Oracle Fusion Cloud Project Management

How do I set up and manage approval workflows in Oracle Project Management?

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G34399-04

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1 How do I set up and manage approval workflows in Oracle Project Management?

About this Playbook

This playbook offers guidance on how you can:

- Use BPM Worklist to configure approval workflows for Oracle Fusion Cloud Project Management.
- Configure approval rules.

Prerequisites to Configuring Approval Workflows

Before you can use BPM Worklist to configure and manage approval workflows in Oracle Fusion Cloud Applications (Fusion Applications), several foundational elements must be in place across different Fusion Applications modules.

Ensuring these prerequisites are completed provides a stable and effective environment for workflow setup, routing, and execution.

Prerequisite Setup Tasks and Owning Applications

Setup Required	Owning Application
Users are created and provisioned in Fusion Applications.	Oracle Fusion Cloud HCM (Oracle Cloud HCM) - Core HR > Security
Job roles and abstract roles, such as Project Manager or Approver, are correctly assigned to the appropriate users.	Oracle Cloud HCM > Security
Security profiles and data access are configured for all approvers and administrators.	Oracle Cloud HCM > Security
The enterprise structure, including legal entities, business units, and divisions, is fully defined in the application.	Oracle Fusion Cloud Financials (Oracle Financials) > Enterprise Structures
Supervisory or position hierarchies are established to support approval routing logic.	Oracle Cloud HCM > Workforce Structures
Worker (employee) records are accurate and reporting lines are current for all workflow participants.	Oracle Cloud HCM
The relevant Fusion Applications module, such as Project Financial Management, are enabled in the system.	Oracle Functional Setup Manager (Functional Setup Manager)

Setup Required	Owning Application
Functional areas related to each offering, such as Project Costing or Billing, are properly set up.	Functional Setup Manager
All necessary global structures, including business units, ledgers, and chart of accounts, are configured.	Oracle Financials
Project templates, transaction types, and document types that will be used in workflows are defined in the system.	Oracle Project Management > Relevant Offering
Custom attributes or flexfields required for workflow routing are configured and tested for accuracy.	Oracle Project Management > Application Composer > Relevant Offering
Email delivery and notification preferences are enabled and successfully tested for all approval participants.	Oracle Fusion Cloud Applications Common Setup (Oracle Applications Common Setup)
Workflow task preferences are configured to ensure approvers receive appropriate tasks and notifications.	Oracle Applications Common Setup
All required profile options for workflow functionality are identified and set in the application or relevant offering.	Oracle Applications Common Setup / Relevant Offering
Implementation options specific to approval routing requirements are defined and activated.	Oracle Applications Common Setup / Relevant Offering
Administrators who will manage workflows are granted access to BPM Worklist.	Oracle Fusion Cloud Applications Security (Fusion Applications Security) / Oracle Business Process Management
Access to BPM Worklist is verified for all relevant administrators and support staff.	Fusion Applications Security > Oracle Business Process Management
Approval Routing Administration is enabled at the offering level to allow access to the following tasks in Application Extensions: Manage Task Configurations and Manage Approval Groups.	Functional Setup Manager

Note: In Fusion Applications, the term Relevant Offering refers to the specific Fusion Applications module or functional area for which you are configuring workflows or business processes. For example, if you are setting up workflow approvals for supplier invoice processing, the “Relevant Offering” would be Oracle Payables.

Related Best Practices and Considerations

- **Sequence Matters:** Complete foundational enterprise and Oracle Cloud HCM setup (users, roles, hierarchies) before configuring approvals in BPM Worklist. Approvers and routing logic depend on accurate organizational data.
- **Coordinate with Functional Owners:** Some setup tasks (such as business units or hierarchies) may need collaboration with your HR, IT Security, or Finance administrators.

- **Test Notifications:** Confirm that notification preferences and email delivery are working as expected to ensure prompt approval task handling.
- **Review Security:** Always verify that only authorized administrators can access and modify approval workflows in BPM Worklist to safeguard business processes.
- **Leverage Oracle Documentation:** Review relevant user assistance and security best practices for setup instructions aligned with your organization's compliance requirements.

Accessing BPM Worklist

1. In Setup and Maintenance, click the Task Panel, then click **Search**.
2. Search for **Manage Task Configurations**.
3. Click **Manage Task Configurations for Project Financial Management** or **Manage Task Configurations for Project Execution Management**, depending on whether you want to set up approval workflows for financial or execution-related project processes.
   BPM Worklist appears in a new window.

Approval Workflow Configuration Tasks

A well-designed approval workflow ensures transactions and documents are reviewed, routed, and acted on by the right people at the right time. The steps below follow the recommended configuration sequence in Oracle Project Management.

For each step, you'll find a high-level description, essential details about related elements, practical examples, and key considerations.

1. Participants

Start by identifying who will be involved in approvals and workflow actions. You'll typically work with:

- Individual users, who are specific named approvers.
- Roles, which represent job functions like Project Manager or Finance Director.
- Approval groups, which are collections of users or roles set up for collective approvals.

Example: Assign all requests for Project ABC to John Doe, allow any Project Manager to approve budget changes, or use the Project Finance Review Group for major project costs.

It's important to keep participant data accurate and up to date by reviewing participant lists to ensure segregation of duties.

2. List Builder

Next, decide how the workflow should select and assign tasks to participants. Options often include:

- Predefined list builders using logic such as the Supervisory or Position hierarchy.
- Custom list builders tailored to your organizational structure or approval requirements.

Example: Use supervisory routing to send requests to a user's manager, or create a custom list to send high-value contracts to legal review.

Make sure your chosen list builder type fits current business needs and revisit after organizational changes.

3. Approval Rules

Define the logic and conditions that trigger the approval workflow and shape how it routes requests. Consider:

- Rule conditions, which specify when the workflow starts (example, by amount, business unit, or project type).
- Rule actions, which dictate the next step if the condition is met.
- Rulesets, which group related rules for evaluation.

Example: If a project cost adjustment exceeds $10,000, start an approval and send it to the Finance Director.

Review, update, and test rules regularly to make sure they align with current business and compliance needs.

4. Workflow Steps/Stages

Chart the sequence of approvals by laying out each stage of the process. Steps might involve:

- Sequential steps for approvals in a set order.
- Parallel steps for simultaneous review by multiple parties.
- Conditional steps that are included or skipped based on business requirements.

Example: Route approvals from Project Manager to Finance Director in sequence, or have both Compliance and Cost Controller review in parallel; skip Finance Director if the amount is under $1,000.

Ensure your workflow structure mirrors business realities, and test multiple scenarios for reliability.

5. Routing Logic

Think about how approval tasks move between workflow steps. Routing can be handled with:

- Serial routing, where tasks progress one-by-one.
- Parallel routing, for simultaneous review.
- Conditional routing, where data or criteria determine the approval path.
- Fallback routing, to handle exceptions or failures along the route.

Example: From Project Manager to Finance (serial), to Legal and Compliance at the same time (parallel), or to EMEA Approvals Group if the transaction is from EMEA (conditional).

Keep routing clear and flexible, and remember to validate periodically as requirements evolve.

6. Notification Mechanism

Set up how you'll keep participants informed and responsive during the workflow. Notifications might be:

- Email notifications sent to users' inboxes.
- In-application notifications that appear in the Fusion Applications interface.
- Reminders, triggered for pending or overdue actions.
- Escalation alerts for time-sensitive or delayed approvals.

Example: Email a new approval assignment; generate reminders if an action is overdue after two days; alert a supervisor if escalation occurs.

Double-check that notifications are reliably delivered and visible to users.

7. Escalation/Delegation

To avoid workflow delays, plan for alternatives when tasks are delayed or participants are unavailable. Consider elements like:

- Escalation rules to move tasks up the chain after a deadline.
- Delegation settings so users can temporarily assign their responsibilities to someone else.
- Backup approvers ready if an original assignee is absent.

Example: Escalate tasks to a department head after three days or allow a finance manager to delegate approvals while away.

Define these policies clearly and communicate them so everyone understands their options.

8. Approval Actions

Specify which actions participants can take at each approval stage, making sure the process flows and is auditable. Usual actions include:

- Approve to progress or complete the workflow.
- Reject to send back or stop the process.
- Request information to clarify details before action.
- Reassign to pass the task to another eligible user.
- Comments or Notes field for recording decisions.

Example: Approve a project for the next stage, reject a budget transfer and provide a reason, ask for more documentation, or reassign to another project manager.

Only enable needed actions at each step, and ensure full audit trails for compliance.

Key Approval Workflows in Oracle Project Management

This topic lists key Oracle Project Management approval workflows and provides important details for each.

Oracle Project Management Workflows

The tables below list key Oracle Project Management approval workflows:

- The first table lists workflows used in Project Financial Management.
- The second table lists workflows used in Project Execution Management.
- The third table lists workflows used in both Project Financial Management and Project Execution Management.

Access these workflows using the Task Configuration page in BPM Worklist.

Workflows in Project Financial Management

Workflow Name - BPM Task Name	Workflow Trigger and Description	Supported in Transaction Console?	Dependent on Configuration?	Workflow Modifications and Notification Customizations Supported	View History Available?
Project Contract Invoice Approval - InvoiceApprovalHuman	When an invoice is submitted for approval, this workflow notifies the contract administrator, who then needs to approve or reject the invoice.	• Troubleshooting: Yes • Configure Rules: No • Bypass Approvals: No	No	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations: None	Yes
Generate Financial Plan Amounts Notification - HumantaskNotification	When you run the Generate Financial Plan Amounts process, this workflow sends a non-action notification to the person who submitted it.	No	No	Workflow Modifications: None Notification Customizations: None	N/A
Project Financial Plan Approval (Budgets and Forecasts) - ApprovePlanVersion	When a financial plan version's submitted for approval, this workflow notifies the designated approvers. It also sends a non-action notification to the project manager of that plan version and to the user who submitted it.	• Troubleshooting: Yes • Configure Rules: No • Bypass Approvals: No	Yes. Use the Manage Financial Plan Types task in Setup and Maintenance to enable/disable a plan type for workflow approval.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations: / Shared Folders/ Projects/Workflow Notifications/ Project Control/ FinancialPlanVersionAp	Yes For workflows that are in progress, you can use the Spectacles icon on the Manage Budget Versions and Manage Forecast Versions pages. The Approval History popup displays the previous, current, and next assignees for the workflow.
Project Financial Plan Approval (Budgets and Forecasts) - NotifyFinancialPlanApp	When a financial plan version is approved, this workflow sends non-action notifications to the designated recipients indicating that the plan version has been approved.	No	Yes. Use the Manage Financial Plan Types task in Setup and Maintenance to enable/disable a plan type for workflow approval.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations: None.	Yes
Project Financial Plan Approval (Budgets and Forecasts) - NotifyFinancialPlanReje	When a financial plan version is rejected, this workflow sends non-action notifications to the designated recipients indicating that the plan version has been rejected.	No	Yes. Use the Manage Financial Plan Types task in Setup and Maintenance to enable/disable a plan type for workflow approval.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes	Yes

Workflow Name - BPM Task Name	Workflow Trigger and Description	Supported in Transaction Console?	Dependent on Configuration?	Workflow Modifications and Notification Customizations Supported	View History Available?
				Notification Customizations: None.	
Project Financial Plan Approval (Budgets and Forecasts) - NotifyFinancialPlanRew	When a financial plan version is reworked and resubmitted for approval, this workflow notifies the designated approvers. It also sends a non-action notification to the project manager of the plan version and to the user who resubmitted it.	No	Yes. Use the Manage Financial Plan Types task in Setup and Maintenance to enable/disable a plan type for workflow approval.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations: None.	Yes
Project Cost Adjustment Approval - ApproveAdjustment	When a user attempts any of the following project cost adjustments, this workflow notifies the designated approver. • Transfer • Split • Split and transfer • Set to billable • Set to nonbillable • Set to capitalizable • Set to noncapitalizable • Hold invoice until released • Hold invoice once • Release invoice hold • Hold revenue until released • Release revenue hold • Change work type	• Troubleshooting: Yes • Configure Rules: No • Bypass Approvals: No	Yes. The workflow is initiated only if the user performing the adjustment hasn't been assigned the **Project Cost Adjustments Approval** duty role or any of its privileges.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations Yes /Shared Folders/ Projects/Workflow Notifications/ Project Cost/Project Cost Transactions Adjustment Approval Report	Yes. For workflows that are in progress, you can use the Spectacles icon on the Adjustment History tab of the Manage Project Costs > Project Cost Transactions page.
Project Cost Adjustment Approval - NotifyAdjustmentAppr	When a project cost adjustment is approved or rejected, this workflow sends non-action notifications to both	No	Yes. The workflow is initiated only if the user performing the adjustment hasn't been assigned the **Project Cost Adjustments**	Workflow Modifications • Modify Rules and Rulesets: Yes	No

Workflow Name - BPM Task Name	Workflow Trigger and Description	Supported in Transaction Console?	Dependent on Configuration?	Workflow Modifications and Notification Customizations Supported	View History Available?
	the requester and the approver.		**Approval** duty role or any of its associated privileges.	• Modify Participants and Stages: Yes Notification Customizations: None.	
Project Expenditure Batch Approval - ProjectExpenditureBatc	When a project expenditure batch is submitted for approval, this workflow notifies the designated approver.	• Troubleshooting: Yes • Configure Rules: No • Bypass Approvals: No	Yes. Use the Manage Project Transaction Sources task in Setup and Maintenance to enable or disable the **Requires Expenditure Batch Approval** setting at the document level.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations: Yes /Shared Folders/ Projects/Workflow Notifications/ Project Cost/ ProjectExpenditureBatc	Yes. For workflows that are in progress, use the Spectacles icon on the Manage Expenditure Batches page to access the Approval History popup.
Project Expenditure Batch Approval - ProjectExpenditureBatc	When a project expenditure batch is approved or rejected, this workflow sends non-action notifications to the designated recipients with the outcome.	No	Yes. Use the Manage Project Transaction Sources task in Setup and Maintenance to enable or disable the **Requires Expenditure Batch Approval** setting at the document level.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations: None.	Yes. For workflows that are in progress, use the Spectacles icon on the Manage Expenditure Batches page. The Approval History popup displays the previous, current, and next assignees for the workflow.
Project Labor Schedule Version Status Change Approval - LaborScheduleVersionS	When a labor schedule version is set to Active from New or Inactive, this workflow notifies designated users that the schedule is being activated and that costs will be distributed through it once it's approved. **Note:** Usage of the Enable Labor Schedule Version Status Change Approval Workflow profile option is in controlled availability. If you would like to uptake this functionality, log an SR for instructions.	• Troubleshooting: Yes • Configure Rules: No • Bypass Approvals: No	This workflow is triggered only if your organization creates and enables the profile option **PJT: Enable Labor Schedule Version Status Change Approval Workflow**. This opt-in approach lets you require approvals for labor schedule version status changes only when needed, avoiding extra complexity for those who don't use it. Auto-approval workflows may still have issues, and this process will be replaced by the upcoming Projects Process Configurator.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations Yes /Shared Folders/ Projects/Workflow Notifications/Project Cost/Labor Schedule Version Status Approval Execution Report	Yes, but only for the user who created the project labor schedule version and the approver, and only on the Notifications page.

Workflows in Project Execution Management

Workflow Name - BPM Task Name	Workflow Trigger and Description	Supported in Transaction Console?	Dependent on Configuration?	Workflow Modifications and Notification Customizations Supported	View History Available?
Task and Action Item Notification - TaskEmailNotificationH	This workflow sends notifications to the task owner and follower when any of the following events occur. • A follower is added. • A followed task is completed. • A task, action item, to-do task, or milestone is assigned.	• Troubleshooting: Yes • Configure Rules: No • Bypass Approvals: No	No	Workflow Modifications: None Notification Customizations: Yes /Shared Folders/ Projects/Workflow Notifications/ Project Management Control/Task Details Notifications	No
Project Manager Daily Digest - emailDigestHumantask	At scheduled intervals, this workflow sends non-action notifications to project managers about significant updates to tasks, issues, action items, deliverables, change orders, and task exceptions.	No	Yes. The Generate Project Updates E-Mail process can be scheduled to pick any new events that occurred since the last time the process was run. The process sends notifications to anyone who's designated as a project manager and who has set their email notification preferences to receive these notifications.	Workflow Modifications: None Notification Customizations: None	No
Change Orders Notification - ChangeManagementEv	When any of the following events occur, this workflow sends notifications to the change order creator, impact assessors, reviewers, approvers, and implementers. • Change order is created or reassigned to a different resource. • Change order is closed.	No	No	Workflow Modifications: None Notification Customizations: Yes /Shared Folders/ Projects/Workflow Notifications/ Project Management Control/Change Order Participant Notifications (Notification that's sent when participants are assigned or removed from a change order)	No

Workflow Name - BPM Task Name	Workflow Trigger and Description	Supported in Transaction Console?	Dependent on Configuration?	Workflow Modifications and Notification Customizations Supported	View History Available?
	• Change order is canceled. • Change order is approved or rejected. • Work on change order is completed. • Participant is removed from change order. • Participant is added to change order Note that approvers only receive notifications for change orders that require their approval. They must log in to the application and approve the change order manually.			/Shared Folders/ Projects/Workflow Notifications/ Project Management Control/Change Order Stage Completion Notifications (Notification that's sent when a participant completes a stage, approves a change order, or rejects a change order) /Shared Folders/ Projects/Workflow Notifications/Project Management Control/ Change Order Stage Change Notifications (Notification that's sent when a change order is assigned, closed, or canceled.)	
Deliverable Notification - DeliverablesNotificatior	When a deliverable is completed, this workflow sends non-action notifications to the creator, owner, and project manager.	No	No	Workflow Modifications: None Notification Customizations: None	No

Workflows Available in Both Project Financial Management and Project Execution Management

Workflow Name - BPM Task Name	Workflow Trigger and Description	Supported in Transaction Console?	Dependent on Configuration?	Workflow Modifications and Notification Customizations Supported	View History Available?
Project Status Change Approval - ProjectStatusNotificatic	When a user updates and saves a project status, this workflow notifies the project manager named on the project, who must approve or reject the changes made to the project status.	Troubleshooting: Yes Configure Rules: No Bypass Approvals: No	Yes. Use the Manage Project Statuses task in Setup and Maintenance to enable or disable project statuses for workflow approval. Simply use the **Enable Workflow** checkbox for each project status.	Workflow Modifications • Modify Rules and Rulesets: Yes • Modify Participants and Stages: Yes Notification Customizations: Yes	Yes. Use the View History button on the Manage Financial Project Settings page to review past project status changes. For workflows that are in progress, use the Spectacles icon on the Manage Financial Project Settings page. The Approval History

Workflow Name - BPM Task Name	Workflow Trigger and Description	Supported in Transaction Console?	Dependent on Configuration?	Workflow Modifications and Notification Customizations Supported	View History Available?
				/Shared Folders/ Projects/Workflow Notifications/ Project Foundation/ ProjectStatusChangeAp	popup displays the previous, current, and next assignees for the workflow.

Project-Related Workflows in Other Fusion Applications

In addition to the Oracle Project Management workflows, other project-related approval workflows, such as approvals for AP invoices, project contracts (for billing), and project time cards, are handled within their respective subledger applications. Guidance for these workflows is available in each application's documentation.

Here's a table showing key project-related workflows in other Fusion applications. Check the related topics for more information.

Business Object(s)	Parent Application
Timecard	Oracle Cloud HCM
Supplier Invoice	Oracle Payables
Requisitions, Purchase Order	Oracle Fusion Cloud Procurement
Project Billing Contract	Oracle Enterprise Contracts
Expense Report	Oracle Expenses

Examples of Setting Up Approval Workflows

Setting Up Auto-Approval for Project Contract Invoices

Say you want to set up auto-approval for project contract invoices. Instead of routing all invoices to the default participants for review and approval, you can configure the **InvoiceApprovalHumantask** workflow so that all new invoices are automatically approved and forwarded for processing.

Follow these steps:

1. In Setup and Maintenance, click the Task Panel, then search for and click the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist application appears.
2. In the Tasks to be configured pane, search for the **InvoiceApprovalHumantask** task, and click the **InvoiceApprovalHumantask** link.
3. Click the **Edit Task** icon in the Tasks to be configured pane to open the task in edit mode.

4. Click the **Assignees** tab.

   The participants of the workflow are displayed. These are the users who must approve project invoices before they can be processed. Click each of these participants to review the workflow rules that apply to their approval choices.
5. Click the **Contract Invoice Single Approver Participant** participant in the workflow, click the **Go to Rule** (the diamond shaped)icon within the Approver box, and then click the **Go to Rule** option that appears.

   The list of rules associated with the participant you selected appears.

   > **Note:** By default, the workflow sends project contract invoices to the contract administrator for approval. You want to remove this requirement, so the approval request won't be routed.
6. In the THEN section of the rule, select the checkbox adjacent to the **Top Participant** field.

   The **Delete Action** icon that's above the rule is enabled.
7. Click the **Delete Action** icon to remove the default approver for your project invoices. You must now configure the rule such that it automatically approves all new invoices.
8. Click the **Insert Action** icon and select **Add Approver** > **Supervisory** from the drop-down list.
9. Enter **1** in the **Number of Levels** field.
10. Perform the following steps to add the **Starting Participant**. This is the first participant, typically a manager in the approval process.
    a. Click the **Search** icon adjacent to the **Starting Participant**.

       The Add Hierarchy Participant dialog box appears.
    b. Select the **Get User** radio button to indicate that you want to specify a user who must approve invoices.
    c. Click the **Expression Builder** icon adjacent to the **Reference User** field.

       The Expression Builder dialog box appears.
    d. Click the **Task > creator** option in the expression builder and click **Insert into Expression**.

       The value in the **Expression** field now reads **Task.creator**.
    e. Click **OK** to exit the expression builder and add **task.creator** as the reference user for the approver. This instructs the workflow to make the creator of the task the approver.
    f. Enter **""** in the **Hierarchy Type** field to indicate that the task creator can belong to any hierarchy type.
    g. Click **OK** to populate these details into the **Starting Participant** field.

       The value in the **Starting Participant** field must now read **HierarchyBuilder.getPrincipal(Task.creator,-1,"","")**.
11. Populate the **Top Participant** field with the same value. The top participant is the last approver of a request.
12. Set **Auto Action Enabled** to **True**.
13. Specify the **Auto Action** as **"APPROVE"** (including the quotation marks) to instruct the application to automatically approve all project contract invoice approval requests.
14. **Save** and **Commit** your updates, enter **Comments** as appropriate, and click **OK**.

You have now configured the **InvoiceApprovalHumantask** workflow to automatically approve all new project contract invoice approval requests using the name of the task creator as the approver.

Setting Up Automatic Approval of Budget Versions for Baseline

Say you're working on a project where manually approving every budget version is time-consuming and unnecessary. To streamline the process, you can configure the **ApprovePlanVersion** workflow to automatically approve budget versions that are marked as baseline.

Follow these steps:

1. In Setup and Maintenance, click the Task Panel, then search for and click the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist application appears.
2. In the Tasks to be configured pane, search for the **ApprovePlanVersion** task, and click the **ApprovePlanVersion** link.
3. Click the **Edit Task** icon in the Tasks to be configured pane to open the task in edit mode.
4. Click the Assignees tab.

   The participants who must approve project budgets or forecasts are displayed. Click on each of these participants to review the workflow rules that apply to their approval choices.
5. Click the **Approver** participant in the workflow, click the **Go to Rule** (the diamond shaped) icon within the Approver box, and then click the **Go to Rule** option that appears.

   The list of rules associated with the Approver participant are displayed. Ensure that the **BudgetForecastAMXRuleSet** rule is selected in the drop-down list.
6. Change the IF condition of the predefined rules from 1 is 1 to 1 is 2 to disable the predefined workflow from sending project budget or forecast approvals to the project manager for approval.
7. Add the AutoApproval rule, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** (the + icon) drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **AutoApproval** in the **Name** field, add the description, verify that the **Active** check box is selected, and click **OK**.
   c. In the IF part of the rule, click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
ApprovePlanVersionPayloadTyp Note that you can also select this value by clicking the **Left Value** search icon and selecting ApprovePlanVersionPayloadTyp in the Condition Browser dialog box.	is	"BUDGET" This value is case-sensitive. Include the quotation marks. Don't copy and paste this value. To meet similar requirements for forecasts, enter "FORECAST".	To specify that the rule is applicable only for budget versions.

d. In the THEN part of the rule, click the **Advanced Add or Modify Options** drop-down list and select the Supervisory list builder by clicking **Add Approver** > **Supervisory**. Then, enter the values as follows:
   - **Response Type**: Required
   - **Number of levels**: 1
   - **Starting Participant**: HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
   - **Top Participant**: HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
   - **Auto Action Enabled**: True
   - **Auto Action**: “APPROVE” (Type this value including the quotation marks. Don't copy and paste this value.)
   - **Rule Name**: “AutoApproval”

     Note: The rule name is auto-populated, its the name that you entered in Step 7.

   - **Dimension Id**: null

     Note: The dimension id is auto-populated as null.

8. Click **Validate** on the top right corner to validate the newly defined rules.
9. Click the **Save** icon in the Tasks to be configured pane to save the rules.
10. Click the **Commit task** icon in the Tasks to be configured pane to complete the rule configuration.
11. Click **OK** to close the confirmation message window.

Using Resource and Supervisory List Builders for Simple Approval Rules

Say you want to approve a budget version for baseline based on its amount. For example, if the budget’s burdened cost is $1,000 or less, the **ApprovePlanVersion** workflow should automatically approve it. If it exceeds $1,000, the workflow should route it to the project manager for approval.

Edit the predefined rule set to define two approval rules as follows:

- Autoapproval rule for budget cost less than or equal to $1000 using the Supervisory list builder.
- Project manager approval for budget cost greater than $1000 using the Resource list builder.

Follow these steps:

1. In Setup and Maintenance, click the Task Panel, then search for and click the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist application appears.
2. In the Tasks to be configured pane, search for the **ApprovePlanVersion** task, and click the **ApprovePlanVersion** link.
3. Click the **Edit Task** icon in the Tasks to be configured pane to open the task in edit mode.
4. Click the Assignees tab.

   The participants who must approve project budgets or forecasts are displayed. Click on each of these participants to review the workflow rules that apply to their approval choices.
5. Click the **Approver** participant in the workflow, click the **Go to Rule** (the diamond shaped) icon within the Approver box, and then click the **Go to Rule** option that appears.

The list of rules associated with the Approver participant are displayed. Ensure that the **BudgetForecastAMXRuleSet** rule is selected in the drop-down list.

6. Change the IF condition of the predefined rules from 1 is 1 to 1 is 2 to disable the predefined workflow from sending project budget or forecast approvals to the project manager for approval.
7. Add the AutoApproval rule, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** (the + icon) drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **AutoApproval** in the **Name** field, add the description, verify that the **Active** check box is selected, and click **OK**.
   c. In the IF part of the rule, click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
ApprovePlanVersionPayloadTyp Note that you can also select this value by clicking the **Left Value** search icon and selecting ApprovePlanVersionPayloadTyp in the Condition Browser dialog box.	is	"BUDGET" This value is case-sensitive. Include the quotation marks. Don't copy and paste this value. To meet similar requirements for forecasts, enter "FORECAST".	To specify that the rule is applicable only for budget versions.
ApprovePlanVersionPayloadTyp	isn't	null	To check if the burdened cost amounts are available.
new BigDecimal(ApprovePlanVersio	same or less than	1000.00	To check if the burdened cost is within the threshold limit.

d. In the THEN part of the rule, click the **Advanced Add or Modify Options** drop-down list and select the Supervisory list builder by clicking **Add Approver** > **Supervisory**. Then, enter the values as follows:
   - **Response Type**: Required
   - **Number of levels**: 1
   - **Starting Participant**: HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
   - **Top Participant**: HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
   - **Auto Action Enabled**: True
   - **Auto Action**: “APPROVE” (Type this value including the quotation marks. Don't copy and paste this value.)
   - **Rule Name**: “AutoApproval”

     Note: The rule name is auto-populated, its the name that you entered in Step 7.

   - **Dimension Id**: null

     Note: The dimension id is auto-populated as null.

8. Add the Project manager approval rule, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **ProjectManagerApproval** in the **Name** field, add the description, verify that the **Active** check box is selected, and click **OK**.
   c. In the IF part of the rule, click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
ApprovePlanVersionPayloadTyp Note that you can also select this value by clicking the **Left Value** search icon and selecting ApprovePlanVersionPayloadTyp in the Condition Browser dialog box.	is	"BUDGET" This value is case-sensitive. Include the quotation marks. Don't copy and paste this value. To meet similar requirements for forecasts, enter "FORECAST".	To specify that the rule is applicable only for budget versions.
ApprovePlanVersionPayloadTyp	isn't	null	To check if the burdened cost amounts are available.
new BigDecimal(ApprovePlanVersio	more than	1000.00	To check if the burdened cost is within the threshold limit.

d. In the THEN part of the rule, click the **Advanced Add or Modify Options** drop-down list and select the the Resource list builder by clicking **Add Approver** > **Resource**. Then, enter the values as follows: :
   - **Response Type**: Required
   - **Users**: ApprovePlanVersionPayloadType.approvePlanPayload.approverName
   - **Groups**: null
   - **Application Role**:null
   - **Rule Name**: “ProjectManagerApproval”

     Note: The rule name is auto-populated, its the name that you entered in Step 8.

   - **Dimension Id**: null

     Note: The dimension id is auto-populated as null.

9. Click **Validate** on the top right corner to validate the newly defined rules.
10. Click the **Save** icon in the Tasks to be configured pane to save the rules.
11. Click the **Commit task** icon in the Tasks to be configured pane to complete the rule configuration.
12. Click **OK** to close the confirmation message window.

Using the Supervisory List Builder for Multilevel Approval Rules

Say you want to approve a budget version for baseline based on its cost, with higher budget amounts requiring additional levels of approval. You can configure the **ApprovePlanVersion** workflow so that as the budget cost increases, the workflow routes the approval through more management levels.

- If the budget cost is $5,000 or less, only the project manager’s approval is required.
- If the budget cost is between $5,001 and $20,000, approval is needed from both the project manager and their superior.
- If the budget cost exceeds $20,000, approval must be obtained from the project manager, their superior, and the superior’s manager.

Budget Cost Greater Than	Budget Cost Same or Less Than	Levels of Approvals Required
0	5000	1
5000	20000	2
20000	No upper limit	3

In this scenario, edit the predefined rule set to route the budget version for approval through the hierarchy using the Supervisory list builder, based on the budget cost:

- First-level approval rule: Route to the project manager if the budget cost is $5,000 or less.
- Second-level approval rule: Route to the project manager and their superior if the budget cost is between $5,001 and $20,000.

- Third-level approval rule: Route to the project manager, their superior, and that superior's manager if the budget cost is greater than $20,000.

You'll also need to identify the highest position in your job hierarchy to ensure the workflow can be extended for any number of approval levels as necessary. For this example, assume the CEO is the highest position in the hierarchy.

Prerequisite: Define jobs in Oracle Cloud HCM.

Follow these steps:

1. In Setup and Maintenance, click the Task Panel, then search for and click the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist application appears.
2. In the Tasks to be configured pane, search for the **ApprovePlanVersion** task, and click the **ApprovePlanVersion** link.
3. Click the **Edit Task** icon in the Tasks to be configured pane to open the task in edit mode.
4. Click the Assignees tab.

   The participants who must approve project budgets or forecasts are displayed. Click on each of these participants to review the workflow rules that apply to their approval choices.
5. Click the **Approver** participant in the workflow, click the **Go to Rule** (the diamond shaped) icon within the Approver box, and then click the **Go to Rule** option that appears.

   The list of rules associated with the Approver participant are displayed. Ensure that the **BudgetForecastAMXRuleSet** rule is selected in the drop-down list.
6. Change the IF condition of the predefined rules from 1 is 1 to 1 is 2 to disable the predefined workflow from sending project budget or forecast approvals to the project manager for approval.
7. Add the first level rule, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** (the + icon) drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **FirstLevel** in the **Name** field, add the description, verify that the **Active** checkbox is selected, and click **OK**.
   c. In the IF part of the rule, click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
ApprovePlanVersionPayloadTyp Note that you can also select this value by clicking the **Left Value** search icon and selecting ApprovePlanVersionPayloadTyp in the Condition Browser dialog box.	is	"BUDGET" This value is case-sensitive. Include the quotation marks. Don't copy and paste this value. To meet similar requirements for forecasts, enter "FORECAST".	To specify that the rule is applicable only for budget versions.

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
ApprovePlanVersionPayloadTyp	isn't	null	To check if the burdened cost amounts are available.
new BigDecimal(ApprovePlanVersio	same or less than	5000.00	To check if the burdened cost is within the threshold limit.

d. In the THEN part of the rule, click the **Advanced Add or Modify Options** drop-down list and select the Supervisory list builder by clicking **Add Approver** > **Supervisory**. Then, enter the values as follows:
  - **Response Type**: Required
  - **Number of levels**: 1
  - **Starting Participant**: HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
  - **Top Participant**: HierarchyBuilder.getPrincipal("john.doe",-1,"","")

    Note: john.doe is the username of the CEO.

  - **Auto Action Enabled**: False
  - **Auto Action**: null
  - **Rule Name**: “FirstLevel”

    Note: The rule name is auto-populated, it's the name that you entered in Step 7.

  - **Dimension Id**: null

    Note: The dimension ID is auto-populated as null.

8. Repeat Step 7 and make the following changes for the second and third levels of approval:
   - Enter the rule names as **SecondLevel** and **ThirdLevel**.
   - Enter the value in the IF condition as follows:
     - Second level: new BigDecimal(ApprovePlanVersionPayloadType.approvePlanPayload.summaryAmounts.pcBurdenedCost) between 5000.00 and 20000.00
     - Third level: new BigDecimal(ApprovePlanVersionPayloadType.approvePlanPayload.summaryAmounts.pcBurdenedCost) more than 20000.00
   - Enter the value in the THEN condition as follows:
     - 2 for second level and 3 for third level in the **Number of levels** field.
9. Click **Validate** on the top right corner to validate the newly defined rules.
10. Click the **Save** icon in the Tasks to be configured pane to save the rules.
11. Click the **Commit task** icon in the Tasks to be configured pane to complete the rule configuration.
12. Click **OK** to close the confirmation message window.

Skipping an Approval Level with the Supervisory List Builder and Rule Priority

Say you want to approve a budget version for baseline using alternate level approvals. You can configure the **ApprovePlanVersion** workflow to route the approval sequentially to every other level in the management hierarchy, rather than to every immediate superior.

Let's say we have the following hierarchy defined in Oracle Cloud HCM.

Person	Position	Manager	Approval Required
David	Project Manager	Henry	Yes
Henry	Senior Manager	Nick	No
Nick	Group Manager	Abraham	Yes

The budget version must first be approved by David. After David approves, the workflow should then skip Henry and route the budget version approval to Nick. After Nick approves, the workflow should move into the approved state.

In such case, edit the predefined rule set to define an additional rule that uses rule priority and a try-catch action.

Follow these steps:

1. In Setup and Maintenance, click the Task Panel, then search for and click the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist application appears.
2. In the Tasks to be configured pane, search for the **ApprovePlanVersion** task, and click the **ApprovePlanVersion** link.
3. Click the **Edit Task** icon in the Tasks to be configured pane to open the task in edit mode.
4. Click the Assignees tab.

   The participants who must approve project budgets or forecasts are displayed. Click on each of these participants to review the workflow rules that apply to their approval choices.
5. Click the **Approver** participant in the workflow, click the **Go to Rule** (the diamond shaped) icon within the Approver box, and then click the **Go to Rule** option that appears.

   The list of rules associated with the Approver participant are displayed. Ensure that the **BudgetForecastAMXRuleSet** rule is selected in the drop-down list.
6. Change the rule priority to ensure that the workflow notification is sent to the project manager and only after this approver approves, notifications are sent to the next approver.
   a. Select the **SoaOLabel.FinancialPlanApprovalRule.BudgetorForecastApprovalRule** predefined rule.
   b. Click the **Properties** link.
   c. Select **Highest** from the **Priority** drop-down list, select the **Advanced Mode** check box, verify that the **Active** check box is selected, and click **OK**.

7. Change the IF condition of the predefined rules from 1 is 1 to 1 is 2 to disable the predefined workflow from sending project budget or forecast approvals to the project manager for approval.
8. Add the skip level rule, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** (the + icon) drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **SkipLevel** in the **Name** field, add the description, select **Medium** from the **Priority** drop-down list, verify that the **Active** check box is selected, select the **Advanced Mode** check box, and click **OK**.
   c. Click the **Insert Pattern** link.
   d. In the IF part of the rule, add the Task is a Task pattern by entering **Task** in both the text boxes. Then, click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF condition, as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
Task.payload.planClassCode Note that you can also select this value by clicking the **Left Value** search icon and selecting Task.payload.planClassCode in the Condition Browser dialog box.	is	"BUDGET" This value is case-sensitive. Include the quotation marks. Don't copy and paste this value. To meet similar requirements for forecasts, enter "FORECAST".	To specify that the rule is applicable only for budget versions.

   e. In the THEN part of the rule, click the **Insert Action** drop-down list and select **try**. Then, perform these actions in the following order:

Where to Perform the Action	Action to Perform	Result
Under the **try** action	Click the **Insert Action** drop-down list and select **catch**.	The **catch** action is added.
Under the **catch** action	Click the **Insert Action** drop-down list and select **Add Approver** > **Supervisory**.	The Supervisory list builder is added.
Under the **catch** action	Select the check box against **catch** and click the **Move down** icon.	The Supervisory list builder moves directly under the **try** action.
Under the **try** action	Enter the values as follows: - **Response Type**: Required - **Number of levels**: 1	NA

Where to Perform the Action	Action to Perform	Result
	- **Starting Participant**: HierarchyBuilder.getManager("supervisory",HierarchyBuilder.g … yload.appr - **Top Participant**: HierarchyBuilder.getManager("supervisory",HierarchyBuilder.g … yload.appr **Note:** Replace "LINE_MANAGER" with the hierarchy type that you define in Oracle Cloud HCM. - **Auto Action Enabled**: False - **Auto Action**: null - **Rule Name**: "SkipLevel" **Note:** The rule name is autopopulated, its the name that you entered in Step 8. - **Dimension Id**: null **Note:** The dimension id is autopopulated as null.	
In the **catch** action	Select the check box against **catch** and click the **Delete Action** icon. **Note:** Before you perform this action, ensure that only the check box against **catch** is selected.	The **catch** action is deleted.
In the **try** action	Select the check box against **try** and click the **Insert Action** drop-down list and select **catch**.	The **catch** action is added.
In the **catch** action	Enter **Object** as the target and **e** as the identifier value in the text boxes.	NA
Under the **catch** action	Click the **Insert Action** drop-down list and select **return**.	NA

Note: If the **try** and **catch** actions are indented at the same level, it indicates that the rule is configured correctly.

9. Click **Validate** on the top right corner to validate the newly defined rules.
10. Click the **Save** icon in the Tasks to be configured pane to save the rules.
11. Click the **Commit task** icon in the Tasks to be configured pane to complete the rule configuration.
12. Click **OK** to close the confirmation message window.

Using Parallel Approval Rules for Budget and Forecast Approvals

Say you want to define an approval rule to approve budgets and forecasts at the same time using approval groups. An approval group consists of the individuals you designate as approvers. For example, you might create an approval group called **FinancialPlanApprovalGroup** that includes finance department members who need to participate in the approval process.

In a parallel approval process, all members of the approval group must approve, and the order of approval doesn't matter as long as everyone responds. Alternatively, you can set a voting percentage, for example, with a 50% threshold, the process is approved once half the group members have given their approval.

Follow these steps:

1. In Setup and Maintenance, click the Task Panel, then search for and click the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist application appears.
2. Click the Approval Groups tab and create a group of approvers as follows:
   a. In the Groups pane, click the **Create Approval Group** icon and select the option to create a static group.
   b. Enter **FinancialPlanApprovalGroup** in the **Name** field and click the **Add Member** icon and add the group members (the people you want to designate as approvers).
   c. Click **Save**.
3. Click the Task Configuration tab, and in the Tasks to be configured pane, search for the **ApprovePlanVersion** task, and click the **ApprovePlanVersion** link.
4. Click the **Edit Task** icon in the Tasks to be configured pane to open the task in edit mode.
5. Click the Assignees tab.

   The participants who must approve project budgets or forecasts are displayed. Click on each of these participants to review the workflow rules that apply to their approval choices
6. Perform these steps:
   a. Click the **Approver** participant in the workflow. Then, click **Advanced** and select the **Ignore Participant** check box.
   b. Click the **Financial Plan Approval Single Participant1** participant in the workflow. Then, click **Advanced** and select the **Ignore Participant** check box.
7. Click the **Financial Plan Approval Parallel Participant 1** participant in the workflow. Then, click **Advanced** and ensure that the **Ignore Participant** check box isn't selected. Note that the **Ignore Participant** check box is selected for all participants except the parallel participant.
8. Verify that all other rules and participants are disabled.
9. Add the approval rule to approve budgets and forecasts simultaneously, as follows:
   a. Click the **Financial Plan Approval Parallel Participant 1** participant in the workflow, click the **Go to Rule** (the diamond shaped) icon within the box, and then click the **Go to Rule** option that appears. Ensure that the **ProjectBudgetsandForecastsApprovalParallelRuleSetOne** rule is selected in the drop-down list.
   b. In the Rules pane, click the **Advanced Add or Modify Options** (the + icon) drop-down list and select **General Rule**.
   c. Click the **Properties** link, enter **FinancialPlanApproval** in the **Name** field and add the description.
   d. Select **Medium** from the **Priority** drop-down list, ensure that the **Advanced Mode** check box isn't selected, verify that the **Active** check box is selected, and click **OK**.
   e. In the IF part of the rule, click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
1	is	1	The default condition to ensure that the rule is always executed. It can be modified to execute the rule only for budgets, for example, by checking for the plan type.

f. In the THEN part of the rule, click the **Insert Action** drop-down list, select **Add Approver** > **Approval Group**. Then, enter the values as follows:
   - **Response Type**: Required
   - **Approval Group**: FinancialPlanApprovalGroup
   - **Allow empty groups**: false
   - **Rule Name**: “FinancialPlanApproval”

     Note: The rule name is auto-populated, its the name that you entered in Step 9.
   - **Dimension Id**: null

     Note: The dimension id is auto-populated as null.

10. Click the Configuration tab, select the **Complete task immediately when participant chooses** check box under the **Early completion settings** section, and then select **Reject** from the **Task Outcome Options** drop-down list.
11. Click the **Save** icon in the Tasks to be configured pane to save the rules.
12. Click the **Commit task** icon in the Tasks to be configured pane to complete the rule configuration.
13. Click **OK** to close the confirmation message window.

Defining Multiple Approval Rules Based on Project Roles

Say you want to define multiple approval rules based on project roles, such as:

- If the submitter has the project manager role on the project, the budget version is auto-approved.
- If the submitter has the project administrator role (not the project manager role), the budget version is routed to the project manager for approval.

To do this, edit the predefined rule set in the **ApprovePlanVersion** workflow and add rules using advanced mode with pattern matching.

Follow these steps:

1. In Setup and Maintenance, click the Task Panel, then search for and click the **Manage Task Configurations for Project Financial Management** task.
   The BPM Worklist application appears.
2. In the Tasks to be configured pane, search for the **ApprovePlanVersion** task, and click the **ApprovePlanVersion** link.
3. Click the **Edit Task** icon in the Tasks to be configured pane to open the task in edit mode.

4. Click the Assignees tab.

   The participants who must approve project budgets or forecasts are displayed. Click on each of these participants to review the workflow rules that apply to their approval choices.
5. Click the **Approver** participant in the workflow, click the **Go to Rule** (the diamond shaped) icon within the Approver box, and then click the **Go to Rule** option that appears.

   The list of rules associated with the Approver participant are displayed. Ensure that the **BudgetForecastAMXRuleSet** rule is selected in the drop-down list.
6. Change the IF condition of the predefined rules from 1 is 1 to 1 is 2 to disable the predefined workflow from sending project budget or forecast approvals to the project manager for approval.
7. Add the approval rule, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** (the + icon) drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **ProjectRoleBasedApproval** in the **Name** field and add the description.
   c. Select **Medium** from the **Priority** drop-down list, select the **Advanced Mode** checkbox, verify that the **Active** checkbox is selected, and click **OK**.
   d. In the IF part of the rule:
      i. Click **Insert Pattern**, then enter **Lists** in the left box and select **Lists** from the drop-down list.
      ii. Click the **Add Pattern** icon, then enter **Task1** in the left box and select **Task** from the drop-down list.
      iii. Click the **Add Pattern** icon and select **Surround from the Surround selected tests with parenthesis** drop-down list that's adjacent to the **Add Pattern** icon you just clicked.
      iv. Select **None** from the drop-down list below **and**.
      v. Enter **ProjectTeamMember1** in the left box and choose **ProjectTeamMember** from the drop-down list in the pattern.
      vi. Click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions within the same pattern as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
Task1.payload.approvePlanPa Note that you can also select this value by clicking the **Left Value** search icon and selecting Task1.payload.approvePlanPa in the Condition Browser dialog box.	is	ProjectTeamMember1.teamM Note that you can also select this value by clicking the **Left Value** search icon and selecting ProjectTeamMember1.teamM in the Condition Browser dialog box.	To specify that the requester is a project team member.
ProjectTeamMember1.teamM	is	"Project Manager"	To check whether the requester plays the Project Manager role in the project.

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition

e. In the THEN part of the rule, add a list builder of resource type by clicking **Insert Action** > **Add Approver** > **Resource**. Then, enter the values as follows:
   - **Response Type**: Required
   - **Users**: Task1.payload.approvePlanPayload.approverName
   - **Groups**: null
   - **Application Role**: null
   - **Rule Name**: “ProjectRoleBasedApproval”

     Note: The rule name is auto-populated, it's the name that you entered in Step 7.
   - **Dimension Id**: null

     Note: The dimension ID is auto-populated as null.

8. Add the auto-approval rule for project manager role, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **AutoApproveForProjectManagerRole** in the **Name** field, and add the description.
   c. Select **Medium** from the **Priority** drop-down list, select the **Advanced Mode** checkbox, verify that the **Active** checkbox is selected, and click **OK**.
   d. In the IF part of the rule:
      i. Click **Insert Pattern**, then enter **Lists** in the left box, and select **Lists** from the drop-down list.
      ii. Click the **Add Pattern** icon, then enter **Task1** in the left box, and select **Task** from the drop-down list.
      iii. Click the **Add Pattern** icon and select **Surround** from the **Surround selected tests with parenthesis** drop-down list that's adjacent to the **Add Pattern** icon you just clicked.
      iv. Select **None** from the drop-down list below **and**.
      v. Type **ProjectTeamMember1** in the left box and choose **ProjectTeamMember** from the drop-down list in the pattern.
      vi. Click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions within the same pattern as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
Task1.payload.approvePlanPa Note that you can also select this value by clicking the **Left Value** search icon and selecting Task1.payload.approvePlanPa	is	ProjectTeamMember1.teamM Note that you can also select this value by clicking the **Left Value** search icon and selecting ProjectTeamMember1.teamM	To specify that the requester is a project team member.

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
in the Condition Browser dialog box.		in the Condition Browser dialog box.	
ProjectTeamMember1.teamM	is	"Project Manager"	To check whether the requester plays the Project Manager role in the project.

e. In the THEN part of the rule, add a list builder of supervisory type by clicking **Insert Action** > **Add Approver** > **Supervisory**. Then, enter the values as follows:
   - **Response Type**: Required
   - **Number of levels**: 1
   - **Starting Participant**: HierarchyBuilder.getPrincipal(Task1.payload.approvePlanPayload.approverName,-1,"","")
   - **Top Participant**: HierarchyBuilder.getPrincipal(Task1.payload.approvePlanPayload.approverName,-1,"","")
   - **Auto Action Enabled**: True
   - **Auto Action**: "APPROVE" (Type this value including the quotation marks. Don't copy and paste this value.)
   - **Rule Name**: “AutoApproveForProjectManagerRole”

     > **Note:** The rule name is auto-populated, it's the name that you entered in Step 8.

   - **Dimension Id**: null

     > **Note:** The dimension ID is auto-populated as null.

9. Click **Validate** on the top right corner to validate the newly defined rules.
10. Click the **Save** icon in the Tasks to be configured pane to save the rules.
11. Click the **Commit task** icon in the Tasks to be configured pane to complete the rule configuration.
12. Click **OK** to close the confirmation message window.

Comparing to the Strategic Budget from EPM in Approval Rules

Say you want to approve a budget version for baseline by comparing it to the strategic budget. For example, if the detailed project budget differs from the strategic budget by $5,000 or less, it’s routed to the project manager for approval. If the difference is greater than $5,000, the workflow automatically rejects the budget version.

Follow these steps:

1. In Setup and Maintenance, click the Task Panel, then search for and click the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist application appears.

2. In the Tasks to be configured pane, search for the **ApprovePlanVersion** task, and click the **ApprovePlanVersion** link.
3. Click the **Edit Task** icon in the Tasks to be configured pane to open the task in edit mode.
4. Click the Assignees tab.

   The participants who must approve project budgets or forecasts are displayed. Click on each of these participants to review the workflow rules that apply to their approval choices.
5. Click the **Approver** participant in the workflow, click the **Go to Rule** (the diamond shaped) icon within the Approver box, and then click the **Go to Rule** option that appears.

   The list of rules associated with the Approver participant are displayed. Ensure that the **BudgetForecastAMXRuleSet** rule is selected in the drop-down list.
6. Change the IF condition of the predefined rules from 1 is 1 to 1 is 2 to disable the predefined workflow from sending project budget or forecast approvals to the project manager for approval.
7. Add the auto-approval rule, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** (the + icon) drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **AutoApprovalLessThanStrategicBudgetBy5000** in the **Name** field and add the description, verify that the **Active** check box is selected, and click **OK**.
   c. In the IF part of the rule, click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions within the same pattern as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
ApprovePlanVersionPayloadTyp	is	“Detailed Budget” Replace this with the appropriate FPT name that's used for the detailed budget.	NA
ApprovePlanVersionPayloadTyp Note that you can also select this value by clicking the **Left Value** search icon and selecting ApprovePlanVersionPayloadTyp in the Condition Browser dialog box.	is	"BUDGET" This value is case-sensitive. Include the quotation marks. Don't copy and paste this value. - To meet similar requirements for forecasts, enter "FORECAST".	To specify that the rule is applicable only for budget versions.
new BigDecimal(ApprovePlanVersio	Same or less than	5000.00	NA rentBasel
ProjectBudgetCurrentBaselined	is	"Strategic Budget"	NA

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Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
		Replace this with the appropriate FPT name that's used in EPM.	
ProjectBudgetCurrentBaselined Note that you can also select this value by clicking the Left Value search icon and selecting ProjectBudgetCurrentBaselined in the Condition Browser dialog box.	isn't	null	NA

d. In the THEN part of the rule, add a list builder of supervisory type by clicking **Insert Action** > **Add Approver** > **Supervisory**. Then, enter the values as follows:
   - **Response Type**: Required
   - **Number of levels:** 1
   - **Starting Participant:** HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
   - **Top Participant:** HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
   - **Auto Action Enabled:** True
   - **Auto Action:** “APPROVE” (Type this value including the quotation marks. Don't copy and paste this value.)
   - **Rule Name**: “AutoApprovalLessThanStrategicBudgetBy5000"

     Note: The rule name is auto-populated, its the name that you entered in Step 7.

   - **Dimension Id**: null

     Note: The dimension id is auto-populated as null.

8. Add the auto-reject rule, as follows:
   a. In the Rules pane, click the **Advanced Add or Modify Options** drop-down list and select **General Rule**.
   b. Click the **Properties** link, enter **AutoRejectMoreThanStrategicBudgetBy5000** in the **Name** field, add the description, verify that the **Active** check box is selected, and click **OK**.
   c. In the IF part of the rule, click the **Advanced Add or Modify Options** drop-down list and select **simple test**, and add the IF conditions within the same pattern as follows:

Value to Enter in the Left Text Box	Value to Select in the Number Comparison Drop-down List	Value to Enter in the Right Text Box	Why to Add the IF Condition
ApprovePlanVersionPayloadTyp Note that you can also select this value by clicking the **Left Value** search icon and selecting ApprovePlanVersionPayloadTyp in the Condition Browser dialog box.	is	"BUDGET" This value is case-sensitive. Include the quotation marks. Don't copy and paste this value. To meet similar requirements for forecasts, enter "FORECAST".	To specify that the rule is applicable only for budget versions.
ProjectBudgetCurrentBaselined Note that you can also select this value by clicking the **Left Value** search icon and selecting ProjectBudgetCurrentBaselined in the Condition Browser dialog box.	isn't	null	NA
ProjectBudgetCurrentBaselined	is	"Strategic Budget" Replace this with the appropriate FPT name that's used in EPM.	NA
ApprovePlanVersionPayloadTyp	is	“Detailed Budget” Replace this with the appropriate FPT name that's used for the detailed budget.	NA
new BigDecimal(ApprovePlanVersio ... rentBasel	more than	5000.00	NA

d. In the THEN part of the rule, add a list builder of supervisory type by clicking **Insert Action** > **Add Approver** > **Supervisory**. Then, enter the values as follows:
   - **Response Type**: Required
   - **Number of levels**: 1
   - **Starting Participant**: HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
   - **Top Participant**: HierarchyBuilder.getPrincipal(ApprovePlanVersionPayloadType.approvePlanPayload.approverName,-1,"","")
   - **Auto Action Enabled**: True
   - **Auto Action**: “APPROVE” (Type this value including the quotation marks. Don't copy and paste this value.)
   - **Rule Name**: “AutoRejectMoreThanStrategicBudgetBy5000"

     Note: The rule name is auto-populated, its the name that you entered in Step 8.

   - **Dimension Id**: null

     Note: The dimension id is auto-populated as null.

9. Click **Validate** on the top right corner to validate the newly defined rules.
10. Click the **Save** icon in the Tasks to be configured pane to save the rules.
11. Click the **Commit task** icon in the Tasks to be configured pane to complete the rule configuration.
12. Click **OK** to close the confirmation message window.