

# **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	
<a href="#">Purchase Requisition Approval</a>	Purchasing				
<a href="#">Payables Invoice Approval</a>	Payables				
<a href="#">Work Confirmation</a>	Purchasing				
<a href="#">Requester Change Order Approval</a>	Purchasing				
<a href="#">AMW Audit Procedure Approval</a>	Internal Controls Manager				

Previous 1-5 Next 5

## 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  
[Go](#) [Clear](#)

[Create](#) [Use Existing Attribute](#)

Attribute	Description	Category	Usage Type	Item Class	Data Type	Update	Delete
<a href="#">REQUISITION TOTAL</a>	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**

Cancel Apply

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

Cancel Apply

# Example 1 – Approval Group

Oracle Applications 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: 1

Matching Method: First Requester Wins

Usage Type: Static

Query:

Dynamic Approver Group requires a SQL.

Validate

**Group Members**

Enter 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

**Item Class:** Header

**Rule Type:** Post List Approver Group

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

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

\* End Date: 31-Dec-4712

[Cancel](#) [Apply](#)

**Other Instances of this Rule**

**Conditions**

[Add Condition](#)

Condition	Condition Type	Item Class	Remove
REQUISITION TOTAL is greater than 250000,USD	Ordinary	Header	<a href="#">Remove</a>

**Actions**

[Add Action](#)

Action Type	* Action	Remove
post-chain-of-authority approvals	Require post-approval from Legal Review Team	<a href="#">Remove</a>

[Cancel](#) [Apply](#)

# Example 1 - Outcome

Shopping Cart

Save Checkout

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

Return to Shopping

Save Checkout

# Example 1 - Outcome

**ORACLE® iProcurement**

Shopping Cart Home Logout Preferences Help Diagnostics

Shop Requisitions Receiving

Requisition Information Approvals Review And Submit

**Checkout: Approvals and Notes**

Your requisition will be sent to the following list of approvers.

Save Submit Back Step 2 of 3 Next

**Approvals**

Manage Approvals

Schoon, Duane Tindall, Paul Petras, Jane Legal Review Team



## **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 : TM\_PROJECT\_TYPE**

\* Indicates required field

Cancel Apply

Name	TM_PROJECT_TYPE
Item Class	Line Item
* Description	TM_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

☒ **Rules Using the Approver Group**

**Details**

Name	<b>JM Project Manager</b>
* 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, po_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.



# 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 4 | 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

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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.

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# Example 2 – Outcome (Test)

**ORACLE** Approvals Management  
 Transaction Type: Purchase Requisition Approval

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[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.
 [View Approval Process Stages \(1\)](#)

Transaction ID **104110**

**Applicable Rules**

Details	Description	Class	Rule Type	Category
<a href="#">+ Show</a>	TM Project Manager	Header	List Creation	Approver

**Final Processed Approver List**

Details	Order Number	Approver Type	Approver	Category	Status
<a href="#">+ Show</a>	1	HR People	Baker, Catherine	Approver	
<a href="#">+ Show</a>	2	HR People	Marlin, Amy	Approver	
<a href="#">+ Show</a>	9	HR People	Brown, Casey	Approver	

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

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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

```
select atcllc_ame_req.get_starting_person_id  
(('REQUIS:TCN',po_ame_setup_pvt.get_new_req_header_id  
(:transactionId),10000) from dual
```

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**

**Usage Type** Dynamic

**\* Value**

```
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
```

Enter SQL query for dynamic attributes.

[Cancel](#) [Apply](#) [Validate](#)

# 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

Rule Type List Creation

\* End Date 31-Dec-4712

\* 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, USD	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

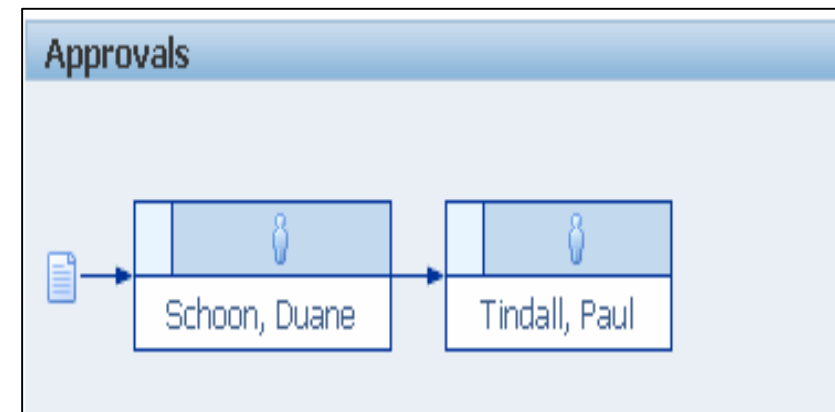
**Delivery**

☐ 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 Information | 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			

# 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 term in the pull-down list and enter a value in the text field, then select the "Go" button.

Search By:

**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 and can modify default config variables.	RLE	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 exception log and config variables.	RLE	UMX AME_TTYPE_ADMIN
<input type="checkbox"/>	Approvals Management Process Owner	Role can view all business dashboard view pages.	RLE	UMX AME_BUD_PROCESS_OWNER
<input type="checkbox"/>	Approvals Management System Viewer	Role has access to admin dashboard with view only access.	RLE	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.	RLE	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
<a href="#">Hide</a>	Approvals Management Business Analyst	Role which gi and Action Ty
* Justification <div> AME setup user </div>		
Role Inheritance <b>Approvals Management Process Owner, Approvals Management Busi</b>		
<a href="#">Hide</a>	Approvals Management System Viewer	Role has acce
* Justification <div> AME setup user </div>		

# Initial Setup Steps

- Verify roles are assigned to the user

**ORACLE User Management**

User Management | Users | Roles & Role Instances | Role Categories | Registered Processes

User Management > Users >

**Confirmation**  
You have successfully updated the information.

Update User: amc\_admin

Indicates required field

User Name: amc\_admin

Email:

Status: ☒ Active

Active From: 14-Nov-2007 (example & default)

Active To:

**Roles**

Assign Roles

Details/Role	Description	Status
<a href="#">Show</a> Approvals Management System Viewer	Role has access to admin dashboard with view only access.	Assigned
<a href="#">Show</a> Approvals Management Admin Dashboard	Role inherits Process Owner role and System Administrator role. Can also create another type and manage default config variables.	Assigned
<a href="#">Show</a> Approvals Management Business Analyst	Role which gives full access to business dashboard pages. Does not have default config variable access and Action type Check or Audit.	Assigned
<a href="#">Show</a> Approvals Management Process Owner	Role can view all the needed to send view pages.	Assigned
<a href="#">Show</a> Approvals Management System Administrator	Role can create, update or delete a new action type. Also inherits System Viewer. Can access Exceptions and config variables.	Assigned
<a href="#">Show</a> Approvals Management Admin Dashboard	AMF admin User Responsibility	Assigned
<a href="#">Show</a> Approvals Management Business Analyst	AMF 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 links for 'Grants', 'Permissions', and 'Permission Sets'. The 'Grants' link is selected. Below the navigation bar, there is a search section with the text 'The search is case insensitive.' and input fields for 'Name', 'Grantee Type' (set to 'All Users'), 'Set', and 'Object'. There are 'Go' and 'Clear' buttons. Below the search section is a 'Create Grant' button. At the bottom, there is a table with columns: Name, Grantee Type, Grantee, Set, Object, and Data Context Type. The table currently shows 'No search conducted'.

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

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'. A progress bar indicates the current step is 'Select Object Data Context'. The main heading is 'Create Grant: Select Object Data Context'. Below this, the 'Object' is set to 'AME Transaction Types' and the 'Data Context Type' is set to 'All Rows' in a dropdown menu.

ORACLE® Applications Administration

Security | Core Services | Personalization | File Manager

Grants | Permissions | Permission Sets

Define Grant | Select Object Data Context

Create Grant: Select Object Data Context

Object AME Transaction Types

Data Context Type All Rows




# 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

\* 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 	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="General Document Creation/Launch"/> <input checked="" type="checkbox"/> Use Contract Agreements for Auto-sourcing <input type="checkbox"/> Include Non-Catalog Requests	<input type="button" value="Search"/> <input type="button" value="Search"/>
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_RQ"/>		
Forward Method:	<input type="text" value="Hierarchy"/>		

Diagnostics Preferences Close Window

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# THANK YOU

## Questions and Answers