

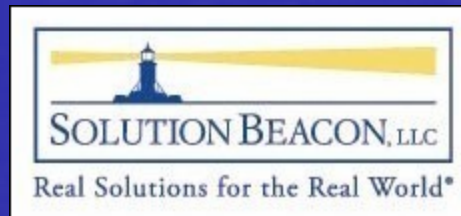
Implementing, Personalizing and Customizing AME for Complex Approvals

Susan Behn

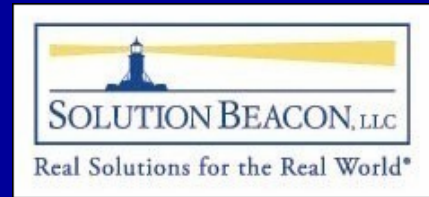
Gerald Jones

NCOAUG, Chicago, IL

August 17, 2007

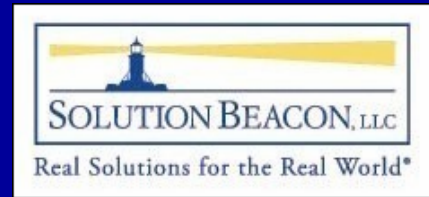


Agenda



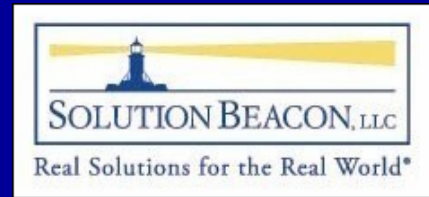
- ◆ AME Basics
- ◆ AME Implementation
 - AP Setup
 - Requisition Setup
- ◆ AME and Approval Workflows
- ◆ Sample Business Case Scenarios
- ◆ Testing Workbench

What is Oracle Approvals Management (AME)?



- ◆ Oracle Self-Service Application
- ◆ Enables development of custom rules to manage transaction approvals
- ◆ Integrated with multiple E-Business applications such as HR, PO, AP and UMX
- ◆ Builds Approver List and works with Workflow to notify and request responses

Advantages of AME



- ◆ Approval Rules can be developed without programming knowledge
- ◆ Approver Lists leverage off existing Oracle hierarchies (e.g. HR supervisor, HR position)
- ◆ AME responds to changes such as organization hierarchies or rule changes
- ◆ Flexible – can combine hierarchy types
- ◆ Rules can be shared by transaction types
- ◆ Alternative to AME is workflow customization

Limitations of AME



- ◆ Timeout functionality is not supported in AME
 - Workflow can be customized, but timeout goes up supervisor chain – not back to AME
- ◆ Notifications only have approve and reject responses
 - No Forward
 - No Approve and Forward
- ◆ R11*i* – Rules are across operating units
 - Must create attribute to limit by OU
- ◆ Release 12 – Rules are specific to operating unit

AME Components



- ◆ Transaction Types
- ◆ Attributes
- ◆ Conditions
- ◆ Actions / Action Types
- ◆ Approver Groups
- ◆ Rules

Transaction Types



- ◆ Describe the type of transaction on which approval rules will be based (e.g. Invoice Approval)
 - 178 Transaction Types in 11.5.10.2
 - 251 Transaction Types in Release 12
- ◆ Custom Types can be created for custom apps

Business Analyst Dashboard

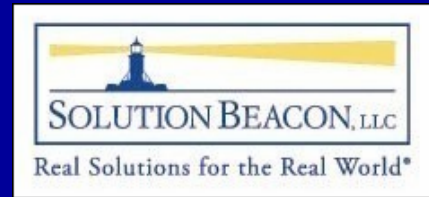
This page displays the transaction types to which you have access and the rules attached to these transaction types.

Transaction Types

◀ Previous 5 136-140 Next 5 ▶

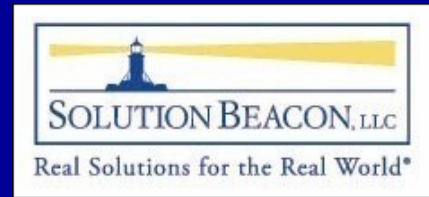
Name	Application	Rules	Test	Setup
Requester Change Order Approval	Purchasing			
Purchase Requisition Approval	Purchasing			
Internal Requisition Approval	Purchasing			
PO ERES Receiving Inspection	Purchasing			
PO ERES ASL Creation	Purchasing			

Attributes



- ◆ Variables that represents business data (e.g. invoice amount, supplier, etc.)
- ◆ Building blocks of rule development
- ◆ Can be static (constant value) or dynamically retrieved at runtime (SQL query)
- ◆ Attribute data types can be alphanumeric, numeric, date, currency or Boolean
- ◆ Many basic attributes exist for transaction types
- ◆ Create additional attributes for anything linked to transaction id for header (invoice id, requisition id)

Attributes – Data Types



◆ Alphanumeric – Can accommodate 100 characters

◆ Numeric – Must be converted to canonical form

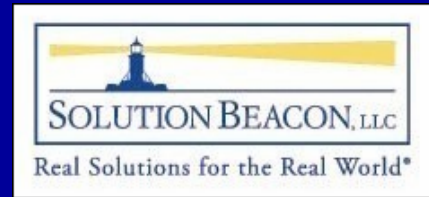
Select `fnd_number.number_to_canonical(123456789)` from dual

◆ Date – Must return format

YYYY:MON:DD:HH24:MI:SS

Select `to_char(sysdate, ame_util.versionDateFormatModel)` from dual

Attributes – Data Types cont'd



- ◆ Currency – Dynamic conversion requires:
 - Numeric column
 - Currency
 - Conversion method
- ◆ Boolean – Allowable values are True or False
 - Use `ame_util.booleanAttributeTrue` or `ame_util.booleanAttributeFalse` to ensure proper format

Attributes - Types



◆ Mandatory Attributes

- Defined in ALL transaction types in AME
- Control runtime behavior

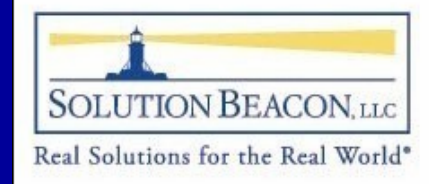
Transaction Type: Payables Invoice Approval

Transaction Type **Payables Invoice Approval**
Application **Payables**
Transaction Type Key **APINV**
AME Internal-ID **-1**

[Item Classes](#) **Mandatory Attributes** [Configuration Variables](#)

Attribute	Static Usage	Value/Query
ALLOW_DELETING_RULE_GENERATED_APPROVERS	Static	false
ALLOW_REQUESTOR_APPROVAL	Static	true
AT_LEAST_ONE_RULE_MUST_APPLY	Static	false
EFFECTIVE_RULE_DATE	Static	
EVALUATE_PRIORITIES_PER_ITEM	Static	false
REJECTION_RESPONSE	Static	Stop all processing
REPEAT_SUBSTITUTIONS	Static	false
USE_RESTRICTIVE_ITEM_EVALUATION	Static	false
USE_WORKFLOW	Static	true
WORKFLOW_ITEM_KEY	Dynamic	select to_char(invoice_id) '_' to_char(approval_iteration) from ap_invoices_all where invoice_id = :transactionId

Attributes - Types



◆ Required Attributes

- Vary by transaction type
- Control certain runtime behavior related to the action type

◆ Example: Can change starting point for approval based on a query

Attribute	Description	Category	Usage Type	Item Class	Data Type	Update	Delete
ALLOW_EMPTY_APPROVAL_GROUPS	whether to allow approval groups to have no members	Required	Static	Header	Boolean		
FIRST_STARTING_POINT_PERSON_ID	first starting point for dual-chains approval type	Required	Static	Header	Number		
INCLUDE_ALL_JOB_LEVEL_APPROVERS	whether to include all approvers at a given job level	Required	Static	Header	Boolean		
JOB_LEVEL_NON_DEFAULT_STARTING_POINT_PERSON_ID	person ID of non-default first approver for job-level authority approval types	Required	Static	Header	Number		



Attributes - Types



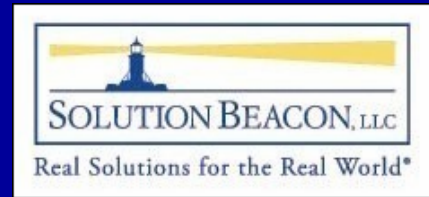
◆ Optional Attributes – Any other attributes defined for a transaction type

- This attribute calls a function to determine the number of supervisors to go up to reach a specified approval amount based on a custom table

* Name	<input type="text" value="XX_APPROVAL_LEVEL"/>
Item Class	<input type="text" value="Header"/>
* Description	<input type="text" value="Number of supervisor levels required to reach adequate signing limit"/>
Data Type	<input type="text" value="Number"/>
Approver Type	<input type="text"/>
Value Set	<input type="text"/>
Usage Type	<input type="text" value="Dynamic"/>
* Value	<input type="text" value="Select XX_AME_FUNCTIONS.xx_apprvl_level(:transactionId) from dual"/>

Enter SQL query for dynamic attributes.

Conditions



- ◆ Used to evaluate the value of attributes at runtime
- ◆ Condition result can either be True or False
- ◆ Represent the *IF* part of an approval rule
- ◆ Three types of conditions
 - Ordinary-Regular
 - Ordinary-Exception
 - List Modifier

Conditions - Types



◆ Ordinary-Regular

- Associates attribute with a defined value or range of values (e.g. invoice amount > 10000)

Conditions

Regular [List Modifiers](#)

Search

Item Class: All
Condition Type: Ordinary
Attribute:

Previous 1-5 Next 5

Condition <input type="button" value="▲"/>	Item Class	Condition Type	Update	Delete
SB_INVOICE_AMT is greater than or equal to 100	Header	Ordinary		
SB_INVOICE_AMT is greater than or equal to 1000000	Header	Ordinary		
SB_SALES_TAX_PRESENT is greater than 0	Header	Ordinary		
SUPPLIER_INVOICE_AMOUNT is greater than 10000,EUR	Header	Ordinary		
SUPPLIER_INVOICE_AMOUNT is greater than 10000,USD	Header	Ordinary		

Conditions - Types



◆ Ordinary-Exception

- Similar to Ordinary-Regular, but can only be used in certain Rule Types (e.g. use regular rules except for Utility suppliers)

Conditions

Regular [List Modifiers](#)

Search

Item Class: All
Condition Type: Exception
Attribute:

Condition	Item Class	Condition Type	Update	Delete
SUPPLIER_INVOICE_TYPE_LOOKUP_CODE in ('UTILITY')	Header	Exception		

Conditions - Types



◆ List-Modification

- Determines if specified approver appears in an approver list (e.g. can be used for conflict of interest checking)

Conditions

Regular List Modifiers

Search

Approver Order All
Approver Type All
Approver

Condition <input type="button" value="Δ"/>	Update <input type="button" value="✎"/>	Delete <input type="button" value="🗑"/>
Any approver is HR People: Behn, Susan		

Actions / Action Types



- ◆ Provide instruction to AME when an approval rule has been satisfied
- ◆ Represent the *Then* part of an approval rule
- ◆ Determine the approvers and number of approvers
- ◆ Action Types are grouping of actions
- ◆ Categorized into type of hierarchy on which approver lists are based

Action Types/Actions



◆ Action Type

Action Types

To reinstate changed configuration details to original values click Revert.

Revert (1) Apply

Search

Rule Type

Previous 1-5 Next 5

Select	Name	Description	Rule Type	Order Number	Ordering Mode	Voting Method	Remove
<input checked="" type="radio"/>	absolute job level	chains of authority based on absolute job level	Chain Of Authority	<input type="text" value="1"/>	Serial	Serial	
<input type="radio"/>	substitution	substitute one approver for another	Substitution	<input type="text" value="1"/>			
<input type="radio"/>	pre-chain-of-authority approvals	group approvals before the chain of authority	Pre List Approval Group	<input type="text" value="1"/>			
<input type="radio"/>	post-chain-of-authority approvals	group approvals after the chain of authority	Post List Approval Group	<input type="text" value="1"/>			
<input type="radio"/>	relative job level	chains of authority based on relative job level	Chain Of Authority	<input type="text" value="2"/>	Serial	Serial	

Actions: absolute job level

Previous 1-5 Next 5

Action	Update	Delete
Require approvals up to at most level 1.		
Require approvals up to at most level 2.		

◆ Valid Actions for Action type *Absolute Job Level*

Action Types – Chain-of-Authority



Action Type	Description	Example
Absolute-job-level	~Ascends HR supervisor hierarchy ~Based on specific job level	Require approvals up to job level six
Relative-job-level	~Ascends HR supervisor hierarchy ~Based on job level relative to requester's job level	Require approvals at least four levels up

Action Types – Chain-of-Authority



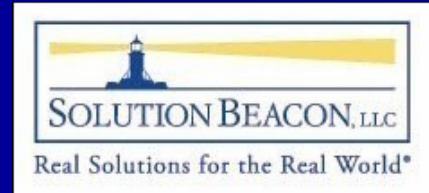
Action Type	Description	Example
Manager-then-Final-Approver	~Ascends HR supervisor hierarchy ~Supervisor and final approver are required to approve	Require approval up to first supervisor and level six final approver
Final-Approver-Only	~Ascends HR supervisor hierarchy ~Only final approver needed for approval	Require approval from level six final approver

Action Types – Chain-of-Authority



Action Type	Description	Example
Dual-Chains-of – Authority	~Ascends HR supervisor hierarchy ~Builds two separate approver lists ~Approval needed from each list	Require approval from previous and current supervisor (i.e. during employee transfer)
Line-Item-Job-Level	~Ascends HR supervisor hierarchy ~Approver chain based on line-level attributes	Require approval from manager of cost center in account code of distribution line

Action Types – Chain-of-Authority



Action Type	Description	Example
Supervisory-Level	Ascends HR supervisor hierarchy a specified number of levels	Require approvals up to three supervisors
HR-Position	Ascends HR position hierarchy up to a specified position	Require approvals up to Accounting Manager

Action Types – Chain-of-Authority



Action Type	Description	Example
Position-Level	Ascends HR position hierarchy a specified number of positions	Require approvals up to position at level 4

Action Types – List Modification



Action Type	Description	Example
Final-Authority	Grants final authority to an approver by ending the approval chain when target approver is reached	If Approver is IT Manager, allow final approval
Non-Final-Authority	Revokes final authority from an approver by extending approver chain	If Approver is Harry, require approval up to one supervisor

Action Types – Approver Group



Action Type	Description	Example
Approver-Group Chain-of-Authority	~Ascends custom approver hierarchy ~Builds chain-of-authority type approver list	If transaction item contains building material, require approvals Chris and then Sharon
Pre and Post Chain-Of-Authority	Approvers are added before or after normal chain-of-authority list build for a transaction	Require sales tax group approver, then up at least one supervisor

Rules



- ◆ The key component in AME application approval setup
- ◆ Represents the translation of an organization business approval rule in AME
- ◆ Associate one or more conditions to a rule
- ◆ Select an action type to build approver list
 - Rule Types determine the action types that can be used on a rule

Create a new rule



◆ Step 1 - Enter name, rule type and item class

Enter Rule Details Add Conditions Add Actions Review

Create New Rule: Enter Rule Details

* Indicates required field Cancel Step 1 of 4 Next

* Name	<input type="text" value="XX test Rule"/>
* Rule Type	List Creation
Item Class	Header
* Start Date	<input type="text" value="19-Jul-2007"/>
	(example: 19-Jul-2007)
* End Date	<input type="text" value="31-Dec-4712"/>

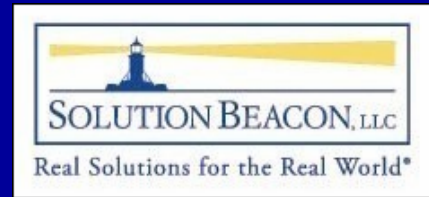
Rules – Rule Types



◆ List-Creation

- Generate Chain-of-Authority Approver Lists
- Acceptable action types
 - ◆ Absolute-Job-Level
 - ◆ Relative-Job-Level
 - ◆ Dual Chains of Authority
 - ◆ Final-Approver-Only
 - ◆ Manager-Then-Final Approver
 - ◆ Supervisory Level
- Example:
 - ◆ IF INVOICE_AMOUNT > \$500,000 , THEN REQUIRE APPROVALS UP TO AT LEAST POSITION CFO

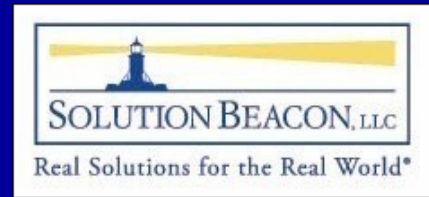
Rules – Rule Types



◆ List-Creation Exceptions

- Generate Chain-of-Authority Approver Lists
- Typically used to suppress another list-creation rule
- Uses one ordinary condition and one exception condition
- Acceptable action types are same as List-Creation rule type
- Examples:
 - ◆ Rule A: IF INVOICE_AMOUNT < 1000 THEN REQUIRE APPROVALS UP TO 1 SUPERVISOR
 - ◆ Rule B: IF INVOICE_AMOUNT < 1000 AND (Exception) COST_CENTER IS IN (0743) THEN REQUIRE APPROVALS UP TO 2 SUPERVISORS

Rules – Rule Types



◆ List-Modification

- Used to extend or reduce final approver authority
- Must use a condition defined as list-modification
- Acceptable action types
 - ◆ Final-Authority
 - ◆ Non-Final Authority
- Examples:
 - ◆ IF INVOICE_AMOUNT > 1000 AND FINAL APPROVER IS GERALD JONES THEN REQUIRE APPROVAL AT LEAST ONE JOB LEVEL UP
 - ◆ IF INVOICE_AMOUNT > 5000 AND PAYGROUP IS 'COMPEQUIP' AND ANY APPROVER IS GERALD JONES GRANT FINAL AUTHORITY

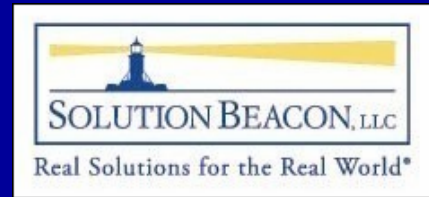
Rules – Rule Types



◆ Substitution

- Allows an approver on approver list to be substituted for another person
- Common uses may be whenever an typical approver is out of the office or unavailable to perform approvals (e.g. vacation)
- Must use condition defined as list-modification condition
- Example
 - ◆ IF ANY APPROVER IS GERALD JONES, THEN SUBSTITUTE SUSAN BEHN FOR THE APPROVER

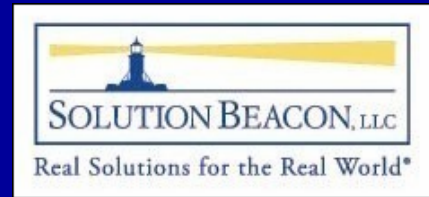
Rules – Rule Types



◆ Pre- and Post-List

- Uses defined Approver Group to generate a list of approvers
- Approvers are inserted either before or after the normal chain-of-authority approver list
- Typically used to allow functional specialists to review transaction
- Example
 - ◆ IF LINE-TYPE IS 'TAX', THEN REQUIRE PREAPPROVAL FROM TAX DEPARTMENT

Rules – Rule Types



◆ Combination

- Allows different action types to be used as part of a rule's actions
- Action Types combinations can either include:
 - ◆ List-Creation, List-Modification
 - ◆ Pre-Chain of Authority
 - ◆ Post-Chain of Authority
 - ◆ List-Modification
 - ◆ Substitution
- Example:
 - ◆ IF REQUESTER IS 'JOHN DOE', REQUIRE PRE-APPROVAL FROM TEAM LEAD, POST-APPROVAL FROM AP MANAGER

Create a new rule



◆ Step 2 - Add Condition

Enter Rule Details **Add Conditions** Add Actions Review

Create New Rule: Add Conditions Cancel Back Step 2 of 4 Next

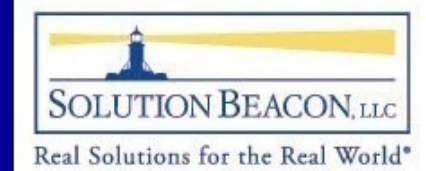
Conditions

Add Condition

Condition	Item Class	Condition Type	Remove
No results found.			

Cancel Back Step 2 of 4 Next

Create a new rule



◆ Step 3 - Add Action Type/Action

Enter Rule Details Add Conditions **Add Actions** Review

Create New Rule: Add Actions

Cancel Back Step 3 of 4 Next

Add Action

Action Type	Action	Remove
<input type="text" value="absolute job level"/>	<input type="text"/>	

Cancel Back Step 3 of 4 Next

[kbench](#) | [Setup](#) | [Return to Dashboard](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Personalize Page](#) [Privacy Statement](#)

Create New Rule: Add Actions

Cancel Back Step 3 of 4 Next

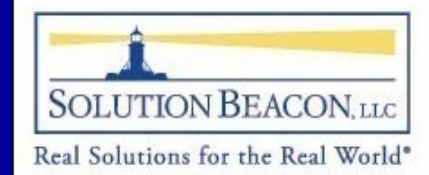
Add Action

Action Type	Action	Remove
<input type="text" value="absolute job level"/>	<input type="text" value="Require approvals up to at least level 3."/>	

Cancel Back Step 3 of 4 Next



Create a new rule



◆ Step 4 – Review and Finish



Create New Rule: Review

Step 4 of 4

Name **XX test Rule**
Rule Type **List Creation**
Item Class **Header**
Start Date **19-Jul-2007**

End Date **31-Dec-4712**

Conditions

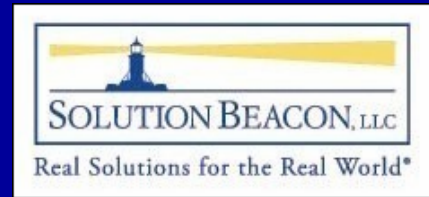
Condition	Condition Type	Item Class
SB_INVOICE_AMT is greater than or equal to 100	Ordinary	Header

Actions

Action Type	Action
absolute job level	Require approvals up to at least level 3.

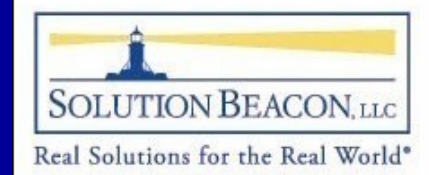
Step 4 of 4

AME and Approval Workflows

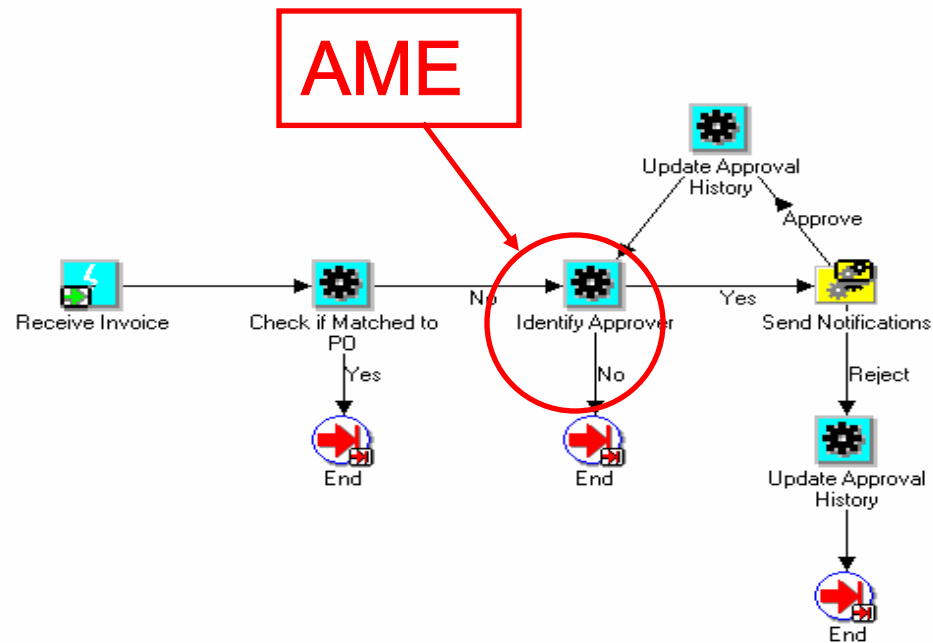


- ◆ Approval routing is controlled by AME rules via workflow
- ◆ Approval workflow communicates with AME to find approvers
- ◆ If valid approver is identified, workflow sends notification
- ◆ Workflow continues to send notifications until
 - Approval from authorized approver is reached
 - Invoice is rejected
 - Approver list is exhausted or no response received

Invoice Approval Workflow



- ◆ Invoice Approval Workflow *Identify Approver* node calls the AME API to identify next approver



AME Setup



- ◆ Install latest AME patch
 - 11i.AME.B (as of March, 2007)

Simple Search

Advanced Search | Quick Links | Saved Searches

Search By Product or Family
(ex. RDBMS Server)
Release
Patch Type
Platform or Language

Results for Platform : AIX Based Systems (32-bit)

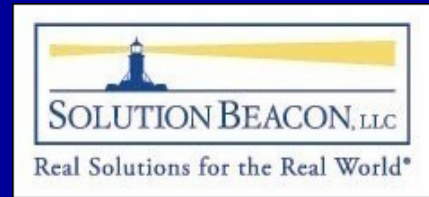
Tip Consider Saving the search to make it easy to run again.

Save Search

Patch	Description	Release	Updated	Size			
5055050	Human Resources Suite Family: Patchset 11i.HR_PF.K.RUP.1	11i	30-JUN-2006	472M			
1428060	Approval Management Engine: Patchset 11i.AME.B	11i	30-SEP-2005	47M			
3500000	Human Resources Suite Family: Patchset Patch 11i.HR_PF.K	11i	05-JUL-2005	495M			
3333633	Human Resources Suite Family: Patchset Patch 11i.HR_PF.J	11i	14-MAR-2005	468M			
3962268	Approval Management Engine: Patchset Patch 11i.AME.A	11i	01-DEC-2004	47M			

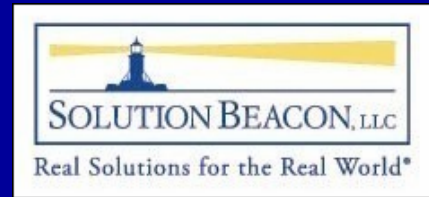
Total: 5

AME Setup



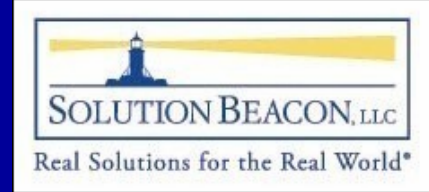
- ◆ Current AME application uses Oracle Role Based Access Model (RBAC) to access AME components
- ◆ The following roles are predefined with 11i/AME.B
 - Approvals Management Administrator
 - Approvals Management Analyst
 - Approvals Management System Viewer
 - Approvals Management System Administrator
 - Approvals Management Process Owner
 - Approvals Management Business Analyst
- ◆ ***Approvals Management Business Analyst*** has access to all AME components required to define business cases

AME Setup



- ◆ Grant access to AME transaction types
- ◆ Functional Administrator Responsibility
 - Grants Tab → Create Grant
 - Select user as grantee
 - Select *AME Transaction Types* as object
 - Choose All rows
 - Instance type = *AME Calling Applications*
 - Review and finish

AME Setup – All Applications

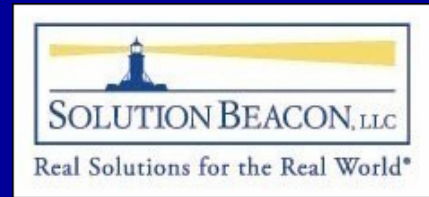


◆ System Administrator

- Set the profile option *AME:Installed* to 'Yes' for specific application

Profile Option Name	Site	Application	Responsibility	User
AME:Installed	No	Yes		

AME for Invoice Approvals



◆ AP Setup

● Payables options related to invoice approval

◆ *Use Invoice Approval Workflow*

- Enables invoice approval in Payables
- All invoices (manual and/or imported) are required to go through workflow for approval

◆ *Allow Force Approval*

- Allows invoices to be manually approved without going through the workflow approval cycle

◆ *Require Validation Before Approval*

- Requires invoice to be fully validated before it can be initiated for approval routing

AME for Invoice Approvals



Payables Options (Vision Operations: USD)

Accounting M... Trans... Payme... Curre... Supplier Invoice Match... Interest Expen... Payment

Main

- Use Invoice Approval Workflow
- Allow Force Approval
- Require Validation Before Approval
- Allow Adjustments to Paid Invoices
- Recalculate Scheduled Payment
- Automatically Create Freight Distribution
- Confirm Date as Invoice Number
- Allow Online Validation
- Allow Document Category Override

Freight Account

GL Date Basis

- Invoice Date
- System Date
- Goods Received / Invoice Date (J)
- Goods Received / System Date

Prepayment

Payment Terms

Settlement Days

Build Prepayment Accounts when Matching

AME for Requisition Approvals



- ◆ Setup →
Purchasing →
Document Types
 - Select Document Type: Purchase Requisition
 - Set Approval Transaction Type = PURCHASE_REQ

Document Types (Vision Operations)

Type	Subtype	Name	Quotation Class
Requisition	Purchase	Purchase Requisition	

Attributes

<input checked="" type="checkbox"/> Owner Can Approve	Security Level	Public
<input checked="" type="checkbox"/> Approver Can Modify	Access Level	Full
<input type="checkbox"/> Can Change Forward-To	Forward Method	Direct
<input type="checkbox"/> Can Change Forward-From	Archive on	
<input type="checkbox"/> Can Change Approval Hierarchy	Default Hierarchy	Materials
<input type="checkbox"/> Disable	Approval Workflow	PO Requisition Approva
<input type="checkbox"/> Use Contract Agreements for Auto Sourcing	Workflow Startup Process	Main Requisition Appro
<input type="checkbox"/> Include Non-Catalog Requests	Approval Transaction Type	PURCHASE_REQ
	Autocreate Workflow	PO Create Document
	Autocreate Workflow Startup Process	Overall Document Crea

AME Dashboards



- ◆ Current version 11i/AME.B delivers a dashboard page to provide access to AME application
- ◆ Dashboard page contents differ depending on which AME role is assigned and accessed
- ◆ AME Business Analyst dashboard provides 'birds-eye view' of AME setup components (e.g. attributes, conditions, rules)
- ◆ AME Administrator dashboard provides view to item classes, mandatory attributes, configuration variables and the exception log

Business Analyst Dashboard



Business Analyst Dashboard

This page displays the transaction types to which you have access and the rules attached to these transaction types.

Transaction Types

Previous 1-5 Next 5

Name ▲	Application	Rules	Test	Setup
AMW Audit Procedure Approval	Internal Controls Manager			
AMW Control Approval	Internal Controls Manager			
AMW Risk Approval	Internal Controls Manager			
BOM ERES Bill of Materials Creation	Bills of Material			
BOM ERES Bill of Materials Update	Bills of Material			

Recently Updated Rules

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

Since number of days

Previous 1-5 Next 5

Name	Rule Type	Transaction Type	Action	Date ▼	User	Update
SB Sales Tax Group Approval	Pre List Approver Group	Payables Invoice Approval	Created	25-Feb-2007	GERALDJONES	
SB Tax Group Approver Rule	Pre List Approver Group	Payables Invoice Approval	Deleted	25-Feb-2007	GERALDJONES	
SB Tax Group Approver Rule	Pre List Approver Group	Payables Invoice Approval	Created	25-Feb-2007	GERALDJONES	
SB Million \$ Invoice	List Creation	Payables Invoice Approval	Created	25-Feb-2007	GERALDJONES	
SB Million \$ Invoice	List Creation	Payables Invoice Approval	Deleted	25-Feb-2007	GERALDJONES	

Future Active Rules

Future Inactive Rules

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](#)

Administrator Dashboard



ORACLE Approvals Management

[Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Administrator Dashboard

This page displays the transaction types and their association with specific Oracle applications.

* Indicates required field

Transaction Types

Filter

Name	Transaction Type Key	Application	Update	Delete
Payables Invoice Approval	APINV	Payables		

Quick Links

- [Configuration Variables](#)
- [Exception Log](#)
- [Setup Report](#)

ORACLE Approvals Management

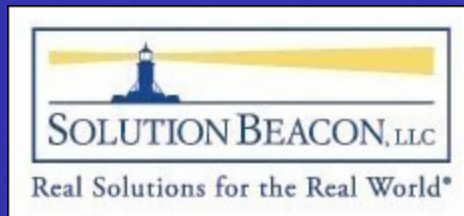
[Return To Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval

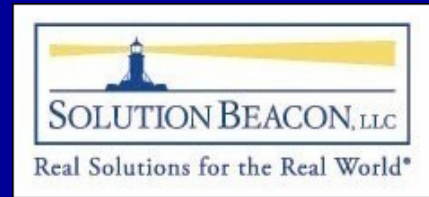
Transaction Type **Payables Invoice Approval**
Application **Payables**
Transaction Type Key **APINV**
AME Internal-ID **-1**

Name	Order Number	Parallelization	Sub-List Mode
Header	1	Serial	Serial
Line Item	2	Serial	Serial

AME Implementation Examples



Business Case #1



- ◆ Require Approvals up 1 level from invoice requester for any invoice \$100 or greater
- ◆ The following AME components need to be defined
 - Attribute: Total Invoice Amount
 - Condition: Total Invoice Amount ≥ 100
 - Rule: If Total Invoice Amount ≥ 100 , then require approvals up to first supervisor

Business Case #1 – Attribute Setup



◆ Attribute Name: SB_INVOICE_AMT

ORACLE® Approvals Management [Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval **Rules** [Test Workbench](#) [Setup](#)

Attributes | [Conditions](#) | [Action Types](#) | [Approver Groups](#)

[Setup: Attributes](#) >

Update Attribute : SB_INVOICE_AMT

* Indicates required field

Name	SB_INVOICE_AMT
Item Class	Header
* Description	<input type="text" value="Custom Invoice Amount"/>
Data Type	Number
Approver Type	None
Value Set	<input type="text"/>
Usage Type	Dynamic <input type="button" value="⚙"/>
* Value	<pre>select fnd_number.number_to_canonical (ai.INVOICE_AMOUNT) from ap_invoices_all ai where ai.invoice_id = :transactionId</pre>

Enter SQL query for dynamic attributes.

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

Copyright (c) 2006, Oracle. All rights reserved. [Privacy Statement](#)

[About this Page](#)

Business Case #1 – Condition Setup



- ◆ Condition Name: SB_INVOICE_AMT is greater than or equal to 100

ORACLE Approvals Management [Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval **Rules** | **Test Workbench** | **Setup**

[Attributes](#) | **Conditions** | [Action Types](#) | [Approver Groups](#)

[Setup: Conditions](#) >

Update Condition: SB_INVOICE_AMT is greater than or equal to 100

Condition Type	Ordinary
Attribute	SB_INVOICE_AMT
Data Type	Number
Item Class	Header

[▶ Show rules using this condition](#)

Details

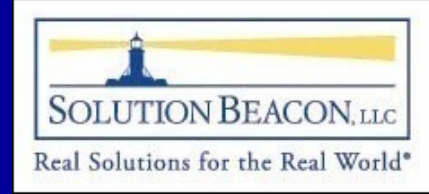
SB_INVOICE_AMT is and

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

Copyright (c) 2006, Oracle. All rights reserved.
[About this Page](#) [Privacy Statement](#)



Business Case #1 – Rules Setup



- ◆ Total Invoice Amount \geq \$100, then require approvals up to the first supervisor (SB Invoice Rule ($>$ \$100))

ORACLE Approvals Management [Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval **Rules** [Test Workbench](#) [Setup](#)

[Rules](#) >

Update Rule: SB Invoice Invoice Rule (> \$100)

* Indicates required field [Cancel](#) [Apply](#)

Item Class **Header** * End Date
Rule Type **List Creation**
* Name
* Start Date (example: 27-Feb-2007)

Other Instances of this Rule

Conditions

Condition	Condition Type	Item Class	Remove
SB_INVOICE_AMT is greater than or equal to 100	Ordinary	Header	

Actions

Action Type	*Action	Remove
supervisory level	Require approvals up to the first superior.	

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

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

Copyright (c) 2006, Oracle. All rights reserved. [About this Page](#) [Privacy Statement](#)

Business Case #2



- ◆ Require pre-approval from the Tax Approver group, for any invoices \$100 or greater with Sales Tax lines
- ◆ The following New AME components need to be defined
 - Attribute: Sales Tax Present on Invoice
 - Condition: Sales Tax Present on Invoice > 0
 - Approver Group: Sales Tax Group
 - Rule: If Sales Tax Present on Invoice > 0, then require pre-approval from the sales tax approver group, then up to the first supervisor

Business Case #2 – Attribute Setup



◆ Attribute Name: SB_SALES_TAX_PRESENT

ORACLE Approvals Management [Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval [Rules](#) [Test Workbench](#) [Setup](#)

[Attributes](#) | [Conditions](#) | [Action Types](#) | [Approver Groups](#)

[Setup: Attributes](#) >

Update Attribute : SB_SALES_TAX_PRESENT

* Indicates required field

Name	SB_SALES_TAX_PRESENT	<input type="button" value="Cancel"/> <input type="button" value="Apply"/>
Item Class	Header	
* Description	<input type="text" value="Any Sales Tax lines present on the current invoice"/>	
Data Type	Number	
Approver Type	None	
Value Set	<input type="text"/>	
Usage Type	Dynamic	
* Value	<input type="text" value="SELECT COUNT(*)
FROM ap_invoice_distributions_all aid
 , ap_tax_codes_all atc
WHERE aid.invoice_id = :transactionId
AND aid.tax_code_id = atc.tax_id
AND aid.line_type_lookup_code in ('TAX')
AND UPPER(atc.name) = 'SALES TAX'"/>	

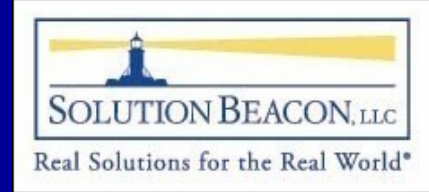
Enter SQL query for dynamic attributes.

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

Copyright (c) 2006, Oracle. All rights reserved.
[About this Page](#) [Privacy Statement](#)



Business Case #2 – Condition Setup



- ◆ Condition Name: SB_SALES_TAX_PRESENT is greater than 0

ORACLE Approvals Management [Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval [Rules](#) [Test Workbench](#) [Setup](#)

[Attributes](#) | **[Conditions](#)** | [Action Types](#) | [Approver Groups](#)

[Setup: Conditions](#) >

Update Condition: SB_SALES_TAX_PRESENT is greater than 0

Condition Type	Ordinary
Attribute	SB_SALES_TAX_PRESENT
Data Type	Number
Item Class	Header

[▶ Show rules using this condition](#)

Details

SB_SALES_TAX_PRESENT is and

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

Copyright (c) 2006, Oracle. All rights reserved. [Privacy Statement](#)

[About this Page](#)



Business Case #2 – Approver Group



◆ Approver Group: SB Sales Tax Group

ORACLE Approvals Management Return to Dashboard Home Logout Preferences Help Personalize Page

Transaction Type: Payables Invoice Approval Rules Test Workbench Setup

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

Setup: Approver Groups >

Update Approver Group :SB Sales Tax Group

* Indicates required field Cancel Apply

► Rules Using the Approver Group

Details

Name	SB Sales Tax Group
* Description	List of approvers needed to review invoices with sales tax lines
* Order Number	6
Voting Method	Serial
Usage Type	Static
Query	

Dynamic Approver Group requires a SQL. Validate

Group Members

Enter members for the static approver group.

Approver Type	Approver	Order Number	Delete
HR People	HR People: Berry-Jones, Halle	1	

[Add Another Row](#)



Business Case #2 – Rules Setup



- ◆ If Sales Tax Present on Invoice > 0 and total invoice amount >= 100, then require pre-approval from the sales tax approver group, then up to the first supervisor

ORACLE® Approvals Management [Return to Dashboard](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Personalize Page](#)

Transaction Type: Payables Invoice Approval **Rules** | [Test Workbench](#) | [Setup](#)

[Rules](#) > **Update Rule: SB Sales Tax Approval Rule** [Cancel](#) [Apply](#)

* Indicates required field

Item Class **Header** * End Date
Rule Type **Combination**

* Name

* Start Date
(example: 27-Feb-2007)

► **Other Instances of this Rule**

Conditions

[Add Condition](#)

Condition	Condition Type	Item Class	Remove
SB_SALES_TAX_PRESENT is greater than 0	Ordinary	Header	
SB_INVOICE_AMT is greater than or equal to 100	Ordinary	Header	

Actions

[Add Action](#)

Action Type	*Action	Remove
supervisory level	Require approvals up to the first superior.	
pre-chain-of-authority approvals	Require pre-approval from SB Sales Tax Group	

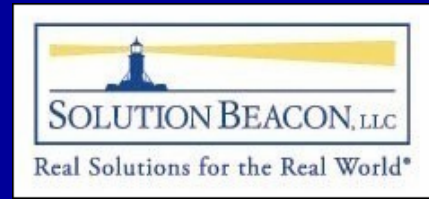
[Cancel](#) [Apply](#)

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

Copyright (c) 2006, Oracle. All rights reserved. [About this Page](#) [Privacy Statement](#)



AME Testing Workbench



- ◆ 11i/AME.B provides a testing workbench to allow defined business rules to be evaluated and tested against transactions
- ◆ Testing workbench allows user to verify various aspects of setups
 - Are attribute values, particularly custom attributes retrieving values correctly?
 - Does the invoice satisfy the appropriate rule?
 - Is the proper approver chain being generated for the transaction based on the rule chosen?

AME Testing Workbench



◆ The testing workbench can be accessed from the Business Analyst Dashboard

ORACLE Approvals Management Home Logout Preferences Personalize Page

Business Analyst Dashboard
 This page displays the transaction types to which you have access and the rules attached to these transaction types.

Transaction Types

Name ▲	Application	Rules	Test	Setup
AMW Audit Procedure Approval	Internal Controls Manager			
AMW Control Approval	Internal Controls Manager			
AMW Risk Approval	Internal Controls Manager			
BOM ERES Bill of Materials Creation	Bills of Material			
BOM ERES Bill of Materials Update	Bills of Material			

◁ 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
SB Sales Tax Group Approval	Pre List Approver Group	Payables Invoice Approval	Created	25-Feb-2007	GERALDJONES	
SB Tax Group Approver Rule	Pre List Approver Group	Payables Invoice Approval	Deleted	25-Feb-2007	GERALDJONES	
SB Tax Group Approver Rule	Pre List Approver Group	Payables Invoice Approval	Created	25-Feb-2007	GERALDJONES	
SB Million \$ Invoice	List Creation	Payables Invoice Approval	Created	25-Feb-2007	GERALDJONES	
SB Million \$ Invoice	List Creation	Payables Invoice Approval	Deleted	25-Feb-2007	GERALDJONES	

◁ Previous 1-5 Next 5 ▷

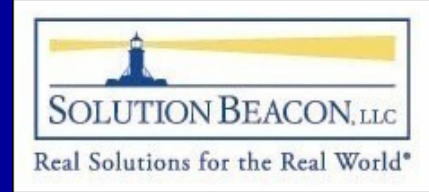
Approval Process Setup

- Select the transaction type**
- 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.
- Define the approval rules**
 Approval Rules determine the approvers or FYI notification recipients required for a business transaction.
[Rules](#)
- Test Workbench**
 Define test cases or test real transactions to verify the approval setup, rules and associated approvers.
[Test Workbench](#)

Future Active Rules

Future Inactive Rules

Using the AME Testing Workbench



- ◆ To execute a test within the workbench, a test case can be defined and attributes entered manually

ORACLE Approvals Management [Return to Dashboard](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Personalize Page](#)

Transaction Type: Payables Invoice Approval **Rules** | **Test Workbench** | Setup

[Test Workbench](#) >

Create Test Case

Name:

Description:

[Expand All](#) | [Collapse All](#)

Focus	Test Data	Value	Add/Delete Item
<input type="checkbox"/>	Parameters		

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

Copyright (c) 2006, Oracle. All rights reserved. [Privacy Statement](#)
[About this Page](#)



Using the AME Testing Workbench



- ◆ The following confirmation page appears once changes are saved

ORACLE Approvals Management Return to Dashboard Home Logout Preferences Help Personalize Page

Transaction Type: Payables Invoice Approval Rules **Test Workbench** Setup

Confirmation
Test case OAUG Test Case has been saved successfully

Test Workbench

Run Real Transaction Test (1)

Test Cases

Select Test Case: |

Select	Name	Description	Last Updated	Update	Delete
<input checked="" type="radio"/>	OAUG Test Case	Test Case to demonstrate AME setup at OAUG 2007	27-Feb-2007		

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.

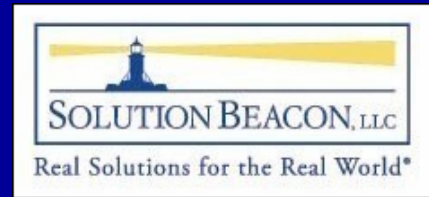
Getting Started

- 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](#) | [Personalize Page](#)

Copyright (c) 2006, Oracle. All rights reserved. [Privacy Statement](#)
[About this Page](#)

Testing Workbench – An Example



- ◆ Run a real transaction test for Business Case #2
- ◆ Enter an invoice with a Sales Tax line

Invoices (Vision Operations: USD)

Batch Control Total Actual Total

For use with approval workflow

Type	Requester	Supplier	Site	Invoice Date	Invoice Num	Invoice Amount	Description
Standard	Jones, Gerald K	Anderson Fabric Compan	GOWNS	27-FEB-2007	AMETEST	160.88	AME Workbench Test

1 General | 2 Holds | 3 View Payments | 4 Scheduled Payments | 5 View Prepayment Applications

Amount Paid
USD 0.00

Invoice Status
Status Validated
Accounted No

Approval Status
Approval Required
Pending Approver

Description AME Workbench Test

Summary
Holds 0
Distribution Total 160.88

Actions... 1 | Overview | Distributions | Purchase Order | Match

Testing Workbench – An Example



- ◆ Create new test case (*OAUG Test Case*). Choose *Run Real Transaction Test* to execute a test

ORACLE® Approvals Management [Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval [Rules](#) [Test Workbench](#) [Setup](#)

Test Workbench

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

Test Cases

Select Test Case: [Run](#) [Copy](#) | [Create](#)

Select	Name	Description	Last Updated	Update	Delete
<input checked="" type="radio"/>	OAUG Test Case	Test Case to demonstrate AME setup at OAUG 2007	27-Feb-2007		

[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](#) | [Personalize Page](#)

Copyright (c) 2006, Oracle. All rights reserved. [About this Page](#) [Privacy Statement](#)

Testing Workbench – An Example



- Transaction id is the id of the invoice entered earlier

ORACLE Approvals Management [Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval [Rules](#) [Test Workbench](#) [Setup](#)

[Test Workbench](#) >

Real Transaction Test

* Indicates required field [Cancel](#) [Save for Later \(1\)](#) [Run Test Case \(2\)](#)

* Transaction Id [Go](#)

TIP Transaction ID is the ID of a real transaction which AME uses to evaluate rules and generate approvers.

Transaction Data	Value
No results found.	

[Cancel](#) [Save for Later \(1\)](#) [Run Test Case \(2\)](#)

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

Copyright (c) 2006, Oracle. All rights reserved. [Privacy Statement](#)

[About this Page](#)



Testing Workbench – An Example



- ◆ First page previews the retrieved values for any defined attributes

ORACLE® Approvals Management Return to Dashboard Home Logout Preferences Help Personalize Page

Transaction Type: Payables Invoice Approval Rules **Test Workbench** Setup

[Test Workbench](#) >

Real Transaction Test

* Indicates required field Cancel Save for Later (1) Run Test Case (2)

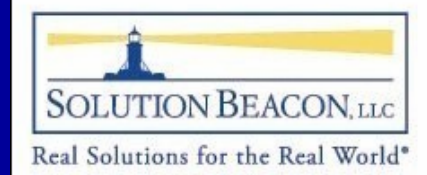
* Transaction Id

✓ TIP Transaction ID is the ID of a real transaction which AME uses to evaluate rules and generate approvers.

[Expand All](#) | [Collapse All](#)

Focus Transaction Data		Value
Parameters		
Mandatory Attributes		
Header Attributes		
Transaction ID: 64007		
ALLOW_EMPTY_APPROVAL_GROUPS		true
FIRST_STARTING_POINT_PERSON_ID		
INCLUDE_ALL_JOB_LEVEL_APPROVERS		true
JOB_LEVEL_NON_DEFAULT_STARTING_POINT_PERSON_ID		
SB_INVOICE_AMT		160.88
SB_SALES_TAX_PRESENT		1
SECOND_STARTING_POINT_PERSON_ID		
SUPERVISORY_NON_DEFAULT_STARTING_POINT_PERSON_ID		
CURRENCY_CODE		USD
VALUE		160.88
CONVERSION_TYPE		Corporate
SUPPLIER_INVOICE_AMOUNT		
SUPPLIER_INVOICE_ATTRIBUTE_CATEGORY		
SUPPLIER_INVOICE_ATTRIBUTE1		
SUPPLIER_INVOICE_ATTRIBUTE10		
SUPPLIER_INVOICE_ATTRIBUTE11		
SUPPLIER_INVOICE_ATTRIBUTE12		
SUPPLIER_INVOICE_ATTRIBUTE13		
SUPPLIER_INVOICE_ATTRIBUTE14		

Testing Workbench – An Example



SUPPLIER_INVOICE_ATTRIBUTE15	
SUPPLIER_INVOICE_ATTRIBUTE2	
SUPPLIER_INVOICE_ATTRIBUTE3	
SUPPLIER_INVOICE_ATTRIBUTE4	
SUPPLIER_INVOICE_ATTRIBUTE5	
SUPPLIER_INVOICE_ATTRIBUTE6	
SUPPLIER_INVOICE_ATTRIBUTE7	
SUPPLIER_INVOICE_ATTRIBUTE8	
SUPPLIER_INVOICE_ATTRIBUTE9	
SUPPLIER_INVOICE_BASE_AMOUNT	
SUPPLIER_INVOICE_CREATION_DATE	27-Feb-2007
SUPPLIER_INVOICE_CURRENCY_CODE	USD
SUPPLIER_INVOICE_DATE	27-Feb-2007
SUPPLIER_INVOICE_DESCRIPTION	AME Workbench Test
SUPPLIER_INVOICE_EXCHANGE_RATE_TYPE	
SUPPLIER_INVOICE_EXPENDITURE_ORGANIZATION_NAME	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE1	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE10	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE11	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE12	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE13	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE14	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE15	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE16	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE17	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE18	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE19	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE2	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE20	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE3	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE4	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE5	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE6	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE7	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE8	



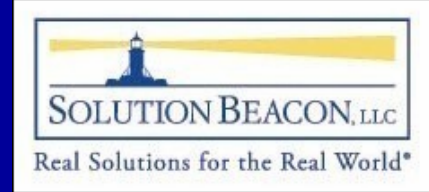
Testing Workbench – An Example



SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE19	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE2	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE20	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE3	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE4	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE5	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE6	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE7	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE8	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE9	
SUPPLIER_INVOICE_GLOBAL_ATTRIBUTE_CATEGORY	
SUPPLIER_INVOICE_GOODS_RECEIVED_DATE	
SUPPLIER_INVOICE_LAST_UPDATE_DATE	27-Feb-2007
SUPPLIER_INVOICE_NUM	AMETEST
SUPPLIER_INVOICE_PAYMENT_CURRENCY_CODE	USD
SUPPLIER_INVOICE_PAYMENT_METHOD_LOOKUP_CODE	CHECK
SUPPLIER_INVOICE_PAY_GROUP_LOOKUP_CODE	Standard
SUPPLIER_INVOICE_PROJECT_RELATED	N
SUPPLIER_INVOICE_RECEIVED_DATE	
SUPPLIER_INVOICE_SOURCE	Manual Invoice Entry
SUPPLIER_INVOICE_TYPE_LOOKUP_CODE	STANDARD
SUPPLIER_INVOICE_USSGL_TRANSACTION_CODE	
SUPPLIER_INVOICE_USSGL_TRX_CODE_CONTEXT	
SUPPLIER_INVOICE_VAT_CODE	
TOP_SUPERVISOR_PERSON_ID	
TRANSACTION_DATE	
TRANSACTION_GROUP_ID	
TRANSACTION_ORG_ID	204
TRANSACTION_REQUESTOR_PERSON_ID	Jones, Gerald K
TRANSACTION_REQUESTOR_USER_ID	
TRANSACTION_SET_OF_BOOKS_ID	1
⊕ ▶ Line Item Attributes	



Testing Workbench – An Example



- ◆ Last page previews any applicable rules satisfied by the transaction and the approver list that was built

ORACLE Approvals Management [Return to Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Transaction Type: Payables Invoice Approval [Rules](#) [Test Workbench](#) [Setup](#)

[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 **64007**

Applicable Rules

Details	Description	Class	RuleType	Category
Show	SB Sales Tax Approval Rule	Header	Combination	Approver

Final Processed Approver List

Details	Order Number	Approver Type	Approver	Category	Status
Show	1	HR People	Berry-Jones, Halle	Approver	
Show	2	HR People	Behn, Susan	Approver	

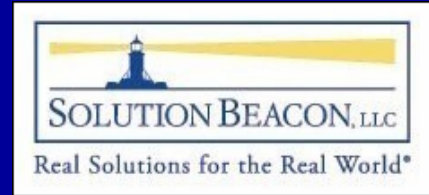
[Return to Test Workbench](#) [View Approval Process Stages \(1\)](#)

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

Copyright (c) 2006, Oracle. All rights reserved. [Privacy Statement](#)
[About this Page](#)

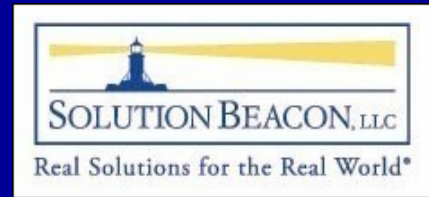


Testing Workbench – An Example



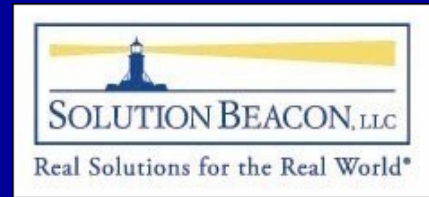
- ◆ To test other options quickly without creating additional transactions
 - Save the real transaction test
 - Edit the transaction test and change attribute results
 - Save the altered transaction test with a new name
 - Run the saved test

References



- ◆ *Oracle Approvals Management Implementation Guide Rel 11i* Part No. B25324-01, MetaLink Note 336901.1
- ◆ *Oracle Approvals Management Developers Guide Release AME.B*, MetaLink Note 289927.1
- ◆ *How to Implement the Invoice Approval Workflow*, MetaLink Note 269057.1
- ◆ *Oracle Payables Users Guide 11i* Part No. A81180-07
- ◆ *Oracle Approvals Management Not Enabled? What does it take to Enabled It?*, MetaLink Note 413300.1
- ◆ *About Oracle Approvals Management Minipack B*, MetaLink Note 336004.1

Questions and Answers



Thank you!

Susan Behn and Gerald Jones

sbehn@solutionbeacon.com

gjones@solutionbeacon.com

www.solutionbeacon.com

Real Solutions for the Real World.®

Installing, Upgrading and Maintaining Oracle E- Business Suite Applications 11.5.10.2+

*Solution Beacon and OnCallDBA
Installing, Upgrading and Maintaining Oracle E-Business Suite Release 11i*



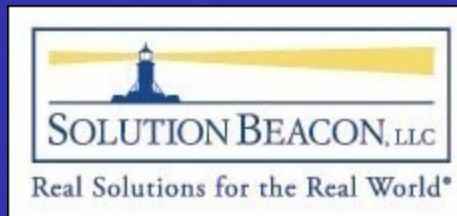
(or "Teaching an Old Dog New Tricks - Release 11i Care and Feeding")

**Installing, Upgrading and Maintaining
Oracle E-Business Suite Applications
Release 11.5.10+**

*By Barbara Matthews, John Stauffer, Randy Giefer, Karen Brownfield, Jeff Huh,
Bruno Coon, James Morrow, Tim Sharpe and Faun deHenry*

Available at www.solutionbeacon.com

Got Oracle? Get the Books!



**SHINING A LIGHT
ON THE RELEASE 12 WORLD**

**Reserve Your
Solution Beacon
Release 12
Primer Book TODAY!**

**Get the Most
Up to Date Information
About Release 12**

Available October 2007

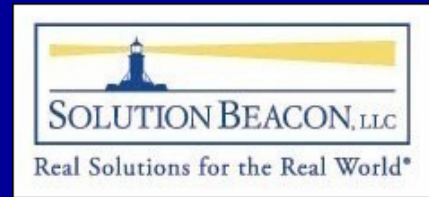
SOLUTION BEACON, LLC
Real Solutions for the Real World.*
In collaboration with

The Release 12 Primer – Shining a Light on the Release 12 World

**Available
October 2007**

More Info? <http://www.solutionbeacon.com>

Questions and Answers



Thank you!

<Presenter(s) Name(s)>
email@solutionbeacon.com

www.solutionbeacon.com

Real Solutions for the Real World.®

Installing, Upgrading and Maintaining Oracle E- Business Suite Applications 11.5.10.2+

*Solution Beacon and OnCallDBA
Installing, Upgrading and Maintaining Oracle E-Business Suite Release 11i*



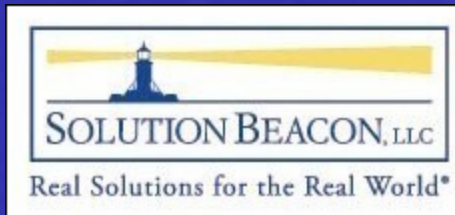
(or "Teaching an Old Dog New Tricks - Release 11i Care and Feeding")

**Installing, Upgrading and Maintaining
Oracle E-Business Suite Applications
Release 11.5.10+**

*By Barbara Matthews, John Stauffer, Randy Giefer, Karen Brownfield, Jeff Huh,
Bruno Coon, James Morrow, Tim Sharpe and Faun deHenry*

Available at www.solutionbeacon.com

Got Oracle? Get the Books!



**SHINING A LIGHT
ON THE RELEASE 12 WORLD**

**Reserve Your
Solution Beacon
Release 12
Primer Book TODAY!**

**Get the Most
Up to Date Information
About Release 12**

Available October 2007

SOLUTION BEACON, LLC
Real Solutions for the Real World.[®]
In collaboration with

OAUG
Oracle applications users group

The Release 12 Primer – Shining a Light on the Release 12 World

**Available
October 2007**

More Info? <http://www.solutionbeacon.com>