

## Create and/or Update Requisition and Purchase Order Approval Rules

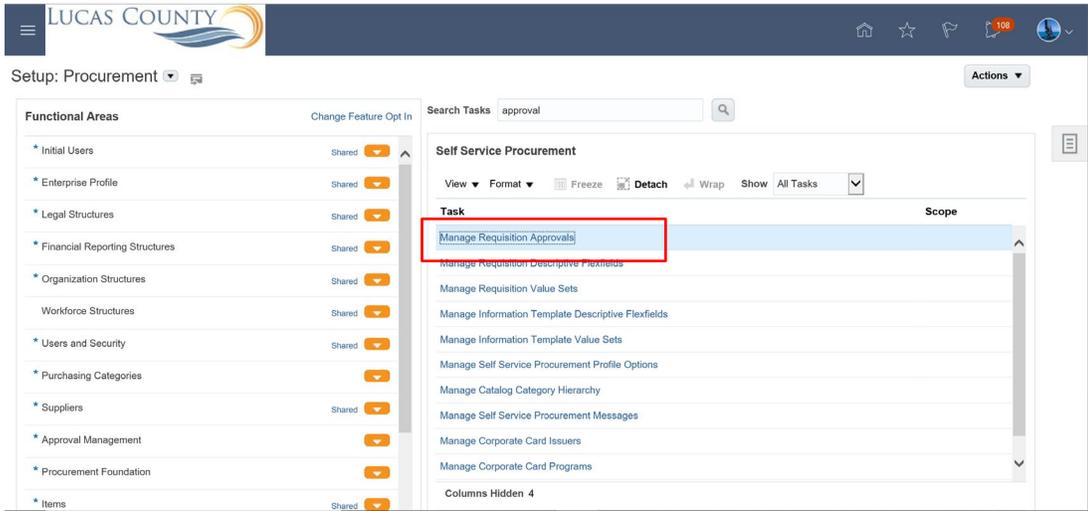
**Audience:** Workflow Administrator

**Purpose:** The Oracle Procurement Approval Rules Management page integrates with the Approval Management Extension rules engine to enable administrators to organize and author approval routing rules based on numerous seeded document attributes such as requisition amount, ordered amount, price change percent, category etc. Based on your unique business requirements, administrators can choose to send the approval request to approvers in parallel or in sequence. Approvals can be routed up a supervisory chain, position or job level hierarchy, to a single approver or a list of approvers.

Lucas County utilizes Requisition and Change Order approval rules based on Cost Center (Department) as well as Requisition/Purchase Order total amount.

When a new Department (Cost Center) is created which end users will utilize for Purchase Requisition/Purchase Order creation, new rules will need to be created to ensure proper approval routing.

### Requisition Approvals (New Department Code)

Step	Action
1	<p>Log into Oracle. <b>Home Page &gt; Setup and Maintenance &gt; Setup: Procurement &gt; Manage Requisition Approvals.</b></p>  <p>The screenshot shows the Oracle Procurement Setup: Procurement page. On the left, there is a 'Functional Areas' list with 'Approval Management' selected. The main content area shows 'Self Service Procurement' tasks. The task 'Manage Requisition Approvals' is highlighted with a red rectangular box.</p>
2	<p>To Create a New Approval Rule, highlight the <b>Header First Responder Wins</b> stage and select <b>Edit Rules.</b></p>

**Manage Requisition Approvals**

Approval Rules Deployment Job Status: Completed

Actions View Format Freeze Detach Wrap **Edit Rules** Disable

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

3 Select the **+** icon to Add a New Rule

**Edit Approval Rules: Header First Responder Wins**

Approval Task Requisition Approvals Routing Parallel

Version 11.13.19.07.0 Voting Regime First Responder Wins

Stage Header Stage

Participant Header First Responder Wins

Rules

Actions View Format **+** Freeze Detach Wrap Disable

Rule	Conditions	Enabled
Department Approver - Olander Department Approval - 970001	Requisition Amount Greater than 500 AND Cost Center Matches 970001	✓
Department Approver - Auditor Accounting - 125001	Requisition Amount Greater than or equal to 0 AND Cost Center Matches 125001	✓
Department Approver - ADMIN Miscellaneous - 119008	Requisition Amount Greater than or equal to 0 AND Cost Center Matches 119008	✓
Department Approver - Health Services - 119005	Requisition Amount Greater than or equal to 0 AND Cost Center Matches 119005	✓
Department Approver - Building Operations - 119003	Requisition Amount Greater than or equal to 0 AND Cost Center Matches 119003	✓

Columns Hidden 2

4 Provide **Rule Name**, for example “Department Approver - Medical Billing and Coding - Special Revenue Fund - 980076” and select **OK**.

**Create Rule**

\* Rule

\* Priority

Description

Rule always applies

**OK** **Cancel**

In the Conditions Region, **Add Condition**

Type: **Approval Task Attribute**

Attribute: **Requisition Amount**

Operator: **Greater than or equal to**

Value Type: **Value**

Value: **0**

Select **Add Another**

Type: **Approval Task Attribute**

Attribute: **Cost Center**

Operator: **Master**

Value: **New Department Code (For example 980076)**

Select **OK**.

5

In the Actions region, Select **Add Action**

**Select Appropriate Approval Group created previously, i.e., Department Approver - Medical Billing and Coding - Special Revenue Fund - 980076**

**Edit Action 1**

Action Type: Approval required

Route Using: Approval group

\* Approval Group: **Department Approver - Medical Billing and Coding - Special Revenue Fund - FQHC - 980077**

Automatically approve if group returns no approvers

Buttons: Add Another, OK, Cancel

6 **Select OK**

7 **Select Save**

**Edit Approval Rules: Header First Responder Wins**

Buttons: Deploy, **Save**, Save and Close, Cancel

Approval Task: Requisition Approvals  
 Version: 11.13.19.07.0  
 Stage: Header Stage  
 Participant: Header First Responder Wins

Routing: Parallel  
 Voting Regime: First Responder Wins

Rules

Rule	Conditions	Enabled
Department Approver - Medical Billing and Coding - Special Revenue Fund - FQHC - 980077	Requisition Amount Greater than or equal to 0 AND Cost Center Matches 980077	✓
Department Approver - CSB Over 3000	Requisition Amount Greater than 3000 AND Cost Center Starts with 235	✓
CSB - Approval Under 1000	Requisition Amount Less than or equal to 1000 AND Cost Center Starts with 235	✓
CSB - Approval Under 3000	Requisition Amount Between 1000.01 and 3000 AND Cost Center Starts with 235	✓
Department Approver - Job and Family Services - Misc. Grants - 225006	Requisition Amount Greater than or equal to 0 AND Cost Center Matches 225006	✓

Department Approver - Medical Billing and Coding - Special Revenue Fund - FQHC - 980077: Details

8 **Select Deploy**

**Edit Approval Rules: Header First Responder Wins**

Buttons: **Deploy**, Save, Save and Close, Cancel

Approval Task: Requisition Approvals  
 Version: 11.13.19.07.0  
 Stage: Header Stage  
 Participant: Header First Responder Wins

Routing: Parallel  
 Voting Regime: First Responder Wins  
 Last Saved: 09-24-2019 10:46 AM

Rules

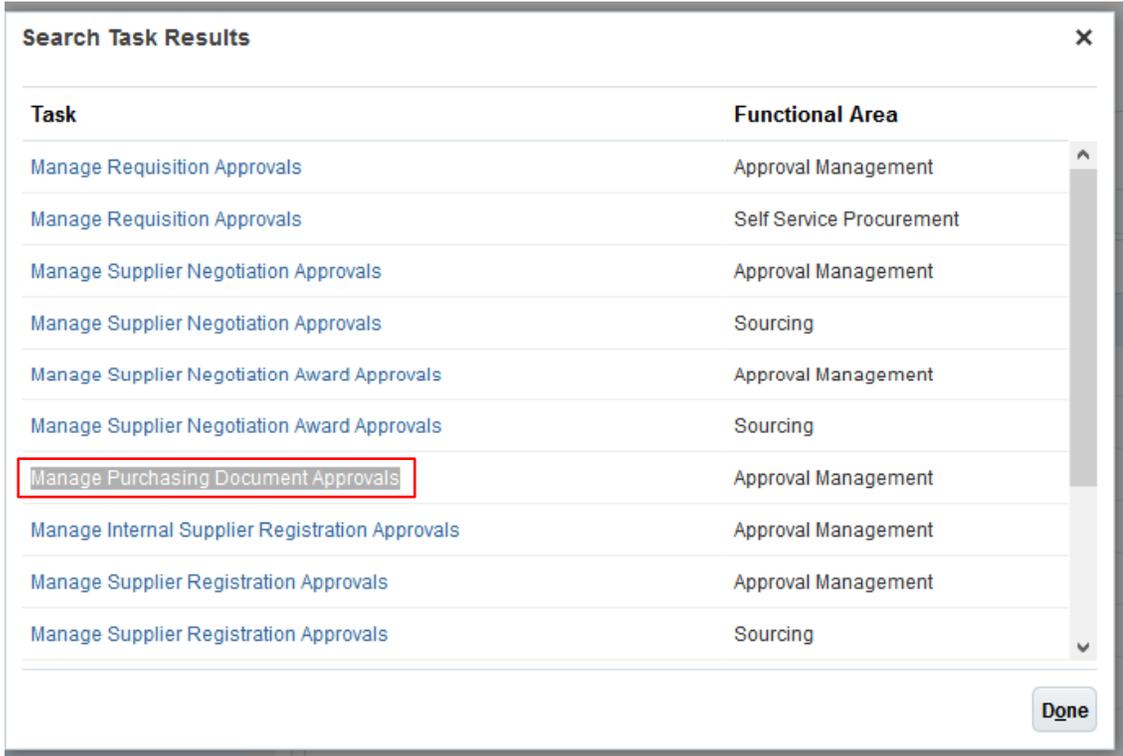
Rule	Conditions	Enabled
Department Approver - Medical Billing and Coding - Special Revenue Fund - FQHC - 980077	Requisition Amount Greater than or equal to 0 AND Cost Center Matches 980077	✓
Department Approver - CSB Over 3000	Requisition Amount Greater than 3000 AND Cost Center Starts with 235	✓
CSB - Approval Under 1000	Requisition Amount Less than or equal to 1000 AND Cost Center Starts with 235	✓
CSB - Approval Under 3000	Requisition Amount Between 1000.01 and 3000 AND Cost Center Starts with 235	✓
Department Approver - Job and Family Services - Misc. Grants - 225006	Requisition Amount Greater than or equal to 0 AND Cost Center Matches 225006	✓

Department Approver - Medical Billing and Coding - Special Revenue Fund - FQHC - 980077: Details

**Select Save and Close**

9	End of Procedure
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**Purchase Order Change Order Approvals (New Department Code)**

Step	Action																						
1	<p>Log into Oracle. <b>Home Page &gt; Setup and Maintenance &gt; Setup: Procurement &gt; Manage Purchasing Document Approvals.</b></p>  <p>The screenshot shows a window titled "Search Task Results" with a close button (X) in the top right. It contains a table with two columns: "Task" and "Functional Area". The table lists various tasks such as "Manage Requisition Approvals", "Manage Supplier Negotiation Approvals", and "Manage Purchasing Document Approvals". The "Manage Purchasing Document Approvals" row is highlighted with a red border. A "Done" button is located at the bottom right of the window.</p> <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>Task</th> <th>Functional Area</th> </tr> </thead> <tbody> <tr><td>Manage Requisition Approvals</td><td>Approval Management</td></tr> <tr><td>Manage Requisition Approvals</td><td>Self Service Procurement</td></tr> <tr><td>Manage Supplier Negotiation Approvals</td><td>Approval Management</td></tr> <tr><td>Manage Supplier Negotiation Approvals</td><td>Sourcing</td></tr> <tr><td>Manage Supplier Negotiation Award Approvals</td><td>Approval Management</td></tr> <tr><td>Manage Supplier Negotiation Award Approvals</td><td>Sourcing</td></tr> <tr style="border: 2px solid red;"><td>Manage Purchasing Document Approvals</td><td>Approval Management</td></tr> <tr><td>Manage Internal Supplier Registration Approvals</td><td>Approval Management</td></tr> <tr><td>Manage Supplier Registration Approvals</td><td>Approval Management</td></tr> <tr><td>Manage Supplier Registration Approvals</td><td>Sourcing</td></tr> </tbody> </table>	Task	Functional Area	Manage Requisition Approvals	Approval Management	Manage Requisition Approvals	Self Service Procurement	Manage Supplier Negotiation Approvals	Approval Management	Manage Supplier Negotiation Approvals	Sourcing	Manage Supplier Negotiation Award Approvals	Approval Management	Manage Supplier Negotiation Award Approvals	Sourcing	Manage Purchasing Document Approvals	Approval Management	Manage Internal Supplier Registration Approvals	Approval Management	Manage Supplier Registration Approvals	Approval Management	Manage Supplier Registration Approvals	Sourcing
Task	Functional Area																						
Manage Requisition Approvals	Approval Management																						
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Manage Internal Supplier Registration Approvals	Approval Management																						
Manage Supplier Registration Approvals	Approval Management																						
Manage Supplier Registration Approvals	Sourcing																						
2	<p>To create a New Approval Rule, highlight the <b>Terms Approval First Responder Wins</b> stage and click the <b>Edit Rules</b> button.</p>																						

Manage Purchasing Document Approvals Deploy Discard **Manage User-Defined Attributes** Done

Approval Rules Deployment Job Status: Completed

Actions View Format Freeze Detach Wrap **Edit Rules** Disable

Stage	Participant	Routing	Voting Regime	Enabled
Preapproval	Preapproval FYI	FYI		
Preapproval	Preapproval Serial	Serial		
Preapproval	Preapproval Consensus	Parallel	Consensus	
Preapproval	Preapproval First Responder Wins	Parallel	First Responder Wins	
Terms	Terms Approval FYI	FYI		
Terms	Terms Approval Serial	Serial		
Terms	Terms Approval Serial 2	Serial		
Terms	Terms Approval Serial 3	Serial		
Terms	Terms Approval First Responder Wins	Parallel	First Responder Wins	<input checked="" type="checkbox"/>
Terms	Terms Approval Consensus	Parallel	Consensus	
Postapproval	Postapproval Serial	Serial		<input checked="" type="checkbox"/>
Postapproval	Postapproval Consensus	Parallel	Consensus	
Postapproval	Postapproval First Responder Wins	Parallel	First Responder Wins	<input checked="" type="checkbox"/>
Postapproval	Funds Override Approval	Parallel	Consensus	
Postapproval FYI	Postapproval FYI	FYI		

Select the **+Icon** to add a new rule.

3 **Provide Rule Name**, for example “Department Approver - Medical Billing and Coding - Special Revenue Fund - 980076” and click the **OK** button.

**Create Rule**

\* Rule

\* Priority Medium

Description

Rule always applies

Select **OK**.

4 In the Conditions Region, **Add Condition**

Type: **Approval Task Attribute**  
 Attribute: **Change Order Creation Method Equals Create Change Order**  
 Operator: **Equals**  
 Value Type: **Value**  
 Value: **Create Change Order**

Click the **Add Another** button to add additional conditions.

Type: **Approval Task Attribute**  
 Attribute: **Cost Center**  
 Operator: **Master**  
 Value: **New Department Code (For example 980076)**

Click the **OK** button.

5 In the Actions region, Select **Add Action**.

	Select <b>Appropriate Approval Group created previously</b> , i.e., Department Approver - Medical Billing and Coding - Special Revenue Fund - 980076
6	Select <b>OK</b> .
7	Select <b>Save</b> .
8	Select <b>Deploy</b> . Select <b>Save and Close</b> .