

Using Approvals Management Engine (AME) for Requisitions in R12

Agenda

- Introductions
- American Transmission Company
- Standard requisition approvals
- Overview of AME
- Examples
- Other AME facts
- Q&A

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American Transmission Company – Background

- First multi-state transmission-only utility
- 9,350 Circuit miles of transmission line
- Live with R12 in May of 2008

Requirements

- Requisition approvals to meet the Expenditure Authorization Policy

Standard Requisition Approval Process

- Position hierarchy
- Employee - Supervisor
- Direct or Hierarchical Routing
- Include and Exclude amounts for various attributes such as document totals and account ranges.

Standard Requisition Approval Process

- There are many ways that the standard approval methods can support your organization.
- Need more? Modify workflow.
- Administrative overhead with maintaining a position hierarchy if your organization changes often.

What is the Approvals Management Engine (AME)?

- A common way for Oracle to manage approvals for its applications.
- AME has a self-service business analyst dashboard to perform maintenance.
- Uses business specific rules to manage the approvals required for a specific type of transaction

AME Business Analyst Dashboard

ORACLE Approvals Management

Business Analyst Dashboard

This table displays the transaction types in the order you accessed them.

Transaction Types

Name	Application	Rules	Test	Setup
Purchase Requisition Approval	Purchasing			
Payables Invoice Approval	Payables			
Work Confirmation	Purchasing			
Requester Change Order Approval	Purchasing			
AMM/ Audit Procedure Approval	Internal Controls Manager			

Recently Updated Rules

This table displays the rules whose definition and usages has changed.

Since number of days

Name	Rule Type	Transaction Type	Action	Date	User	Update
No results found.						

Approval Process Setup

1. Select the transaction type
2. Define the components
 - Approvals Management uses these components within the approval rules.
 - Attributes
Define attributes to fetch business facts for a specific transaction.
 - Conditions
Define conditions to evaluate attributes within rules. If all conditions in a rule are true then the rule is active for the transaction.
 - Action Types
Enable action types to specify the action to take if a rule is active for a transaction.
 - Approver Groups
Define approver groups to contain approvers who are usually members of peer groups such as payroll or expenses department.
3. Define the approval rules
 - Approval Rules determine the approvers or FYI notification recipients required for a business transaction.
 - Rules
4. Test Workbench
 - Define test cases or test real transactions to verify the approval setup, rules and associated approvers.
 - Test Workbench

Approval Rules

- Business rule that determines the approval process used by a transaction.
 - Rules are constructed by Conditions and Actions.
- **Example:**
 - **If** requisition amount > \$250,000.00 USD (condition), **THEN** require post-chain-of-authority approval (action) from the Legal Team (approval group).

Approval Rules

If

requisition amount > \$250,000.00 USD,



condition

THEN

use post-chain-of-authority approval to add the approval group of Legal team



action

Approval Rules

- Transaction Types
- Attributes
- Conditions
- Action Types
- Approval Groups

Transaction Type

- Represents “Which” application transaction type will have a set of distinct rules applied to it.
- Types of Transaction Types:
 - Requisition Approval
 - Requisition Change Approval
 - Work Confirmation
 - Supplier Registration Approval

Attributes

- Business variables that have a single outcome for a transaction:
 - Transaction amount
 - Purchasing Category
 - Cost Center
 - Item Number
- Attributes are used in conditions to provide one piece of the rule.
- Create attributes that do not come seeded

Conditions

- The **IF** part of an Approval Rule
- True or False statement for a given transaction
- Types of conditions
 - Regular - Ordinary or Exception conditions
 - List-modifiers - checks for a given approver
- Ordinary Conditions associates an attribute with a set of allowed values or range.

Action Types

- The **THEN** part of an Approval Rule
- An *action type* is an instruction to AME to modify a transaction's approval process in the manner you specify.
- AME typically provides all the actions and action types that will be required but custom ones can be created if needed

Available Action Types

- Available Action Types Are:
 - Chain of Authority – Uses HR supervisory or HR position hierarchies.
 - List Modification
 - Substitution
 - Pre Approval Group
 - Post Approval Group

Approval Groups

- When using pre- or post- list approval group action types you will have to create an Approval group
- An approver group can either be an ordered set of one or more approvers (persons and/or user accounts) or it can be a list, which is dynamically generated at rule evaluation time.

Approval Groups

- Are typically created to support non-financial approvals such as:
 - Legal Review
 - Gate Keeper for specific commodities
 - Engineering
 - Project Management
- This means in addition to the approval list that was automatically built based on financial constraints (emp/supervisor hierarchy)

Example 1- Simple Business Rule

- At a local electric transmission company all requisition transactions over \$250,000.00 Require the approval of a legal representative
- The legal team should be notified after the initial financial approval list has reviewed and approved the requisition
- First team member to respond provides the approval

Example 1

If

requisition amount > \$250,000.00 USD,



condition

THEN

use post-chain-of-authority approval to add the approval group of Legal team



action

Example 1 - Attributes

ORACLE Approvals Management
Transaction Type: Purchase Requisition Approva Return to Dashboard Diagnostics

Rules | **Test Workbench** | Setup

Attributes | Conditions | Action Types | Approver Groups

Attributes

This page enables you to view attributes present in your transaction type, create new, and reuse existing attributes to specify the business components of a transaction such as total amount, a percent discount, and a person's salary.

Search

Attribute Category: AI
Item Class: AI
Data Type: AI
Name: REQUISITION_TOTAL

Attribute	Description	Category	Usage Type	Item Class	Data Type	Update	Delete
REQUISITION_TOTAL	Requisition Total	Others	Dynamic	Header	Currency		

Example 1 - Conditions

ORACLE Approvals Management
Transaction Type: Purchase Requisition Approval Return to Dashboard | Diagnostics

Rules | **Test Workbench** | Setup

Attributes | **Conditions** | Action Types | Approver Groups

Setup: Conditions >

Update Condition: REQUISITION_TOTAL is greater than 250000,USD

Condition Type: **Ordinary**
Attribute: **REQUISITION_TOTAL**
Data Type: **Currency**
Item Class: **Header**

Show rules using this condition

Details

Currency Code: USD

REQUISITION_TOTAL is greater than 250000

Example 1 – Approval Group

ORACLE Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard | Diagnostics

Rules | Text Workbench | Setup

Attributes | Conditions | Action Types | **Approver Groups**

Setup: Approver Groups >

Update Approver Group: Legal Review Team

* Indicates required field

Cancel | Apply

Rules Using the Approver Group

Details

Name: Legal Review Team

Description: Legal Review Team is required to review requisitions over \$250K

Order Number: ?

Matching Method: First Requisition Wins

Usage Type: Static

Query

Dynamic Approver Group requires a SQL

Validate

Group Members

Group Members for this static approver group:

Approver Type	Approver	Order Number	Delete
HR People	HR People: Ecker, Susan	1	
HR People	HR People: Anderson-Richards, Katherine	2	

Add Another Row

Example 1 – Rule Set Up

ORACLE® Approvals Management
Transaction Type: Purchase Requisition Approval Return to Dashboard Diagnostics

Rules **Test Workbench** Setup

Rules >

Update Rule: Legal review required for Requisitions over \$250K

* Indicates required field Cancel! Apply

Item Class: **Header** * End Date: 31-Dec-4712

Rule Type: **Post List Approver Group**

* Name: Legal review required for Requisitions over \$250K

* Start Date: 17-Dec-2007
(example: 29-Feb-2108)

Other Instances of this Rule

Conditions

Add Condition

Condition	Condition Type	Item Class	Remove
REQUISITION TOTAL is greater than 250000,USD	Ordinary	Header	

Actions

Add Action

Action Type	* Action	Remove
post-chain-of-authority approvals	Require post-approval from Legal Review Team	

Cancel! Apply

Example 1 - Outcome

Shopping Cart

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (USD)	Delete
1	Services over \$250,000.00					250,001.00	
Total						250,001.00	

[Return to Shopping](#)

Example 1 - Outcome

The screenshot shows the Oracle iProcurement interface. At the top, the 'Approvals' step is highlighted with an orange dot on a progress bar. Below the progress bar, the text reads 'Checkout: Approvals and Notes' and 'Your requisition will be sent to the following list of approvers.' To the right of this text are buttons for 'Save', 'Submit', 'Back', 'Step 2 of 3', and 'Next'. The main section is titled 'Approvals' and contains a flowchart of the approval process. The flowchart consists of four boxes connected by arrows: 'Schoon, Duane', 'Tindall, Paul', 'Petras, Jane', and 'Legal Review Team'. The 'Legal Review Team' box is highlighted with a red rectangle, and a mouse cursor is pointing at it. A 'Manage Approvals' button is located to the right of the flowchart.

Example 2 – Medium Complexity

- If project type is Indirect, require requisition approval by Project Manager and then preparer's immediate supervisor.

Example 2 - Attributes

ORACLE Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard Home

Rules | **Test Workbench** | Setup

Attributes | Conditions | Action Types | Approver Groups

Setup: Attributes >

Update Attribute : IM_PROJECT_TYPE

* Indicates required field

Cancel **Apply**

Name	IM_PROJECT_TYPE
Item Class	Line Item
* Description	IM_PROJECT_TYPE
Data Type	String
Approver Type	None
Value Set	
Usage Type	Dynamic
* Value	<pre>select pap.project_type from pa_projects_all pap, po_req_distributions_all prd, po_requisition_lines_all prl where prl.requisition_header_id = po amo setup pvt.get now req header id(:transactionId) and prl.requisition_line_id = prd.requisition_line_id and pap.project_id = prd.project_id order by prd.distribution_id</pre>

Enter SQL query for dynamic attributes.

Validate

Cancel **Apply**

Example 2 - Conditions

ORACLE Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard Home

Rules | **Test Workbench** | Setup

Attributes | **Conditions** | Action Types | Approver Groups

Setup: Conditions >

Update Condition: JM_PROJECT_TYPE in (Indirect)

Cancel | Apply

Condition Type **Ordinary**
Attribute **JM_PROJECT_TYPE**
Data Type **String**
Item Class **Line Item**

+ Show rules using this condition

String Values

String Value	Delete
Indirect	

Add Another Row

Cancel | Apply

Example 2 – Approver Groups

ORACLE® Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard | Home

Rules | Test Workbench | Setup

Attributes | Conditions | Action Types | **Approver Groups**

Setup: Approver Groups >

Update Approver Group : JM Project Manager

* Indicates required field

Cancel | Apply

Rules Using the Approver Group

Details

Name	JM Project Manager
* Description	JM Project Manager Indirect
* Order Number	1
Voting Method	Serial
Usage Type	Dynamic
Query	<pre>select 'person id:' person id from apps.pa_fv_key_members key, pu_req_distributions_all prd, po_requisition_lines_all prl, pa_projects_all pap where prl.requisition_header_id = po_ame_setup_pvt.get_new_req_header_id(:transactionid) and prl.requisition_line_id = prd.requisition_line_id and key.project_id = prd.project_id and pap.project_type = 'Indirect'</pre>

Dynamic Approver Group requires a SQL.

Validate

Example 2 – Rule Set Up

ORACLE® Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard Home Logout Preferences

Rules | Test Workbench | Setup

Rules: Approver Groups >

Update Rule: JM Project Manager

* Indicates required field

Item Class: **Header** * End Date: 31-Dec-4712

Rule Type: **List Creation**

* Name: JM Project Manager

* Start Date: 04-Nov-2007
(example: 20-Oct-2007)

Other Instances of this Rule

Conditions

Add Condition

Condition	Condition Type	Item Class	Remove
JM_PROJECT_TYPE in (Indirect)	Ordinary	Line Item	

Actions

Add Action

Action Type	Action	Remove
Supervisory level	Require approvals up to the first superior.	
approval-group chain of authority	Require approval from JM Project Manager	

Cancel Apply

Example 2 – Outcome (Test)

Enter requisition in iProcurement. Distributed to three different projects:

- JM 1 – Indirect – PM = Catherine Baker
- JM 2 – Indirect – PM = Amy Marlin
- Bldg Renovation – Build Capital – PM = Samuel Sole

Supervisor = Casey Brown

Save requisition to get number then lookup requisition_header_id for transaction ID.

Example 2 – Outcome (Test)

ORACLE iProcurement

Shopping Cart Home Logout Preferences Diagnostics

Shop Requisitions Receiving

Requisition Information Approvals Review And Submit

Requisition Information: Edit Lines

* Indicates required field Apply

Delivery Billing Accounts Attachments

Select Lines: Update Copy Delete

Select All | Select: None

Select	Line	Description	Project	Task	Expenditure Type	Expenditure Organization	Expenditure Item Date	Split
<input type="checkbox"/>	1	Paper - requires 2-way match office supply item	JM 1	1.1	Supplies	Vision Operations	10-Aug-2007	
<input type="checkbox"/>	2	Paper - requires 2-way match office supply item	JM 2	1.1	Supplies	Vision Operations	10-Aug-2007	
<input type="checkbox"/>	3	Paper - requires 2-way match office supply item	JM 1	1.1	Supplies	Vision Operations	10-Aug-2007	
<input type="checkbox"/>	4	Paper - requires 2-way match office supply item	Bldg Renovation	1.0	Supplies	Vision Operations	10-Aug-2007	
<input type="checkbox"/>	5	Paper - requires 2-way	JM 1	1.1	Supplies	Vision Operations	10-Aug-2007	

Example 2 – Outcome (Test)

ORACLE Approvals Management
Transaction Type: Purchase Requisition Approval

Return to Dashboard Home Logout Preferences Help Diagnostics

Rules **Test Workbench** Setup

Test Workbench

[Run Real Transaction Test \(1\)](#)

Test Cases

[Create](#)

Select	Name	Description	Last Updated	Update	Delete
	No results found.				

[Run Real Transaction Test \(1\)](#)

Test Workbench

The Workbench enables you to define test cases to verify your approval setup. Approval Management treats a test case as a real transaction, It evaluates your defined rule and generates an approver list for your review.

Getting Started

- To create a new test case for the current transaction type, click Create.
- To view the applicable rules and approver list for an existing test case, select the test case and click Run.
- To duplicate an existing test case that you can modify later, select the test case and click Copy.
- To view the applicable rules and approvers for a real transaction, click Run Real Transaction Test.

Rules Test Workbench Setup Return to Dashboard Home Logout Preferences Help Diagnostics

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Example 2 – Outcome (Test)

ORACLE Approvals Management
Transaction Type: Purchase Requisition Approval

[Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Diagnostics](#)

Rules | **Test Workbench** | **Setup**

[Test Workbench](#) > [Test Workbench](#) > [Real Transaction Test](#) >

Run Real Transaction

To review the process stages that Approvals Management took to arrive at the applicable rules and approver list, click [View Approval Process Stages \(1\)](#).

Transaction ID **104110**

Applicable Rules

Details	Description	Class	Rule Type	Category
+ Show	TM Project Manager	Header	List Creation	Approver

Final Processed Approver List

Details	Order Number	Approver Type	Approver	Category	Status
+ Show	1	HR People	Baker, Catherine	Approver	
+ Show	2	HR People	Marlin, Amy	Approver	
+ Show	9	HR People	Brown, Casey	Approver	

[Return to Test Workbench](#) [View Approval Process Stages \(1\)](#)

[Rules](#) | [Test Workbench](#) | [Setup](#) | [Return to Dashboard](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Diagnostics](#)

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Example 3 – Complex Business Rule

- Whenever a requisition is created utilizing a project type of construction, do the following:
 - Make the project manager the first approver
 - Follow the project manager's employee/supervisor hierarchy rather than the preparer's.

Example 3

If

requisition includes a project with a type of “PM” for the approval path

condition

THEN

Change the first approver in the list to the project manager of the project and follow their approval path

action

Example 3 – Update Seeded Attribute

Update Attribute **JOB_LEVEL_NON_DEFAULT_STARTING_POINT_PERSON_ID**

* Indicates required field

Cancel Apply

Name	JOB_LEVEL_NON_DEFAULT_STARTING_POINT_PERSON_ID
Item Class	Header
Description	Person ID of non-default first approver for job-level authority approval types
Data Type	Number
Approver Type	HR People
Value Set	
Usage Type	Dynamic
* Value	<pre>select atcllc_ame_req.get_starting_person_id (REQUIS:TICN ,po_ame_setup_pvt.get_new_req_header_id (:transactionId),10000) from dual</pre>

Enter SQL query for dynamic attributes.

Validate

Example 3 – Custom Attribute

Transaction Type: Purchase Requisition Approval Return to Dashboard | Diagnostics

Rules | **Test Workbench** | Setup

Attributes | Conditions | Action Types | Approver Groups

Setup: Attributes >

Update Attribute : ATC_REQ_HDR_APPROVAL_PATH

* Indicates required field

Name	ATC_REQ_HDR_APPROVAL_PATH
Item Class	Header
* Description	Returns PM or Requester based on the project on the requisition distribution.
Data Type	String
Approver Type	None
Value Set	<input type="text"/>
Usage Type	Dynamic
* Value	<pre>select max(ppt.attribute2) from pa.pa_project_types_all ppt, pa.pa_projects_all ppa, po.po_requisition_lines_all prl, po.po_rec_distributions_all prd where ppt.project_type = ppa.project_type and ppt.org_id = prd.org_id and ppa.project_id = prd.project_id</pre>

Enter SQL query for dynamic attributes.

Example 3 - Conditions

Update Condition: ATC_REQ_HDR_APPROVAL_PATH in (PM)

Cancel Apply

Condition Type **Ordinary**
Attribute **ATC_REQ_HDR_APPROVAL_PATH**
Data Type **String**
Item Class **Header**

+ Show rules using this condition

String Values

String Value	Delete
PM	
<input type="button" value="Add Another Row"/>	

Example 3 – Rule Set Up

Update Rule: PM Path and Requisition_Total > 100,000 and <= 250,000 requires at least Level 5 approval

* Indicates required field

Cancel Apply

Item Class **Header**

* End Date 31-Dec-4712

Rule Type **List Creation**

* Name PM Path and Requisition_Total > 100,000 and <= 250,000 requires at least Level 5 approval

* Start Date 17-Dec-2007
(example: 29-Feb-2008)

Other Instances of this Rule

Conditions

Add Condition

Condition	Condition Type	Item Class	Remove
REQUISITION_TOTAL is greater than 100000 and less than or equal to 250000, JED	Ordinary	Header	
ATC_REQ_HDR_APPROVAL_PATH in (PM)	Ordinary	Header	

Actions

Add Action

Action Type	*Action	Remove
absolute job level	Require approvals up to at least level 5.	

Example 3 – Other Set Up

- Flexfield on Project Type information to indicate if it is a “PM” path
- Set up job levels on each job in HR

Example 3 - Outcome

- Preparer = Gary Marines
- Requester = Gary Marines
- Project Manager = Duane Schoon

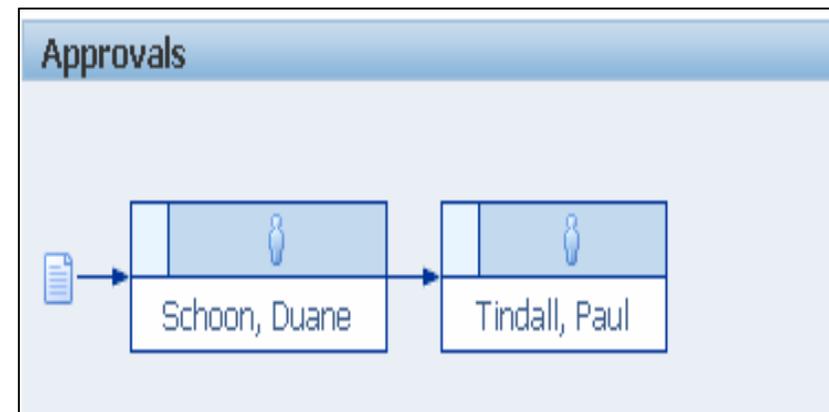
Delivery

Urgent

* Need-By Date: 02-Mar-2008 00:00:00
(example: 29-Feb-2008 19:45:00)

* Requester: Marines, Gary

* Deliver-To Location: Headquarters
[Enter one-time address](#)



What else does AME do?

- Parallel approvals
- FYI notifications
- List-Creation Exception
 - **If** invoice amount > \$500 USD and pay group = Employee, **THEN** require approval two job levels above requestor.
- List-Modification
 - **If** any approver = Sam Clark, **THEN** grant final authority.

What else does AME do?

- Conflict Resolution
 - An approver will only be required to take action once if they are repeated for some reason
 - If chain-of-authority and pre or post approval rule include the same person, chain-of-authority wins.
 - If pre and post rules include the same person, pre wins.

What else does AME do?

- Much More!
- We have just skimmed the surface today

Initial Setup Steps

- User Management responsibility
- Users page
- Find user and click Update

ORACLE User Management

User Management

Users | Roles & Role Profiles | Role Categories | Registration Processes

User Maintenance

Search for people and User accounts. All fields except "First Name" are case insensitive. For wildcard searches, please use "%"

Search:

User Name: Organization:

Email: Role:

Last Name:

First Name:

Register:

Last Name	First Name	Email	User Name	Status	Create User	Reset Password	Update
			ame admin	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Initial Setup Steps

- Select Assign Roles and search for **Role** starting with **Approval**

Search and Select: Assign Roles Cancel Select

Search

To find your item, select a filter item in the pull-down list and enter a value in the text field, then select the "Go" button.

Search By: Role

Results

[Select All](#) | [Select None](#)

Select	Name	Description	Type	Code
<input type="checkbox"/>	Approvals Management Administrator	Role inherits Process Owner role and System Administrator role. Can also create action type etc. Can modify default config variables.	Role	UMX AME_APP_ADMIN
<input type="checkbox"/>	Approvals Management System Administrator	Role can create, update or delete transaction types. Also inherits System Viewer. Can access exceptions log and config variables.	Role	UMX AME_TTYPE_ADMIN
<input type="checkbox"/>	Approvals Management Process Owner	Role can view all business dashboard view pages.	Role	UMX AME_BUD_PROCESS_OWNER
<input type="checkbox"/>	Approvals Management System Viewer	Role has access to admin dashboard with view only access.	Role	UMX AME_ADMIN_VIEWER
<input type="checkbox"/>	Approvals Management Business Analyst	Role which gives full access to business dashboard pages. Does not have default config variable access and Action Type Create Access.	Role	UMX AME_BUS_ANALYST

[About this Page](#)

- Add all roles to the user

Initial Setup Steps

- Fill out Justification for each role and save.

Assign Roles		
Details	Role	Description
<input type="checkbox"/> Hide	Approvals Management Business Analyst	Role which gi and Action Ty
* Justification	<input type="text" value="AME setup user"/>	
Role Inheritance Approvals Management Process Owner, Approvals Management Busi		
<input type="checkbox"/> Hide	Approvals Management System Viewer	Role has acce
* Justification	<input type="text" value="AME setup user"/>	

Initial Setup Steps

- Verify roles are assigned to the user

The screenshot displays the Oracle User Management console. At the top, there's a navigation bar with 'User Management' and sub-links for 'Users', 'Roles & Role Instances', 'Role Categories', and 'Registration Processes'. Below this, a confirmation message states: 'Confirmation: You have successfully updated their information.' The 'Update User' section shows details for 'jame_admin', including 'User Name', 'Email', 'Status' (Active), 'Active From' (14 Nov 2007), and 'Active To'. Below the user details is a 'Roles' section with an 'Assign Roles' button. A table lists assigned roles with columns for 'Details/Role', 'Description', and 'Status'.

Details/Role	Description	Status
Show Approvals Management System Viewer	Role has access to admin dashboard with view only access.	Assigned
Show Approvals Management Administration	Role inherits Empass Owner role and System Administrator role. Can also create and/or type and manage default config variables.	Assigned
Show Approvals Management Business Analyst	Role which gives full access to business dashboard pages. Does not have default config variable access and Action type Global Access.	Assigned
Show Approvals Management Process Owner	Role can view all the needed flow and view pages.	Assigned
Show Approvals Management System Administration	Role can create, update or delete configuration types. Also inherits System Viewer. Can access Exceptions, Flow and Config variables.	Assigned
Show Approvals Management Administration	EMP admin User Responsibility	Assigned
Show Approvals Management Business Analyst	EMP Business User Responsibility	Assigned

Initial Setup Steps

- Switch to Functional Administrator

The screenshot shows the Oracle Applications Administration interface. The top navigation bar includes 'Security', 'Core Services', 'Personalization', and 'File Manager'. Under 'Security', there are sub-tabs for 'Grants', 'Permissions', and 'Permission Sets'. The 'Grants' section is active, displaying a search form and a table.

Search
The search is case insensitive.

Name:

Grantee Type:

Set:

Object:

Name	Grantee Type	Grantee	Set	Object	Data Context Type
No search conducted					

- Select Create Grant

Initial Setup Steps

ORACLE Applications Administration

Security | Core Services | Personalization | File Manager

Grants | Permissions | Permission Sets

Define Grant | Select Object Data Context

Create Grant: Define Grant

↑ Indicates required field

* Name: AME Transaction Types to AME_ADMIN
 Description:

* Effective From: 01-Nov-2007
(example: 20-Oct-2007) Effective To:

Security Context

Define the context when the grant is applied by selecting a grantee, a responsibility and/or operating unit.

Grantee Type: Specific User
 * Grantee: AME_ADMIN
 Operating Unit:
 Responsibility:

Data Security

To define a data security policy, select an object.

Object: AME Transaction Types

Initial Setup Steps

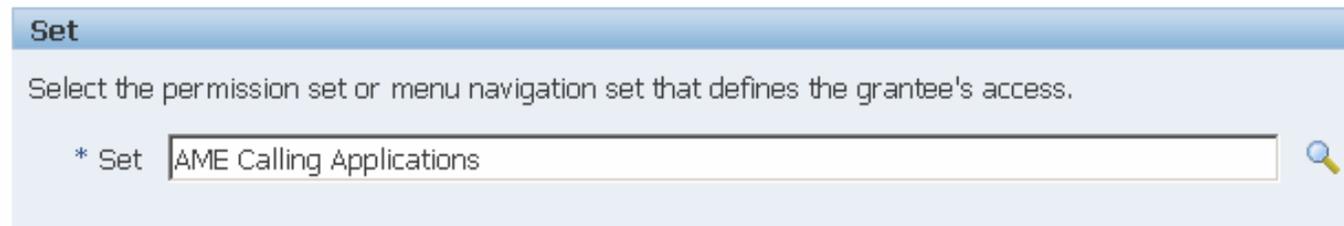
- AME Transaction Types – All Rows



Object **AME Transaction Types**
Data Context Type

Initial Setup Steps

- Application Set = AME Calling Applications



Set

Select the permission set or menu navigation set that defines the grantee's access.

* Set 

- Proceed to last page and select Finish

Initial Setup Steps

- Set AME:Installed profile for calling applications

System Profile Values		
Profile Option Name	Site	Application
AME:Installed	No	Payables
		Yes

Initial Setup Steps

- Set application-specific setups

ORACLE Purchasing Diagnostics Preferences Close Window

Update Document Type: Requisition Purchase for Vision Operations

* Indicates required field Cancel Apply

* Document Name:

Approval	Control
<input checked="" type="checkbox"/> Owner Can Approve <input checked="" type="checkbox"/> Approver Can Modify <input type="checkbox"/> Can Change Forward-To Approval Workflow: <input type="text" value="PO Requisition Approval"/> Workflow Start Process: <input type="text" value="Main Requisition Approval"/> Approval Transaction Type: <input type="text" value="PURCHASE_REQ"/> Forward Method: <input type="text" value="Hierarchy"/>	Security Level: <input type="text" value="Public"/> Access Level: <input type="text" value="Full"/> Autocreate Workflow: <input type="text" value="PO Create Documents"/> Autocreate Workflow Start Process: <input type="text" value="Universal Document Creation/Launch"/> <input checked="" type="checkbox"/> Use Contract Agreements for Auto-sourcing <input type="checkbox"/> Include Non-Catalog Requests

Cancel Apply

Diagnostics Preferences Close Window

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THANK YOU

Questions and Answers