Oracle Fusion Cloud Project Management

How do I Set Up and Manage Approval Workflows in Oracle Project Management

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G13388-01

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1 About This Playbook

About This Playbook

This playbook introduces workflows and details how to set up and manage approval workflows and notifications in Oracle Fusion Cloud Project Management.

It serves as a reference manual and a practical resource for project application administrators and other stakeholders who configure approval workflows or review workflow-driven approval requests.

2 About Approval Workflows

What's a workflow?

One of the main goals of software is to simplify workflows. So, what's a workflow?

- A workflow is a sequence of tasks, designed to accomplish a specific result.
- Workflows simplify complex processes, breaking them down into smaller and simpler tasks that can be accomplished with relative ease.
- Some workflow tasks are one-person activities; others may require multiple persons working together, or in parallel.
- If team members in a workflow complete their assigned tasks at the right time, the workflow should reliably deliver the expected result.

An approval workflow is a structured process that's used to manage and control the approval of various types of documents, decisions, or actions. It typically involves a sequence of steps where approvers or approval groups review, comment on, and ultimately approve or reject a request.

Workflows can be implemented as processes and procedures in teams, where they help streamline operation. Implemented as software, however, workflows move faster, become more reliable, and handle a sizeable percentage of tasks without human intervention. For example, if the user requesting a cost adjustment has the privilege required to approve cost adjustments, the application skips the workflow and automatically approves the adjustment. On the other hand, if you want the user to only initiate the cost adjustment and route the adjustment request to designated approvers, then you should *create a custom role* that doesn't have the privilege to approve cost adjustment requests and assign this custom role to the user. You then configure the approval rules in BPM Worklist such that when the requester is this user, the request is routed to the designated approver for approval.

Why do we need approval workflows?

Approval workflows are essential because they provide a structured tool for stakeholders to review and approve decisions, reducing errors and ensuring agreement across parties.

Here's why we need approval workflows:

- While they may seem like an extra step, a well-defined workflow actually boosts efficiency by ensuring that only correct and approved updates make it into the system.
- They ensure that proper audit trails are maintained and that the project is always compliant with applicable regulations.
- They improve coordination across departments and teams, ensuring operational alignment and effective communication.
- They specify who is responsible for approving decisions or documents, aiding in accountability tracking.
- You can incorporate multiple levels of review that help to detect potential issues or errors that might not be apparent to a single person, thereby minimizing the risk of costly mistakes.

Approval Workflows in Oracle Project Management

The following table lists some of the key approval workflows in Oracle Project Management. For detailed information on these approval workflows, see *Workflows in Oracle Project Management*.

You can access all of these approval workflows using the Task Configuration page in BPM Worklist. For information on how to access BPM Worklist and search for workflows, see Search for Workflow Tasks to Configure in the Implementing Applications guide.

Workflows in Oracle Project Management

Workflow Name - BPM Task Name	Workflow Trigger and Description
Project Contract Invoice Approval - InvoiceApprovalHumantask	When an invoice is submitted for approval, this workflow notifies the administrator of the contract associated with the invoice, who must approve or reject the submitted invoice.
Generate Financial Plan Amounts Notification - HumantaskNotification	When the Generate Financial Plan Amounts process is run, this workflow sends an FYI notification to the person who submitted the process.
Project Financial Plan Approval (Budgets and Forecasts) - ApprovePlanVersion	When a financial plan version is submitted for approval, this workflow notifies configured approvers, who must approve or reject the financial plan version. It also sends an FYI notification to the project manager and the user who initiated the workflow.
Project Financial Plan Approval (Budgets and Forecasts) - NotifyFinancialPlanApproved	When a financial plan version is approved by the configured approver, this workflow sends an FYI notification to configured recipients indicating that the plan version has been approved.
Project Financial Plan Approval (Budgets and Forecasts) - NotifyFinancialPlanRejected	When a financial plan version is rejected by the configured approver, this workflow sends an FYI notification to configured recipients indicating that the plan version has been rejected.
Project Financial Plan Approval (Budgets and Forecasts) - NotifyFinancialPlanReworked	When a financial plan version is reworked and submitted for approval, this workflow notifies configured approvers, who must approve or reject the financial plan version. It also sends an FYI notification to the project manager and the user who initiated the workflow.
Project Cost Adjustment Approval - ApproveAdjustment	When any of the following project cost adjustments is attempted by a user, this workflow notifies configured approvers, who must approve or reject the project cost adjustment. • Transfer • Split • Split and transfer • Set to billable • Set to nonbillable

Workflow Name - BPM Task Name	Workflow Trigger and Description
	• 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
Project Cost Adjustment Approval - NotifyAdjustmentApproval	When a project cost adjustment is approved or rejected by configured approvers, this workflow sends an FYI notification to the requester and approver.
Project Expenditure Batch Approval - ProjectExpenditureBatchApprovalTask	When a project expenditure batch is submitted for approval, this workflow notifies configured approvers, who must approve or reject the project expenditure batch.
Project Expenditure Batch Approval - ProjectExpenditureBatchApprovalNotifyTas	When a project expenditure batch is approved or rejected by configured approvers, this workflow notifies configured recipients.
Project Labor Schedule Version Status Change Approval - LaborScheduleVersionStatusApproval	When a labor schedule version is set to Active status from New or Inactive, this workflow notifies configured users that the labor schedule version is being set to active and that costs will start to be distributed through it after it's approved using this workflow.
Task and Action Item Notification - TaskEmailNotificationHumantask	When any of the following is true, this workflow sends notifications to the task owner and follower. • A follower is added. • A followed task is completed. • A task, action item, to-do task, or milestone is assigned.
Project Manager Daily Digest - emailDigestHumantask	When it's time to send regular notifications containing status of tasks, issues, action items, deliverables, change orders, or task exceptions, this workflow sends FYI notifications to project managers.
Change Orders Notification - ChangeManagementEventNotificationHum	When any of the following events occurs, this workflow sends a notification to the change order creator, impact assessors, reviewers, approvers, and implementers. • Change order is created or reassigned. • Change order is closed. • Change order is canceled. • Change order is approved or rejected. • Work on change order is completed. • Participant is removed from the change order.

Workflow Name - BPM Task Name	Workflow Trigger and Description
	• Participant is added to the change order. Note that approvers only receive notifications that they need to approve. They must go to Oracle Project Management and approve the change order manually.
Deliverable Notification - DeliverablesNotificationsHumanTask	When a deliverable is completed, this workflow sends an FYI notification to the creator, owner, and project manager.
Project Status Change Approval - ProjectStatusNotificationApproval	Project Status Change Approval - ProjectStatusNotificationApproval

Note: Apart from the Oracle Project Management approval workflows, there are other project-related approval workflows, such as approval of project-related AP invoices, project contracts (for billing), project time cards, and so on, in other subledger applications. You can find guidance on these approval workflows in the documentation associated with the application to which they belong.

3 How to Set Up and Manage Approval Workflows in Oracle Project Management

Setting Up and Managing Approval Workflows in Oracle Project Management

Use BPM Worklist to set up and manage approval workflows.

You can access BPM Worklist using the **Manage Task Configurations for Project Financial Management** or **Manage Task Configurations for Project Execution Management** task (depending on whether you want to set up and manage approval workflows in Project Financial Management or Project Execution Management applications) in the Setup and Maintenance work area.

BPM Worklist lets users view and manage their assigned tasks. In BPM Worklist, you can configure approval management by setting up workflow tasks that require user actions for approvals, including managing associated notifications. For example, you can define the number of required approval levels, direct the approval routing, and handle email notifications. A workflow notification may be sent when a task is assigned, completed, or overdue. You'll receive both in-app and email notifications when a task is assigned to you for approval.

Here are some ways you can configure workflow tasks and notifications:

- Determine the number of approval levels needed for transactions exceeding a specified amount.
- Assign approvers based on the supervisory hierarchy in Oracle Fusion Cloud HCM.
- Create approval groups to assign tasks to a group of users rather than an individual.
- Control when notifications are sent to users involved in the task.
- Enable or disable in-app or email notifications, or both.

After all required approvers have given their consent, the approved actions take effect. Some tasks may only be informational, requiring no action from assignees.

> **Note:** For generic guidance on customizing workflows and notifications, see Workflow Approvals and Notifications in the Implementing Applications guide. For information on configurable workflow notifications in Oracle Project Management, see *Overview of Configurable Workflow Notifications in Project Management*.

Get Started

In the Offerings work area, enable the Approval Routing Administration feature at the offering level so that these setup tasks are available in the Application Extensions functional area:

- Manage Task Configurations
- Manage Approval Groups

These setup tasks take you to BPM Worklist, where you can set up and configure your workflows.

Key Components of Approval Workflows

Using approval workflows, you can define complex and multistage routing rules.

Here's a table listing the key components of a workflow:

Key Components of Approval Workflows

Component	Description
Oracle SOA Suite Approval Management Extensions	Approval management extensions of the human workflow services in Oracle SOA Suite are essential for managing approval functionality in Oracle Cloud. These components enable several crucial tasks, including: • Integration with Oracle HCM Cloud to determine approvers based on supervisory, job role, and position-based hierarchies defined in Oracle HCM Cloud. • Offering a framework for creating approval rules applicable to various business documents, such as financial plan versions and invoice approvals. • Selection of intricate routing patterns tailored to business processes, including sequential or parallel routing of documents to approvers.
Oracle Business Process Management (BPM)	Provides the BPM Worklist interface, which enables authorized business users to setup and configure approval workflows. When recipients review an approval request, the tool offers additional information as configured. For example, when an approver reviews a financial plan, BPM Worklist displays budget details associated with the plan so that the approver can review related information before approving or rejecting a request.
Oracle Human Capital Management Cloud (Oracle HCM Cloud)	Used for defining different employee hierarchies, such as supervisory, job-based, or position-based. Approval management extensions integrate with Oracle HCM Cloud to identify approver users when approval rules are set up based on Oracle HCM Cloud hierarchies.

Human Task Workflow Concepts

To set up an approval hierarchy, define these concepts as part of your workflow rules:

Human Task Workflow Concepts

Concept	Description
List Builders	A list builder is the method used for routing a workflow task; for example, by going up the supervisory hierarchy or sending to an approval group.

<table>
<tr><th>Concept</th><th>Description</th></tr>
<tr><td>Participants</td><td>A participant is a user or approval group that participates in the approval process. Each participant is associated with a rule set. Approval rules are defined in the context of a rule set, and you can create many rules under one rule set. Based on your approval requirements, you must configure appropriate approval rules for each participant.

BPM Worklist enables you to configure the following types of participants in your workflows:
Single: When there's only one participant in the workflow.
Serial: When a series of participants must review a request in a specific order.
Parallel: When a series of participants must review a request simultaneously.
BPM Worklist also enables you to specify whether you want to send an approval or FYI notification to each participant.</td></tr>
</table>

> **Note:** For more information about List Builders and Participants, see List Builders and Participants in the Implementing Applications guide.

Configuring Approval Rules

In BPM Worklist, configure the rule sets and rules to control how a workflow task should be routed, assigned, and completed, based on specific conditions.

A workflow task has one or more rule sets, and a rule set has one or more rules. At run time, if a rule set has multiple rules, all the rules are evaluated at the same time. A rule has two parts, an If section, which lists conditions that the rule must evaluate, and a Then section, which lists the actions that must be performed when the conditions are met.

For example, you can configure approval rules for these scenarios:

- Transactions over a certain amount must have approvals up three levels in the management chain.
- The workflow task must automatically be approved or rejected without having to send it to any approver.
- Route tasks to an approval group. An approval group is a set of users who can act on workflow tasks.

In rare cases, workflow tasks get routed to the person who created the task, or to someone who should not approve, due to conflicts of interest. To prevent this, you can configure tasks to skip certain users in the approval chain.

> **Note:** For information about approval groups, how workflow task routing is mapped out, configuring approval rule sets and rules, defining rules to automatically approve or reject workflow tasks, creating rules in advanced mode, how to prevent assigning approvals to specific users, or the things to check if there are issues with workflow tasks, see Workflow Approvals and Notifications in the Implementing Applications guide.

Configuring Notifications

In BPM Worklist, you can configure email and in-app notifications for all users.

When notifications are enabled, each workflow task sends notifications as part of the approval process. For any workflow task, you can change the setup to control when notifications are sent and to whom they're sent. For more information, see Define When to Send Workflow Notifications in the Implementing Applications guide.

You can also disable or enable workflow notifications. For example, disable when testing changes to approval rules to avoid sending test notifications. When done testing, reenable notifications. For more information, see Disable or Enable Workflow Notifications in the Implementing Applications guide.

> **Note:** For generic guidance on workflow notifications, see Workflow Approvals and Notifications in the Implementing Applications guide.

Tracking Workflow Tasks

After users create a task, for example by submitting something for approval, you can use the Transaction Manager: Transactions page in the Transaction Console work area to keep track of the workflow task, and also to jump in when you need to, especially if something goes wrong.

> **Note:** For information on managing workflow transactions, see Manage Workflow Transactions in the Implementing Applications guide.

Example of Setting up Auto-Approval for Project Contract Invoices

Suppose you want to set up auto-approval for project contract invoices. This means that instead of routing all invoices to the default participants who must review and approve new invoices, you will configure the InvoiceApprovalHumantask workflow such that all new invoices will be automatically approved and forwarded for processing.

Follow these steps:

1. In theSetup and Maintenance work area, go to the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist tool is displayed.
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 are displayed.

> **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.

Example of Defining Multiple Approval Rules Based on Project Roles

Suppose you want to define multiple approval rules based on project roles, as follows:

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

You then need to edit the predefined rule set to define a couple of additional rules that use advanced mode with pattern matching.

Follow these steps:

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist tool is displayed.
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	is	ProjectTeamMember1.teamM Note that you can also select this value by clicking the **Left Value** search icon and selecting	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
Task1.payload.approvePlanPa in the Condition Browser dialog box.		ProjectTeamMember1.teamM 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 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 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 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.

Example of Multilevel Approval Rule Using Supervisory List Builder

Suppose you want to approve the budget version for baseline based on the budget cost. The higher the budget cost, the greater number of levels of approval needed for the budget.

- If the budget cost is $5000 or less, approval is required only from the project manager.
- If the budget cost is between $5000 and $20000, it needs approval from both the project manager and the project manager's superior.
- If the budget cost exceeds $20000, approval must be obtained from the project manager, the project manager's superior, and the superior's manager.

Budget Cost Greater Than	Budget Cost Same or Less Than	Levels of Approvals Required
0	5000	1

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

In this scenario, edit the predefined rule set to route the budget version to a hierarchy using the Supervisory list builder based on the budget cost.

- First level approval rule to route approval to the project manager for budget cost that's same or less than $5000.
- Second level approval rule to route approval to the project manager and the project manager's superior for budget cost that's between $5000 and $20000.
- Third level approval rule to route approval to the project manager, the project manager's superior, and that superior's manager for budget cost that's greater than $20000.

You must also find out the highest position in the job hierarchy so that you can implement this approval for any number of levels till the highest position in your hierarchy. In this example, we'll consider the highest position in the hierarchy to be CEO.

Pre-requisite: Define jobs in Oracle Fusion Cloud HCM.

Follow these steps:

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations for Project Financial Management** task.

   The BPM Worklist tool is displayed.
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.
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.