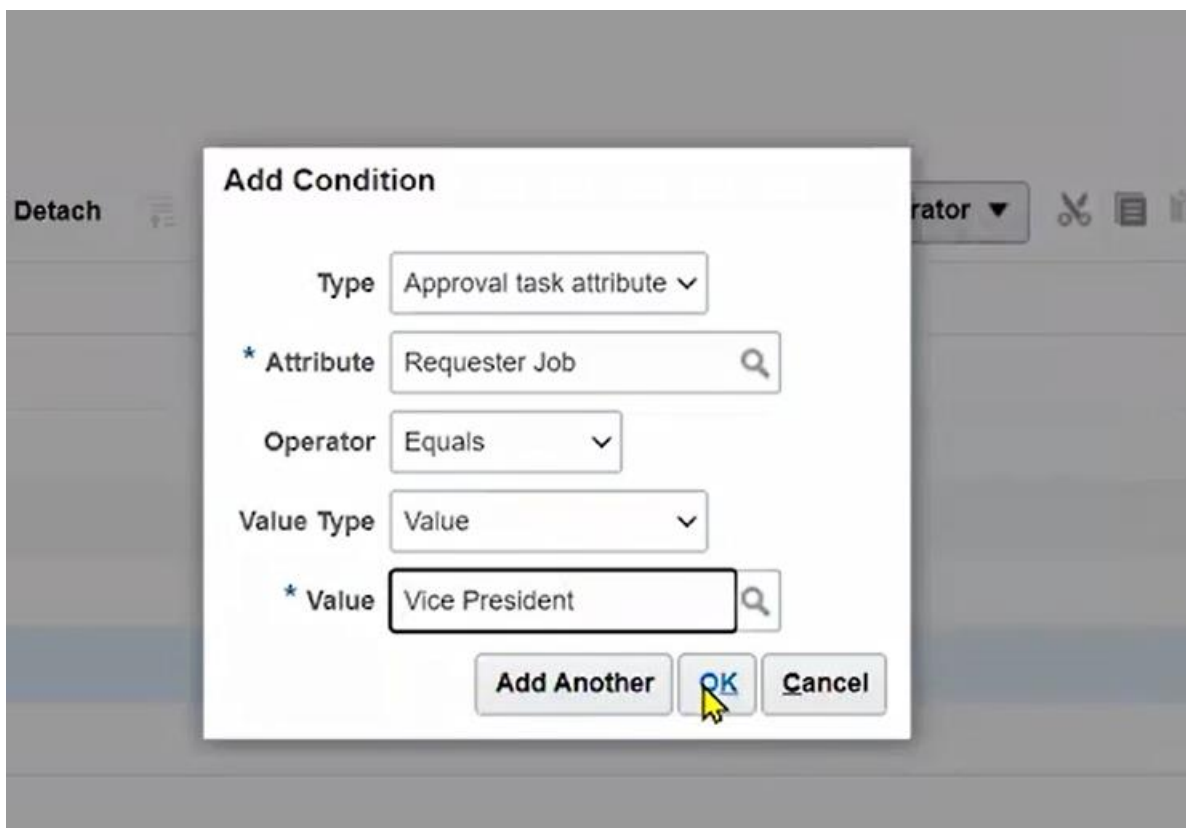
\* Value: Yes ▼

Add Another OK Cancel

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



**Add Condition**

Type: Approval task attribute ▼

\* Attribute: Requester Job 🔍

Operator: Equals ▼

Value Type: Value ▼

\* Value: Vice President 🔍

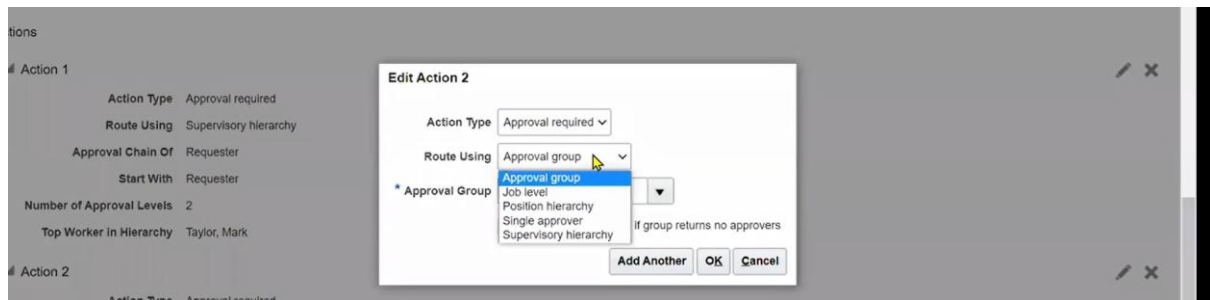
Add Another OK Cancel

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

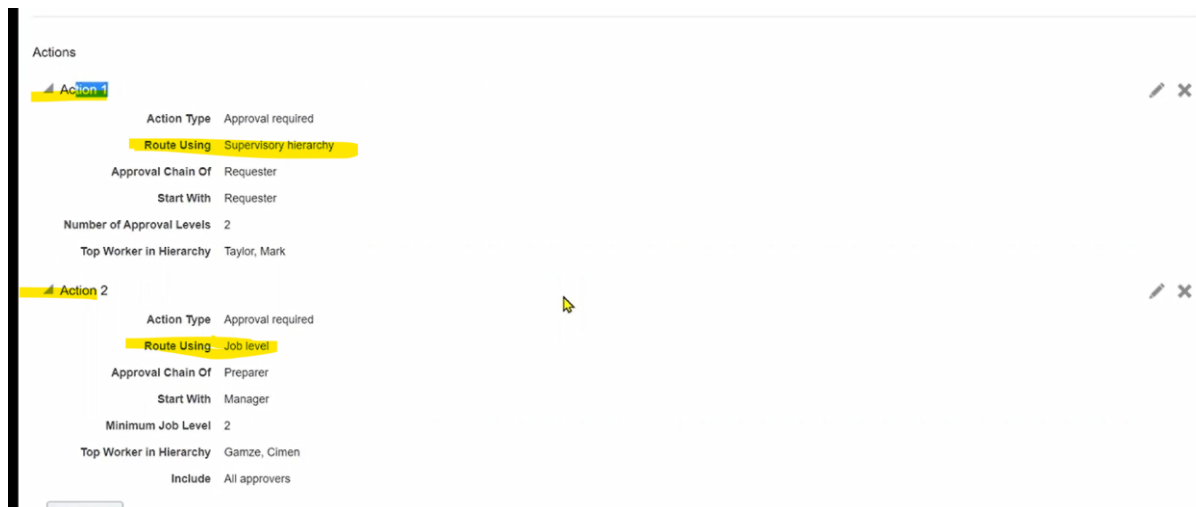
### Approval Hierarchy:-

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



The screenshot shows a requisition approval interface. A modal titled "Approval Amount Details" is open, displaying the following information:

- Recoverable Tax: 0.00 INR
- Nonrecoverable Tax: 0.00 INR
- Requisition Amount: 250.00 INR
- Approval Amount: 250.00 INR

The modal has a "Done" button at the bottom. In the background, the requisition details are visible:

- Creation Date: 3/2/22
- Requisition Amount: 250.00 INR
- Approval Amount: 250.00 INR
- Attachments: None
- Category Name: Miscellaneous

A table at the bottom shows the requisition line item:

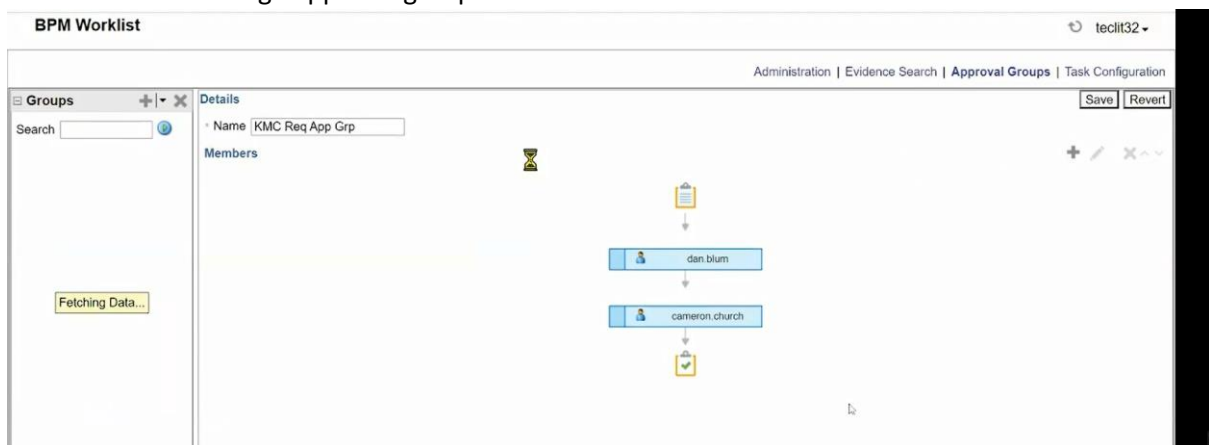
Price	Amount (INR)	Status	Order	Line Life Cycle
250.00 INR	250.00	Approved	711266	

**Requisition Amount: -**

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

**Approval Group:-**

Global serach> Manage approval groups>

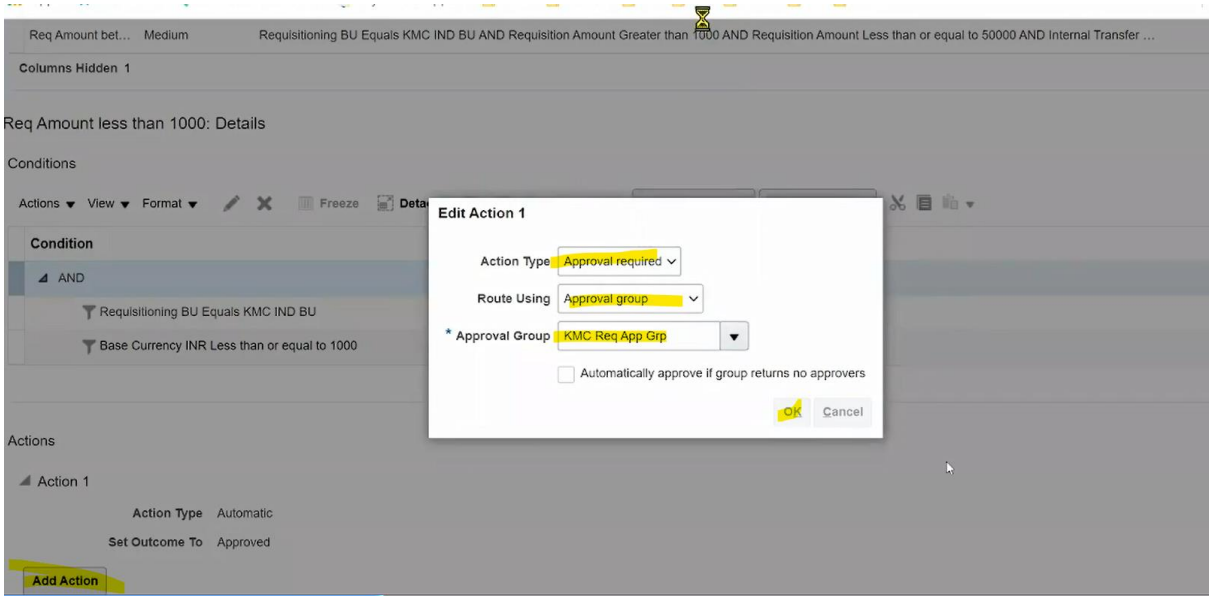


Click on + symbol

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.



PO Approval conditions also same as purchase requisition: -

Manage Purchasing Document Approvals <span>?</span>					Deploy	Discard	Manage User-Defined Attributes	Done
Saved rules are not yet deployed. You can deploy or discard the saved changes.								
Actions View Format Freeze Detach Wrap Edit Rules Enable								
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			PO Conditions	
Requisition Header	Requisition Line	Requisition Distribution	Document Header	Document Line
BU	Category	Charge Account Based ---	BU	Category
Requisition Amount	Delivery to Location	Natural Account Range	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	